Notifications (CA-NO)

HELP.CACAN

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SAP™

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Icons

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Notifications (CA-NO)

Purpose

The notifications in the SAP System are part of a cross-application component that allow you to record, process, and manage different types of information. This information, for example, may consist of simple inquiries to complex, specialized problems. You can use the notifications to process all types of information or problems that might be encountered in the business processes of your company. Among other things, you can use the notifications to:

- Process complaints

- Process maintenance requirements

- Document malfunctions or exceptional situations in your company

- Process inquiries or problems in the IT area (for example, when using the SAP System)

- Process inquiries by or needs of individual employees over the Intranet

Implementation Considerations

You can use this component independently of other SAP application components.

Integration

The notifications are used by the following SAP application components or services:

Component / Service	Notifications
Quality Management (QM)	Quality notification
Plant Maintenance (PM)	Maintenance notification
Customer Service (CS)	Service notification
Project System (PS)	Claim
Engineering Change Management (LO-ECH)	Change notification
Feedback Notifications (SV-FDB)	R/3 notification
Intranet	Internal service request
Internet	Internal service request
	Quality notification
	Service notification

The notifications are supported by the following SAP application components:

- *SAP Business Workflow* (BC-BMT-WFM)

- *Document Management System* (CA-DMS)

- *Generic Object Services* (BC-SRV-GBT-GOS)

Notifications (CA-NO)

Features

You record the information or problem to be documented in a notification [Page 386]. Depending on the application area, you can record a notification in the SAP-System, on the Intranet, or on the Internet. When you create a notification, the system assigns a unique number to the notification, so it can be retrieved at any time in the system for further processing.

When you create a notification, you can choose a predefined notification type that is compatible with the information's business content. This ensures that the information be properly categorized and assigned to the proper person or department for further processing.

When you process a notification, the system supports you with functions that allow you, among other things, to:

- Thoroughly describe, prioritize, and categorize the information

- Deal with the subject matter in a logical, process-oriented sequence

- Monitor the notification processing activities from start to finish within specified deadlines

- Define tasks that can be executed, for example, to correct a problem

- Communicate with persons or departments affected by the subject matter

- Evaluate notification data

The following table summarizes the important features of the notifications in the SAP System:

Notification	Using these notifications, you can :
Quality Notifications [Page 58]	Record and process different types of problems that are related to or caused by poor-quality goods or services. For example, this includes customer complaints, complaints against vendors, and company-internal problems.
Maintenance Notifications [Page 163]	Describe malfunctions or exceptional technical situations at an object in the area of maintenance processing, request the maintenance department to perform a necessary task, and document the work that has been performed
Service Notifications [Page 173]	Record, process, and track problems received from customers or inquiries relating to customer service. In a service notification, you can trigger all work processes necessary to solve a problem (for example, specify tasks via a help desk or hotline support, create service orders to dispatch service technicians, or deliver spare parts).
Claims [Page 322]	Record any deviations in a project plan - for example, in terms of costs or dates - , identify the person responsible for the deviation, and define activities to correct the deviation.
Change Notifications [Page 500]	Record change requests for product data, which are subject to approval in your company as part of the engineering change management process. Using a change notification, for example, you can document design errors or make suggestions for improving products.
Feedback Notifications [Page 312]	Contact your responsible support group as a user of an SAP System, to receive support for IT-related problems

| Internal Service Request [Page 49] (General information)

Internal Service Request [Page 363] (Using forms) | Process inquiries or problems over the Intranet You can search for an immediate solution to your problem using the solution database or you can send a notification to the SAP System for further processing.

The request can involve a general problem (for example, an office move) as well as a business request (for example, a request to change cost center master data). |

Simplified Notification Processing

Purpose

With the transactions for simplified notification processing, you are presented with a simplified view of a notification in terms of structure and functions. In this processing view, the system only provides the functions that you need to process the notifications quickly and efficiently. This view is primarily designed for users who:

- Use the notification transactions only occasionally and do not need the full scope of notification processing functions

- Want to record information in notifications quickly and easily

The transactions for simplified notification processing differ from the transactions for extended notification processing [Page 38] in the following ways:

- The scope of functions and complexity of the notification structure have been reduced:

  - The recording of notification data is confined to the notification header data, execution data, and partner data.

  - The hierarchical levels and data fields for items, causes, tasks and activities are not visible.

- You can only create tasks and activities using the action box.

If you have the authorization, you can switch from the transactions for simplified notification processing to the transactions for extended notification processing.

You can use the transactions for simplified notification processing in both the SAP System and on the Intranet.

Prerequisites

In Customizing for *Cross Application Components* under *Notification → Notification Creation → Notification Type →* :

- *Allocate Start Values for Transactions*, a notification type is maintained for transaction IQS21 and the indicator *Proc. initial screen* is not set

- *Define Screen Templates*, the subscreens for simplified notification processing (subject, execution, partner overview) have been maintained

Process Flow

1. You create a notification to record a problem or information about a subject matter.

   The system automatically selects the notification type that was predefined in Customizing or in the user default values as the default notification type. In the standard system, the *General notification* is defined as the default notification type.

2. If the notification type that the system proposes when you create a notification does not suit your problem, you can change the notification type.

3. You record the required information on the notification screen (for example, short and long texts for subject matter, partner information, and notification priority).

Among other things, you can also:

–   Execute follow-up functions via the action box [Page 520]

–   Print the notification

–   Change the processing status of the notification [Page 531] (for example, put the notification in process)

4. After you have entered all of the required data, you save the notification.

The system saves the notification data and returns an empty notification screen, so you can create a new notification.

Result

Once you have created and saved a notification in the system, you or another authorized person can process the notification further (for example, as a result of a workflow being triggered or by means of a worklist).

Notification

Definition

Data record that a user can use to inform an application area about a particular subject matter.

Use

You can use the notifications in the SAP System and on the Intranet to record and process various business-related information. The notification supports you with a number of functions that you can use to process this information. The most important of these functions allow you to:

- Record problems or information

- Define and execute tasks [Page 560]

- Log activities [Page 566]

- Record costs

- Manage the status of notifications and tasks

- Communicate with persons or departments affected by the subject matter

- Evaluate notification data

Structure

In the SAP System, you can process notifications in a simplified or extended view. The structure of a notification differs on the basis of this processing view:

- Notification structure [Page 22] for simplified notification processing

- Notification structure [Page 44] for extended notification processing

If you have the appropriate authorization, you can switch between the simplified and extended processing view.

Integration

The SAP System currently supports the following notification categories:

- Quality notification

- Maintenance notification

- Service notification

- Claim

- Feedback notification (R/3 Support Line Feedback)

- Internal service request

- Change notification

- General notification

Notification Type

Definition

Key that specifies the origin, informational content, and other attributes of a notification. In the standard system, a notification type is assigned various notification origins, which in turn are grouped together in a notification category.

The standard system supports the following notifications (examples):

Notification Type	Notification Origin	Notification Category
M1 - Maintenance request	01 - Maintenance request	Maintenance notification
M2 - Malfunction report	02 - Malfunction report	
M3 - Activity report	03 - Activity report	
S1 - Problem notification	04 - Problem notification	Service notification
S2 - Service request	05 - Activity report (Service)	
S3 - Activity report	06 - General notification (Service)	
Q1 - Customer complaint	Q1 - Customer complaint	Quality notification
Q2 - Complaint against vendor	Q2 - Complaint against vendor	
Q3 - Internal problem notification	Q3 - Internal problem notification	
$$ - Feedback notification	R3 - Feedback notification	
C1 - Claim (internal)	C1 - Internal claim	Claim
C2 - Claim (external)	C2 - External claim	
G0 - General notification	G0 - General notification	General notification

In addition to the notification types listed above, the standard system may also contain other notification types.

Use

When you create a notification in the system, you choose a notification type that suits the subject matter of the notification from a business standpoint. You can either use the notification type that was predefined in Customizing or in the user default values (default notification type), or you can select another notification type.

You can also define your own notification types in Customizing. When you create a new notification type, you must assign a notification origin predefined in Customizing to this notification type. On the basis of this assignment, the system automatically determines the notification category.

You cannot define notification origins or notification categories in Customizing.

Notification Structure (Simplified View)

Definition

Hierarchical structure and informational content of a notification.

Structure

A notification that was created in the standard system using the functions for simplified notification processing [Page 16] (simplified view) has the following structure:
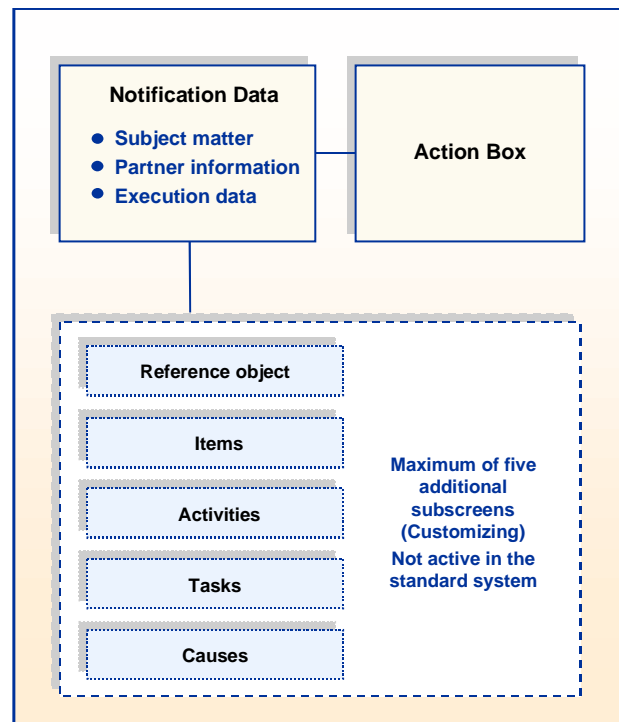
The simplified notification contained in the standard system consists of the notification data screen and the action box. However, you can configure the structure of the notification in Customizing to user-specific requirements (for example, displaying additional subscreens).

Create Notification (in the SAP System)

Use

Using this function, you can create and save a new simplified notification in the SAP System.

Procedure

1. Choose *Logistics → Central Functions → Notification → Create → Simplified View*.

   The initial screen for creating or changing a new notification is displayed. The system displays the notification type that was predefined in Customizing or in the user default values as the default notification type.

2. If you want to change the proposed notification type, choose *Change notification type* and then select another notification type using the field-related input help.

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   Make sure you are aware of the rules that apply to a notification type change [Ext.].

3. Enter the required data in the notification (for example, subject matter, execution data, and partner information).

   If you want to process the notification further, use the selection of available functions (see table below).

4. Save the notification.

   The initial screen for creating or changing a new notification is displayed again.

Functions on the Notification Screen		
Function	**Menu path/Pushbutton**	**What you should know**
Change notification	*Change notification* pushbutton	You switch to the change mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Display notification	*Display notification* pushbutton	You switch to the display mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Notification (extended)	*Notification (extended)* pushbutton	You switch to the extended notification processing mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Put notification in process	*Put in process* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].

Create Notification (in the SAP System)

Postpone notification	*Postpone* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Complete notification	*Complete* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Give approval	*Give approval* pushbutton	You approve a notification so it can be processed further; for more information, see Approval Requirement for Notifications [Page 526].
Refuse approval	*Refuse approval* pushbutton	You do not approve a notification for further processing; for more information, see Approval Requirement for Notifications [Page 526].
Set default values	*Default values* pushbutton	See Setting User Default Values [Page 530] for additional information.
Display object	*Display object* pushbutton	You display reference objects or reference documents that may be specified in the notification.
Display notification structure	*Notification structure* pushbutton	You display the current structure of the notification.
Print notification	*Notification → Print → …*	If you choose *Notification*, you print the contents of the notification. If you choose *Item selection*, you print individual items in the notification.
Notification address	*Extras → Address*	You call up the screen to enter or change the notification address. For example, you can enter the address of the person who reported the notification problem.
Catalog profile	*Extras → Settings → Catalog profile → …*	If you choose *Display*, you can display the current catalog profile that is assigned to the notification type. If you choose *Catalog profile*, you can select an individual catalog profile. For more information, see Catalog Profile [Page 568].

Create Notification (On the Intranet)

Use

Using this function, you can create a simplified notification on the Intranet from an internal service request. The function is automatically called when you submit an internal service request, provided you have chosen a scenario that calls for the creation of a notification using the notification transactions.

Prerequisites

In Customizing for the internal service request (*Define scenarios*), a recording type with notification transactions is specified for the selected scenario (*Recording type on the Web*).

Procedure

2. Once you submit an internal service request, the initial screen for creating and changing a new notification is displayed.

    The system displays the notification type that was predefined in Customizing for the selected scenario.

5. If you want to change the proposed notification type, choose *Change notification type* and then select another notification type using the field-related input help.

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    Make sure you are aware of the rules that apply to a notification type change [Ext.].

6. Enter the required data in the notification (for example, subject matter, execution data, and partner information).

    If you want to process the notification further, use the selection of available functions (see table below).

7. Save the notification.

    The initial screen for creating or changing an internal service request reappears.

Functions on the Notification Screen		
Function	**Menu path/Pushbutton**	**What you should know**
Change notification	*Change notification* pushbutton	You switch to the change mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Display notification	*Display notification* pushbutton	You switch to the display mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.

Create Notification (On the Intranet)

Notification (extended)	*Notification (extended)* pushbutton	You switch to the extended notification processing mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Put notification in process	*Put in process* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Postpone notification	*Postpone* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Complete notification	*Complete* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Give approval	*Give approval* pushbutton	You approve a notification so it can be processed further; for more information, see Approval Requirement for Notifications [Page 526].
Refuse approval	*Refuse approval* pushbutton	You do not approve a notification for further processing; for more information, see Approval Requirement for Notifications [Page 526].
Set default values	*Default values* pushbutton	See Setting User Default Values [Page 530] for additional information.
Display object	*Display object* pushbutton	You display reference objects or reference documents that may be specified in the notification.
Display notification structure	*Notification structure* pushbutton	You display the current structure of the notification.
Print notification	*Notification → Print → …*	If you choose *Notification*, you print the contents of the notification. If you choose *Item selection*, you print individual items in the notification.
Notification address	*Extras → Address*	You call up the screen to enter or change the notification address. For example, you can enter the address of the person who reported the notification problem.

Catalog profile	*Extras → Settings → Catalog profile → …*	If you choose *Display*, you can display the current catalog profile that is assigned to the notification type.
		If you choose *Catalog profile*, you can select an individual catalog profile.
		For more information, see Catalog Profile [Page 568].

Process Notification

Use

Using this function, you can change or display a notification that already exists in the SAP System.

Procedure

3. If you want use the simplified processing view to:

   − Change a notification, choose *Logistics → Central Functions → Notification → Change → Simplified View*

   − Display a notification, choose *Logistics → Central Functions → Notification → Display → Simplified View*

   The initial screen for changing or displaying a notification is displayed.

8. Use the input help for the *Notification* field to select a notification and confirm the selection with *Continue*.

9. If you are currently in the change mode, you can change the desired notification data.

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   If you want to change the notification type, use the *Change notification type* function. You can only use this function under certain circumstances. Make sure you are aware of the rules that apply to a notification type change [Ext.].

   If you want to process the notification further, use the selection of available functions (see table below).

10. If you changed data in the notification, save the notification.

   The initial screen for changing or displaying a notification reappears.

Functions on the Notification Screen		
Function	**Menu path/Pushbutton**	**What you should know**
Create notification	*Create notification* pushbutton	You switch to the create mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Display notification	*Display notification* pushbutton	You switch to the display mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.

Notification (extended)	*Notification (extended)* pushbutton	You switch to the extended notification processing mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.
Put notification in process	*Put in process* pushbutton	You change the processing status of the notification of the notification; for additional information, see Process Notification [Page 531].
Postpone notification	*Postpone* pushbutton	You change the processing status of the notification of the notification; for additional information, see Process Notification [Page 531].
Complete notification	*Complete* pushbutton	You change the processing status of the notification; for additional information, see Process Notification [Page 531].
Set default values	*Default values* pushbutton	See Setting User Default Values [Page 530] for additional information.
Display object	*Display object* pushbutton	You display reference objects or reference documents that may be specified in the notification.
Display notification structure	*Notification structure* pushbutton	You display the current structure of the notification.
Display action log	*Action log* pushbutton	You display changes in the notification via the action log [Page 525].
Document flow	*Document flow* pushbutton	You display the document flow [Page 527] for the notification.
Print notification	*Notification → Print → …*	If you choose *Notification*, you print the contents of the notification. If you choose *Item selection*, you print individual items in the notification.
Notification address	*Extras → Address*	You call up the screen to enter or change the notification address. For example, you can enter the address of the person who reported the notification problem.
Catalog profile	*Extras → Settings → Catalog profile → …*	If you choose *Display*, you can display the current catalog profile that is assigned to the notification type. If you choose *Catalog profile*, you can select an individual catalog profile. For more information, see Catalog Profile [Page 568].

Process Notification

Task Processing

Purpose

Using the functions for task processing, you can change or display the tasks [Page 560] in a notification independently of the notification itself. In this way, you can:

- Process tasks quickly and easily

- Execute tasks using the functions of the action box

- Access the information in the associated notification at any time

Process Flow

1. You process the tasks using one of the following options, depending on your job duties or method of working:

   − Worklist [Page 476]

      You call up the worklist for tasks to determine whether tasks exist that you must process.

   − Workflow [Page 481]

      You check your workflow inbox determine whether tasks exist that you must process.

   − Functions for Task Processing [Page 473]

      If you want to process a specific task in a specific notification, use the transactions for processing or displaying a task.

2. After you have selected and executed one of the above options, you process a task by either:

   − Forwarding the task to another person, if you cannot process the task yourself

   − Carrying out the instructions specified in the task

   − Documenting the information for a task that has just been executed; for example, as a task long text or via a follow-up function in the action box (internal remark)

   − Setting the status of the task to "completed," once you have carried out the instructions specified in the task

   − Executing additional follow-up functions in the action box, if additional tasks need to be implemented

Result

Once you have processed and completed a task, you can complete the notification (provided there are no other tasks in the notification that need to be processed).

Task

Definition

Planned or completed activity that describes a planning and organizational measure in a notification. A task can:

- Apply to the notification as a whole or to individual items in a notification

- Have different statuses

Use

Using a task, you can plan how different people can interact to process a notification and track how various activities are completed within a specified period of time. The task data in a notification is displayed in varying levels of detail in the:

- Task overview

- Task detail screen

You can record task information for the notification header and for individual notification items:

- Tasks that apply to the notification as a whole (or notification header) are designated as "immediate tasks." These tasks usually provide a "quick fix" for a problem that requires immediate attention.

- Tasks for notification items are referred to as "corrective tasks." These tasks usually provide permanent solutions that will prevent the problem from reoccurring in the future.

For each task, you can enter the:

- Key for the task to be performed and a brief instruction describing what is to be done

- Planned start and end dates for the task

- Task status

Integration

If the appropriate data is maintained in Customizing, the system can trigger certain follow-up actions on the basis of the task code (for example, printing a paper or calling up an SAP transaction). You can define follow-up actions to meet your individual requirements. (For more information, see Follow-up Actions for Tasks [Page 99].)

Processing Tasks Using Worklist

Use

Using the worklist for tasks, you can select notification tasks on the basis of different criteria and process them. You can select the tasks as follows:

- You select the tasks using the *My worklist* function. The system then displays the following tasks for further selection and processing:

  - All outstanding tasks to be processed by you as the "person responsible"

  - All tasks to be processed by you as a *<Partner function>*

  - All tasks you created

  - All tasks you completed

- You select the tasks using the *General selection* function. The system then displays all tasks for further selection and processing. Make sure the preset selection criteria contain the values you want (for example, selection period, outstanding tasks only).

Prerequisites

If you use the *General selection* function and you want to process tasks for which you are not responsible or which you did not create, you must have the corresponding authorization.

Activities

You choose *Logistics → Central functions → Notification → Worklist → Tasks* to call up the worklist for tasks.

You enter the required data and choose *Execute*.

See also:

Select and Process Tasks Using the Worklist [Page 537]

Processing Tasks Using Workflow

Use

If a task is created in a notification or if the person responsible for a task is changed, the system can automatically notify the person or department responsible via the *SAP Business Workflow* that a task needs to be processed.

You receive the information about the task that needs to be processed as a *work item* in your inbox (*Business Workplace)*. Your inbox provides an overview of all tasks that you are responsible for processing. You can begin processing the work item directly from your business workplace.

Integration

You can access your business workplace by choosing *Office → Workplace* from the SAP menu. Then choose *Inbox → Workflow* to display any work items that may be present.

Prerequisites

The required system settings to activate the *SAP Business Workflow* have been made.

Activities

If there is a work item in your inbox, proceed as follows to begin processing the work item:

- You double click the work item to display a description of the task to be executed.

- You choose *Execute* to process the work item. The system calls up the transaction to process the task.

Process Specific Task in a Notification

Use

Using this function, you can process a specific task in a notification. You can process tasks for the notification header (immediate tasks) as well as tasks for individual items (corrective tasks). On the initial screen for this transaction, for example, you can:

- Call up the task to be processed directly by entering the notification number, item number, and task number

- Display a selection of tasks using the input help for the notification number and then select a specific task (for example, if you do not know the notification number, item number, and task number)

Procedure

Notification, item, and task numbers are known

4. Choose *Logistics → Central Functions → Notification → Task → Process.*

   The initial screen for processing a task is displayed.

2. Enter the notification, item, and task numbers and choose *Enter*.

   The screen for processing a task is displayed.

3. Use the functions listed in the table below to process the task.

Notification, item, and task numbers are unknown

1. Choose *Logistics → Central Functions → Notification → Task → Process.*

   The initial screen for processing a task is displayed.

2. Choose the input help for the *Notification* field and enter your selection criteria for the task in the dialog box.

   For example, you can select a task on the basis of the notification type, the person responsible, or various other views (for example, vendor, material, WBS element/project, etc.). If you do not enter any selection criteria, the system will select all tasks in the system.

3. Choose *Continue*.

   The system displays a list of tasks sorted by notification and item numbers.

   Tasks with an item number "0000" are immediate tasks. Tasks with an item number greater than "0000" are corrective tasks.

4. Select a task and then choose *Copy.*

   The initial screen reappears.

5. Choose *Enter*.

Process Specific Task in a Notification

The screen for processing a task is displayed. Use the functions listed in the table below to process the task.

Functions on the Task Screen		
Function	**Menu path/Pushbutton**	**What you should know**
Release task	*Release task* pushbutton	You release the task so it can be executed. For more information, see Status Management for Tasks [Page 562].
Complete task	*Complete task* pushbutton	You confirm that the task was executed. For more information, see Status Management for Tasks [Page 562].
Denote task as being successful	*Task successful* pushbutton	You confirm that the task solved the problem successfully. For more information, see Status Management for Tasks [Page 562]
Set user status	*Set status* pushbutton	If a user status was defined in a status profile, you can use this function to set the user status. For more information, see Status Management for Notifications [Page 541].
Display associated notification	*Notification (extended)* pushbutton	You display the notification that contains the task. Choose *Back* to return to the task processing screen.
Display object	*Display object* pushbutton	You display reference objects or reference documents that may be specified in the notification.
Display action log	*Action log* pushbutton	You display changes in the notification via the action log [Page 525].
Expand all screen areas	*Expand all (Expand all screen areas)* pushbutton	You expand all screen areas in the task processing screen.
Collapse all screen areas	*Collapse all (Collapse all screen areas)* pushbutton	You collapse all screen areas in the task processing screen.
Display notification	*Notifctn (Open)* pushbutton	You display a summary of the notification data, including short and long texts.
Expanding the individual screen areas	*Basic data, Planning* and *Item* pushbuttons	You expand the individual screen areas to display and process the corresponding task data.
Action box		You execute follow-up functions in the action box. For more information, see Action Box [Page 520].

Extended Notification Processing

Using the functions for extended notification processing, you can use the full scope of notification functions (as opposed to those available in the simplified notification processing view [Page 16]). If you process a notification in the extended view in the standard system, all hierarchical levels in the notification (for example, items, tasks, activities, and causes) and the corresponding functions are available for use.

The extended view for notification processing is designed for users who:

• Use the notification transactions intensively and need to access all functions

• Do not only create notifications, but also process the information in the notifications

The extended view supports the following processing options:

• Notification processing (all notification categories) [Page 502]

• Notification processing on the Intranet [Page 49]

• Notification processing (specific notification categories) [Page 57]

Notification Processing (All Notification Categories)

Purpose

In this processing mode, you use the extended processing view to create and process notifications of all notification types. You can create quality notifications, maintenance notifications, service notifications, claims, or general notifications. In contrast to the procedure for simplified notification processing, you cannot change the notification type once a notification has been created.

Prerequisites

All required settings have been made for the respective notification types in Customizing (see *Cross-Application Components → Notification → Overview of Notification Type*).

Process Flow

4. You create a notification to record a problem or information about a subject matter.

   When you create the notification, you select the desired notification type.

5. You record the required information for the notification (for example, short and long texts for subject matter, partner information, notification priority, items, tasks, and activities).

   Among other things, you can also:

   − Execute follow-up functions via the action box [Page 520]

   − Print the notification data

   − Change the processing status of the notification [Page 531] (for example, put the notification in process)

5. After you have entered all of the required data, you save the notification.

   The notification data is saved and the initial screen reappears.

Notification

Definition

Data record that a user can use to inform an application area about a particular subject matter.

Use

You can use the notifications in the SAP System and on the Intranet to record and process various business-related information. The notification supports you with a number of functions that you can use to process this information. The most important of these functions allow you to:

- Record problems or information
- Define and execute tasks [Page 560]
- Log activities [Page 566]
- Record costs
- Manage the status of notifications and tasks
- Communicate with persons or departments affected by the subject matter
- Evaluate notification data

Structure

In the SAP System, you can process notifications in a simplified or extended view. The structure of a notification differs on the basis of this processing view:

- Notification structure [Page 22] for simplified notification processing
- Notification structure [Page 44] for extended notification processing

If you have the appropriate authorization, you can switch between the simplified and extended processing view.

Integration

The SAP System currently supports the following notification categories:

- Quality notification
- Maintenance notification
- Service notification
- Claim
- Feedback notification (R/3 Support Line Feedback)
- Internal service request
- Change notification
- General notification

Notification Type

Definition

Key that specifies the origin, informational content, and other attributes of a notification. In the standard system, a notification type is assigned various notification origins, which in turn are grouped together in a notification category.

The standard system supports the following notifications (examples):

Notification Type	Notification Origin	Notification Category
M1 - Maintenance request	01 - Maintenance request	Maintenance notification
M2 - Malfunction report	02 - Malfunction report	
M3 - Activity report	03 - Activity report	
S1 - Problem notification	04 - Problem notification	Service notification
S2 - Service request	05 - Activity report (Service)	
S3 - Activity report	06 - General notification (Service)	
Q1 - Customer complaint	Q1 - Customer complaint	Quality notification
Q2 - Complaint against vendor	Q2 - Complaint against vendor	
Q3 - Internal problem notification	Q3 - Internal problem notification	
$$ - Feedback notification	R3 - Feedback notification	
C1 - Claim (internal)	C1 - Internal claim	Claim
C2 - Claim (external)	C2 - External claim	
G0 - General notification	G0 - General notification	General notification

In addition to the notification types listed above, the standard system may also contain other notification types.

Use

When you create a notification in the system, you choose a notification type that suits the subject matter of the notification from a business standpoint. You can either use the notification type that was predefined in Customizing or in the user default values (default notification type), or you can select another notification type.

You can also define your own notification types in Customizing. When you create a new notification type, you must assign a notification origin predefined in Customizing to this notification type. On the basis of this assignment, the system automatically determines the notification category.

You cannot define notification origins or notification categories in Customizing.

Notification Structure (Extended View)

Definition

Hierarchical structure and informational content of a notification.

Structure

A notification that was created in the standard system using the functions for extended notification processing [Page 38] (extended view) has the following structure:
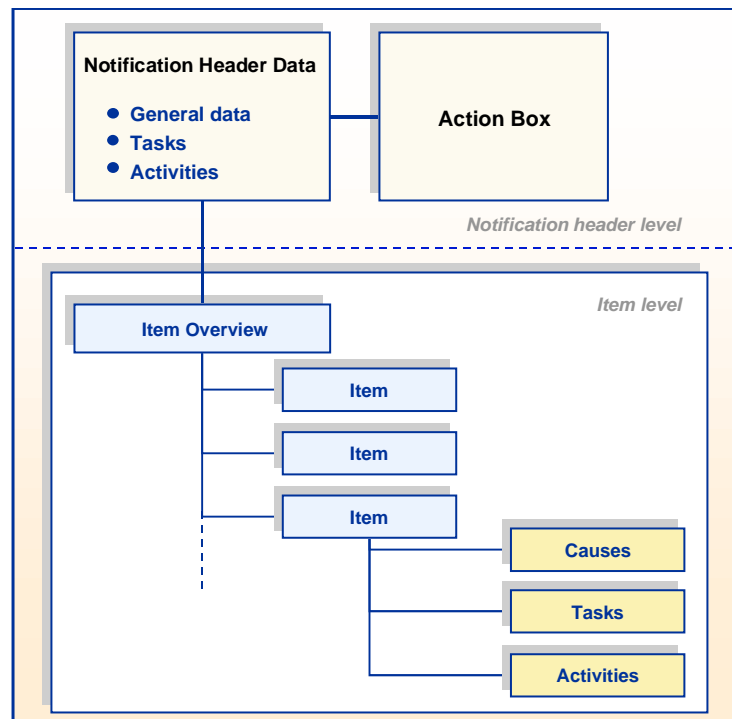
The structure of a notification can be configured in Customizing to meet the user's specific requirements (this means you can display or hide selected screen areas, tab pages, and levels in the notification).

Create and Process Notification

Use

Using these transactions, you can create and process notifications of any notification type.

> During notification processing, the contents of the notification screens and selection of available functions may differ from one notification to another, depending on the notification type. For this reason, refer to the documentation for specific notification categories [Page 57] to obtain detailed information about the functions that apply to specific notification types.

Procedure

To call up the functions for creating and processing notifications, proceed as follows:

Function	Follow-on menu path	What you should know
Create notification	1. Choose *Logistics* → *Central Functions* → *Notification* → *Create* → *Extended View*. 2. Enter a notification type and choose *Enter*.	An additional dialog box for entering reference data may be displayed before the system creates the notification. This depends on the settings in Customizing.
Create notification with reference	1. Choose *Logistics* → *Central Functions* → *Notification* → *Create* → *Extended View*. 2. Enter the notification type. 3. Enter the number of the notification you want use as a reference and choose *Enter*.	To reduce the amount of data that you need to enter, you can use an existing notification as a copy model. You can use a notification of any notification type as a copy model, regardless of the new notification's type. When you save the new notification, the reference notification is saved in the new notification. Therefore, you can later select the notifications that were created with a specific reference notification.
Change notification	1. Choose *Logistics* → *Central Functions* → *Notification* → *Change* → *Extended View*. 2. Enter the number of the notification you want to change and choose *Enter*.	Make the necessary changes to the notification and then save the data.

Create and Process Notification

Display notification	1. Choose *Logistics → Central Functions → Notification → Display → Extended View*.	
	2. Enter the number of the notification you want to display and choose *Enter*.	

Processing Notifications Using Worklist

Use

Using the worklist for notifications, you can select notifications on the basis of different criteria and process them. You can select the notifications as follows:

- You select the notifications using the *My worklist* function. The system then displays the following notifications for further selection and processing:

  - All notifications to be processed by you as the "person responsible" or that fall within your department's area of responsibility

  - All notifications to be processed by you as a *<Partner function>*

  - All notifications you created

  - All notifications that were last processed by you

- You select the notifications using the *General selection* function. The system then displays all notifications for further selection and processing. Make sure the preset selection criteria contain the values you want (for example, notification status, selection period).

Prerequisites

If you use the *General selection* function and you want to process notifications for which you are not responsible or which you did not create, you must have the corresponding authorization.

Activities

You choose *Logistics → Central Functions → Notification → Worklist → Notifications* to call up the worklist for notifications.

You enter the required data and choose *Execute*.

See also:

Select and Process Notifications Using Worklist [Page 533]

Processing Notifications Using Workflow

Use

If a notification is created or put in process in the system, the system can automatically notify the person(s) or department(s) responsible via the *SAP Business Workflow* that:

- The notification must be processed or tasks need to be defined

- Defined tasks need to be executed

- All notification tasks have been completed and the notification must either be completed or additional tasks must be defined for the notification

You receive the information about the notification that needs to be processed as a *work item* in your inbox (*Business Workplace).* Your inbox provides an overview of all notifications that you are responsible for processing. You can begin processing the work item directly from your business workplace.

Integration

You can access your business workplace by choosing *Office → Workplace* from the SAP menu. Then choose *Inbox → Workflow* to display any work items that may be present.

Prerequisites

The required system settings to activate the *SAP Business Workflow* have been made.

Activities

If there is a work item in your inbox, proceed as follows to begin processing the work item:

- You double click the work item to display a description of the notification.

- You choose *Execute* to process the work item. The system calls up the transaction to process a notification.

Notification Creation on the Intranet

Purpose

In many companies, the Intranet is the primary medium over which employees obtain company-related information and services (for example, displaying news of the day or submitting vacation requests). In addition, employees can now use the Intranet to report all types of problems or search interactively for solutions to their problems.

Using the **internal service request,** a centralized, easy-to-use means of creating notifications, every user who has access to the Intranet can create notifications from his or her workplace and search for possible solutions or answers.

A person who creates a notification does not have to be familiar with the SAP System and does not have to assign a processor or mailing address to the notification. The system makes these assignments automatically (for example, by using a standard role and activating the *SAP Business Workflow* component), thereby ensuring that the notification will be processed further. In view of the predefined settings in Customizing, even users without prior SAP experience can use this Intranet service.

Using the internal service request, you have the following options for making an inquiry or recording a problem:

- Notification Creation Using Free Text Search [Page 51]

- Notification Creation Using Easy Web Transaction [Page 53]

- Notification Creation Using Forms

In addition to creating notifications, you can check and display the current processing statuses of all notifications you created.

Prerequisites

To use the internal service request, the following conditions must be fulfilled in Customizing:

- Your company's Intranet is linked to the SAP System.

- Business processes (scenarios) have been defined.

- The *SAP Business Workflow* component is active for the efficient processing of notifications (optional)

Process Flow

1. You call up the transaction for the internal service request from your workplace.

   The recording screen for the internal service request is displayed and filled with your personal user data.

2. You create an internal service request by entering an inquiry or problem description in the text entry field.

   If the system contains a scenario that relates to your text entry, it displays a form or calls up an Easy Web transaction to allow you to process the notification further.

3. After you have entered your text, the system reacts as follows (based on your text entry):

   – The system displays possible solutions to your inquiry or problem.

Notification Creation on the Intranet

- You can send the inquiry or problem description for immediate processing.

- The system displays a form in which you can enter additional information (for example, name of cost center to be changed).

- The system calls up an Easy Web transaction, in which you can enter a description as well as information that is specific to the notification type (for example, material, equipment, customer, etc.).

Notification Creation Using Free Text Search

Use

Using the internal service request, you can enter all types of inquiries or problem descriptions and then initiate a free text search to:

- Find possible solutions in a solution database

- Locate forms that you can use to record and describe your inquiry or problem in more detail

When you search for a solution, you may be able to obtain an immediate answer to your inquiry or solution to your problem. If you choose a form, you can enter additional information to make it easier to process the notification. Forms can be created for many different, customer-specific needs (for example, to request an office move, to approve a budget request, etc.)

Integration

The internal service request is integrated with the following functions in the SAP System:

- Solution database (enables you to search for solutions)

- Easy Web transactions [Page 53] (for simplified recording of notifications on the Intranet)

- *SAP Business Workflow* (allows you to optimize your notification processing activities)

Prerequisites

When you process an internal service request, make sure you consider the following points:

- To be able to search for solutions in the solution database, the database must be maintained with the appropriate information or keywords that will support such searches.

- To be able to search for forms, all scenarios to be available for selection must be defined in Customizing for the *Internal Service Request* (*Define Scenarios*); in addition, long texts or keywords must be maintained so the system can automatically find the forms on the basis of these texts.

Features

Solution Search Via Free Text Entry

When you enter a text, the system can automatically search for possible solutions in a solution database that match the context of your inquiry or problem description. When the system displays a list of possible solutions, you can select and display the individual solutions. If an attachment is assigned to a solution (for example, an Office document or a URL address), you can also call it up for display.

If the system cannot find a suitable solution, you can send your inquiry or problem description to the SAP System for further processing. In this case, you do not have to assign a processor to the inquiry or problem, since the system generally does this automatically.

Forms Search Via Free Text Entry

In addition to searching solutions, you can also use the internal service request to search for forms. In this case, the system starts a keyword search on the basis of the text you entered to

Notification Creation Using Free Text Search

find a suitable form. A form consists of a scenario-related recording screen, in which you can enter additional information about your inquiry or problem.

If the system finds a form, it responds as follows (based on the Customizing settings for the *Internal Service Request* under *Define Scenarios*):

- It calls up an Easy Web transaction with which you can process the notification further.

- It calls up a form in which you can enter additional data.

- It saves and sends the notification immediately, if Customizing specifies a text entry only.

As an alternative to an automatic forms search carried out by the system, you can also manually select a form that fits the context of your text entry via the *Subject* field.

Activities

You enter an inquiry or a problem description in the text field of the internal service request. You can then either:

- Search for solutions

- Search for forms or select a form manually via the *Subject* field

- Send the entered text

Simplified Notification Creation on the Intranet

Use

If you create an internal service request on the Intranet for a business scenario whose Customizing settings specify a recording with notification transactions, the system automatically calls up an Easy Web transaction when you send the request. In this transaction, you can enter information that is specific to the notification type and you can then send the notification for further processing.

The system calls up the Easy Web transaction for creating a simplified notification over the Web GUI; this transaction, however, is the same as the one used in the SAP System.

Prerequisites

A recording type with notification transactions (*Recording type on the Web*) is specified for the selected scenario in Customizing for the *Internal Service Request* (*Define scenarios*).

See also:

Create Notification (on the Intranet) [Page 25]

Internal Service Requests

Use

Internal service requests enable you to request and process any service using a simple form, or a freely formulated text. You do not require SAP R/3 experience. This kind of request action could be a removal for example. The request is forwarded to the approving manager or the processor. If the service request incurs costs, you can send the request to a cost center manager or budget manager (who can execute an automatic cost calculation) for approval.

This function enables you to process numerous requests in the intranet that you previously processed by mail or telephone. You can enter the requests at any time of day or night, every day of the week. All those involved can also call up the status at any time. The integrated cost posting ensures that the data is transferred without errors to Controlling, and the costs of the line item reports are monitored.

The internal service request covers three business processes:

- Finding solutions to a particular problem [Page 442]

- Having the non-cost incurring request (such as: removal request) entered and processed [Page 444]

- Having the cost incurring request (such as: budget change) entered and processed [Page 447]

Advantages

You can create your own request forms without ABAP skills

You have **one** initial screen for entry and status query of the request.

The system finds the processors for the request using the details in the request form.

The SAP workflow is used to inform the request processors
For more information on the *SAP Workflow*, see *Basis → Business Management →* SAP Business Workflow [Ext.]**.**

You can use Easy Cost Planning to calculate incurred costs for the request
For more information, see the SAP Library under *Financials → Controlling → Product Cost Controlling → Product Cost Planning →* Easy Cost Planning and Execution Services [Page 370]*.*

Costs are automatically posted to the corresponding cost center or another *fixed account assignment object.*

Process Flow

The Environment

Intranet	SAP System
Entered by	Person who processes/approves the request

Entry

You can select predefined standard services, or create your own service request scenarios in Customizing.

You can add notes to the service request at any time during the processing time.

You enter an internal service request via the LaunchPad in your my SAP.com Workplace.

Approval

In Customizing, you can specify under which conditions an approval for a service request is to be made.

The cost center manager or budget manager automatically receives an overview of all the service requests relevant for them. This overview is provided via a worklist or a workflow.

The manager can:

- Change the person responsible, and thus forward the service request The request can be forwarded automatically, for example, to a representative if someone is on vacation.

- Before approval, send a note with a query on the service request to the person who entered the request.

- Forward the service request for a "cost estimate" to the processor.

The cost center manager or budget manager can use a cost collector (such as an internal order) that is linked to the internal service request to monitor the request costs.

Carrying Out The Request

The service request processor is determined in the same way as the cost center manager or budget manager.

This person is informed about the service request, using the workflow.

If the processor indicates the service request as completed, then the incurred costs are posted via integrated cost posting.

You call up processing

- For the notification via:

- *Office → Notification → Change* or

- *Office → Notification → Worklist → Notifications.*

- For the notification task via:

- *Office → Task → Process* or

- *Office → Notification → Worklist → Tasks.*

Result

You sent a request that was processed or executed after approval (if required).

For more information on customizing internal service requests, see the implementation guide (IMG) under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Scenario Definition → Define Scenarios.*

Internal Service Requests

Internal Service Requests

Notification Processing (Specific Notification Categories)

Purpose

In this processing mode, you can only create and process notifications of a specific notification type. For example, if you are only responsible for processing maintenance notifications, this mode only allows you to access the transactions to create and process maintenance notifications. However, you can create and process all notification types that have been defined for the notification category "Maintenance Notifications."

Prerequisites

All required settings have been made for the respective notification types in Customizing (see *Cross-Application Components → Notification → Overview of Notification Type*).

Process Flow

6. You create a notification to record a problem or information about a subject matter.

    When you create the notification, you select the desired notification type.

7. You record the required information for the notification (for example, short and long texts for subject matter, partner information, notification priority, items, tasks, and activities).

    Among other things, you can also:

    −   Execute follow-up functions via the action box [Page 520]

    −   Print the notification data

    −   Change the processing status of the notification [Page 531] (for example, put the notification in process)

6. After you have entered all of the required data, you save the notification.

    The notification data is saved and the initial screen reappears.

See also:

Quality Notifications [Page 58]

Maintenance Notifications/Service Notifications [Page 162]

Feedback Notifications [Page 312]

Claims [Page 322]

Change Notifications [Page 500]

Quality Notifications (QM-QN)

Purpose

This component contains functions for recording and processing different types of problems (for example, problems resulting from poor-quality goods or services). You can use the notifications to analyze the recorded defects and monitor the correction of these problems. In particular, the notifications can help you process internal or external problems such as:

- Complaints filed by customers

- Complaints against vendors

- Company-internal problems

- Other user-specific problems

As an extremely flexible system, you can also use this component to process and manage information of a positive nature (for example, to implement a "suggestion system" in your company to manage improvements).

Implementation Considerations

You should implement this component if your company needs an effective and efficient tool that can:

- Manage and process its internal and external problems

- Help you optimize your business processes through continuous process improvement

Integration

The quality notifications are a part of the general system of notifications in the R/3 System that also includes maintenance notifications in the *Plant Maintenance* (PM) component and service notifications in the *Customer Service* (CS) component.

The quality notifications are also integrated with the following processes in the logistics supply chain:

- Repairs Processing [Page 145] (*Quality Management*, *Customer Service*, *Sales and Distribution*)

- Complaint Processing [Page 148] (*Quality Management*, *Materials Management*, and *Sales and Distribution*)

Integration with Other Quality Management Components

If you want to	You must install
Access catalog code groups and codes to document the defect items, causes, and tasks in a quality notification	*Catalog* (QM-PT-BD-CAT)
Create quality notifications while processing an inspection to record quality-related problems	*Quality Inspection* (QM-IM)
Analyze the notification data using various evaluation tools	*QM Information System* (QM-QC-IS)

Create quality notifications for customer complaints over the Internet	*Quality Notifications on the Internet* (QM-QN-NT)

Integration with Other R/3 Components

If you want to	You must install
Settle the nonconformity costs recorded for a notification problem in a QM order	*Controlling* (CO)
Trigger workflow tasks in the course of notification processing.	*SAP Business Workflow* (BC-BMT-WFM)
Store notification-related documents in an optical archive	*SAP ArchiveLink* (BC-SRV-ARL)
Classify defect items in a notification using general characteristics	*Classification System* (CA-CL)
Link documents managed in the R/3 System's Document Management System to a quality notification	*Document Management System* (CA-DMS)

Features

The quality notifications include a wide range of features and functions. In general, you can use a quality notification to:

- Describe a problem and identify the affected reference objects (for example, material, vendor, manufacturer)

- Record the names of all persons (partners) who are involved with the problem

- Define processing parameters for the quality notification (for example, assigning a priority to the notification and specifying a time range within which the problem should be completed)

- Record individual defect items that relate to the problem and analyze their causes

- Specify the corrective actions to be taken (for example, tasks that are implemented immediately or corrective tasks that are implemented after a thorough analysis of the defects)

- Monitor the execution of corrective actions through a status management function

- Log all activities that have been carried out for the problem

- Record the nonconformity costs incurred while processing and correcting a problem

- Print, fax, archive or export various types of reports (shop papers) that relate to the problem

In addition, this component also allows you to selectively generate lists of recorded notifications for processing or evaluation purposes.

Quality Notification

Definition

Describes a business object's nonconformance with a quality requirement and contains a request to take appropriate action.

The following quality notification types are predefined in the system:

- Customer complaint

- Complaint against a vendor

- Internal problem report

In addition to the standard notification types, you can also define your own user-specific notification types.

Use

You can use a quality notification to record the following information:

- Problem description

- Affected reference objects (for example, material, purchase order or delivery)

- Partner information (for example, customer, vendor, or coordinator)

- Defect items

- Causes of defect items

When you process a quality notification, you can:

- Define tasks for the notification or for individual defect items

- Log the activities carried out for the notification or for individual defect items

- Record problem-related nonconformity costs in a QM order. You can assign an existing QM order to a quality notification or create a new QM order and assign it to a notification.

- Print shop papers

- Select and evaluate quality notifications

A quality notification supports you in your processing activities with the following functions:

- Response monitoring for tasks

- Status management

- Follow-up actions for tasks

- Action box

- Action log

Structure

A quality notification has the following basic structure:

Info related to the overall notification
- General data
- Tasks
- Activities

Notification header

Notification header level

Item level

Item overview

Item

Item — Individual notification-related defects

Item

Causes

Tasks — Information related to a single defect item

Activities
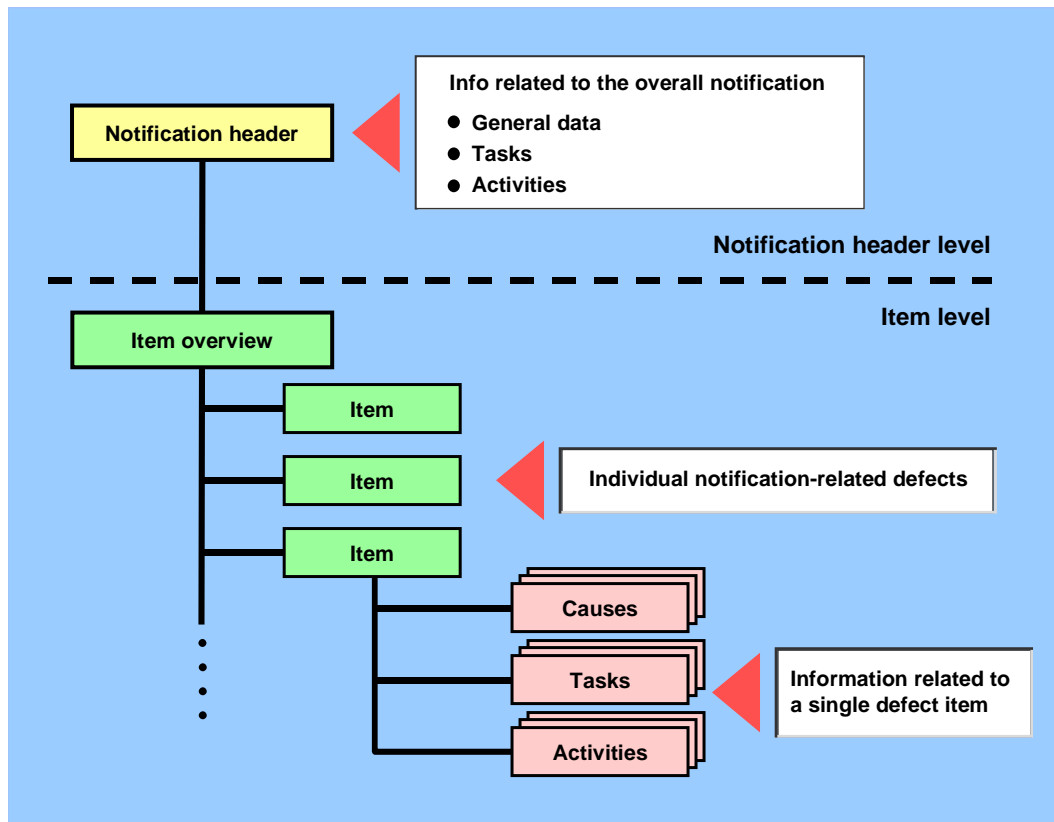
See also:

Notification header [Page 74]

Item [Page 89]

Cause [Page 207]

Task [Page 94]

Activity [Page 100]

Customer Complaint

Definition

A customer complaint is a quality notification type (Q1) that deals with a problem involving poor-quality goods or services delivered to a customer.

Use

You can use a notification for a customer complaint to record and process a problem that is reported by a customer.

Integration

In a quality notification for a customer complaint, you can specify one or more **reference objects**. A reference object has a relationship to the problem in a quality notification. A customer complaint may include the following reference objects:

- Customer

- Material / batch

- Sales order

- Sales organization

- Division

- Distribution channel

- Delivery

- Inspection lot

- Serial number

- Device data

- Notification number (field in which you can reference a quality notification that was used as a copy model)

- Reference number (field in which you can assign an external reference number to a notification; for information purposes only)

- Purchase order number

- Purchase order date

When you process a quality notification for a customer complaint, you can also display the following supplementary information for a customer:

- Sales summary

- Summary of important customer information (for example, order data, terms of payment, transaction data, and so on).

Complaint Against a Vendor

Definition

A complaint against a vendor is a quality notification type (Q2) that deals with a problem involving poor-quality goods or services delivered by a vendor or manufacturer.

Use

You can use a notification for a complaint against a vendor to record and process a problem that was confirmed in a delivery.

Integration

In a quality notification for a complaint against a vendor, you can specify one or more **reference objects**. A reference object has a relationship to the problem in a quality notification. A complaint against a vendor may include the following reference objects:

- Vendor

- Material / batch

- Material document (goods receipt)

- Purchase order

- Purchase organization

- Purchasing document

- Inspection lot

- Serial number

- Device data

- Notification number (field in which you can reference a quality notification that was used as a copy model)

- Reference number (field in which you can assign an external reference number to a notification; for information purposes only)

When you process a quality notification for a complaint against a vendor, you can also display the following supplementary information for a vendor:

- Buyer's negotiation sheet

- Summary of important information for the vendor/material (for example, quantities of materials ordered from vendor, vendor prices and conditions, and so on).

Internal Problem Report

Definition

An internal problem report is a quality notification type (Q3) that deals with quality-related problems that originate within one's own organization.

Use

You can use a notification for an internal problem report to record and process company-internal problems (for example, defects confirmed for a material or product in a production process).

Integration

In a quality notification for an internal problem report, you can specify one or more **reference objects**. A reference object has a relationship to the problem in a quality notification. An internal problem report may include the following reference objects:

- Material / batch

- Production order / run schedule header

- Work center

- Inspection lot

- Serial number

- Device data

- Notification number (field in which you can reference a quality notification that was used as a copy model)

- Reference number (field in which you can assign an external reference number to a notification; for information purposes only)

User-Specific Quality Notification

Definition

A user-specific quality notification is one that does not belong to one of the standard notification types **predefined** in the QM component.

Use

You can create user-specific notifications:

- To handle the types of problems that cannot be processed adequately using one of the predefined notification types

- If you want to evaluate the data for user-specific notification types separately

Structure

A user-specific notification type has the same basic structure as the standard, predefined notification types. The screen layouts, reference objects, and tab indexes, however, may differ from those in the predefined notification types, depending on how you customize the user-specific notification type.

Creating and Processing Quality Notifications

To call up the functions for creating and processing quality notifications, proceed as follows:

Function	Menu path	What you should know
Creating a quality notification	1. Choose *Logistics → Quality management → Quality notification → Create*. 2. Enter the notification type and then choose *Enter*.	Notification types: *Q1* - Customer complaint *Q2* - Complaint against vendor *Q3* - Internal problem Another dialog box may be displayed before the notification is created, depending on how the quality notifications were customized. If a dialog box is displayed, you may have to enter additional reference information (for example, a material, sales order or delivery).
Creating a user-specific quality notification	1. Choose *Logistics → Quality management → Quality notification → Create*. 2. Enter the notification type and then choose *Enter*.	To be able to create a user-specific notification, you must specify a user-specific notification type that has been predefined in Customizing.
Creating a quality notification with reference	1. Choose *Logistics → Quality management → Quality notification → Create*. 2. Enter the notification type. 3. Enter the number of the notification you want use as a copy model and choose *Enter*.	To reduce the amount of data that you need to enter, you can use an existing quality notification as a copy model. You can use any notification type as a copy model, regardless of the notification type for the new notification. When you save the new quality notification, the notification you used as a copy model is saved at the same time in the notification. This means that you can later select the quality notifications that were created using certain references.

Changing a quality notification	1. Choose *Logistics → Quality management → Quality notification → Change*. 2. Enter the number of the notification you want to change and choose *Enter*.	Make the necessary changes to the notification and then save the data.
Displaying a quality notification	1. Choose *Logistics → Quality management → Quality notification → Display*. 2. Enter the number of the notification you want to display and choose *Enter*.	
Defining user default values	1. Choose *Logistics → Quality management → Quality notification → Create* or *Change*. 2. In the notification, choose *Extras → Settings → Ctrl/Default values*	In this dialog box, you can define default values that the system will automatically propose when you create a notification (also see Setting User Default Values [Page 73]).

Displaying Changes in Quality Notifications

Use

The system automatically documents the changes that are made to the following data in a quality notification:

- Tasks

- Items

- Causes

- Activities

- Partners

The system only records the changes that are made to existing data in the notification. For example, if you create a **new** task in a notification, the system does not create a change document. It only creates a change document if you change the task after it was saved at least once.

Procedure

1. Call up a notification in the display or change mode.

2. Choose *Extras → Notification documents → Changes*.

   The change documents that were recorded for the notification are displayed.

3. To view the contents of a change document, position the cursor on a document and choose *Display documents*.

   The system displays the changes recorded in the change document.

Displaying the Action Log for a Notification

Use

The system records the changes you make in a notification in the action log. This allows you to determine:

- Which data or statuses were changed for the selected fields

- Who made the changes

- When were the changes made

The action log also records the changes that a person processing the notification made to tasks, items, and activities.

Procedure

1. Call up a notification in the display or change mode.

2. Choose *Extras → Notification documents → Action log*.

   The action log for the notification appears.

3. To display the changes to tasks, items, or activities, choose *Task/Item/Act.*, position the cursor on a desired object, and then choose *Detail action log*.

Document Flow

Use

You can use this function to display the document flow for a quality notification in the form of a list or network graphic. The document flow allows you to identify:

- Preceding documents (documents from which the current notification originated)

- Subsequent documents (documents originating from the current notification)

- "To-and-from" references between documents

Each document contains the following information:

- Description of document (for example, quality notification or sales order)

- Document number

- Additional data (if available)

- Logical system (if any of the other documents was created in a logical system other than the one in which the original notification was created)

You can also display detailed information for each document in the graphic.

Integration

The document flow can also include notifications from the *Customer Service* (CS) and *Plant Maintenance* (PM) components. The document flow is also integrated with the following other components in the logistics supply chain:

- *Materials Management* (MM)

- *Production Planning and Control* (PP)

- *Sales and Distribution* (SD)

Features

The document flow can display the following objects:

- Quality notification

- Service notification

- Maintenance notification

- Service order

- Sales order

- Production order

- Run schedule header

- Goods movement

- Purchase order

- Inspection lot

Displaying the Document Flow for a Notification

1. Call up a quality notification in the display or change mode.

2. Choose one of the following menu paths, depending on whether you want to display the document flow as a list or graphic:

    –   *Extras → Notification documents → Document flow → List*

    –   *Extras → Notification documents → Document flow → Graphics*

        In the list display, the notifications that reference other subsequent notifications are labeled with a *(Ref.)* designation.

3. If you displayed the document flow as a graphic, select a document in the graphic and choose *Goto → Display document*.

        The detailed information about the selected document is displayed.

Setting User Default Values

Use

If you create notifications in which certain data is always the same, you can permanently define certain user default values to make it easier to create the notifications. The system automatically copies this default data into the appropriate notification fields. You can, however, overwrite the proposed information.

Features

You can define default values for the following data:

- General data (for example, notification type, reference object, or contact person)

- Sales and distribution data (for example, sales organization)

- Purchasing/internal data (for example, purchasing organization or work center)

The default values that are valid for:

- All notification types (for example, material, plant, screen group) are copied into all notification types

- Specific notification types (for example, customer, vendor, and so on) are copied into the applicable notification types only

You can also set the reference object view here using the screen category.

Activities

To define default values for a notification, choose *Extras → Settings → Ctrl/Default values* and then maintain the data on the appropriate tab pages.

Notification Header

Definition

The notification header contains a variety of general information about a quality notification.

Use

You use the information in the notification header for identification and processing purposes. The header data applies to the quality notification as a whole.

Structure

Because the quality notification screens can be customized, the information contained in a quality notification will vary. The table below shows the header information contained in the standard quality notification types.

Customer complaint (Q1)	Complaint against vendor (Q2)	Internal problem report (Q3)
General notification data For example: • Notification number • Notification type • Notification status	**General notification data** For example: • Notification number • Notification type • Notification status	**General notification data** For example: • Notification number • Notification type • Notification status
Problem information For example: • Reference objects • Contact persons • Problem description • Organizational data	**Reference objects** For example: • Material, vendor, manufacturer • Address data • Reference documents • Quantities	**Problem information** For example: • Reference objects • Reference documents • Problem description
Processing information For example: • Priority • Notification start/end dates • Reference documents • Quantities • Costs	**Organizational information** For example: • Organization • Work center • Execution • Malfunction data • Problem description	**Contact persons** For example: • Organization • Address data • Execution • Malfunction data

		Supplementary information For example: • Quantities • Material data • Effect on system • System availability • Costs
Tasks / Activities Header-related immediate tasks and activities	**Tasks / Activities** Header-related immediate tasks and activities	**Tasks / Activities** Header-related immediate tasks and activities

Linking a Document from the DMS

Use

In the standard system, quality notifications are linked to the R/3 System's *Document Management System* (DMS). This allows you to link documents that are managed in the DMS to a quality notification.

Procedure

1. Call up a notification in the create or change mode.

2. Choose *Environment → Documents.*

      A dialog box appears in which you can link one or more documents from the DMS.

3. Enter the data as required.

4. Choose *Continue* and save the data.

Result

Once you have linked documents to a notification, you can display or print them from the notification.

Entering a Notification Header Text

1. Call up a notification in the create or change mode.

2. Enter a notification short text in the *Description* field (for example, a short description of the problem that occurred).

    In the standard notification types, the *Description* field is located on the following tab pages:

    - Customer complaint (Q1): tab for subject matter

    - Complaint against vendor (Q2): tab for organizational data

    - Internal problem (Q3): tab for subject matter

3. If the short text field is too short for the description, choose the icon *Create text*.

    A word processing screen appears.

4. Enter a long text and then return to the notification header by choosing *Back*.

    If you specified that a long text may not be changed for a notification type in Customizing for *Notification Types*, you cannot change a previously entered long text when you change a notification. However, you can enter a new text in a new block at the end of the existing long text.

    In Customizing for *Notification Types*, you can also specify that the system should record the user name and date with any long text changes.

5. Save the data.

Partners in Quality Notification Processing

Definition

The business object **business partner** is a natural person, organization, group of natural persons, or group of organizations in which a company has a business interest. A business partner may also be a person, organization, or group within a company.

A business partner can have several **functions** at one time. The meaning of functions is defined by function types. A function type, for example, may be a sold-to party, sales party, payer, or payee.

A business partner can have relationships with other business partners. The meaning of relationships is defined by **relationship types**. Relationships, for example, are "is the subsidiary of," "is the contact person for," or "is identical to." A business partner can have several addresses. Addresses are defined by address types. Address types are, for example, delivery address or correspondence address.

One business partner can be assigned other business partners using function determination. These business partners represent the business partner in a certain role. For example, a business partner can be defined as a payee for another business partner.

For more information about business partners, see the SD documentation *Basic Functions and Master Data in Sales and Distribution*.

Use

In a quality notification, you can record all partners who are affected by the problem described in the notification. This includes the person who reported the quality notification, the persons responsible for processing the notification, and those responsible for processing individual notification tasks. The partner data you can maintain in a notification is predefined for each notification type in Customizing.

The following graphic depicts the roles of partners in notification processing.
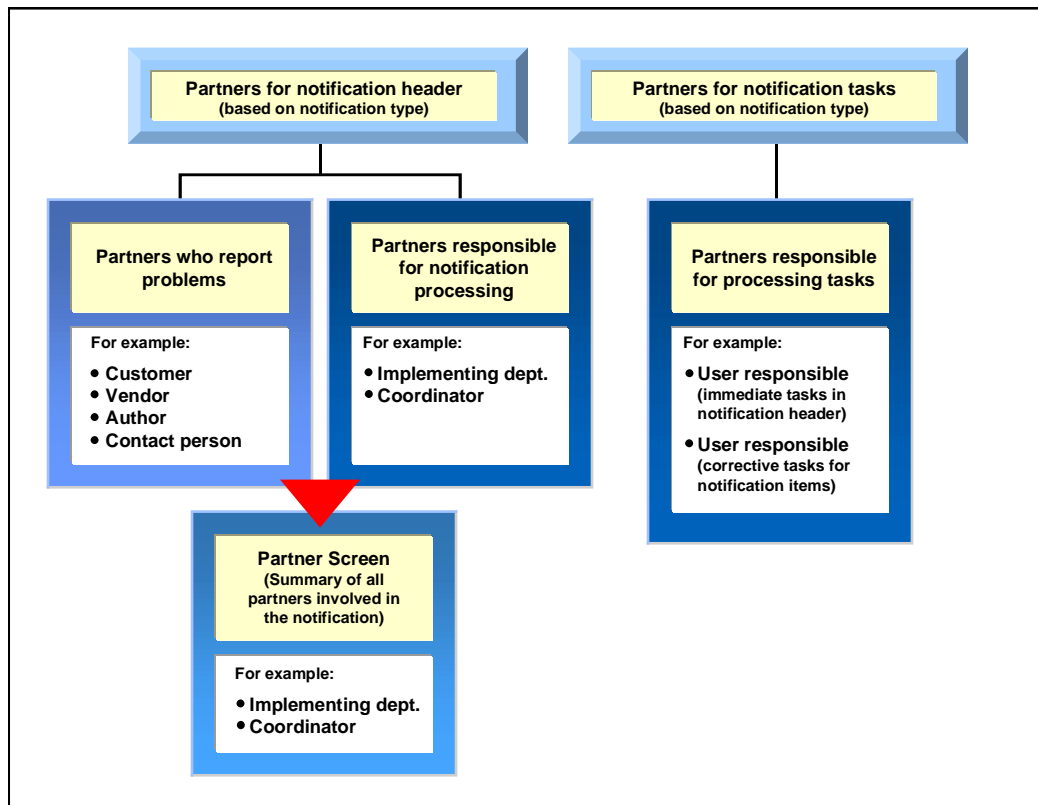
Structure

Partner type

Partners can be:

- Internal partners (for example, internal employees or partners in the HR Human Resources system)

- External partners (for example, customers, vendors, or manufacturers)

Partner function

The various partner types can be subdivided into **partner functions**. The partner function defines the rights, responsibilities and tasks of each partner during the processing of a business transaction.

Predefined Partner Functions for the Standard Notification Types		
Notification Type	**Partner Functions for Notification Header**	**Partner Functions for Tasks**

Partners in Quality Notification Processing

Customer complaint (Q1)	Sold-to party Contact person Implementing department Coordinator	User responsible
Complaint against vendor (Q2)	Vendor Manufacturer Implementing department Coordinator	User responsible
Internal problem report (Q3)	Author Implementing department Coordinator	User responsible

Partner determination procedure

The partner determination procedure specifies which partners can be assigned to a quality notification and which partner functions are possible for processing a particular business function. Your system administrator defines the partner determination procedure in Customizing.

Processing the Partner Information

Prerequisites

You can only display the partner data screen if a partner determination procedure has been defined centrally for your company in Customizing for *Notification Creation.*

Procedure

1. In a notification, choose *Goto → Partner.*

    The screen for the partner data appears. If partner data already exists for the notification, it will be displayed in a table on this screen. In this screen, you can use the following functions:

Function	Follow-on menu path
Display partner data	Select a partner and choose *Environment → Display object*
Delete a partner	Select a partner and choose *Delete partner assignment*
Phone a partner	Select a partner and choose *Phone partner*
Sort partners by function	Choose *Edit → Sort by partner function*
Display, change, or delete partner addresses	Select a partner and choose the corresponding pushbutton

    If you want to enter new partner data for the notification, enter the data directly in the table.

2. Go back to the notification header and save the new or changed partner data.

Specifying a Priority

Use

By assigning a priority to a notification, you can specify the importance and urgency of the notification. When you specify a priority in a quality notification, the system automatically calculates the start and end dates for processing the notification based on this priority. You can change the priority of a notification as long as the notification has not been completed.

Prerequisites

The priorities and associated time intervals are defined in Customizing for *Notification Processing*.

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> In Customizing, your system administrator can define an execution interval for each priority. For example, priority 1 might have the following meaning: the notification processing must begin within 2 hours after creating the notification and the notification must be completed within 2 days.

Procedure

1. Call up a quality notification in the create or change mode.

2. Enter the required key in the *Priority* field and choose *Continue*.

   The system calculates the start and end for the notification in the background and enters these dates in the relevant fields. You can see the newly-calculated dates next to the priority field.

   When you release the notification, the system also calculates the dates for the tasks. This is done on the basis of the factory calendar. The dates for the tasks are displayed in the task overview screen.

3. Save the data.

Displaying Administrative Information

Use

The system records administrative information for the notification header and for individual items, tasks and activities. This information specifies who created the quality notification, item, task, or activity and who made the latest changes.

Displaying Administrative Information for the Notification

1. Call up a notification in the create or change mode.

2. Position the cursor somewhere on the notification screen, but **not** on an item, task, or activity, and choose *Goto → Administrative data*.

   The dialog box for the administrative data appears. It specifies who created the notification and who made the latest changes to the notification.

3. Choose *Continue* to close the dialog box.

Displaying Administrative Data for an Item, Task, or Activity

1. Call up a notification in the create or change mode.

2. Choose the tab for the item, task, or activity overview.

3. Select an item, task, or activity, and choose *Goto → Administrative data*

   The dialog box for the administrative data appears. It specifies who created the notification and who made the latest changes to the item, task, or activity.

4. Choose *Continue* to close the dialog box.

Transfer of One-Time Customer Data

Use

When you create or process a quality notification, you can record the data for a one-time customer in the notification. The data for a one-time customer can be transferred from a:

- Sales order to the quality notification

- Quality notification to a service notification

You use the one-time customer data if you do not want to create a complete customer master record (for example, for customers you process occasionally or only once).

The one-time customer data consists of a one-time customer master record and an address.

Integration

The one-time customer master record is created in the *Sales and Distribution* (SD) component. For more information, see One-Time Customers and One-Time Vendors [Ext.].

Activities

When you record the one-time customer data in a notification, the system prompts you to enter a customer address.

Displaying Related Notifications

Use

When you create, change, or display a notification, you can also display related notifications that contain the same reference objects. The information in these related notifications may help you analyze or correct the problem you are processing in the current notification (for example, by informing you how many times this problem occurred in the past, which tasks were implemented, and so on).

Prerequisites

You can only display related notifications if the system contains other notifications that specify the same reference objects.

Procedure

1. Create a new notification and enter the applicable reference object(s) in the notification header (for example, material, customer, or vendor).

2. Choose *Enter*.

   If one or more notifications already exist for this reference object, a corresponding pushbutton for related notifications appears.

3. Choose *Related notifications.*

   A dialog box appears that indicates how many outstanding and completed notifications that exist for the reference objects.

4. You have two options for displaying the notifications:

	Option 1	**Option 2**
a)	Choose *Select notifications* to display a selection screen.	Choose one of the detail functions to display the outstanding, completed, or all notifications for the reference object.
b)	Enter the desired selection criteria in the selection screen.	Position the cursor on a notification in the dialog box.
c)	Choose *Execute*. The system displays a list of notifications that meet the selection criteria.	Choose *Continue*. The selected notification is displayed.
d)	Select one or more of the notifications in the list.	Choose *Back* to return to the list of notifications. The notification you previously displayed is highlighted.
e)	Choose *Choose* to display the first of the selected notifications.	Choose another notification or choose *Cancel* to return to original dialog box described in step 3.
f)	Choose *Back* to display the next notification if several notifications were selected or to return to the list of notifications.	

Displaying Related Notifications

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When you display a related notification, you can use this function again to call up additional related notifications.

Inbound Telephone Calls

Use

You can use this function to create quality notifications for problems that are reported by incoming telephone calls. For example, when a customer contacts you by phone, the system can automatically call up the function to create a quality notification (either directly or via a list of workflow tasks). When you create the notification, the system searches for the customer data assigned to the phone number and copies this information into the notification.

Prerequisites

The *SAPphone* component in Customizing for *Basis Components* (*Basis Services* → *Communication Interfaces*) must be active. Refer to the SAPphone [Ext.] documentation for more information.

Activities

The system notifies you by express mail that an incoming telephone call has been received. Depending on how the *SAPphone* component was installed, you can proceed in one of two ways:

- The system displays a list of workflow tasks that are assigned to your user (for example, create a new quality notification for a telephone call). You select the function to create a new notification, enter the required data, and save the notification.

- The function for creating a quality notification is called up automatically. You enter the required data and save the notification.

Outbound Telephone Calls

Use

When you process a quality notification, you can use this function to initiate a telephone call to a customer, vendor, or other partner directly from within a notification.

You can initiate an outgoing telephone call in a notification from:

- The partner overview screen

- A worklist screen for processing notifications, items, tasks or activities

- The action box as a follow-up function (provided this function was integrated into the action box in Customizing)

Prerequisites

The *SAPphone* component in Customizing for *Basis Components* (*Basis Services →
Communication Interfaces)* must be active. Refer to the SAPphone [Ext.] documentation for more information.

Activities

Choose the function for outgoing telephone calls in the partner overview screen, in a notification list, or in the action box.

Item

Definition

A notification item (or defect item) describes a specific notification-related problem or defect. You can record one or more defect items in a quality notification.

Use

The item data for a notification can be displayed in various degrees of detail in the:

- Notification header
- Item overview
- Item detail screen

You should maintain at least one item in a notification, so you can:

- Evaluate the notification on the basis of the defect data (for example, defect type or defect location)
- Classify the notification (provided you use the R/3 *Classification System* in your company).

    You can only classify at the level of notification items. If the notification has only one item, the classification data is valid for the whole notification, even though you entered it for the item. If the notification has several items, the classification data applies to each item accordingly.

You should create several items, for example, if a notification problem was caused by several defects or if more than one class has to be assigned to a defect

Structure

A notification item typically contains the following information:

- Item number
- Item short text and long text
- Defect location data (for example, a code group and code identifying the defect location, a reference to an assembly part in a bill of materials)

    If a notification contains a reference to a production order, the system determines the procedure for drilling down a bill of materials (BOM) on the basis of the order type and plant.

For each defect item, you can also record one or more:

- Causes
- Tasks
- Activities

Item

Entering Items

To use the individual functions in the table, call up a notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Entering item data in the notification header (notification type Q3 only)	Choose the *Subject* tab.	You can enter data for a **single** item directly in the header of an internal problem report (notification type Q3). In all other standard notification types, you enter the item data in the item overview.
Entering item data in the item overview	Choose the *Overview* tab.	Enter the data for an item in the various columns of a single row.
Entering item data in the item detail screen	Choose the *Overview* tab. Select an item in the item overview and choose *Detail view* to display the dialog box for the item detail.	You can only access the fields for classification and assembly in the item detail screen. If you selected several items in the item overview, choose *Next* to go to the detail screen for the next item. To create a new item from the detail screen, choose *New entry*.

Cause

Definition

A reason or event that led to the occurrence of a notification item. A cause item contains the following information:

- Code group
- Code
- Short text
- Long text

Use

You can record one or more causes for an individual defect item. You can display the cause information in varying levels of detail on the following screens:

- Cause overview
- Cause detail screen

The cause overview and the cause detail screen are the same for all notification types.

Entering Causes for an Item

To use the individual functions in the table, call up a notification in the create or change mode.

Function	Tab page	What you should know
Entering the cause data for an item in the cause overview	Choose *Causes*.	You must select an item in the item overview before you can enter the cause data.
Entering the cause data for an item in the cause detail screen	Choose *Causes*. Select a cause item and then choose *Detail view.*	If you selected several causes in the cause overview, choose *Next cause* to go to the next cause detail screen. To create a new cause from the detail screen, choose *New cause*.

Task

Definition

Activities that describe the planning and organizational aspect within a notification. Using tasks, you can plan the way in which various people work together to process the notification and perform the activities within a specified period of time.

A task can relate both to the notification headers to the individual items. They can have different statuses.

In an internal problem report, a task might consist of a follow-up action that notifies the author of the notification of production-related defects.

Use

The task data in a notification is displayed in varying levels of detail in the:

- Task overview

- Task detail screen

The task overview and detail screens are the same for all notification types.

You can enter task data for the notification header and for individual notification items. The tasks:

- For the notification header are also referred to as "immediate tasks." These tasks usually provide a "quick fix" for a problem requiring immediate attention.

- For notification items are also referred to as "corrective tasks." These tasks usually provide final solutions that will prevent the problem from reccurring.

For each task, you can enter the:

- Key for the task to be performed and a brief instruction of how the work is to be performed

- Planned start and end dates for the task

When the system calculates the task deadlines, it uses the plant-specific factory calendar to calculate the dates. This means that the dates are calculated on the basis of the number of **working days** defined in the factory calendar.

- Task status

Integration

If the appropriate data is maintained in Customizing, the system can trigger certain follow-up actions on the basis of the task code (for example, printing a paper or calling up a certain SAP function). You can determine these follow-up actions in your company individually (see Follow-Up Actions for Tasks [Page 99]).

Entering Tasks

To call up the individual functions in the table, call up a notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Entering immediate tasks for the notification header	Choose the *Tasks* tab.	Enter the data in the task overview.
Entering the immediate task data in task detail screen	Select a task in the task overview and choose *Detail view.*	Enter the data in the task detail screen.
Entering corrective tasks for a notification item	Choose the *Items* tab, select an item, and then choose the *Item tasks* tab.	Enter the task data for the item.
Entering the corrective task data in the task detail screen	Choose the *Items* tab and then select an item. Choose the *Item tasks* tab, select a task and then choose *Detail view*.	In this screen, you specify the planned start and finish date for the task. The dates entered may be changed based on the status issued (see Status Management for Tasks [Page 96]).

See also:

Automatic Determination of Tasks [Page 98]

Status Management for Tasks

Use

A task status informs you of a task's current processing stage. You can set the following statuses for a task:

- Released

  Indicates that the task can now be executed.

- Completed

  Indicates that the task has been performed.

- Successful

  Indicates that the task was successfully implemented and the notification problem has been solved.

Integration

The various task statuses are independent of one another. This means that a notification can be put in process even if it contains outstanding tasks that have not yet been released. You cannot, however, complete a notification if it contains outstanding tasks.

The system does not distinguish between notification header tasks (immediate tasks) and item tasks (corrective tasks). If the status information indicates that there are outstanding tasks in the notification, these can be both immediate tasks and corrective tasks.

> A notification will retain the status "outstanding tasks" as long as a task has not been completed (even if the task has already been released).

For more information about the general status management function, see Status Management [Page 141].

Features

You can use the status management function for tasks as follows:

- **Assigning a status to a task**

  You assign a status to a task by choosing the corresponding function in the task overview or task detail screens. You should assign a status to each task individually. If you select several tasks in the overview screen and choose a status, the system assigns the status to all of the selected tasks.

- **Status information**

  After you assign a status to a task, the system displays the status code in the status field in both the task overview and task detail screen. If you want to display the text for the status code, choose *StatusDetail*.

- **Date changes as a result of status assignments**

  When you assign a status to a task, the system automatically changes the relevant dates as follows:

Status	The system completes these fields
Released	*Planned start* with the current time
	Planned finish with either the current time or with the required notification end time.
	You can overwrite both fields.
Completed	*Date carried out <date> Carried out by <user name>* with the current date and the current user name.
	You cannot overwrite these fields.
Successful	None

The planned dates for a task must fall within the desired start and end dates of the notification. If you specify other dates for the task, the system issues a message to remind you of this. If no dates are maintained for the quality notification, the system uses the value 0 as a basis, so that it can still issue an information message if the dates are inconsistent.

Automatic Determination of Tasks

Use

The system can automatically determine which tasks should be performed first, based on the predefined parameters **response profile** and **service profile**. The response profile and service profile determine the times and the time interval within which your company should respond to a notification in a particular way:

- In the response profile, you can define one or more standard tasks based on a notification's priority, which the system can propose automatically and which must be performed within a specified time period. The system automatically assigns the determined tasks to the notification header.

- In the service profile, you can define time periods for individual workdays (service windows), in which a quality notification can be processed.

> You create a notification at 10:00 am. The response profile defines a time interval of two hours for the task code "Call back customer" and a time interval of 4 hours for the code "Check whether technician is on site". The times defined in the service window are 8:00 am to 12.00 noon and from 2:00 pm to 6:00 pm.
>
> In this case, you should call back the customer by 12:00 noon to discuss or clarify the problem. If you have to send a technician to the customer site, the technician must arrive by 4:00 pm.

Prerequisites

Your system administrator must assign both a response profile and a service window to each notification type in Customizing for *Notification Processing*.

Activities

Choose *Edit → Tasks → Determine* to automatically determine the tasks. You can also choose *Edit → Tasks → Simulation(Det.)…* to simulate the task determination (without actually assigning the tasks to the notification).

Follow-Up Actions for Tasks

Use

You can define one or more follow-up actions for a notification task. These follow-up actions are automatically executed by the system after you have processed and saved the notification.

Prerequisites

In Customizing for *Quality Management*, your system administrator must:

- Set the indicator for follow-up actions in the task catalog (catalog type 2)

- Define a follow-up action key and assign this to one or more function modules (the function modules determine the actions to be executed)

Features

The system automatically executes a follow-up action for a task after you have:

1. Entered a task code (for the notification header or for a notification item) that has one or more follow-up actions assigned to it.

2. Saved the notification

You can display a log on the task detail screen that lists the follow-up actions.

Activity

Definition

An action performed within the framework of a notification. It documents an activity that someone has performed in the process of solving a notification problem.

Use

You can enter the following data for each individual activity:

- Key for the activity that was performed and a short text that can be changed individually

- Start and end of the activity

- Quantity factor for the activity (for example, if an activity consisted of sending three units of a material to a laboratory for testing, you might enter the value "3" for the quantity factor)

An activity can relate both to the notification header and to the individual notification items. The activity data is displayed in various degrees of detail in two places in the quality notification:

- In the activity overview

- In the activity detail screen

The activity overview and detail screens are the same for all notification types.

⇨

The main difference between an activity and a task is that an activity does not have a status and cannot be assigned a partner. The activity is used strictly for documentation purposes.

Entering Activities

To call up the individual functions in the table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Entering activities for the notification header	Choose the *Activities* tab.	Enter the data in the activity overview.
Entering activities for the notification header in the activities detail screen	Select an activity in the activity overview and choose *Detail view*.	Enter the data in the activity detail screen. Here you specify the dates and times for executing the activity. To create a new activity from the detail screen, choose *New entry*.
Entering activities for a single item	Choose the *Items* tab, select an item, and then choose the *Item activities* tab.	Enter the activity data for the item.

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You can overwrite the activity text if the text proposed by the system based on the activity code does not really apply for this activity.

If you have entered your own activity text, you can also enter a long text for the activity by choosing *Create text*.

Both texts are displayed in the activity detail screen. In evaluations, you only see the activity text that is defined in the catalog, not your own text.

Catalog Profile

Definition

A combination of code groups from several catalogs that have been grouped together as allowed values for notification processing or defects recording.

The catalog profile is defined in Customizing and assigned to the notification type. You can also assign a catalog profile to a:

- Material in the material master

- Report type in defects recording

A catalog profile assigned to a material master or report type has priority over a catalog profile assigned to a notification type.

Standard catalog profile

This is the catalog profile assigned to a notification type in Customizing for *Notification Types*. The system proposes this catalog profile for all quality notifications of the corresponding notification type.

Using other catalog profiles

You can also copy a catalog profile other than the standard one in a notification, provided this is allowed by Customizing. If you copy another catalog profile into a notification, the new catalog profile becomes the standard catalog profile for this notification only.

For more information, see .

Use

The catalog profile has two primary functions for notification processing:

- It controls which code groups you can access from the individual catalogs, to record defects, tasks, and activities in a quality notification.

- You can store a default class in the catalog profile under which a defect item can be classified in the R/3 System's *Classification System* (provided the *Classification System* was activated for the notification type in Customizing).

You can use the catalog profile, for example, to restrict the selection of codes to specific types of defects or damage, based on the notification type.

With the help of classes in the *Classification System*, you can record additional problem attributes if the criteria in the quality notification (for example, defect type, defect location, defect cause, and so on) is not sufficient for your needs. For example, if you maintain the class "problems in production" along with the class characteristic "cause," you can record the causes of production problems as characteristic values.

For notification processing and defects recording, the catalog profile specifies the unit of measurement and the degree of accuracy to be used when you record the quantitative defect valuations. You can valuate the defects quantitatively and, if necessary, assign a unit of measurement to the value. For example, you can use the damage potential or the time and effort necessary to eliminate a defect as a criterion for weighting the defects.

Selection of an Alternative Catalog Profile

Use

A catalog profile is typically assigned to a quality notification type. The information in a catalog profile is usually broad enough so you can use it to process a variety of problems. In some cases, however, you have to use a catalog profile other than the one assigned to the notification type. When such a situation arises:

- The system can copy another catalog profile automatically.

  For example, if you specify a material in a notification for which a catalog profile has assigned in the material master, the system automatically selects the catalog profile assigned to the material (and not the catalog profile assigned to the notification type).

- You can change the catalog profile manually (see "Prerequisites" below).

Prerequisites

You can only change a catalog profile manually, if the QM Customizing application allows it. If you change the catalog profile in a quality notification manually or if you manually enter defect codes that are not contained in the assigned catalog profile, the system responds differently, depending on the message category that is stored for the catalog profile "check" in Customizing for *Notification Contents*:

System message (message category)	Effect
Information message	The system copies the new catalog profile
Warning message	The system copies the new catalog profile
Error message	The system does not copy the new catalog profile; instead, it retains the existing catalog profile

For example, if a particular catalog profile applies to a certain notification type and this catalog profile and its codes are intended to be binding for the notification processor, the message category "error message" should be stored in Customizing. In this way, no other catalog profile can be copied and only the codes in this catalog profile can be used in the notification.

> If a message category is not specified in Customizing, the system will copy a catalog profile without issuing a system message.

Activities

To see which catalog profile is valid for a notification, choose *Extras → Catalog profile → Display*.

Changing the Catalog Profile

1. In a notification, choose *Extras → Catalog profile → Catalog profile*.

   A dialog box appears. The *Current catalog profile* block contains the current or last copied catalog profile and the *Default catalog profile* block contains the catalog profile that was previously valid.

2. If you want to copy the catalog profile proposed by the system, choose *Default transfer.*

   The catalog profile is displayed in the *Current catalog profile* block.

3. If you do not want to use the current or proposed catalog profile, enter the desired catalog profile in the *Individual catalog profile* block and choose *Individual transfer.*

   The catalog profile is displayed in the *Current catalog profile* block.

   The individual catalog profile applies to the **current notification only** and will remain valid until you change it explicitly.

   If you create a new notification (of this notification type), the system uses the standard catalog profile assigned to the notification type and not this individual catalog profile.

4. Close the dialog box and save the changes.

Reference Object

Definition

An object that relates to a problem in a quality notification. Reference objects are defined in Customizing for *Notification Types*.

The following table contains the possible reference objects for the standard notification types:

Customer Complaint (Q1)	Complaint Against Vendor (Q2)	Internal Problem Report (Q3)
Customer	Vendor	Internal partner
Material or batch	Material or batch	Material or batch
Sales order	Material document (GR)	Production order, run schedule header
Sales organization	Purchase order	Work center
Division	Purchasing organization	Inspection lot
Distribution channel	Purchasing document	Serial number
Delivery	Inspection lot	Device data
Inspection lot	Serial number	Notification number (copy model)[1]
Serial number	Device data	Reference number[2]
Device data	Notification number (copy model)[1]	
Notification number (copy model)[1]	Reference number[2]	
Reference number[2]		
Purchase order number		
Purchase order date		

[1] Field in which you can reference another quality notification that was used as a copy model

[2] Field in which you can assign an external reference number to a notification (for informational purposes only).

Processing Reference Objects

To call up the individual functions in the table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Processing a notification without a reference object		The Customizing settings for the standard quality notification types require you enter at least the material when you create a notification. If you want to create a notification without entering a reference object, have your system administrator make the necessary changes in Customizing for *Notification Creation*.
Entering a reference object		When you create a notification for a customer complaint (Q1), you must enter the reference object "**material**" in a dialog box before the system displays the notification screen. For a complaint against a vendor (Q2) or an internal problem report (Q3), you enter the reference objects in the notification.
Changing a reference object		You can change a reference object in a quality notification at any time. If you change the reference object "**material**," the system may automatically try to select another catalog profile if the new material has a different catalog profile assigned to it. For more information, see Catalog Profile [Page 102].

Changing the reference object view	*Extras → Settings → Reference object view*	Using this function, you can change the information displayed for a reference object.
		You can only change the view if a reference object has not yet been entered.
		After saving the notification, the selected setting will be retained for this notification **only**.
Changing the reference object view	*Extras → Settings → Ctrl/Default values*	Using this function, you can change the reference object view permanently for all notifications of this notification type.
Entering or changing reference documents		If you enter or change a reference document (for example, a sales order, production order, or material document) in a notification that was previously saved, the system overwrites the existing document-related data with new information, unless you choose to retain the original data.
Displaying object information	*Environment → Display object*	This function allows you to display detailed information for a reference object (for example, the material master record for a material).

Action Box

Use

When you process quality notifications, maintenance notifications, or service notifications, you can use the **action box** to execute **follow-up functions**. Follow-up functions can help you process a notification problem and are documented as an **activity** or **task** for the notification header after being executed. Depending on your settings in Customizing for *Notification Processing*, the follow-up functions in the action box can include functions that you can execute:

- More than once and independently of other follow-up functions in the action box

- Only once and/or after certain other follow-up functions have been executed (for example, interdependent, process-related functions)

> Follow-up functions in the action box are different from task-related follow-up actions [Page 99]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a quality notification. With a follow-up function, the system executes the corresponding function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information in a dialog box. This is not possible with follow-up actions.

Integration

You can link the follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. This allows the system to trigger certain workflow tasks, once a function has been executed and the notification has been saved.

The action box contains follow-up functions that support the following business processes:

- Repairs Processing Using Quality Notifications (RMA) [Page 145]

- Processing Return Deliveries to Vendors [Page 148]

Prerequisites

The follow-up functions delivered in the standard system are ready for use. If you do not need a particular follow-up function, you can delete it in Customizing for *Notification Processing*. If you want to include your own, self-programmed functions in the action box, you must define them in Customizing for *Notification Processing*.

Features

Function	What you should know

Appearance of the action box	In the standard system, the action box is displayed as an overview tree. In this mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning:
	• Blue: The follow-up function is active and can be executed.
	• Black: The follow-up function is inactive and cannot be executed (yet).
	• Gray: The follow-up function has been executed and cannot be executed again.
	If you set the *Action box: Table* indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).
Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing for *Notification Processing*. For more information about these functions, see:
	• Standard Follow-Up Functions for Activities [Page 249]
	• Standard Follow-Up Functions for Tasks [Page 250]
Business transactions	You can also assign a business transaction to each follow-up function in Customizing for *Notification Processing*. The business transaction determines whether an activity or task resulting from a follow-up function can be executed, based on the current status of a notification.
Authorization check	Each follow-up function is assigned a code group in Customizing for *Notification Processing*. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function does not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.

Activities

To execute a follow-up function in the action box, click the text or double-click the symbol for a follow-up function that is displayed in blue. A dialog box appears, in which you can enter the data that is required to execute the function.

➡

> You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the possible entries help for a catalog, the system will not execute a follow-up function.

Action Box

The system executes the selected function and documents it as an activity or task for the notification header.

Standard Follow-Up Functions (Activities)

Use

The action box contains several standard follow-up functions that you can use to help you process a notification problem. When you execute one of these follow-up functions, the system documents the execution of the function as an activity for the notification header.

Features

Follow-up function	What you should know
Telephone contact using *SAPphone*	You can use this function to initiate a telephone call using *SAPphone*. The system logs the details of your telephone call as a notification activity. To be able to use this function, the telephone and computer in your office must be interconnected and the *SAPphone* component must be active.
Telephone contact without *SAPphone*	You can use this function to record a telephone call that you initiated while processing a notification. The system logs the details of your telephone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system logs the memo as a notification.
Solution database [Ext.]	You can use this function to search the solution database for symptoms and solutions that may be similar to the problem you are currently processing. If you find a symptom/solution in the database that applies to the problem in your current notification, you can: • Document your database search as an activity in the notification • Copy the tasks associated with the solution into your notification

Standard Follow-Up Functions (Tasks)

Use

The action box contains several standard follow-up functions that you can use to help you process a notification problem. When you execute one of these follow-up functions, the system documents the execution of the function as a task for the notification header.

Features

Follow-up function	What you should know
Changing the quality level	You can choose one or more quality levels in QM and increase the inspection severity for these levels. The selected quality levels may relate to the following criteria: • Material • Material / vendor • Material / customer • Material / manufacturer • Material / vendor / customer / manufacturer • Material / inspection type You can only increase the inspection severity for a quality level by a single stage (even if you select the same quality level more than once). When you save the notification, the system increases the inspection severity for the selected quality levels by executing a corresponding follow-up action.
Resetting the quality level	You can choose one or more quality levels in QM and reset the inspection severity to the initial inspection stages. When you save the notification, the system resets the inspection severity for the selected quality levels by executing a corresponding follow-up action.

Sending notices during notification processing	You can use this function to read and format selected data in a notification, which the system can then print, fax, or send as an e-mail to an internal or external (Internet) address.
	The standard system supports the following types of notices:
	• Confirmation of receipt
	• Interim report
	• Final report
	When you execute this function, the system retrieves and displays a standard text that is stored as a long text under the corresponding catalog task code. You can edit this text as necessary without changing the original long text. If several partners exist for the notification, you can select a partner before you process the text.
	You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a corresponding follow-up action.
Creating a new notification	You can use this function to create a new notification while you are processing an existing notification. When you create a new notification, you can copy the:
	• Header data from the existing notification into the new notification and edit the data as necessary.
	• Defect data from the existing notification into the new notification. This defect data does not include the cause, task, activity, classification, and long text data.
Requesting an 8D report (notification type Q2, complaint against vendor)	An 8D report is a standard form that is used in the automobile industry to document the correction of defects. For example, as an automobile manufacturer, you can use this follow-up function to request an 8D report from a vendor to receive a statement about the confirmed defects and how the vendor intends to correct the defects.
	You can use this function to create an 8D report for a defect while processing a quality notification. When you save the notification, the system prints the 8D report by means of a corresponding follow-up action.

Standard Follow-Up Functions (Tasks)

Creating an 8D report (notification type Q1, customer complaint)	If a customer submits a complaint about a product you delivered as vendor, the customer may ask you to submit an 8D report. In this case, you create a quality notification for a customer complaint to describe the defects and possible causes, and to define appropriate tasks.
	You can also create an 8D report for each defect item. The system inserts the tasks in the various sections of the 8D report, based on the task sort number.
	For example, if a task has the sort number "4," the system inserts the task in the fourth section of the 8D report. The system prints all tasks with the corresponding sort numbers in appropriate sections of the 8D report.
	The system selects the persons responsible as follows: for tasks, it specifies the person responsible for the task; for causes, the person responsible for the notification.
	The system determines dates for the tasks as follows:
	• If the task has already been completed, it specifies the completion date and includes the text "completed."
	• If the task has not been completed yet, but an end date has been planned, it specifies the planned end date and includes the text "planned."
	• If no date has been specified for a task, it record the text "outstanding."
	If you want to use your own form for an 8D report, assign your form to the shop paper "8D_C" in the print control for the quality notification.

Permission to Deviate from Specification	Using this follow-up function, you can contact a notification partner to obtain permission to a deviate from a specification. For example, if parts delivered by a vendor are found to be out of tolerance, you can document this as a defect in a quality notification. When you process the notification, you can execute this function to obtain permission from an internal or external notification partner, for example, to allow you to use the out-of-tolerance parts in production.
	This function starts the following workflow:
	• It sends an e-mail to the partner that contains a description of the problem and an address (URL).
	• Using the URL, the partner can access his or her workflow inbox (provided he or she has an Internet user) where the work item can be processed.
	• Once the partner has processed the work item by entering a response and a decision, this information is documented as a long text in the original quality notification.
	• Both the processor (partner) and the person who initiated the workflow receive a confirmation mail.

See also:

Functions for Repairs Processing [Page 147]

Functions for Processing Return Deliveries [Page 151]

Defining Responsibilities (SAP Business Workflow)

Purpose

The activities associated with problem management can often involve many departments in a company's organization. Such cross-departmental business processes may involve considerable resources if the work is not closely coordinated and the resources are not organized efficiently.

The *SAP Business Workflow* component can help you streamline your problem management activities in the course of processing quality notifications by defining the employees' responsibilities and optimizing the flow of work within the company.

Process Flow

The *SAP Business Workflow* supports the following workflow scenarios for quality notifications:

- **Processing quality notifications**

    This workflow scenario helps you process, monitor and complete newly created or activated quality notifications promptly and efficiently. This process is implemented in a workflow template that triggers and controls the execution of the following standard tasks:

    − Notifying an authorized person (for example, the notification coordinator) that a new quality notification has been created or activated in the system and that tasks need to be defined for the notification

    − Notifying an authorized person that tasks have been created for the quality notification and that these tasks need to be processed

    − Notifying an authorized person (for example, the notification coordinator) that all tasks have been completed for the quality notification and that the notification needs to be completed or new tasks need to be defined for the notification

- **Completing tasks**

    If one or more tasks were created in a quality notification, this workflow notifies the responsible department or person that a task must be implemented. Once a task has been completed, the relevant work item is deleted from the responsible person's inbox.

- **Processing critical defects**

    This workflow informs the responsible department or person that a critical defect has been recorded during a quality inspection and activated as a quality notification.

- **Notifying an interested party that a notification has been created**

    This workflow automatically sends a mail to an interested party when a notification is created.

See also:

SAP Business Workflow for Quality Notifications [Ext.]

Shop Papers for Quality Notifications

Definition

Notification-related documents that can be printed, faxed, or archived in the course of processing quality notifications.

Structure

The standard system supports the following shop papers for quality notifications:

- **Notification overview**

    A complete printout of a quality notification that provides the notification-processing department with an overview of the important notification data.

- **Item list**

    A partial or complete listing of defect items contained in a quality notification. You can selectively include or exclude individual defect items in an item list.

- **Letter of complaint to a vendor**

    A standard letter of complaint that can be sent to a vendor who delivered defective goods. This shop paper can only be printed for notifications that involve complaints against vendors (notification type Q2).

- **8D-report**

    A standard form that is used in the automotive industry to process vendor-related problems.

    Unlike the other shop papers described above, you cannot print an 8D-report using the standard print functions for shop papers. You must print this report using the action box. For more information, see Standard Tasks in the Action Box [Page 250] (Creating an 8D-report).

- **User-specific shop papers**

    Your can also define user-specific shop papers for your company in Customizing for *Notification Processing* (*Print Control*).

Printing and Faxing Shop Papers

Use

In addition to displaying the shop papers for quality notifications on screen, you can also:

- Print the shop papers

- Transmit the shop papers by fax

- Archive the shop papers in the *SAP ArchiveLink* (optical storage medium)

- Copy the shop papers to an external database (for example, Microsoft Access®)

When you print or fax shop papers:

- You can either print or fax a selected shop paper (that is, you cannot simultaneously print and fax the same shop paper). Therefore, make sure you specify **either** an output device (printer destination) **or** a fax number (subscriber number) for a selected shop paper.

- The first printout is always the original. All additional printouts are treated as copies. For example, if you initially send a shop paper as a fax and then print it, the fax is the original and the printout is the copy.

- The sequence for printing/faxing can differ, depending on whether you called up the notification in the display or change mode:

  – In the display mode, the system prints the notification after you exit the notification.

  – In the change mode, the system automatically saves the notification when you choose the function to print the notification.

Features

Function	Use
Printing a Quality Notification in Full [Page 119]	Printing out the complete notification including all items
Printing a Quality Notification Item [Page 120]	Printing out individual notification items
Printing Shop Papers for Several Notifications [Page 121]	Printing shop papers for several notifications at the same time
Faxing Shop Papers [Page 122]	Faxing notifications or notification items
Viewing the Print Log [Page 123]	Determining which parts of a notification have been printed
Archiving Shop Papers in SAP ArchiveLink [Page 124]	Storing notifications or notification items in ArchiveLink, the optical storage medium in the R/3 System
Downloading Quality Notifications [Page 125]	Downloading notifications from the R/3 System to PC application

Printing a Quality Notification in Full

Procedure

1. Call up a quality notification in the change or display mode.

2. Choose *Notification* → *Print* → *Notification.*

   A dialog box for choosing the shop papers is displayed. This dialog box contains a list of all the shop papers that can be printed out for this quality notification type.

3. Select the shop papers you want to print.

   Individual shop papers may already be selected on the basis of predefined entries in Customizing. Check the other entries in this dialog box and change them where necessary.

   You can select the archiving mode by choosing *Choose.* Archiving means "saving in the ArchiveLink", the system's optical storage medium.

4. Choose *Print/fax* to print the selected shop papers.

   The dialog box is closed and the notification will be printed or faxed when you exit the transaction.

5. Save the notification.

Result

The notification is printed on the specified printer. Each item is printed on a separate page with the notification header in the first section. The notification is assigned the status "printed" (*NOPT*).

Printing a Quality Notification Item

Procedure

1. Call up a quality notification in the display or change mode.

2. Choose *Notification → Print → Item selection.*

    A dialog box is displayed that contains a list of all defect items in the notification.

3. Select the items you want to print and choose *Continue*.

    A dialog box for choosing the shop papers is displayed.

4. Select the shop papers you want to print.

    ➡

    Individual shop papers may already have been selected on the basis of predefined entries in Customizing. Check the other entries in this dialog box and change them where necessary.

5. Choose *Print/fax* to print the selected items.

    The dialog box is closed and the selected notification items are flagged for printing/faxing.

6. Save the notification.

Result

Each selected notification item is printed out on the specified printer. Each item is printed on a separate page with the notification header data in the first section. The notification is assigned the status "printed" (*NOPT*).

➡

If you try to print an item more than once, the system displays a warning message informing you that the item has already been printed. If you print the item again, the paper printout is labeled as a *Copy*.

Printing/Faxing Shop Papers for Several Notifs.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality notification* → *Worklist* → *Notification* → *Change data*.

   A notification selection screen appears.

2. Generate a list of notifications by entering your selection criteria and then choosing *Execute*.

   For more information on how to select notifications, see Selecting Quality Notifications [Page 135].

3. In the resulting list of notifications, select the notifications for which you want to print shop papers and then choose *Notification* → *Print notification*.

   A dialog box with the printable shop papers appears.

4. Select the shop papers you want to print.

   Check the other settings in this dialog box and change them where necessary.

5. Choose *Print/fax*.

Result

The system prints or faxes the shop papers for the selected notifications. The notifications receive the status *Printed* (*NOPT*).

Faxing Shop Papers

Faxing Individual Shop Papers to Different Recipients

1. Call up the dialog box for printing shop papers (see also Printing a Quality Notification in Full [Page 119] or Printing a Quality Notification Item [Page 120]).

2. Select the desired shop papers in the dialog box.

3. Delete the printer destination if one has already been entered.

4. For each selected shop paper, enter the recipient's fax number and country key.

5. Choose *Print/fax*.

6. Save the notification.

   The fax is transmitted and the notification is assigned the status printed (*NOPT*).

   You cannot simultaneously print and fax the same shop paper. However, you can selectively print and fax different shop papers (for example, you can print the notification overview and send the item report by fax at the same time).

Faxing Several Shop Papers to a Particular Recipient

1. Call up the dialog box for printing shop papers (see also Printing a Quality Notification in Full [Page 119] or Printing a Quality Notification Item [Page 120]).

2. Select the desired shop papers in the dialog box.

3. Choose *Multiple fax*.

   Another dialog box is displayed.

4. Enter the recipient's fax number and country key.

5. Choose *Continue*.

6. Save the notification.

   The fax is transmitted and the notification is assigned the status printed (*NOPT*).

Viewing the Print Log

Use

When a quality notification or individual notification items have been printed out, the notification receives the status "printed." If you want to print a quality notification (or individual notification items) that has already been printed, you can check the print log to find out who printed what information when.

The destination in the print log shows you whether the shop paper was printed internally or sent by fax.

Procedure

1. Call up a quality notification in the change mode.

2. Choose *Notification* → *Print* → *Display log.*

    The print log is displayed.

    ⚠️

    If you delete an item from a quality notification, it is automatically deleted from the print log as well. If another printout of the item exists within the company, this can lead to inconsistencies under certain circumstances.

Archiving Shop Papers in ArchiveLink

Archiving Shops Papers

1. Call up the dialog box for printing shop papers (see also Printing a Quality Notification in Full [Page 119] or Printing a Quality Notification Item [Page 120]).

2. Choose *Choose* to display the selection details for the shop papers.

3. Enter the desired value for the archiving mode and then choose *Continue*.

4. Choose *Print/fax*.

    The notification is saved and the selected shop papers are archived.

Displaying Objects Archived in ArchiveLink

1. Call up a notification in the display or change mode.

2. Choose *Environment → Object links*.

    A dialog box appears.

3. Select *Archived documents* and choose *Continue*.

    If archived documents are available, the system displays a selection list from which you can choose a document, or it displays the document directly if only one exists.

See also:

SAP ArchiveLink [Ext.]

Downloading Quality Notifications

Use

You can use this procedure to download notifications from the R/3 System into a PC application (for example, you can download a newly created quality notification from the R/3 System into a Microsoft Access® database for further processing).

>   When you download a notification, the R/3 System supplies the notification data. The customer is responsible for supplying the target application in the PC.

Prerequisites

The following hardware and software requirements must be fulfilled in order to download notifications:

- Frontend running under Windows 3.1® or Windows NT®

- Microsoft Access®, version 2.0 or higher

Procedure

Downloading a List of Notifications

1. Choose *Logistics* → *Quality management* → *Quality notification* and then *Evaluation* → *Notification list*.

    The screen for selecting the quality notifications appears.

2. Create a list of notifications by entering your selection criteria and then choosing *Execute*.

>   For more information on how to select notifications, see <u>Selecting Quality Notifications [Page 135]</u>.

3. In the generated list of notifications, select the notifications you want to download and then choose *List* → *Access.*

    A dialog box is displayed in which you must enter the destination and name of the Access database.

4. Choose *Copy*.

    The notifications are downloaded into the MS Access® database.

Downloading Individual Notifications

1. Call up the quality notification you want to download in the change mode.

2. Choose *Notification* → *Print* → *Download.*

    The quality notification is downloaded into the MS Access® database.

Putting Quality Notifications in Process

Use

Once you have created a quality notification and entered all of the facts of the problem, you can put the notification in process. When you put a notification in process, you are releasing the notification for processing.

Features

A quality notification can be put in process in the following ways:

- You can put a quality notification in process manually.

- The system puts a quality notification in process automatically when a QM order is created for the notification (for more information, see Assigning a QM Order to a Quality Notification [Page 127]).

When a notification is put in process, the system changes the status of the notification from "outstanding" (*OSNO*) to "notification in process" (*NOPR*).

Activities

Call up the notification in the create or change mode and then choose *Notification → Functions → Put in process.*

QM Orders in Notification Processing

Use

The correction and elimination of quality-related problems usually involve **nonconformity costs**. When you process a quality notification, you can use a **QM order** as a cost collector for nonconformity costs. Nonconformity costs can include:

- Internal failure costs (for example, costs for defects analyses, costs for reworking a defective product, costs for scrap, and so on)

- External failure costs (for example, warranty costs, costs for investigating customer complaints, costs for processing returned materials, and so on)

Integration

All costs accumulated in a QM order must be confirmed and settled in the *Controlling* (CO) component of the R/3 System.

Activities

In a quality notification, you can:

- Assign an existing QM order to the notification [Page 128]

- Create a new QM order and assign it to the notification [Page 129]

See also:

Quality-Related Costs [Ext.]

Assigning an Existing QM Order to a Notification

Procedure

1. Call up a quality notification in the create or change mode.

2. Choose *Notification → Functions → Order → Assign.*

   A dialog appears in which you can enter the existing QM order number.

3. Enter the QM order number and choose *Continue*.

4. Save the notification.

Result

When the QM order has been assigned, the notification receives the status "order assigned" (*ORAS*) and "notification in process" (*NOPR*). The QM order number is displayed in the *QM order* field.

Creating a QM Order for a Notification

Prerequisites

Before you can create a QM order, make sure the following conditions have been met:

- The *Controlling* (CO) component is active in your company.

- The following QM order parameters are defined in Customizing for *Notification Processing*:

    – Quality notification type*****

    – Plant number*****

    – Order type (*QN01* for nonconformity costs)

    – Business area (optional)

    – Account assignment (cost object for debiting the costs; for example, cost center, sales order)

    > The parameters marked with an asterisk above **must** be maintained in Customizing for *Notification Processing*. If the remaining parameters are not defined in Customizing, you can enter them in a dialog box when you create a QM order for a quality notification.
    >
    > Before you create a QM order, you can specify that you want to change the default account assignment data. You do this by setting the *Spec. SR* indicator (special settlement rule) in the *Costs* block of the notification.

Procedure

3. Call up a quality notification in the create or change mode.

    > If you want to change the default account assignment data, set the *Spec. SR* indicator. When you choose the menu option in step 2, the system branches to the screen for maintaining the settlement rule in the CO component before it creates the QM order.

4. Choose *Notification → Functions → Order → Create.*

    The system responds in one of the following ways:

    – If all of the required QM order parameters have been maintained in Customizing, the system creates the QM order directly.

    – If the QM order parameters were not completely maintained in Customizing, the system displays a dialog box in which you can enter the QM order parameters.

3. Save the notification.

Creating a QM Order for a Notification

Result

When the QM order has been created, the notification receives the status "order assigned" (*ORAS*) and "notification in process" (*NOPR*). The QM order number is displayed in the *QM order* field.

Postponement of Quality Notifications

Use

In some cases, it may be necessary to delay the processing of a quality notification (for example, because the assigned tasks cannot be performed yet or because the defects analysis has not been completed).

Using this function, you can postpone the processing of a notification. When you postpone a notification, the system sets the status *NOPO* (*notification postponed*).

You cannot postpone a notification that has already been put in process.

Activities

Call up a quality notification in the change mode and choose *Notification → Functions → Postpone* and save the notification.

Completion of Quality Notifications

Use

You complete a quality notification when the notification problem has been solved and no further processing is required. After you complete a notification, the data in the notification can no longer be changed. You can then only display the notification.

When a notification is completed, it receives the status *NOCO* (*notification completed*).

Integration

When you complete a quality notification for a complaint against a vendor (quality notification type Q2) and you specify that the problem cause was "external," the system uses this information to calculate a complaint factor for the "quality" criterion in the vendor evaluation. The resulting score evaluates the performance of the vendor with respect to nonconformity costs.

Prerequisites

You cannot complete a notification if outstanding tasks still exist in the notification.

Features

Categorizing a notification problem

When you complete a notification, the system displays a dialog box with the current date and time, which you can accept or edit as the time of completion. In this dialog box, you must also indicate whether the cause of the problem was **internal** or **external** (for example, if a defective product was delivered by a vendor, the cause is external).

Putting a notification back in process

If you determine that additional processing is necessary for a completed quality notification, you can put the notification back in process.

Archiving of completed notifications

Completed notifications are automatically archived and deleted from the database after a specific time interval has expired. This time interval is set in Customizing for *Quality Management* (*Quality Management → Environment → Central Functions → Organize Archiving*). Therefore, make sure all processing steps have been concluded for a notification before you complete the notification.

Activities

Call up a quality notification in the change mode and choose *Notification → Functions → Complete*.

Specify the completion date/time and the cause of the problem, then close the dialog box and save the notification.

See also:

Putting Quality Notifications in Process [Page 126]

Vendor Evaluation [Ext.]

Deletion of Quality Notifications

Use

In some cases, you may want to delete a notification for one reason or another. You cannot delete a notification directly in dialog mode. Instead, you must set a deletion flag for a notification, which informs the system that the notification can be deleted.

Typically, a company executes an archiving program at regular intervals. This program searches for the notifications with deletion flags, converts the deletion flags to deletion indicators, and copies them to an archive. Finally the system deletes the notifications from the database.

Before you delete a notification, you should make sure that it is no longer needed.

Features

You can no longer change a notification once it has a deletion flag. It is assigned the status *Deletion flag* and *Complete*. You can now only display it. For more information on notification statuses, see Status Management [Page 141].

The individual tasks for the notification are also flagged for deletion when you set the deletion flag in the notification header.

You can cancel the deletion flag as long as it has not been converted to a deletion indicator. You can then put the notification back in process and maintain the notification in the usual manner.

Activities

To set the deletion flag, call up the notification in change mode and choose *Notification → Functions → Deletion flag → Set*.

To reset the deletion flag, choose *Notification → Functions → Deletion flag → Deselect*.

See also:

Archiving Quality Notifications [Ext.]

Selecting and Evaluating Quality Notifications

Use

In certain cases, you may want to use the system's functions for selecting and displaying a list of notifications, tasks, items, or activities for evaluation purposes. For example:

- You want to change or display a particular notification, but do not know the number of the notification.

- You want to change or display several notifications with certain attributes.

- You want to perform certain functions simultaneously for several notifications that have particular attributes.

- You want to obtain an overview of all notification tasks, items, or activities that fulfill certain criteria.

Features

The following functions are available for selecting and evaluating quality notifications:

- Multi-level lists [Page 137]

    A multi-level list consists of a selection of notifications and notification objects that are displayed hierarchically in two levels. From this list, you can select an object and branch to a screen to display detailed information about the object. You cannot **change** data in a multi-level list. You can create multi-level lists for the following objects:

    – Notifications

    – Partners

    – Items

    – Tasks

    – Activities

- Single-level lists [Page 138]

    A single-level list contains of a list of selected notifications. From a single-level list, you can branch to **display** or **change** information in a quality notification. You can create a single-level list for the following objects using the **worklist** functions for quality notifications:

    – Notifications

    – Items

    – Tasks

    – Activities

- Time series analysis [Page 140]

    This function allows you to display the number of quality notifications that were created over a specified period of time in an SAP statistics graphic.

Selecting and Evaluating Quality Notifications

Defining Variants

For the various notification lists, you can define:

- Report variants for the initial screen (screen in which you enter the selection criteria)

- Display variants for the list screen (screen with the results of the selection)

> You cannot define display variants for multi-level lists.

For more information about defining variants, see Types of Report Variants in QM [Ext.].

Selecting Notifications (Multi-Level List)

Procedure

1. Choose *Logistics* → *Quality management* → *Quality notification* → *Info system* → *Notification* → *Multi-level list*.

    The initial screen for selecting the notifications appears.

2. Enter the search criteria as required.

3. Choose one of the following options:

    – *Execute* if you only want to display the list

    – *Program* → *Execute + print* if you want to display and print the list

Result

The system displays a list of notifications that meet your selection criteria. You can use the functions described in the table below to process selected objects in the list further.

Function	Procedure
Display notification header	Select a notification number and choose *Display object*.
Display reference objects (for example, material, customer, sales order, and so on)	Select an object and choose *Display object*.

If you selected more than one object in the list, the system displays the first selected object in the list. When you have finished processing the first object, choose *Goto* → *Back*. The system automatically calls up the next selected object.

Selecting Notifications (Single-Level List)

Procedure

1. Choose *Logistics → Quality management → Quality notification* and then one of the following options under *Worklist*:

    − *Notification → Change data*

    − *Notification → Display data*

    − *Item → Change data*

    − *Item → Display data*

    − *Task → Change data*

    − *Task → Display data*

    − *Activity → Change data*

    − *Activity → Display data*

    The initial screen for entering the search criteria appears.

4. Enter the search criteria as required.

    ⇨

    If you want to activate the monitor function for a list, enter an appropriate value in the *Ref. field monitor* field. For example, if you want to monitor the notifications on the basis of the "notification priority," enter the value 1 in this field. The system will display a traffic light next to each notification for which a priority was specified (for example, a red light for "very high" priority, a yellow light for a "high" priority, and so on).

5. Choose one of the following options:

    − *Execute* if you only want to display the list

    − *Program → Execute + print* if you want to display and print the list

Result

The system displays a list of objects that meet your selection criteria. You can use the functions described in the table below to process selected objects in the list further.

Function	Procedure
Display or change notifications, items, tasks or activities (branch to notification header)	Select one or more objects in the list and then choose *Goto → Notification*.
Display or change tasks (branch to task detail screen)	Select one or more objects in the list and then choose *Goto → Tasks*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.

Display a graphic (for example, how many notifications were created on a particular date or for a specific material)	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.
Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a notification and then choose the function for an outgoing telephone call.
Compare notification processing times (required start and end times)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Export notification list to MS Excel	Choose *Spreadsheet*.
Display document flow for one or more notifications	Select one or more objects in the list and then choose *Display document flow*.
Display or change QM order	Select one or more objects in the list and then choose *Goto → Order*.
Display report documentation	Choose *Goto → Report documentation*

If you selected more than one object in the list, the system displays the first selected object in the list in the display or change mode. When you have finished processing the first object, choose *Goto → Back*. The system then automatically calls up the next selected object.

Displaying a Time Line of Notifications

Procedure

2. Choose *Logistics → Quality management → Quality notification → Info system → Notification → Time series analysis*.

   The screen for selecting the notifications appears.

6. Enter the search criteria for the notifications.

7. Choose one of the following options:

   – *Execute* if you only want to display the list

   – *Program → Execute + print* if you want to display and print the list

Result

The system displays the time series analysis in an SAP statistics graphic. The graphic shows the number of quality notifications (meeting your selection criteria) that were created over the specified time range.

Status Management

Use

Quality notifications are supported by the R/3 System's status management function. Whenever you create and process a quality notification, you execute certain business transactions for the notification. These business transactions are documented in the R/3 System by a status. The current status of a notification (or combination of active statuses) tells you which processing stages the notification has reached and which processing activities have yet to be completed.

Of the available statuses in the system, only a few need to be set at any given time. Typically, a notification must have a certain status before you can process the notification further. If a status is missing, the system displays a message to inform you of this.

A quality notification can have two types of statuses:

- **System statuses**

    System statuses are automatically set by the system when you execute a function for a quality notification. For example, if you print a notification, the systems sets the status "printed" (*NOPT*) for the notification. The system status informs you that a certain business transaction was performed for the notification.

    System statuses for quality notifications are predefined in the R/3 System and cannot be changed.

- **User statuses**

    User statuses are additional statuses that allow you to restrict the control of the business processes managed by the system statuses.

    Your system administrator defines user statuses in status profiles (see Customizing for *Notification Processing*). You can assign and delete user statuses that have been defined in your system, provided you have the necessary authorization.

Displaying Status Information

To call up the individual functions in the table, call up the notification in the change or display mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Displaying status information in the notification header		The current system statuses for a notification are displayed in the *Status* field of the notification header. If a user status also exists, it is also displayed.
		The task status is also displayed in the *Status* field. If at least one notification task is still outstanding or has been released, the status "task outstanding" (*TSOS*) is displayed. As long as this status is set, you cannot complete the notification.
Displaying status information for individual tasks	Choose the *Task* tab.	The task overview contains the status of all recorded tasks.
Displaying system and user statuses with short text	Choose *Status detail*	All active system and user statuses for the notification are displayed on the *Status* tab page.
Displaying the general status overview	Choose *Status detail* and then *Extras → Overview*	You can see which processing steps have already been performed.
		All active and inactive system and user statuses for the notification are displayed.
Displaying statuses that can still be assigned	Choose *Status detail* and then the *Business processes* tab.	You can see which processing steps are currently allowed or not allowed.
		By choosing *Transaction analysis*, you can find out which business transactions can still be carried out for the notification (green traffic light), as well as those that cannot be assigned (red traffic light).

Assignment of System Statuses

Use

Whenever you execute a function for a notification that is subject to the R/3 System's status management facility, the system automatically assigns a corresponding system status to the notification. On the basis of the current system status, you can determine which additional functions can be executed for the notification.

Activities

The system assigns a system status to a notification when you:

- Create a notification
- Postpone a notification
- Put a notification in process
- Assign an order to a notification
- Complete a notification
- Print a notification
- Create a task
- Release a task
- Complete a task
- Complete a task successfully
- Complete all tasks

Assigning and Changing User Statuses

Prerequisites

To assign user statuses in a quality notification, your system administrator must have performed the following steps in Customizing for *Notification Processing*:

- Defined user statuses in a status profile

- Assigned the status profile to the notification type you intend to process

You can only change a user status if the **status order numbers** assigned to the user statuses in Customizing allow it:

- The status order numbers defined for individual user statuses in the status profile determine the sequence in which the user statuses can be activated.

- If a status order number was not assigned to a user status, the user status can always be set.

- Only one user status with a status order number may be active at one time.

- You cannot delete the initial user status that has been set for a notification.

Procedure

1. Call up a quality notification in the change mode.

2. In the notification header, choose *StatusDetail*.

    The status information is displayed.

3. In the column for user statuses (right column), activate the desired user status and then choose *Back*.

    The system displays the notification header with the chosen user status.

4. Save the notification.

Repairs Processing Using Quality Notifications (RMA)

Purpose

You can use the *Quality Notifications* component in QM to support the RMA (Return Material Authorization) process in your company. For example, if goods are returned by a customer for repair or replacement because of a technical defect, you can use a quality notification to process the return delivery. You record the problem in a quality notification for a customer complaint (notification type Q1) and then use the functions of the quality notification and integrated action box [Page 246] to:

- Create a repair order

- Initiate a technical check (analyzing the defects and determining what corrective action is needed)

- Post a goods movement to the appropriate stock so the returned items can be processed accordingly (for example, sales order stock, unrestricted-use stock, or scrap)

- Confirm the result of the technical check in the repair order and complete the notification

The goods can be processed further, depending on the results of the technical check. For example:

- If the goods need to be repaired, an authorized person working with the:

  - *Customer Service* (CS) component can create a service order to process the repairs and record the repair costs

  - *Sales and Distribution* (SD) component can send replacement parts to the customer

- If the technical check confirms that the goods are in proper working order and repairs are not necessary, the goods can be returned to the customer.

- If the goods have to be scrapped, an authorized person in *Sales and Distribution* (SD) can send replacement parts to the customer.

Prerequisites

If you intend to use the quality notifications for repairs processing, the inspection type assigned to the **inspection lot origin 05** in Customizing for *Inspection Lot Creation* **should not** be active for the material in the material master. If this inspection type is active, the system will automatically create an inspection lot when the goods are received (this is only necessary if you intend to process the return delivery via an inspection lot).

Process Flow

1. A customer files a complaint concerning the delivery of defective goods.

2. You create a quality notification for a customer complaint (notification type Q2).

3. You choose the function to create a repair order in the action box.

4. When the customer returns the goods, you post the goods receipt in reference to the repair order you created in the notification in step 3.

Repairs Processing Using Quality Notifications (RMA)

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>   If you specified the notification number when your created the repair order, you can search for the repair order using the notification number.

5. You perform a technical check for the received goods and record any confirmed defects in the notification.

    On the basis of the technical check, you reach one of the following conclusions:

    −   The goods are defective and need to repaired

    −   The goods are in proper working order and do not need to be repaired

    −   The goods are beyond repair and need to be scrapped

6. You choose the function in the action box to create a goods movement.

    In doing so, you post the goods to the appropriate stock, based on the findings of the technical check (for example, to sales order stock if the goods must be repaired or to unrestricted-use stock if repairs are not necessary).

7. You confirm the stock postings in the repair order by choosing the corresponding function in the action box.

    The system sets a status in the repair order indicating that the notification has been completed.

See also:

Functions for Repairs Processing [Page 147]

Returns and Repairs Processing (Sales & Distribution) [Ext.]

Repairs Processing Using Inspection Lots in QM [Ext.]

Functions for Repairs Processing

Use

In a quality notification for a customer complaint, you can use the action box [Page 246] to execute the following functions for repairs processing:

Follow-up function in the Action Box	What you should know
Creating a repair order	When you choose this function, the system creates a repair order for repairs processing. The repair order serves as the object for: • Posting a goods receipt for the returned goods • Confirming stock postings after the completion of a technical check When you create a repair order, you can specify the following data: • Order type (for example, *RO* for repair order predefined in Customizing for *Sales Document Header*) • Sales-related organizational data • Sold-to party, material, and quantity The system also proposes the number of the current notification, which you later use to search for the repair order. If necessary, you can overwrite the notification number with the purchase order number specified in the sales order. You have several options for creating and saving the repair order and notification. You can also branch to the transaction to process the repair order.
Posting a goods movement	After you have completed a technical check and have determined what corrective action needs to be taken for the repair order, you can choose this function to post the goods to an appropriate stock. In doing so, the system exits the notification and calls up the transaction in *Inventory Management* (MM-IM) to create and post a goods movement.
Confirming a decision for the repair order	When you choose this function, you can confirm the stock postings for the repair order. The system then completes the notification and sets a corresponding status in the repair order.

Activities

To execute a follow-up function in the action box, you click the text or double-click the symbol for a follow-up function that is displayed in blue. A dialog box appears, in which you can enter the data that is required to execute the function.

The system executes the selected function and documents it as a task for the notification header.

Processing Return Deliveries to Vendors

Purpose

This process describes how you can use quality notifications and functions of the action box [Page 246] to:

- Record complaints against vendors for the delivery of nonconforming or defective goods

- Transfer these goods to an appropriate stock, depending on how you intend to process the goods

- Process return deliveries to vendors

The return delivery process is supported by the following components in the R/3 System:

- *Quality Management* (QM)

- *Materials Management* (MM)

- *Production Planning and Control* (PP)

- *Warehouse Management* (LE-WM)

- *Sales and Distribution* (SD)

Restrictions

When you process a return delivery:

- You can only process a **single** complaint in a notification. This means that the quality notification can only reference a **single vendor** and a **single material**.

- The goods to be returned must initially be located in unrestricted-use stock. You cannot process goods that have already been debited to an order or cost center.

- You cannot process materials with serial numbers or manufacturer part numbers.

- All goods to be returned must be located in a single storage location within the same plant. If the *Warehouse Management* component is in use in your company, the goods must be located in a single storage bin within the same plant.

Prerequisites

Customizing

Your system administrator has made all general and component-specific settings in Customizing for *Notification Use (Process Return Delivery to Vendor)*.

Basic data / master data

You have created and maintained the following basic and master data in the R/3 System:

Data	What you should know

Vendor master (MM)	Vendor master records exist for the vendors for whom you intend to process return deliveries. In the *Control data* of each vendor master, you have set the following indicators: • *GR-based invoice verification* • *Evaluated receipt settlement* • *Automatic evaluated receipt settlement for return items* • *Returns vendor*

Material master (MM)	The following data has been maintained for the returned material in the material master:
	
	• The key for the material type should allow you to maintain both purchasing and sales/distribution data (for example, trading goods).
	
	• A loading group is specified in the *Sales general/plant* view, so that the system can automatically determine the shipping point.
	
	• In the inspection settings *(Inspection set-up)*:
	
	   − Inspection type 08 is set for the material
	
	   − *Inspect with task list* indicator is active if you intend to inspect the material using an inspection plan

Inspection plan (QM)	If you intend to inspect a returned material using an inspection plan, a corresponding inspection plan exists and has been assigned to the material.
Catalogs (QM)	Code groups and codes have been maintained in catalog type 2 (Tasks) for the following functions in the action box: • Assign vendor • Assign purchasing document • Transfer posting: unrestricted-use stock to blocked stock • Transfer posting: unrestricted-use stock to inspection stock • Create transfer order • Scrap • Create return delivery • Record usage decision • Change outbound delivery

Process Flow

The process described below is supported by a <u>process flow diagram [Ext.]</u>. For detailed information about the functions in this process, refer to Functions for Processing Return Deliveries.

1. During a goods receipt or production, you determine that a vendor has delivered defective goods.

Processing Return Deliveries to Vendors

2. You create a quality notification to record a complaint against a vendor (notification type Q2).

3. You determine whether or not the goods need to be inspected. If the goods:

   − Need to be inspected, you post the goods from unrestricted-use stock to inspection stock

   − Do not need to be inspected, you post the goods from unrestricted-use stock to blocked stock

4. Depending on the stock you chose in step 3, you process the defective goods accordingly. For example, if you posted the goods to:

   − Inspection stock, you inspect the goods in a quality inspection

     After you have completed the inspection, you choose a function in the action box to make the usage decision for the inspection lot. When you make the usage decision, you determine whether the goods should be returned to the vendor or posted from inspection stock to unrestricted-use stock (for example, if the goods are OK). In this case the process is terminated.

   − Blocked stock, you decide whether the goods should be returned to the vendor in a return delivery or scrapped

5. If you decided to:

   − Return the goods to the vendor, you can choose function in the action box to create a return delivery (with or without reference to an original purchasing document)

   − Scrap the goods, you can choose a function in the action box to post the goods to scrap

6. You choose a function in the action box to branch from the quality notification to the delivery.

   Using the functions of the *Sales and Distribution* (SD) component, you can process the return delivery, prepare the shipping documents, and process the goods issue.

7. You debit the vendor with the costs of the returned goods and settle the costs in the *Materials Management* (MM) component. If the evaluated receipt settlement [Ext.] (ERS) procedure is used in MM, the system can debit the vendor automatically.

See also:

Functions for Processing Return Deliveries [Page 151]

Return Delivery (Materials Management) [Ext.]

Functions for Processing Return Deliveries

Use

The action box [Page 246] contains several follow-up functions for processing return deliveries. When you execute a function, the system documents the function as a task for the notification header.

The functions that are not preceded by the text "Action box" in the table below are not follow-up functions. These are functions that are also used in the return delivery process, but which you execute independently of the action box.

Function	What you should know
Creating the notification	The quality notification for a complaint against a vendor can be created as follows: • You can create the notification for a vendor complaint manually (notification type Q2). • If you recorded defects in an inspection, you can activate a defect record (notification type F2) manually as a quality notification (notification type Q2). • The system can automatically activate a defect record (notification type F2) as a quality notification (notification type Q2).
Action box: Assigning a vendor to the notification	You can display a list of vendors for your complaint material. From this list, you can select and assign a vendor to the notification which you are processing.
Action box: Posting goods from unrestricted-use stock to blocked stock	If you determine that the goods to be returned do not need to be inspected, you can use this function to post the goods to blocked stock (stock type *S*). While the goods are in blocked stock, you can decide whether to scrap the materials or return them to the vendor. The standard movement types for this stock posting are "344" in MM and "309" in WM. The system prints out a goods issue slip that contains the pertinent material data and that you can affix to the goods.

Functions for Processing Return Deliveries

Action box: Posting goods from unrestricted-use stock to inspection stock	If you determine that the goods need to be inspected, you can post the goods to inspection stock (stock type *Q*). The movement type for this stock posting is "322" in MM and "321" in WM. If inspection type 08 (inspection for a stock transfer) is active for this goods movement in the inspection data of the material master, the system automatically creates an inspection lot when you post the goods to inspection stock. The system prints out a goods issue slip that contains the pertinent material data and that you can affix to the goods.
Action box: Posting goods from blocked stock to unrestricted-use stock	If, for example, the materials in blocked stock are only slightly defective and you urgently need the materials in production, you post the goods from blocked stock back to unrestricted-use stock. The standard movement types for this stock posting are "343" in MM and "309" in WM. The system prints out a goods issue slip that contains the pertinent material data and that you can affix to the goods.
Action box: Posting goods to scrap	If you determine that the goods are no longer usable, you can post the goods to scrap.
Action box: Creating transfer orders	If the *Warehouse Management* (LE-WM) component is in use in your company, you can create a transfer order to move goods from one storage location to another.
Recording the usage decision (Inspection lot)	If you posted the goods to inspection stock and the system created an inspection lot, you can branch from the notification to the transaction for recording the usage decision.
Posting stocks while making the usage decision (Inspection lot)	When you make the usage decision, you can post the goods to unrestricted-use stock (if you determine that the goods are OK) or to blocked stock (if you intend to return the goods to the vendor). The standard movement types for the stock posting from inspection stock to blocked stock are "350" in MM and "309" in WM.

Action box:	
Assigning an original purchasing document to the notification	If you want to create a return delivery with reference to an original purchasing document, you must first assign this document to the notification. You can do this in one of the following ways: • Enter the document number and item in a dialog box when you create the notification. The system also automatically retrieves the associated data (for example, material, plant, and vendor) • Choose *Assign purchasing document* in the action box. • Enter the document number and item in the notification manually.

Functions for Processing Return Deliveries

Action box:	

Creating a return delivery	To be able to create a return delivery, make sure the notification contains the following information: material, plant, vendor, complaint quantity, and if applicable, the batch.
	
	You have the following options for creating a return delivery:
	
	• Creating a return delivery with reference to an original purchasing document
	
	   – When you choose this function, the system displays a dialog box in which you enter various information for the return delivery.
	
	   – Make sure you set the indicator *Return delivery with reference to original purchase order* in the dialog box.
	
	   – If several goods receipts exist for the purchasing document, you must select the goods receipt for which you want to process the return delivery in another dialog box.
	
	• Creating a returns to vendor without referencing an original purchasing document
	
	   – The system creates a purchase order with a returns item and a return delivery in the background. The system displays a dialog box in which you enter various information for the return delivery.
	
	   – Make sure you do **not** set the indicator *Return delivery with reference to original purchase order*.
	
	   – The system displays a second dialog box in which you can enter additional information for the delivery.
	
	   – If a purchasing info record exists, the system proposes the settlement data contained in the info record. This information is then copied into the purchase order with the returns item.
	
	   – After creating the delivery, the system displays the log for the delivery run. When you exit the log, the system records the document flow between the notification, purchase order, and delivery. The system then exits the notification.

Action box: Changing the outbound delivery	The system saves the notification and branches to the delivery in the change mode. This allows you to add or change information in the delivery, pick the order, and post the goods issue.

Debiting the vendor	If the evaluated receipt settlement procedure/credit memo procedure is in use in your company, the vendor does not send an invoice to the customer. Instead, the recipient of the goods:
	• Creates the incoming invoice himself based on the quantity of delivered goods and the terms specified in the purchasing contracts
	• Sends the credit memo to the vendor by fax, as an EDI document or as a hard copy

Quality Notifications on the Internet (QM-QN-NT)

Use

In today's business world, a highly efficient and effective customer service is very important for both customer and vendor. Contact between vendor and customer must take place as quickly as possible. A customer should be able to notify a vendor of a problem as easily as possible, and the vendor must receive the notification as soon as possible.

The Internet Application Component *Quality Notifications* can considerably improve the processing of customer complaints.

In the R/3 System, complaints are recorded and processed via quality notifications. Notifications entered in the system via the Internet are treated in the same way as notifications entered directly in the R/3 application component *Quality Management* (QM).

Type of Internet Application Component

Consumer-to-Business

If you implement this Internet Application Component, you and your customers will benefit as follows:

Advantages for Your Customers

- Your customers can send quality notifications at any time.

- Your customers can enter the quality notifications directly on their Web server, that is, they do not need to phone or fax you.

- Using a list of predefined defect codes, your customers can select a problem and, if necessary, append a text to it.

- Your customers can check the process status of their notifications whenever they want.

Advantages for You as a Vendor

- You can design your Internet pages to enable your customers to record data quickly and easily.

- You receive the notification online, that is, shortly after it was recorded.

- You can react to a notification very quickly.

Prerequisites

Authorizations/Security

The customer contact person assigned the task of recording quality notifications requires authorization to access the following data:

Authorization object	Description
Q_QMEL	Notification type
Q_TCODE	Transaction authorization for QMW1

Q_MATERIAL	Material authorization
Q_GP_CODE	Use of group codes

Internet Users

To start this Internet Application Component, the customer contact person must log on using the contact person number and a password that you have assigned:

- Before you create the Internet user, you must specify a customer contact person in the *Sales and Distribution* component using transaction VD01 or VD02. On the detail screen for the contact person, enter a contact person number under the customer number.

- You use this number to create an Internet user with transaction SU05. With this transaction, you can create, change, and delete passwords for Internet users. To create a unique identifier for your contact person, enter the object type *BUS1006001*.

Standard Settings and Default Values

To ensure that the quality notifications that your customers send over the Internet have all the necessary data for the R/3 System, the notification type Q1 must be defined in the system.

> This Internet Application Component uses notification type **Q1**. When you create a notification, the system checks if all required partner functions have been entered. Since only the SP (sold-to-party) and CP (contact person) functions can be entered in this Internet Application Component, you cannot mark any other functions as required functions in the partner profile for notification type Q1 in **Customizing**. Otherwise, the notification is not created.

Features

Differences to the R/3 Transaction

The following functions, which are to be found in the R/3 transaction QM01, are not contained in this Internet Application Component:

- Creating several items

- Creating cause, task, and activity

- Navigation possibilities in the SAP environment (for example, you can go to the material display screen)

- Priorities, deadlines, internal processing

Modification Options

You can change the design of this Internet Application Component.

> Every change to any of the R/3 development objects used for the Internet Application Component counts as a modification.

Quality Notifications on the Internet (QM-QN-NT)

> You should not, under any circumstances, change the development objects of the standard version.

R/3 Development Objects

In the R/3 System, data exchange on the Internet is carried out via transactions and function modules. The following development objects are required to create and process quality notifications:

Development class:	QQM
Transaction:	QMW1
Function group for screens:	SAPQMWWW
Function modules:	BAPI_QNOTIFICAT_CREATE
	BAPI_QNOTIFICAT_GETCATALPROFIL
	BAPI_QNOTIFICAT_GETLISTFORCUST
	BAPI_QNOTIFICAT_GETMATLISTFCUS
Business Application Programming Interface (BAPIs):	QualityNotification.CreateFromData
	QualityNotification.GetCatalogProfile
	QualityNotification.GetListForCustomer
	QualityNotification.GetMaterialListFCust

The R/3 Function Builder contains online documentation about each of these modules.

Data Output via the Internet Transaction Server

Data is output via the Internet Transaction Server (ITS). The layout sets are filled with data and made available in HTML format on the Internet/Intranet.

Service Name

The service name of this Internet Application Component is QMW1. You can find all the relevant data under this service name in the SAP@Web Studio.

The layout sets are to be found in subdirectory QMW1 of the TEMPLATES directory. The following layout sets are used:

SAPQMWWW_100.HTML

SAPQMWWW_200.HTML

SAPQMWWW_210.HTML

SAPQMWWW_220.HTML

SAPQMWWW_300.HTML

The numbers in the names of the layout sets correspond to the R/3 screen numbers.

Practical Application (QM-QN-NT Quality Notifications)

If you implement this Internet Application Component, the process is as follows:

The process outlined below describes the Internet Application Component delivered with R/3. However, customers typically copy the delivered application and then change the copy in order to develop a customer-specific solution.

If a customer discovers a problem with a material that you delivered, he/she will want to inform you of this as soon as possible.

To do so, the customer contact person records a quality notification on the Internet. This requires the necessary authorization. The contact person selects the appropriate material from a list that only contains those materials for which you have created a customer-material information record. The contact person then describes the problem by making selections from a list of object-dependent codes. This person can also write a text describing the problem in more detail, if necessary.

As soon as the notification is sent, the R/3 System assigns a quality notification number to it, and informs the contact person of this number.

The person who processes the notifications receives the customer complaint online. It appears directly in his pool of new notifications, where it can be processed immediately.

See also:

Example (QM-QN-NT Quality Notifications) [Page 161]

Example (QM-QN-NT Quality Notifications)

Your company produces car radios that are supplied to the consumer via dealers. The dealers have Internet access as well as all the necessary authorizations for recording quality notifications on your Web site.

If the dealer discovers a radio to be defective, he/she sends you a quality notification informing you of the problem. After he/she records the notification, the system proposes a list of only those radios for which you have maintained a customer-material information record. When the dealer describes the problem, only defect codes that pertain to actual radio defects are proposed. This minimizes the time needed by the dealer to record a notification. It also minimizes the number of incorrect notifications sent. The dealer can send off a notification at any time, that is, he is not bound to the operating hours of your Hotline.

You receive the notification immediately online, and can begin to tackle the problem.

Notifications (CS-CM-SN/PM-WOC-MN)

Here you can find information about notifications in the *Customer Service* (CS) and *Plant Maintenance* (PM) application components.

Service Notifications (CS-CM-SN) [Page 173]

Maintenance Notifications (PM-WOC-MN) [Page 163]

For more information about the simplified notification processing, see Notifications (CA-NO) [Ext.].

Maintenance Notifications (PM-WOC-MN)

Purpose

You use this application component in maintenance processing in the event of a malfunction or exceptional situation to:

- Describe the exceptional technical condition at an object

- Request the maintenance department to perform a necessary task

- Document work that has been performed

Maintenance notifications document maintenance tasks completely, and make them available for analysis in the long term. You can use them for preliminary planning and execution of tasks.

Integration

Maintenance processing for unplanned tasks can be divided into the following three major areas:

- Description of the object condition

    The main element in this area is the **maintenance notification**. It is used to describe the condition of a technical object or to report a malfunction at a technical object and request that the damage be repaired.

- Execution of the maintenance tasks

    The main element in this area is the **maintenance order**. It is used to plan in detail the execution of maintenance tasks, trace the progress of the work performed, and to settle the costs for the maintenance tasks.

- Completion of the maintenance tasks

    The main element in this area is the **maintenance history**. It is used to store the most important maintenance data on a long-term basis. You can call up this data at any time for evaluation purposes.

You can use this instrument to process all the tasks that are executed within Plant Maintenance, and operations that do not belong directly to Plant Maintenance, such as investment, modifications, conversions, and so on.

Features

When you enter a notification for a maintenance object, the system automatically copies all the relevant object data (for example, installation location cost center).

You can use maintenance notifications as the basis for creating maintenance orders, in order to:

- Plan tasks in detail

- Track work progress

- Enter and settle costs for the maintenance tasks

When planning concrete tasks in a maintenance order, you can make reference to several maintenance notifications. If one or more notifications already exist for a maintenance order, you can also enter the technical data for the assigned object retrospectively for these notifications.

Maintenance Notifications (PM-WOC-MN)

During processing or upon completion of a maintenance order, you can also create maintenance notifications as completion confirmations in the form of activity reports.

Follow-up tasks can result from maintenance notifications, such as printing a certain paper, triggering an R/3 function, or initiating a workflow.

When a maintenance notification is technically completed, its data is entered in the maintenance history.

Maintenance Notification

Definition

Means with which company notifications are created and managed in the area of Plant Maintenance. The following notification types are predefined in the standard system:

- **Problem notification [Page 167]**

    Notification of a malfunction or problem that has occurred

- **Maintenance request [Page 168]**

    Request for tasks to be performed

- **Activity report [Page 178]**

    Documentation of activities that have been performed

In addition to these standard notification types, you can also define your own user-specific notification types.

You can configure the screens for the individual notification types in Customizing.

Use

You can enter all of the above notification types for the following reference objects:

- Functional location
- Equipment
- Material and serial number

If functional locations or equipment are further sub-divided into assemblies and material with the help of a maintenance BOM, these assemblies can also serve as reference objects for the notification. If you use object hierarchies, the system copies all data from the higher-level technical object to the respective reference object for the notification.

However, you can also create maintenance notifications without entering an object number. This is the case, for example, when a problem notification refers to an object that is not managed under a number in the system, or when a maintenance request refers to an object that is to be set up within the framework of an investment.

The data of the maintenance notification is transferred to the history, and is of great importance when performing evaluations and future planning.

Structure

A maintenance notification consists of a notification header and one or more items.

Maintenance header data is information that is used to identify and manage the notification. It is valid for the whole maintenance notification.

Depending on the notification type, the notification items contain data describing the problem or malfunction that occurred, or the activity that was performed in greater detail.

Maintenance Notification
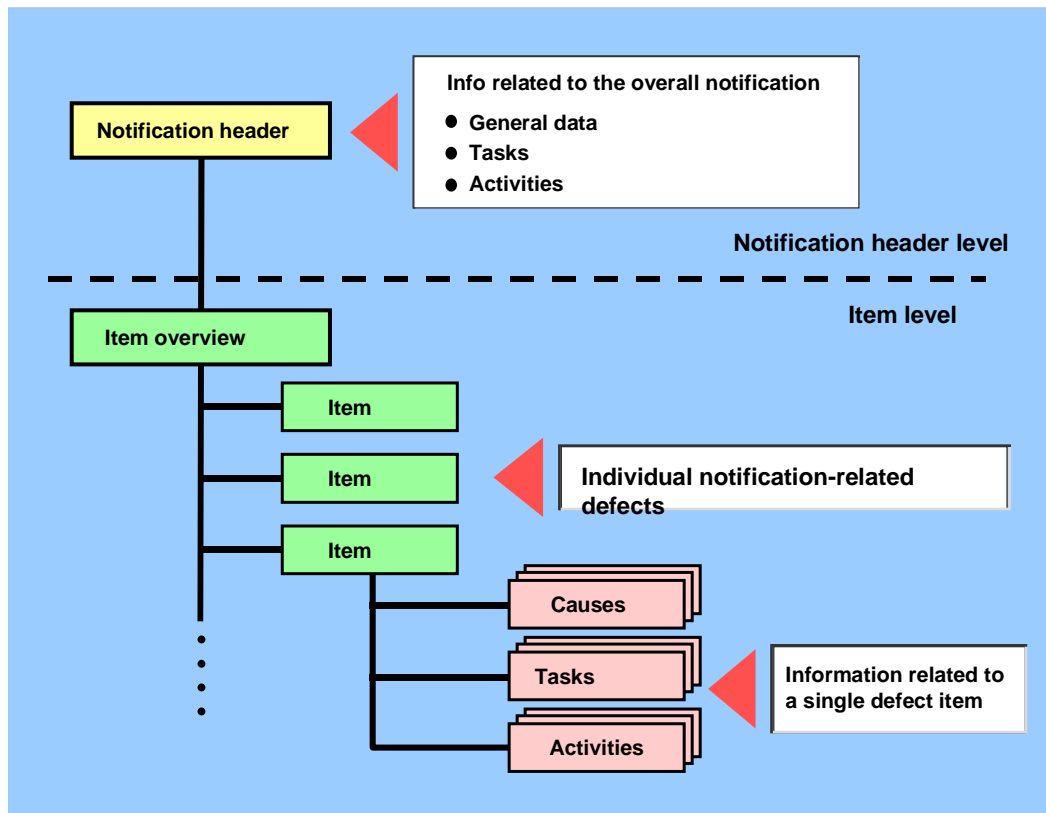
Malfunction Report

Definition

A malfunction report describes a malfunction at an object that affects its performance in some respect. For example, an employee from production would use a malfunction report to report that:

- A technical system is not functioning properly

- Performance has reduced for a technical system, or that the system is not functioning at all

- A production system is producing goods of poor quality

As a rule, a malfunction report requires the maintenance department to arrange for a specific repair task to be performed, for the ideal condition of the object to be restored (according to DIN norm 31051).

Use

As a rule, most companies only record the malfunction, damage or problem initially, in other words, only data relating to the malfunction are entered in the notification. Data referring to the repair and to technical findings is usually only entered as a second step in the system, that is, as changes to the notification.

A special case of malfunction report is when a machine operator determines a malfunction, immediately repairs it and subsequently documents the malfunction that occurred, its effect and the way in which it was rectified. In this case, the maintenance notification is created as a completion confirmation once the maintenance tasks have been completed.

When you create a malfunction report, you should provide the maintenance planning department with as much information as possible regarding the malfunction or problem. To do this, make the following entries where possible:

- Which malfunction or problem has occurred

- Where the malfunction or problem has occurred

- What effect it has

- Who reported the malfunction or problem

- What further damage or problems have been caused

Maintenance Request

Definition

A maintenance request is a targeted instruction to the maintenance department to perform an activity in the manner described. The decisive factor in this case is that there is no malfunction.

Use

Maintenance requests are typically used for investments, for example if an employee requires a new monitor, or if all the telephones in one part of the building in a company need replacing.

All that is initially important in the maintenance request is the maintenance activities. Data relating to the execution of the tasks is only entered in the system in a second step, by changing the maintenance notification.

When creating a maintenance request you should provide as much information as possible for maintenance planning, regarding the activities you want the maintenance department to carry out for you. To do this, make the following entries where possible:

- What is being requested

- The object or area to which the request refers

- Who requested the activity

Activity Report

Definition

An activity report describes a maintenance or service activity already performed, or one that was not the result of a malfunction or damage. It simply provides technical documentation of which activities were performed when and with what results. Activity reports are therefore used for the technical confirmation of maintenance or service activities.

A typical activity report, for example, is the inspection findings, since it describes the results of an inspection to test the actual condition of the object. In most cases, the inspection task is based upon an inspection order.

Another typical activity report is the maintenance findings. This documents the technical values of the object that are determined during and/or after planned maintenance work. This maintenance work is performed in order to maintain the ideal condition of the object, and always results from maintenance plans.

Typical examples of the activities documented in activity reports are "Fill up oil", "Check pressure" or "Tighten screws".

Use

When you create an activity report, you have already performed an activity. You want to document this activity using an activity report. To do this, enter the following information, where applicable:

- Which activity you performed

- Where you performed the activity

- What effects it may have (had)

- What the extent of the activity was

The activity report differs from the malfunction report or customer notification in that no malfunctions or problems need to be described, only the activities that were performed.

User-Specific Notification Types

Definition

A user-specific notification is one that does not belong to one of the standard notification types.

This is the case if your company uses individual notification types, because, for example, certain notifications are to be evaluated separately.

A user-specific notification type is based on the standard notification type. You can configure the screens in Customizing.

Maintenance Processing for Unplanned Tasks

Purpose

The *Plant Maintenance (PM)* application component supports the planning, processing and settlement of maintenance tasks for the entire maintenance area. It gives you a clear representation of maintenance processes, providing a solid base for rational decision-making as regards cost-intensive technical systems, replacement investments and changes in maintenance strategies. It distributes up-to-date information on a regular basis to all the departments affected or concerned.

Process Flow

The processing of unplanned maintenance tasks can be divided into the following steps:

1. You report a malfunction or a problem at a technical system or part of a technical system, or describe the condition of the technical system, and create a maintenance notification for this.

2. You use the maintenance notification [Page 165] to request a maintenance task.

3. You create a maintenance order [Ext.] and plan the work that is to be performed.

4. You release the maintenance order.

5. You perform the order.

6. You complete the order, and confirm it as being completed.

7. You enter technical information in the order, such as findings, causes, breakdown times and activities.

8. You close the order and the maintenance notification, and the system saves the relevant data for evaluations and for the planning of future maintenance activities.

The organization of your company, and in particular of your maintenance department, determines which employees perform these steps in which areas, and the amount of detail in which the data for the individual steps needs to be entered. For example, one company may plan a task in great detail, while another company will only plan a rough outline for the same task.

The diagram below provides an overview of the major steps in maintenance processing for unplanned tasks:

Maintenance Processing for Unplanned Tasks
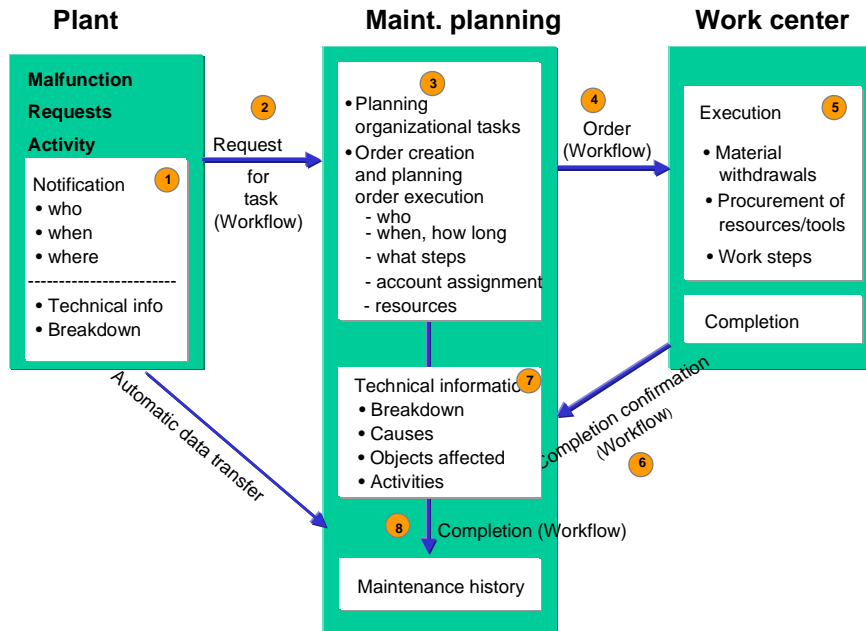
Service Notifications (CS-CM-SN)

Purpose

This application component enables you to:

- Enter customer notifications

- Recognize the condition of the service object

- Request the necessary service tasks and thereby roughly plan further service processing

- Track the progress of the tasks to be performed

Integration

You can only use this component in conjunction with the *Maintenance Notifications* component.

Features

From the service notification, you can initiate all the processes involved in problem solving:

- Tasks for problem solving using the Help Desk or Hotline Support

- Creation of a service order for sending service technicians to a customer site for a service within the service center

- Delivery of spare parts

The description of the problem can be written as text or in coded form. It is not absolutely necessary to enter the service object in the service notification. However, if it is entered, the system determines the following data based on the object definition or serial number whilst the problem is being entered:

- Localization of the object

- Warranty claims, existing contracts or contact people

The system makes this data available to the processor immediately. The entry of the notification is fully integrated into contract and customer object management.

If your system has been configured accordingly, the system provides the number of the service notification as soon as you call up the create function. This is particularly useful if you enter a notification over the phone, since you can immediately inform the caller of the notification number.

If one or more service technicians are required to solve the problem, you can make a rough plan in the service notification for further processing using tasks. This can be calculated automatically based on certain settings (for example, priority, response times, and service times). Proposals for service activities to be performed using customer-specific interfaces, which are dependent on the problem screen, can also be included in task determination.

Follow-up tasks can result from service notifications, for example, printing a certain paper, or initiating a workflow.

A service order, in which you plan dates, technicians and materials in detail, can be created from a service notification.

Service Notifications (CS-CM-SN)

During service processing, you can obtain an overview of all the service requests entered and the progress of service notifications at any time.

In addition, the functions for incoming calls and service notifications in the Internet are available, which make it easier to enter service notifications.

When a service notification is completed, its data is entered in the service history.

Service Notification

Definition

Means with which customer notifications are created and managed in the areas of Plant Maintenance and Customer Service. The following notification types are predefined in the standard system:

- Customer notification [Page 177]

    Informing a customer of a malfunction or damage that occurs

- Service request [Page 179]

    Request for service to be performed

- Activity report [Page 178]

    Documentation of activities that have been performed

In addition to these standard notification types, you can also define your own user-specific notification types.

You can configure the screens for the individual notification types in Customizing.

Use

If a customer device has to be repaired or maintained, the contact person on site at the customer can enter a service notification directly in the R/3 System, or inform the customer service department of the problem by telephone, fax or mail. For the latter, the customer service employee for the device vendor or manufacturer enters the notification in the system.

You can enter the following data in all notification types:

- Object and partner data

    This data describes the reference object [Page 227] for the service notification (functional location, equipment, material and serial number), the organizational structures involved (sales organization, distribution channel and column), sold-to-party, contact person and so on.

- Problem and damage data, using catalogs and classification

    This data describes the required service including the reason for the notification and the steps necessary for notification processing.

- Execution data

    This data refers to the activities to be executed, for example, priority, time information, and responsibilities.

Structure

A service notification consists of a notification header and one or more items.

Notification header data is information that is used to identify and manage the notification. It is valid for the whole notification.

Depending on the notification type, the notification items contain data describing in greater detail the problem or malfunction that occurred, or the activity that was performed.

Service Notification
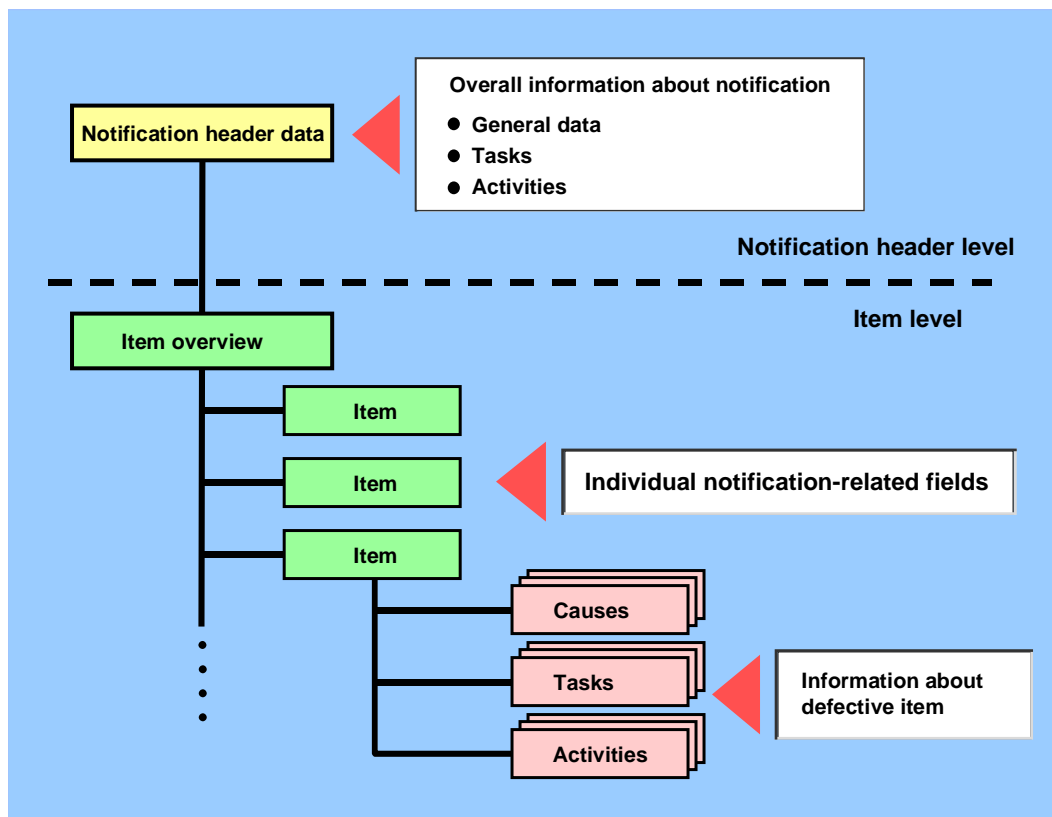
Customer Notification

Definition

Service notification, which describes a malfunction on a technical object at the customer site.

Use

A person, for example, a customer uses a customer notification to report that a technical system is not functioning properly, providing no output, or delivering poor results.

Activity Report

Definition

An activity report describes a maintenance or service activity already performed, or one that was not the result of a malfunction or damage. It simply provides technical documentation of which activities were performed when and with what results. Activity reports are therefore used for the technical confirmation of maintenance or service activities.

A typical activity report, for example, is the inspection findings, since it describes the results of an inspection to test the actual condition of the object. In most cases, the inspection task is based upon an inspection order.

Another typical activity report is the maintenance findings. This documents the technical values of the object that are determined during and/or after planned maintenance work. This maintenance work is performed in order to maintain the ideal condition of the object, and always results from maintenance plans.

Typical examples of the activities documented in activity reports are "Fill up oil", "Check pressure" or "Tighten screws".

Use

When you create an activity report, you have already performed an activity. You want to document this activity using an activity report. To do this, enter the following information, where applicable:

- Which activity you performed

- Where you performed the activity

- What effects it may have (had)

- What the extent of the activity was

The activity report differs from the malfunction report or customer notification in that no malfunctions or problems need to be described, only the activities that were performed.

Service Request

Definition

Service notification, which requests a particular activity from the service or customer service department.

Use

The activity should not be to repair damage or a malfunction; this is covered by a customer notification. The service request is intended more for modifications, conversions and so on.

User-Specific Notification Types

Definition

A user-specific notification is one that does not belong to one of the standard notification types.

This is the case if your company uses individual notification types, because, for example, certain notifications are to be evaluated separately.

A user-specific notification type is based on the standard notification type. You can configure the screens in Customizing.

Special Functions in the Service Notification

Use

In service processing, there are the following special functions for the service notification:

- Entry of Partner Data in a Service Notification [Page 182]

- Transfer of One-Time Customer Data [Page 184]

- Credit Limit Check [Page 185]

- Incoming Calls [Page 186]

- Outgoing Calls [Page 187]

- Notification Monitoring [Page 193]

Entry of Partner Data in a Service Notification

Use

A partner is a company or a person, with whom you can or must come into contact when conducting business.

To process a service notification from start to finish, you need to know the organizational structures involved. These structures are primarily of importance in a later phase of processing, for example, if you create a service order for the service notification and want to bill the costs.

Therefore, you should enter the *Sales organization*, *Distribution channel* and *Column* under location data, before you enter the following partner data in the notification header:

- **Sold-to-party**

    Here you enter the master record number of the customer, where the service object is located.

- **Contact person**

    If you know the person who is responsible for the service object, enter their user number (for example, the person who called because of the object).

- **Purchase order number** and **purchase order date** of the customer

Features

If a service contract exists in the technical object specified in the notification and Customizing has been maintained accordingly, the system automatically enters the number of the service contract with contract item in the field *Sales document*.

This contract is copied into the order automatically when the order is created. If a service contract exists, the system also automatically proposes a specific order type.

From the initial screen for the service notification, you can call up the partner data screen and enter any number of partner functions, depending on which service object and which type of notification is involved.

In addition, you can call up address and other contact data in a dialog box.

> Depending on your requests, the fields for customer and contact person data can be set for a particular partner function in Customizing during system implementation (for example, if the equipment partner for customer notifications is always the sold-to-party).
>
> For more information about partners, see Partners in PM/CS Processing [Page 218].

See also:

Partners [Page 218]

Creating a Partner for the Notification [Page 225]

Calling up Partner Information [Page 226]

Transfer of One-Time Customer Data

Use

You can also create a one-time customer as the customer in the service notification and service order, and transfer the data to subsequent functions. You use one-time customer data if you do not want to create a complete customer master record.

One-time customer data consists of a one-time customer master record and an address. A one-time customer master record is used for several customers, with whom you only have contact very occasionally.

Integration

The one-time customer master record is created in the *Sales and Distribution (SD)* component. For more information, see One-Time Customers and Vendors [Ext.].

Prerequisites

The central address management component must be used in SD to ensure data is transferred uniformly to the SD functions.

Features

The one-time customer data is transferred as follows:

From	To
Service notification	Service order
Service notification	Sales order
Service order	Service notification
Service order	Sales order (in resource-related billing)
Service order	Sales order (in advance shipment of spare parts)
Service order	Purchase requisition (delivery address for external processing)

Activities

The system asks you to enter a customer address when creating one-time customer data.

Credit Limit Check

Use

You can use this function at any time within service processing to call up information about the current credit status of a customer. The credit limit can be checked manually or automatically. The system generally checks the planned costs without tax.

You can define in Customizing that the check should be made automatically. If the customer has exceeded their credit limit, the system issues a warning either as soon as you:

- Release the service notification or service order, or

- Have entered the sold-to-party and chosen *Continue*

Integration

The actual credit limit check is performed in the *Sales and Distribution (SD)* component.

Prerequisites

You define the automatic credit limit check in the Customizing for *Plant Maintenance* by choosing *Maintenance Order Management*.

- For service notifications, choose *Define Partner Roles, Order Types and Additional Notification Parameters*.

- For service orders, choose *Credit Limit Check, Sales Document Types for Service Orders*.

Activities

To perform the credit limit check manually, choose *Functions → Credit limit check* from the service notification or service order.

Incoming Calls

Use

The *Incoming calls* function makes it easier to enter service notifications. When a customer calls, the system determines the technical objects assigned to the customer and proposes these to the person entering the notification as possible entries.

Prerequisites

The system administration must activate the *SAPphone* component in the Customizing for *Basis* by choosing *Basis Services → Communication Interfaces*, and define that Customer Service is involved. For more information, see the *SAPphone* documentation.

You must also use central address management for technical objects. This is the case if you specify addressees for pieces of equipment or functional locations.

It is possible to integrate internal search programs for pieces of equipment and functional locations in the master data.

Features

The system determines the technical objects assigned to the caller by using their telephone number. A list appears of all the technical objects assigned to the caller.

- If several technical objects are available, the user selects the required object and branches directly to the screen for entering a notification. The user creates a notification for this reference object.

- If no technical object is assigned to the caller, the system proposes a notification be created without a reference object.

If all the technical objects are assigned to the same customer, the upper part of the list provides additional customer information.

Activities

From this list, you can:

- Create a notification

- Display the reference object

- Display classification data

- Display the customer master record

Outgoing Calls

Use

The *Outgoing calls* function makes it easier to process service notifications and service orders. It enables you to initiate a phone call to the customer directly from the notification or order.

Prerequisites

The system administration must activate the *SAPphone* component in the Customizing for *Basis* by choosing *Basis Services → Communication Interfaces.* For more information, see the *SAPphone* documentation.

Activities

On the partner overview screen for service notifications or service orders, you can trigger the call direct to the customer using an icon. If several partners exist, you can select the telephone number of the respective customer to be used as the default.

You can use this function on the partner overview screen for functional locations and pieces of equipment, and in list editing for items, tasks, and activities.

Task Determination and Notification Monitoring

Purpose

To provide good customer service, it is important to have an overview of:

- Incoming service notifications

- Services to be provided

- Progress in completing the service notifications

When entering notifications, you can use the automatic determination of standard tasks.

In the case of further processing, the function for notification monitoring always provides you with a current overview of the standard tasks. This ensures that you are up-to-date with regard to customer requests and problems do not escalate unnecessarily.

Prerequisites

The parameters Response Profile [Page 190], Service Profile [Page 190] and, if necessary, Priority [Page 190] must be preset in Customizing. These parameters determine the times and the time interval, at which a particular response must be made to a notification (refer to Example: Automatic Determination of Tasks [Page 238]).

A response profile must be assigned to a notification. This can be done in two ways:

- Using the notification type

- Using a service contract

Settings for Notification Type

You have maintained the following data in Customizing under *Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Notifications*:

1. You have defined standard tasks using the code and catalog functions.

2. You have defined response profiles, entered the standard tasks and times, in which they must be executed.

3. You have defined service profiles and assigned a response profile, if required.

4. You have assigned response profiles and service profiles to the notification types.

5. If necessary, you have also defined priority types, priorities for each priority type, and assigned the priority types to the notification types.

Note that the response profile, which is entered in the service profile, overrides the response profile for the notification type. The response profile for the notification type is only decisive if:

- No response profile has been entered in the service profile

- The notification is entered outside of the service windows

Settings for Service Contract

In addition to the above data, you also have maintained the following data:

1. You have assigned a response profile to the service profile in Customizing.

2. You have created a characteristic master record and entered it as table name `T355R` and field name `SERWI` on the additional data screen. You have thereby assigned the service profile to the characteristic and displayed the *Service profile* field in the material master record on the characteristic valuation screen.

3. You have created a service product (material master record of material type DIEN), classified and performed a characteristic valuation. You have entered the above service profile, to which a response profile is assigned, for the characteristic valuation.

4. You have created a service contract for a technical object (functional location or equipment) and entered the service product.

Process Flow

1. When entering a notification, call up the function for automatic task determination [Page 237].

    The system copies the standard tasks into the task overview for the notification, where you can add specific information, such as text.

2. After entering the notification, you use the list editing function to create a list of all the notifications starting from a particular date.

    You can use the monitor [Page 194] to monitor the response times for all tasks.

Parameters for Task Determination

For task determination, you must preset the parameters *Response profile*, *Service profile* and, if necessary, *Priority* in Customizing.

Definition: Response Profile

The **response profile** determines the tasks to be executed and the time intervals, at which they must be executed. These standard tasks are defined using the code and catalog functions. You can define a particular person, who is proposed during task determination, to process each standard task. This person can also be changed manually.

The actual time, in which the tasks from the response profile must be executed, is calculated based on the days and times specified in the service profile.

Definition: Service Profile

The **service profile** determines the times, at which a service should be provided. You can enter as many combinations of times and days as required to cover weekdays, weekends, shifts, holidays and so on. The service windows in the service profile are the basis for the start and end of processing of the tasks to be executed.

Definition: Priority

The **priority** determines the importance of a notification.

Use

Based on the parameters *Response profile*, *Service profile*, and, if necessary, *Priority*, you can use the automatic determination of tasks when entering the notification.

The predefined parameters determine the times and the time interval within which your company should respond to a notification in a particular way.

See also:

Example: Automatic Determination of Tasks [Page 238]

Automatic Determination of Tasks

Use

Based on the preset parameters Response Profile [Page 190], Service Profile [Page 190] and, if necessary, Priority [Page 190], you can use the automatic determination of tasks when entering the notification. The predefined parameters determine the times and the time interval within which your company should respond to a notification in a particular way.

Example: Automatic Determination of Tasks [Page 238]

Integration

The automatic determination of tasks is particularly important for service and maintenance contracts. Specifically, if an explicit agreement is made between the contract partners that certain responses should be made at certain intervals.

For more information on task determination in maintenance planning, see Automatic Task Determination for Notifications [Ext.].

You can assign a response profile to the notification in two ways:

* Using the notification type

* Using a service contract

Prerequisites

Refer to the prerequisites under Task Determination and Notification Monitoring [Page 188].

Features

For task determination, the system proceeds as follows:

If you enter a notification with a reference object, the system checks whether:

There is a service contract for the reference object

A service product with service profile is defined as a characteristic valuation

If this is the case, the service profile forms the basis for the task determination.

If no service profile and thereby no response profile is found using the contract, or if the reference object is not contained in a contract, the system uses the service profile, which is assigned to the notification type, as a basis.

Activities

From the notification, choose *Edit → Tasks → Determine* or if you would like to simulate tasks, choose *Edit → Tasks → Simulation (Determination).*

Example: Automatic Determination of Tasks

A customer service department is available, for example, at the following times:

Service Profile

Counter	Days	Times	Response Profile
1	Monday - Friday	08.00 - 20.00	Local office hours
2	Thursday	20.00 - 22.00	Local office hours
3	Saturday	09.00 - 13.00	Local office hours

The response profile "Local office hours" contains the following codes and time intervals:

Response Profile "Local Office Hours"

Priority	Code	Description	Time Interval
2	PHON	Call customer back	30 minutes
2	ONSI	Service technician on site	2 hours
1	PHON	Call customer back	15 minutes
1	ONSI	Service technician on site	1 hour

The following tasks result:

- If a customer submits a notification with priority 2 (medium) at 12.00 p.m. on Saturday, you must call back within 30 minutes for an explanation of the problem, since this is agreed for the response profile in the contract. Therefore, you must have called back by 12.30 p.m. on that Saturday.

- If a technician has to be sent to the customer site, they must be there by Monday at 9 a.m. at the latest.

- If the notification has priority 1 (high), you must call back within 15 minutes of receiving the notification and the service technician must be at the customer site an hour later.

     The times defined cannot exceed the daily limit. If you have to define times, which exceed the daily limit, define them, for example, as follows:

- 00.00 - 08.00

- 08.00 - 20.00

- 20.00 - 24.00

Notification Monitoring

Use

The notification monitoring function always provides you with a current overview of the standard tasks to be provided as services. This ensures that you are always up-to-date with regard to customer requests and problems do not escalate unnecessarily. For example, you need to know whether:

- The processing of a particular task has already begun

- The task has been completed at a particular time

Prerequisites

Refer to the prerequisites under Task Determination and Notification Monitoring [Page 188].

When entering a service notification, you must have called up the function for automatic task determination [Page 237].

Activities

You can use list editing to create a list of all the service notifications with a start and end date. This list can be used to monitor the response times.

The color display makes it easy to recognize which tasks:

- Are new in the system

- Are being processed

- Have exceeded the deadline

See also:

Monitoring of Response Time [Page 194]

Monitoring of Response Time

Use

You can monitor the different processing phases for your service notifications and tasks using the function *Monitor* in the list editing function. In the monitor, you can assess the notifications and tasks using the following criteria:

- Planned start not yet reached

    These tasks are marked in green.

- Planned end of processing not yet reached, but start date is in the past

    These tasks are marked in yellow.

- Planned end of processing exceeded

    These tasks are marked in red.

From this list, you can call up:

- The notification header from the notification

- The task overview from the task

Features

Updating the Task Status

On the task detail screen, you can assign a status to the task manually (for example, released, completed) and then update the monitor. Alternatively, you can specify a time interval in Customizing, after which the monitor is automatically updated.

Sorting the List Display

You can define the fields that should appear in the list. You can sort the list according to the entries in one of the displayed columns (for example, to see the notifications in the list sorted by entry date or reference object).

Service Notifications in the Internet (CS-CM-SN)

Use

Service notifications are the medium in which service notifications are received by the SAP System. They form the basis for service orders, by means of which the individual services can be planned in detail and subsequently performed.

Service notifications received via the Internet are processed further in the SAP Customer Service component in the same way as service notifications entered in the SAP System.

Type of Internet Application Component

Consumer-to-Business

Advantages for Your Customers:

- Your customers can send service notifications round the clock.

- Your customers can enter service notifications directly in their Web server, that is, they do not need to telephone or send a fax.

- Your customers can enter data quickly and easily using the screen layout you have designed.

- Using a list of pre-defined problem codes, your customers can limit their problem and even describe the problem in text.

- Your customers can check the processing status of their notifications at all times.

Advantages for You as Service Provider:

- You can design the screen layout in such a way that the entry of required data for the customer is quick and easy.

- You receive the notification online, that is, shortly after it is entered.

- As a result of the short time between entry and receipt of the notification, you are sometimes able to solve the problem immediately.

- You can react speedily to the notification.

- You can structure peak periods for receipt of notifications, and possibly reduce your Hotline personnel.

Prerequisites

Authorizations/Security

SAP Users

The contact person who enters the service notifications at the customer company must have authorizations for accessing the following data:

Authorization Object	Description
I_BEGRP	Authorization group

Service Notifications in the Internet (CS-CM-SN)

I_IWERK	Planning plant
I_SWERK	Maintenance plant
I_QMEL	Notification type
I_TCODE	Transaction authorization for IWWW

Internet Users

To start this Internet application component, your contact person must log on using their contact person number and a password that you assign.

- Before you create an Internet user, you must specify a contact person for the customer in the *Sales* component using transaction VD01 or VD02. In the detail screen for the contact person, enter the contact person number as the number of the customer.

- You use this number to create an Internet user with transaction SU05. Here, you can create, change, and delete passwords for Internet users. To be able to explicitly identify a contact person, enter the object type *BUS1006001*.

Standard Settings and Default Values

The start notification type for transaction IW51 (= Enter service notification) must be defined so that the service notification that your customer sends over the Internet contains all data required by the SAP System.

Features

How the Internet Application Component Differs From the R/3 Transaction

This Internet application component does not include the following functions of the SAP standard transaction:

- Creation of several items
- Creation of causes, tasks, and actions
- Navigation options in the SAP environment (for example, displaying the material)
- Priorities, dates, internal processing

Modification Options

You can change the screen layout for this Internet application component.

⚠️

Each change made to SAP development objects that are used for the Internet application component is regarded as a modification.

You should not change the development objects of the standard version under any circumstances.

Service Name

The service name of this Internet application component is IWWW. You can find all the relevant data under this service name in the SAP@Web Studio.

The output forms are in the subdirectory IWWW of the directory TEMPLATES. The following forms are used:

SAPMIWOW_100.HTML

SAPMIWOW_200.HTML

SAPMIWOW_210.HTML

SAPMIWOW_220.HTML

SAPMIWOW_300.HTML

The numbers in the form names correspond to the respective SAP screen numbers.

R/3 Development Objects

The data exchange over the Internet is carried out on the SAP side using transactions and function modules. The following development objects are required for the entry and transmission of service notifications:

Development class:	IWWW
Transaction:	IWWW
Function group for the screens:	SAPMIWOW
Function modules:	BAPI_CUSTOMER_EQUIPMENTLIST
	BAPI_CUSTOMER_NOTIFIC_LIST
	BAPI_SERVICENOTIFICAT_CREATE
	BAPI_EQMT_GETCATALOGPROFIL

Data Output Using the Internet Transaction Server

The output of the data is performed using the Internet Transaction Server (ITS). There, the data determined is mixed with output forms and made available to the Inter-/Intranet in HTML format.

Process Flow (Service Notifications)

When you use the Internet application component *Service notifications*, the process is as follows:

> The process outlined below describes the Internet application component delivered with the Standard System. However, if you want to represent your own processes, you should use the Internet application component that is delivered in the Standard System as a reference for performing customer-specific development. Do not modify the development objects of the Standard System under any circumstances. Instead you should modify copies of them (in your own name range where necessary).

If your customer has a problem with a technical system or appliance, you must be informed of this as a service provider.

For this reason, the contact person at the customer company enters a service notification in the Internet. Of course, the customer must be authorized to do this. The contact person selects the object for which the service is requested from a list containing only those objects assigned to his or her company. Then the customer enters his or her order number; this is the reference number under which the service notification will be managed. The contact person then describes the problem using codes, which can be selected from a list on an object-specific basis, and with free text.

As soon as the notification is sent, the SAP System assigns a service notification number and passes this on to the customer contact person.

The service/maintenance planner at your company as the service provider receives the customer service notification online. He or she receives this directly into their pool of new notifications, that is, without any great time delay. He or she may then be in a position to react immediately by analyzing the problem, making inquiries at the customer company, sending a service technician to the customer company, or delivering a spare part.

Application Example (Service Notifications)

A company manufactures PC workstations and also provides customer service for them. The company leases several PCs to one customer and agrees a service contract with that customer, which covers maintenance work and the delivery of spare parts. The PCs are installed at the customer company. The vendor manages all leased PCs in corresponding master records. Vendor and customer have Internet access, and the vendor offers the entry of service notifications in the Internet. The customer has all necessary authorizations.

If a hard disk should break down at a customer company, for example, the customer informs the vendor customer service department by means of an Internet service notification, and requests the remedy for the problem. When the customer enters the service notification, the system gives them a list of PCs that they are leasing. With regard to the problem description, codes are proposed only for problems that can actually arise with PC workstations. This keeps data entry by the customer to a minimum, and the amount of data entry errors is very small. The customer can enter the notification immediately after the problem arises; they are not bound by the times at which the vendor hotline is manned.

The vendor receives the service request online immediately and, in this case, they can establish the fact that the hard disk needs to be replaced. In this way it is ensured that the customer receives a new hard disk at the earliest possible time. This can be installed by the internal PC service department.

Creating, Changing and Displaying a Notification

Depending on the application component in which you are working, choose:

- *Logistics → Plant maintenance → Maintenance processing*

- *Logistics → Customer service → Service processing*

To call up the individual functions in the table, choose the corresponding menu path.

Function	Menu Path	What You Should Know:
Create a malfunction report (PM)	*<Notification> → Create (special) → Malfunction report*	If you create a malfunction report after having corrected a malfunction, create the malfunction report and, at the same time, enter all the activities that were performed to rectify the problem.
Create a maintenance request (PM)	*<Notification> → Create (special) → Maintenance request*	
Create a customer notification (CS)	*<Notification> → Create (special) → Customer notification*	
Create a service request (CS)	*<Notification> → Create (special) → Service request*	
Create an activity report (PM/CS)	*<Notification> → Create (special) → Activity report*	
Create a user-specific notification (PM/CS)	*<Notification> → Create (general)*	Here, you enter notifications: - For all notification types different from the standard type used in your company - For standard notification types Specify the notification type and notification number on the initial screen. If internal number assignment for notifications is used in your company, do not enter a number.

Create a notification with reference (PM/CS)	*\<Notification\>* → *Create (general)*	To reduce the amount of data entered, you can use an existing notification as a copy model. You can use any notification type as a reference, irrespective of which notification type the new notification should have. When you save the notification, the notification used as a reference is also saved in the notification. This means that you later have the option of selecting notifications that were created with a particular reference. For more information about which data is copied, see Data from the Copy Model [Page 206].
Create a service notification for advance shipment (CS)		Creating a Service Notification for Advance Shipment [Ext.]
Change a notification (PM/CS)	*\<Notification\>* → *Change*	
Display a notification (PM/CS)	*\<Notification\>* → *Display*	

Configuration of User Default Values

Use

If you have to create notifications, for which particular data is always the same, you can define certain user default values. The system then copies these values to the corresponding data screens. You can overwrite these values.

Features

You can define default values for the following data:

- General data (for example, notification type, maintenance planner group)

- Reference object (equipment, functional location, assembly, material, serial number)

- Sales data, in the case of service notifications (for example, sales organization)

You can also use the screen type to set the reference object view here. For more information, see Specifying a Reference Object [Page 228].

The default values that are:

- Valid for all notifications (for example, reference object, plant) are copied to all notification types

- Valid for specific notifications are only copied to the appropriate notification types (for example, sales organization only to service notification)

Activities

- You want certain default values and a certain reference object view to be proposed every time you create a notification:

  From the tab page for the notification, choose *Extras → Setting → Control/default values* and then *General*, *Reference object*, *Sales* or *Action box*.

- You want to change the reference object view when you create a certain notification:

  From the tab page for the notification, choose *Extras → Setting → Reference object view*. You change the reference object view when you create a certain notification.

Entering a Notification Header Text

1. Call up the notification in create or change mode.

2. Enter a notification short text in the field *Description*. This text has the following meaning:

Notification type	Meaning
Malfunction report	The problem or malfunction that has occurred
Activity report	The activity performed to solve the problem or rectify the malfunction
Maintenance request	The activities requested by the maintenance department

3. If the short text line is not of adequate length for the description, select the icon *Create text*.

   A word processing screen is displayed.

4. Enter a long text, and then return to the notification screen by choosing *Back*, and save the data.

> If you have defined for a notification type in Customizing for Plant Maintenance that the long text may not be changed, then you can no longer change a long text entered previously when you change the notification.
>
> The text is blocked for entry. However, you can enter the new text in a new block at the end of the existing long text.
>
> You can also define in Customizing that changes to a long text are logged by user name and change date for particular notification types.

Entering Items

Use

In the notification item you enter and maintain data describing in greater detail the problem or malfunction that occurred, or the activity that was performed. A notification can have several items. Each item contains the following data:

- **For a malfunction report:**

    A short description of the malfunction that occurred, at which object part the problem occurred, and what caused it

- **For an activity report:**

    A short description of the activity that was performed, at which object part, and possibly at which assembly, the activity was performed

- **For a maintenance request:**

    Short description of the tasks that are to be performed, to which object part the tasks should be performed by the maintenance department, and what possibly prompted the request to be made

Procedure

In each notification, you should maintain the first item so that the notification:

- Can be evaluated with reference to object parts, problems and causes

- Can be classified, if you use the SAP Classification System in your company. You can only classify at the level of notification items.

    If the notification has only one item, the classification data is valid for the whole notification, even though you entered it for the item. If the notification has several items, the classification data is valid in each case for the item for which you entered it.

You should create several items if:

- More than one object part is affected, and/or

- More than one problem or damage has occurred, and/or

- There is more than one cause, and/or

- More than one class must be assigned

To call up the individual functions in the table, call up the notification in create or change mode. As the notification screen is adjustable, it is possible that the functions in your system are located on other tabstrips.

Function	**Tab page/Symbol**	**What you should know**
Entering item data	*Items*	You enter data for a **single** item directly in the group box *Item* on the tabstrip *Notification*.

Entering item data in the item overview	*Items*	For each item there is a row containing the most important data.
Entering item data in the item detail screen		You can only access the fields for classification and assembly in the item detail screen.
		If you have selected several items in the item overview, select the icon ▶ to go to the next item on the detail screen.
		To create a new item from the detail screen, choose *New entry*.

Data from the Copy Model

When creating notifications with reference, the system copies the following data:

- Certain data from the notification header (see structure RFC_VIQMEL)

- Certain data from the notification items (see structure RFC_VIQMFE)

- Certain tasks at notification header and notification item level (see structure RFC_VIQMSM)

- Activities at notification header and notification item level (see structure RFC_VIQMMA)

- Damage causes for notification items (see structure RFC_VIQMUR)

- All partner data

- All long texts

- All classification data

Cause

Definition

A reason or event that led to the occurrence of a notification item. A cause item contains the following information:

- Code group
- Code
- Short text
- Long text

Use

You can record one or more causes for an individual defect item. You can display the cause information in varying levels of detail on the following screens:

- Cause overview
- Cause detail screen

The cause overview and the cause detail screen are the same for all notification types.

Entering Causes for an Item

To use the individual functions in the table, call up a notification in the create or change mode.

Function	Tab page	What you should know
Entering the cause data for an item in the cause overview	Choose *Causes*.	You must select an item in the item overview before you can enter the cause data.
Entering the cause data for an item in the cause detail screen	Choose *Causes*. Select a cause item and then choose *Detail view.*	If you selected several causes in the cause overview, choose *Next cause* to go to the next cause detail screen. To create a new cause from the detail screen, choose *New cause*.

Processing Different Notification Data

To call up the individual functions in the list, call up the notification in create or change mode. Since the notification screen can be configured differently, the functions in your system may be located on other tab pages.

Function	Tab Page/Menu Path	What You Should Know:
Specifying system availability and condition	*System availability*	Here, you can make entries regarding system availability before and after the problem occurs, as well as before and after the task is performed. If the problem has an effect on other systems or system parts, enter the affected object and key for the effect. You can also expand the structure list using 🏠 This information is not relevant for maintenance requests.
Entering breakdown data and duration	*Notification* or *Malfunction, breakdown*	Refer to Entering Breakdown Data and Downtimes [Page 211]
Calling up location and account assignment data	*Notification* or *Location data*	The location and account assignment data originates from the reference object. It is copied from the master data to the notification, where you can make changes if required. The advantage of this is that a change to the master data for the reference object does not automatically change the notification.
Calling up the scheduling overview	*Notification* or *Scheduling overview*	The scheduling overview, for example, contains the required start and end dates for the notification. These dates can also be calculated automatically on the basis of priorities.
Changing the reporter of the problem	*Notification* or *Scheduling overview*	Here, you enter the name of the person who reported the malfunction.
Calling up administrative data	*Goto → Administrative data*	The administrative data records who created the notification, when, who last changed it and when.

Processing Different Notification Data

Entering Breakdown Data and Duration

Use

If there is a functional breakdown due to a problem or the execution of an activity, you note this breakdown - depending on Customizing - in one of the following two places:

- Notification header

  As a rule, when you create a notification, it is sufficient to enter the malfunction start in the notification header, and flag the field *Breakdown*. This indicates that the system is broken down at the time specified.

- Breakdown data screen

  The breakdown data screen is relevant mainly for entering the breakdown end and the downtime.

Entries in the Breakdown Data Screen

1. Call up the notification in create or change mode and choose the tab pages *Malfunction*, *Breakdown*.

2. Enter the start and end dates of the malfunction. Flag the field *Breakdown* to indicate that the malfunction caused a function breakdown.

3. As soon as you press *Enter* , the system automatically calculates and displays the downtime in hours.

4. If you want to use a different unit of time, enter it in the field to the right of the field Breakdown duration and choose *Enter*.

   The system calculates and displays the duration in the new unit of time. The unit entered when you save the notification is then valid for further processing of the notification.

5. Save the notification.

   If the downtime is already displayed and you subsequently change the malfunction start or end, the system recalculates the duration.

Specifying a Priority

Use

By assigning a priority to a notification, you can specify the importance and urgency of the notification.

Prerequisites

You have defined priorities in Customizing for the Plant Maintenance and Customer Service application components. You can define an interval for performing the notification for each priority.

> For example, priority 1 can mean: Execution is to start 2 hours after creating the notification and is to be finished within 2 days.

Procedure

1. Call up the notification in create or change mode.

2. Enter the required priority on the tabstrip *Notification* in the field *Priority* and choose *Continue*.

   The system calculates the required start and end of the maintenance notification in the background based on the definition of the priority, and enters these dates in the relevant fields.

   If you want to see the newly-calculated dates, call up the scheduling overview by choosing *Goto → Schedule overview*.

   When you release the notification, the system also calculates the dates for the tasks. This is done on the basis of the factory calendar. The dates for the tasks are displayed on the tabstrip *Tasks*.

3. Save the data.

Entering Measurement Documents

Use

In your company, it is possible to define that the current status, usage, wear, or reduction in usage is described at particular physical and/or logical locations (that is, at functional locations and pieces of equipment).

The condition of a location (for example, temperature, pressure, number of revolutions) is recorded at measuring points in the form of **measurement readings**. Consumption, wear or reduction in utilization (for example, vehicle mileage, electricity consumption) are recorded at counters in the form of **counter readings**.

The data that is measured at a measuring point or counter must first be entered in the system in the form of a measurement document.

For a more detailed description of measurement and counter readings, see *PM - Entering Measurement and Counter Readings*.

Procedure

1. Call up the notification in create or change mode.

2. In one of the notification screens, choose *Extras → Measurement documents.*

    The screen for multiple entry of measurement documents is displayed.

3. Enter the required measuring points for which you want to enter measurement or counter readings. Also enter the measured or read value and any other necessary data.

4. Choose *Continue.*

    The system completes all other fields with data from the measuring point master record.

5. If required, select individual measuring points for detail processing. To do this, select the measuring point and choose *Goto → MeasDocument.*

6. If you have entered all the necessary data, return to the previous screen and save the notification.

Linking a Document From the DMS

Use

By connecting notification processing with the Document Management System (DMS), it is possible to link one or more documents that you want to manage using the DMS.

Procedure

1. Call up the notification in create or change mode.

2. Choose *Environment → Documents.*

   A dialog box is displayed, in which you can include one or more documents from the DMS.

3. Enter the required documents.

4. Choose *Continue* and save the data.

Result

Once you have linked documents to a notification, you can display or print them from the notification.

Displaying the Action Log for a Notification

Use

Changes to the notification are recorded in the action log. This enables you to track who has made which status or data changes to which fields, and when.

Changes to tasks, items and activities as well as partners are also recorded in the action log within the framework of notification processing.

Procedure

1. Call up the notification in display or change mode.

2. Choose *Extras → Notification documents → Action log*.

    The action log for the notification is displayed.

3. To display changes to tasks, items or activities, select the icon *Task/Item/Activity*, and then the icon *Detail action log*.

Displaying Changes in Notifications

Use

The system automatically documents the changes that are made to the following data for a notification:

- Tasks

- Items

- Causes

- Activities

- Partner

The system only records changes that are made to existing data in change documents. For example, if you enter new tasks in an existing notification, then this is not recorded in the change document. Only when you make changes to the tasks will this be recorded.

Procedure

1. Call up the notification in display or change mode.

2. In a notification screen, choose *Extras → Notification documents → Changes.*

   The screen *Change Documents for Object Class NOTIFICATION* is displayed*.* A list of change documents is displayed, created on the basis of changes to the types of notification data mentioned above.

3. To see what was changed and how, position the cursor on the required line and select *Display documents.*

   A screen is displayed, showing the exact changes that were made .

Displaying an Installed Base from the Notification

Use

You can use the maintenance notification or service notification to display the installed base to which the equipment you are using as a reference object belongs. If you create a notification, you can also search for a piece of equipment about which you only know that it belongs to a particular installed base and use this as the reference object for the notification.

> You create a problem notification for a pump engine, although you do not know the equipment number of the engine, only that of the pump. Enter the pump as the reference object and display the installed base. In this way, you find the equipment number of the engine using the structure display and can copy this as the reference object in the malfunction report.

Prerequisites

Your system administration has activated the screen area with installed base data for a certain tab in the Customizing function for notifications.

Procedure

1. Choose *Logistics → Plant Maintenance → Maintenance Processing* or *Logistics → Customer Service → Service Processing* and then *Notification→ Create*.

2. Enter a piece of equipment as the reference object. If the equipment is assigned to an installed base as a component, you will see the installed base on the corresponding tab.

   Choose *Whole installation* if you want to view the installed base in the overview.

   Choose *Copy* if you want to copy another piece of equipment from the installed base as a new reference object.

Partner

Definition

Partners (business partners) are internal and/or external organizational units. For example, internal partners can be logistics and sales departments that perform services. External partners can be customers as service recipients and vendors as supporting service providers. A partner can be a natural or a legal entity. You can use partners in CS and PM processing.

Structure

Partner Type

The following partner types are delivered with the Standard System:

- Customer

- Contact person

- Vendor

- User

- Personnel number

- Organizational unit

- Position

Partner Function

You define partner functions in Customizing for Plant Maintenance and Customer Service. They are freely definable and always refer to a partner type. Standard functions exist (for example, goods recipient) and you can also define your own functions.

Partner Determination Procedure

The partner determination procedure is a grouping of partner functions. It specifies which partner functions are permitted or must always be specified for a particular business transaction (for example, for the processing of a service or maintenance order). In Customizing you define the partner determination procedure and assign partner functions to it. If functions are assigned to the partner determination procedure, you can assign the partner determination procedure to an object (for example, to a notification type).

Integration

You can assign partners to the following objects:

- Functional location [Ext.] and equipment [Ext.]

    If you have defined in Customizing for Plant Maintenance and Customer Service under *Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partners → Copy Partner Functions to Master and Movement Data*, which partners you want to copy, the system copies the respective partner functions when creating the notification with a technical object. For example, a particular technician, who performs a service to a piece of equipment, is assigned to a

customer. This technician can be specified as the partner in the equipment master record. In this case, the system copies the partner data into the notification.

- Notification [Page 225]
- Order [Ext.]

For more information on partner data in serial numbers see *Management of Serial Numbers* in Partner Data [Ext.].

The system offers you different search helps depending on the partner function. In the Standard System up to now, you could select organizational units using a search term. If the partner function of category *Employee* has been maintained in Customizing, you can search for organizational units using tasks as of Release 4.6C. The system displays a hit list of the organizational units which fulfill this task.

Customizing for Partners

Purpose

You want to work with partners in your company.

Prerequisites

You can make the following settings in Customizing:

Function	Menu Path	What You Should Know
General settings		
You define the partner functions and the partner determination procedure	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partners → Define Partner Determination Procedure and Partner Function*	If you want to work with partners, first define the partner functions, then define the partner determination procedure, and finally, assign the partner functions to the partner determination procedure.
You assign the partner functions to the partner determination procedure	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partner Data→ Copy Partner Functions to Master and Movement Data*	
Notification		
The *Partner* tab should be visible in the notification	*Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Notifications → Notification Creation → Notification Types → Set Screen Templates for the Notification Type*	

Assign notification type to partner determination procedure	*Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Notifications → Notification Creation → Partners → Define Partner Determination Procedure and Partner Function*	
Define field selection for partner data fields	*Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Notifications → Notification Processing → List Editing → Define Field Selection for Multi-Level List Displays of Notifications*	
You want to set the fields for the additional partner address	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partners → Define Field Selection for List Display of Address Data*	There is an additional partner address per partner function in the notification. You can define which fields in this additional address are mandatory or optional, and which fields should not be displayed.
Order		
Define partner determination procedure and assign order types to partner determination procedure	*Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Orders → Partner → Define Partner Determination Procedure and Partner Function*	The partner overview screen can be seen in the order by choosing the *Partner* tab. By choosing the *Overview* button, you go to a more detailed overview screen where you are able to perform further settings using the menu.
You want to set the fields for the additional partner address	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partners → Define Field Selection for List Display of Address Data*	There is an additional partner address per partner function in the order. You can define which fields in this additional address are mandatory or optional, and which fields should not be displayed.

Customizing for Partners

You define a transaction variant for the transaction in which an additional partner address is to be entered. Afterwards, you assign the transaction variant to the respective partner function	*General Settings → Field Display Characteristics → Configure Application Transaction Fields*	You can create a transaction variant per partner function, which defines the field selection.
You want to process the partner in the order header.		Partner Processing in the Order Header [Ext.]
Functional Locations		
Define field selection for partner data fields	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → Functional Locations → Field Selection for Multi-Level List Displays of Functional Locations*	
The *Partner* tab should be visible in the functional location	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → General Data → Set View Profiles for Technical Objects*	
Assign functional location category to partner determination procedure	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → Functional Locations → Define Category of Functional Location*	
Equipment		
Define field selection for partner data fields	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → Equipment → Define Field Selection for Multi-Level List Displays of Equipment.*	

The *Partner* tab should be visible in the equipment	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → General Data → Set View Profiles for Technical Objects*	
Assign equipment category to partner determination procedure	*Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → Equipment → Assign Partner Determination Procedure to Equipment Category*	

For more information, refer to the documentation in Customizing for Plant Maintenance and Customer Service.

Partner Transfer

Use

You use this function to determine which partner the system copies from an object into the notification, order, and serial number. The system also copies the mandatory partner if one exists.

Features

Data source	Data destination
Master record of a functional location or of a piece of equipment	Notification when creating a notification for the reference object
Master record of a functional location or of a piece of equipment	Order when creating an order for the reference object
Notification	Order when creating an order for the notification
Delivery note	Serial number when posting goods issues

If you change the reference for notifications or orders at a later date, it is possible that the partner data will no longer correspond. You can then decide whether you want to copy the partner data of the new reference object.

Creating a Partner for the Notification

1. Call up a notification in Create or Change mode.

2. Choose 👥.

   The Partner screen is displayed.

3. In this screen you can enter an additional address for each partner function. To do this, select the relevant partner function and choose *Change partner address*.

   A dialog box is displayed in which data from the master record is possibly proposed. You can overwrite the data; the changes will not be copied into the master record. The partner address that you have entered is valid only for this notification.

4. Choose *Copy*.

   You return to the Partner screen. The indicator for an additional address is now displayed.

5. You also have the following options in the Partner screen:

   − Using the function *Delete Partner Address*, you can delete the additional address.

   − If you enter a one-time customer as a partner, the system automatically prompts you to specify an address. It is only possible to create a one-time customer if an address is specified. It is not possible to delete just this address, because the system will also delete the partner function.

   − If you choose *Delete partner assignment*, the system deletes the assignment (for example, to the notification) and the additional address.

   − You can display the main partner changes (for example, change of sold-to party) for the notification in the Action Log [Page 215]).

6. Save the data.

   If you enter the reference object in the notification and choose *Continue*, you have the following options:

   If partner data already exists for the reference object in the notification, a dialog box is displayed. You can copy the partner data from the reference object.

   If you replace the reference object in the notification with another one, the dialog box is only displayed if the partner is different. You can select which partner data you want to copy.

Calling Up Partner Information

Use

A partner is a company or person, with whom you can or must come into contact when conducting business. Partner information is available in the:

- Maintenance notification on a separate screen

- Service notification as a subscreen in the notification header and on a separate screen

Prerequisites

You can only call up the separate screen if a partner determination procedure has been defined centrally for your company in Customizing.

Procedure

1. From a tab page for the notification, choose *Goto* → *Partners.*

    The partner overview screen appears.

    If partner data already exists for this notification (for example, because a partner is assigned to the equipment), the partner function, number and description are displayed here.

2. To see additional data for one of the partners displayed, choose 📧.

3. When changing or creating the notification, you can enter the partner that should be assigned to this notification in the partner fields.

4. Save the notification with the new or changed partner data.

See also:

Partners [Page 218]

Creating a Partner for the Notification [Page 225]

Entry of Partner Data in a Service Notification [Page 182]

Reference Object

Definition

A technical object (for example, piece of equipment, functional location, assembly or combination of material and serial numbers), to which a notification refers.

Notification Type	Reference Object
Malfunction report (PM) Customer notification (CS)	Object at which the problem or malfunction occurred
Activity report (PM/CS)	Object at which the activity was performed
Maintenance request (PM) Service request (CS)	Object at which activities should be performed by the maintenance department

The reference object is located on the *Notification* tab page.

Structure

The reference object view displayed in a notification depends on the following factors:

- The setting for the notification type in Customizing for Plant Maintenance and Customer Service under *Maintenance and Service Processing → Notifications → Notification Types → Define Notification Types*

- The field selection for notifications in Customizing for Plant Maintenance and Customer Service under *Maintenance and Service Processing → Notifications → Set Field Selection for Notifications*

- User-specific setting on the *Notification* tab page under *Extras → Setting → Control/default values*

Specifying and Changing Reference Objects

To call up the individual functions in the table, call up the notification header data screen in create or change mode. As the notification screen is adjustable, it is possible that the functions in your system are located on other tabstrips.

Function	Tab page/Menu path	What you should know
Entering a reference object directly	*Notification*	Enter the number of the reference object directly on the tabstrip. After choosing *Continue*, the system displays the text for the reference object. If you have entered a piece of equipment that is assigned to a functional location, the functional location is also displayed. Moreover, the system will copy the location and account assignment data for the reference object from the master data to the notification. You can modify the data here. This has the advantage that a change in the technical object master data does **not** automatically change the notification.
Changing the reference object	*Notification*	Enter the number of the new reference object directly on the tabstrip. Moreover, the system will copy the location and account assignment data of the current reference object to the notification.
Updating the reference object	*Updating the reference object data*	You use this function to adjust the location and account assignment data in the notification with the data from the reference object master record.
Not specifying a reference object	*Location data*	Leave the fields for the reference object on the tabstrip *Notification* empty, and instead enter the location data as precisely as possible.

Changing the reference object view	*Extras → Settings → Reference object view*	You can only change the view if a reference object has not been entered.
		After saving the notification, the selected setting will only be retained for **this** notification.

Calling up Object Information

Use

You can display information that affects the reference object in a dialog box, which can be shown automatically. The following data, which refers to the object in the notification, is available in the *Object Information* dialog box:

- Structure data (for example, object hierarchy)

- Classification data

- Previous damage and the number of days required to solve the problem

- Previous notifications and/or orders, which have been created or completed for the object

- Maintenance plans for this object

- Documents or drawings for this object

From the dialog box, you can call up more detailed data for all these entries, for example, an individual notification. You can also branch to the information system to evaluate statistics.

Prerequisites

In Customizing for Plant Maintenance and Customer Service, you have defined an object information key by choosing *Maintenance Order Management* → *Notifications* → *Object Information*, and assigned it to the notification type.

This information can also be displayed automatically if certain conditions are met. This means, for example, that you can set in Customizing whether object information should always be displayed if a particular number of notifications are still outstanding for this object within a particular period of time, or if the object has certain characteristics.

Procedure

1. Depending on the application component in which you are working, choose:

    – *Logistics* → *Plant maintenance* → *Maintenance processing*

    – *Logistics* → *Customer service* → *Service processing*

2. Call up the notification in display or change mode.

3. If a reference object has been entered in the notification, choose *Object information*.

    A dialog box appears that displays information about the reference object.

4. In the *Reference* group box, you can choose whether you want to see information about the object specified in the notification, about its superior object, or the entire object structure.

    The dialog box also contains the following information:

    – The last three notifications entered for this object, with short text, date, completion and priority

    – Statistics concerning the notifications created for the object

    – Classification data for the object regarding contracts, maintenance items and maintenance dates

Time Zones

Use

Different time data is stored in the service notification. The system time usually forms the basis for this data. The date when the notification was created and when it was changed are thereby always displayed in the system time.

If you define a personal time zone in the user master record, the system saves particular time data for the notification in the local time zone of the user. This data consists of:

- Notification date

- Dates for notification (for example, malfunction start, malfunction end, required start)

The system also takes the local time zone of the user as the basis for calculating dates.

If detail data for the customer is displayed in the notification, the time zone of the customer is displayed there for information. However, the system does not consider this time zone during its calculations.

Prerequisites

You have maintained time zones centrally in the Customizing for *Cross-Application Components* by choosing *General Application Functions*.

You have entered the local time zone of the user in the user master record under *Personal time zone*.

You have activated the include screen *Customer/Contact Person with Detail Data* in the Customizing for *Plant Maintenance and Customer Service* under *Maintenance and Service Notification*.

Activities

Displaying a Time Zone

You can display the local time zone of the user by choosing *Goto → Administrative data* in the notification.

Task

Definition

Work that is planned within the framework of a notification. In contrast to an activity, the planning and organizational aspects of a notification are the most important.

Using tasks, you can plan the way in which various persons work together to process the notification and perform the activities within a specified period of time.

You can enter the following data for each task:

- Key for the task to be performed, and a brief instruction of how the work is to be performed.

- Planned start and end of the task

- Task status

A task can relate both to the notification header, as well as to the individual items. They can have different statuses.

> An example of a task in a problem notification might be, for example, to inform the construction department of a defect.
>
> In a service notification - the main area where tasks are used - frequently occurring tasks might be "Call customer back within an hour" and "Technician to be on site within a day".

Use

Data regarding tasks in the notification is displayed in varying levels of detail in two different screens:

- In the task overview

- In the task detail screen

The task overview and detail screens are the same for all notification types.

Integration

If the appropriate data is maintained in Customizing, the system can trigger certain follow-up actions on the basis of the task code (for example, printing a paper or calling up a certain SAP function). You can determine these follow-up actions in your company individually (see Follow-Up Actions for Tasks [Page 239]).

Entering Tasks

To call up the individual functions in the table, call up the notification in create or change mode. Since the notification screen can be configured differently, the functions in your system may be located on other tab pages.

Function	Tab Page	What You Should Know:
Entering tasks for the notification header	*Tasks*	The tasks entered here apply to the entire notification.
Entering tasks for a **single** item	*Tasks* on the *Items* tab page	The tasks entered here apply to the respective item.
Entering tasks for one or more items	*Tasks* on the *Items* tab page	Here, you specify the planned start and finish date for the task. The dates entered may be changed, based on the status issued (see Status Management for Tasks [Page 235]). If you have selected more than one item on the *Items* tabstrip, choose ▶ on the task overview screen for the item. The tasks for the next selected item are displayed. To call up the task detail screen, choose 🗃. To create a new task from the detail screen, choose *New entry*.
Automatically determining tasks		Automatic Determination of Tasks [Page 237]

Status Management for Tasks

Use

Tasks are used to plan and manage notifications as a background process. For this reason, it is useful to be able to determine the various processing stages that a task has reached using statuses.

There are three statuses relevant to tasks in the system:

- Released

    The task can now be performed.

- Completed

    The task has been performed.

- Successful

    The results of the task were positive; the problem has been solved or the damage repaired.

Integration

The task status is only used to provide the maintenance planner with information. There is little interaction between the different statuses; to a large extent they are independent of one another.

This means that, for example, a notification can be put in process, even if it contains outstanding tasks that have not yet been released. However, you cannot complete a notification while it contains outstanding tasks.

All tasks are the same from a system perspective, in other words, the system does not distinguish between tasks at notification header level and ones at notification item level. Therefore, if the status line indicates that there are tasks outstanding in the notification, these can be both header tasks and item tasks.

➡️

So long as a task is not "completed", the notification has the status "outstanding tasks", even if the task has already been released.

For more information on general status management, see Status Management [Page 305].

Features

You must assign a status to each task individually. To do this, you choose the appropriate symbol on either the task overview or task detail screen.

The status of each task is entered in abbreviated form in the task status line, both in the task overview and in the task detail screen. If you want to see the text for the abbreviations, select the task and choose 🛈. The screen *Change Status* is displayed.

When you assign a status to a task, the system automatically changes the relevant dates:

Status	The system completes these fields:

Status Management for Tasks

🏴 **Released**	*Planned start* with the current time *Planned finish* with either the current time or with the required notification end time **You can overwrite both fields.**
🔒 **Completed**	*Date carried out <date> Carried out by <user name>* with the current date and the current user name; **You cannot overwrite these fields.**
✅ **Successful**	**None**

The planned dates for a task must fall within the period of time specified in the notification as the required start and end dates. If you specify other dates for the task, the system issues a message to remind you of this. If no dates are maintained for the notification, the system takes 0 as a basis, so that it can still issue an information message if the dates are inconsistent.

Automatic Determination of Tasks

Use

Based on the preset parameters Response Profile [Page 190], Service Profile [Page 190] and, if necessary, Priority [Page 190], you can use the automatic determination of tasks when entering the notification. The predefined parameters determine the times and the time interval within which your company should respond to a notification in a particular way.

Example: Automatic Determination of Tasks [Page 238]

Integration

The automatic determination of tasks is particularly important for service and maintenance contracts. Specifically, if an explicit agreement is made between the contract partners that certain responses should be made at certain intervals.

For more information on task determination in maintenance planning, see Automatic Task Determination for Notifications [Ext.].

You can assign a response profile to the notification in two ways:

• Using the notification type

• Using a service contract

Prerequisites

Refer to the prerequisites under Task Determination and Notification Monitoring [Page 188].

Features

For task determination, the system proceeds as follows:

If you enter a notification with a reference object, the system checks whether:

• There is a service contract for the reference object

• A service product with service profile is defined as a characteristic valuation

If this is the case, the service profile forms the basis for the task determination.

If no service profile and thereby no response profile is found using the contract, or if the reference object is not contained in a contract, the system uses the service profile, which is assigned to the notification type, as a basis.

Activities

From the notification, choose *Edit → Tasks → Determine* or if you would like to simulate tasks, choose *Edit → Tasks → Simulation (Determination)*.

Example: Automatic Determination of Tasks

A customer service department is available, for example, at the following times:

Service Profile

Counter	Days	Times	Response Profile
1	Monday - Friday	08.00 - 20.00	Local office hours
2	Thursday	20.00 - 22.00	Local office hours
3	Saturday	09.00 - 13.00	Local office hours

The response profile "Local office hours" contains the following codes and time intervals:

Response Profile "Local Office Hours"

Priority	Code	Description	Time Interval
2	PHON	Call customer back	30 minutes
2	ONSI	Service technician on site	2 hours
1	PHON	Call customer back	15 minutes
1	ONSI	Service technician on site	1 hour

The following tasks result:

- If a customer submits a notification with priority 2 (medium) at 12.00 p.m. on Saturday, you must call back within 30 minutes for an explanation of the problem, since this is agreed for the response profile in the contract. Therefore, you must have called back by 12.30 p.m. on that Saturday.

- If a technician has to be sent to the customer site, they must be there by Monday at 9 a.m. at the latest.

- If the notification has priority 1 (high), you must call back within 15 minutes of receiving the notification and the service technician must be at the customer site an hour later.

  The times defined cannot exceed the daily limit. If you have to define times, which exceed the daily limit, define them, for example, as follows:

- 00.00 - 08.00
- 08.00 - 20.00
- 20.00 - 24.00

Follow-Up Actions for Tasks

Use

You can define tasks for one or more follow-up actions. These follow-up actions are automatically performed by the system as soon as you have processed and saved the notification.

Prerequisites

In the Customizing function for the Plant Maintenance and Customer Service application components for notifications, you have

- Set the indicator for follow-up actions in the task catalog (catalog type 2)

- Defined a follow-up action key and assigned one or more function modules **that you have programmed** to this key

The function modules determine the activities to be performed.

Features

If you enter a notification code on the tabstrip *Notification* to which one or more follow-up actions are assigned and then save the notification, the system will perform the follow-up actions.

You can display a log on the task detail screen that contains the follow-up actions performed, on condition that they are supported by the function module.

Activity

Definition

Work that is performed within the framework of a notification. In contrast to the task, the activity describes what has already been performed within the framework of solving the problem. You can enter the following data for each individual activity:

- Key for the activity that was performed, and a short text that can be changed individually

- Start and end of the activity

- Quantity factor for the activity

An activity can relate both to the header of a notification, as well as to the individual items.

Use

Activity data is displayed in various degrees of detail in two places in the maintenance notification:

- In the activity overview

- In the activity detail screen

The activity overview and detail screens are the same for all notification types.

Entering Activities

To call up the individual functions in the table, call up the notification header data screen in create or change mode. As the notification screen is adjustable, it is possible that the functions in your system are located on other tabstrips.

Function	Tab page	What you should know
Entering activities for the notification header	*Activities*	The activities entered here apply to the entire notification.
Entering activities for a single item	*Activities* on the *Item* tabstrip	The activities entered here apply to the respective item.
Entering activities for one or more items	*Activities* on the *Item* tabstrip	If you have selected more than one item on the *Items* tabstrip, choose ▶ on the activity overview screen for the item. The activity for the next selected item is displayed. To call up the activity detail screen, select the activity and choose 🖻. To create a new activity from the activity detail screen, choose *New entry*.

➡️

Overwrite the activity text, if the text entered by the system based on the activity code does not really apply for this activity.

If you have entered your own activity text, you can also enter a long text for the action using 📝.

Both texts are displayed in the activity detail screen. In evaluations, you only see the activity text that is defined in the catalog, not your own text.

Catalog Profile

Data on problems, malfunctions, damages, causes and problem solutions or malfunction corrections is recorded in the system or reported to the planner responsible in the form of technical findings after a visual check, after the object has been inspected or checked, or the problem has been determined. This data forms part of the service or maintenance notification and is entered in the maintenance history. The data needs to be formalized, so that it can be used in evaluations.

Definition: Codes and Code Groups

Codes are the means with which this data is managed in the *Customer Service* (CS) and *Plant Maintenance* (PM) application components. There is a corresponding code for each set of findings. The codes are grouped together in code groups according to particular characteristics. For example, there is

- A code group with all codes for problems and damage relating to engines

- A code group with all codes for problems and damage relating to pumps

There are also code groups for problems, causes, object parts, tasks and activities in the CS and PM application components.

Definition: Catalogs

Code groups that belong together in terms of **content** are grouped in catalogs. These catalogs are identified by the catalog type (a number or a letter). For example, in this way you combine

- All code groups for particular problems for a catalog type

- All code groups for causes for another catalog type and

- All code groups for activities for a further catalog type

> The catalog functionality originates from the Quality Management (QM) application component.
>
> You will find further information on the structure of codes, code groups, catalogs and catalog profiles in the Customizing function for Customer Service and Plant Maintenance.

Definition: Catalog Profile

Central service and maintenance planning indicates from a **functional** perspective in catalog profiles, which code groups should be used for a particular reference object or for a particular notification type. In this way, it makes available to other service and maintenance employees a basic number of codes that are relevant to the reference object.

If a particular catalog profile is valid for a particular technical object, the system displays the catalog profile name in the data screen of the corresponding functional location or piece of equipment. The equipment catalog profile is more detailed than that of the functional location.

In the notification, the system determines the catalog profile on the basis of the reference object in the following sequence:

Equipment → Construction type of equipment → Functional location → Construction type of functional location → Notification type.

This means the following:

The system checks whether a piece of equipment is specified. If so, it checks whether a catalog profile is specified for this piece of equipment. If this is the case, it copies the catalog profile to the notification; if not, it checks whether a construction type with catalog profile exists for the piece of equipment. If so, it copies the catalog profile of the construction type to the notification; otherwise, it checks whether a catalog profile exists for the functional location assigned to the piece of equipment or the functional location specified, and so on.

Copying Another Catalog Profile

Use

In principle, a globally defined catalog profile underlies a maintenance notification on the basis of the notification type. If, for example, you specify a functional location in the notification for which a particular catalog profile has already been defined, or if a functional location with catalog profile has already been specified in the notification, and you now enter a piece of equipment with different catalog profile, you or the system must decide whether the original catalog profile should continue to be valid, or whether the new one should be copied to the notification.

Prerequisites

This decision is made in Customizing by the central service and maintenance planning department for each catalog profile as follows:

System message	Effect
Information message	The system adapts the new catalog profile.
Warning message	The system adapts the new catalog profile.
Error message	The system does not adapt the new catalog profile, but retains the original one.

If, for example, a particular catalog profile is valid for certain pieces of equipment, and this catalog profile with its code should be compulsory for the service and maintenance employee, then it should be specified in Customizing that an error message is issued whenever other catalog profiles are used in the notification. As a result of this, no other catalog profile can then be copied and only the codes of this catalog profile can be used in the notification.

> If no specifications regarding catalog profiles have been made in Customizing, the system adopts the new catalog profile without issuing a system message.

Activities

To see which catalog profile is valid for a notification, choose *Extras* → *Catalog profile* → *Display*.

Changing the Catalog Profile

1. On one of the tabstrips, select *Extras* → *Catalog profile* → *Selection...*.

   A dialog box is displayed. The group box *Current catalog profile* contains the current or last copied catalog profile, while the group box *Default catalog profile* contains the catalog profile that was previously valid.

2. If you want to copy the catalog profile proposed by the system, press *Default transfer.*

   The system displays the proposed catalog profile in the block *Current catalog profile*.

3. If you do not want to use either the current or the proposed catalog profile, you can enter another one. To do this, enter the required catalog profile in the catalog profile *Individual catalog profile*. Choose *Individual transfer*.

   The system displays the individual catalog profile in the block *Current catalog profile*.

   The individual catalog profile is no longer overwritten by the catalog profile of the reference object. If it is no longer to be used, you have to change it explicitly.

4. Choose *Continue* to close the dialog box, and save the changes.

Action Box

Use

When you process quality notifications, maintenance notifications, or service notifications, you can use the **action box** to execute **follow-up functions**. Follow-up functions can help you process a notification problem and are documented as an **activity** or **task** for the notification header after being executed. Depending on your settings in Customizing for *Notification Processing*, the follow-up functions in the action box can include functions that you can execute:

- More than once and independently of other follow-up functions in the action box

- Only once and/or after certain other follow-up functions have been executed (for example, interdependent, process-related functions)

> Follow-up functions in the action box are different from task-related follow-up actions [Page 99]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a quality notification. With a follow-up function, the system executes the corresponding function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information in a dialog box. This is not possible with follow-up actions.

Integration

You can link the follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. This allows the system to trigger certain workflow tasks, once a function has been executed and the notification has been saved.

The action box contains follow-up functions that support the following business processes:

- Repairs Processing Using Quality Notifications (RMA) [Page 145]

- Processing Return Deliveries to Vendors [Page 148]

Prerequisites

The follow-up functions delivered in the standard system are ready for use. If you do not need a particular follow-up function, you can delete it in Customizing for *Notification Processing*. If you want to include your own, self-programmed functions in the action box, you must define them in Customizing for *Notification Processing*.

Features

Function	What you should know

Appearance of the action box	In the standard system, the action box is displayed as an overview tree. In this mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning:
	
	• Blue:
	  The follow-up function is active and can be executed.
	
	• Black:
	  The follow-up function is inactive and cannot be executed (yet).
	
	• Gray:
	  The follow-up function has been executed and cannot be executed again.
	
	If you set the *Action box: Table* indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).

Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing for *Notification Processing*. For more information about these functions, see: • Standard Follow-Up Functions for Activities [Page 249] • Standard Follow-Up Functions for Tasks [Page 250]
Business transactions	You can also assign a business transaction to each follow-up function in Customizing for *Notification Processing*. The business transaction determines whether an activity or task resulting from a follow-up function can be executed, based on the current status of a notification.
Authorization check	Each follow-up function is assigned a code group in Customizing for *Notification Processing*. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function does not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.

Activities

To execute a follow-up function in the action box, click the text or double-click the symbol for a follow-up function that is displayed in blue. A dialog box appears, in which you can enter the data that is required to execute the function.

You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the possible entries help for a catalog, the system will not execute a follow-up function.

Action Box

The system executes the selected function and documents it as an activity or task for the notification header.

Standard Follow-Up Functions (Activities)

Use

The action box contains several standard follow-up functions that you can use to help you process a notification problem. When you execute one of these follow-up functions, the system documents the execution of the function as an activity for the notification header.

Features

Follow-up function	What you should know
Telephone contact using *SAPphone*	You can use this function to initiate a telephone call using *SAPphone*. The system logs the details of your telephone call as a notification activity. To be able to use this function, the telephone and computer in your office must be interconnected and the *SAPphone* component must be active.
Telephone contact without *SAPphone*	You can use this function to record a telephone call that you initiated while processing a notification. The system logs the details of your telephone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system logs the memo as a notification.
Solution database [Ext.]	You can use this function to search the solution database for symptoms and solutions that may be similar to the problem you are currently processing. If you find a symptom/solution in the database that applies to the problem in your current notification, you can: • Document your database search as an activity in the notification • Copy the tasks associated with the solution into your notification

Standard Follow-Up Functions (Tasks)

Use

The action box contains several standard follow-up functions that you can use to help you process a notification problem. When you execute one of these follow-up functions, the system documents the execution of the function as a task for the notification header.

Features

Follow-up function	What you should know
Changing the quality level	You can choose one or more quality levels in QM and increase the inspection severity for these levels. The selected quality levels may relate to the following criteria: • Material • Material / vendor • Material / customer • Material / manufacturer • Material / vendor / customer / manufacturer • Material / inspection type You can only increase the inspection severity for a quality level by a single stage (even if you select the same quality level more than once). When you save the notification, the system increases the inspection severity for the selected quality levels by executing a corresponding follow-up action.
Resetting the quality level	You can choose one or more quality levels in QM and reset the inspection severity to the initial inspection stages. When you save the notification, the system resets the inspection severity for the selected quality levels by executing a corresponding follow-up action.

Sending notices during notification processing	You can use this function to read and format selected data in a notification, which the system can then print, fax, or send as an e-mail to an internal or external (Internet) address.
	The standard system supports the following types of notices:
	• Confirmation of receipt
	• Interim report
	• Final report
	When you execute this function, the system retrieves and displays a standard text that is stored as a long text under the corresponding catalog task code. You can edit this text as necessary without changing the original long text. If several partners exist for the notification, you can select a partner before you process the text.
	You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a corresponding follow-up action.
Creating a new notification	You can use this function to create a new notification while you are processing an existing notification. When you create a new notification, you can copy the:
	• Header data from the existing notification into the new notification and edit the data as necessary.
	• Defect data from the existing notification into the new notification. This defect data does not include the cause, task, activity, classification, and long text data.
Requesting an 8D report (notification type Q2, complaint against vendor)	An 8D report is a standard form that is used in the automobile industry to document the correction of defects. For example, as an automobile manufacturer, you can use this follow-up function to request an 8D report from a vendor to receive a statement about the confirmed defects and how the vendor intends to correct the defects.
	You can use this function to create an 8D report for a defect while processing a quality notification. When you save the notification, the system prints the 8D report by means of a corresponding follow-up action.

Standard Follow-Up Functions (Tasks)

Creating an 8D report (notification type Q1, customer complaint)	If a customer submits a complaint about a product you delivered as vendor, the customer may ask you to submit an 8D report. In this case, you create a quality notification for a customer complaint to describe the defects and possible causes, and to define appropriate tasks.
	You can also create an 8D report for each defect item. The system inserts the tasks in the various sections of the 8D report, based on the task sort number.
	For example, if a task has the sort number "4," the system inserts the task in the fourth section of the 8D report. The system prints all tasks with the corresponding sort numbers in appropriate sections of the 8D report.
	The system selects the persons responsible as follows: for tasks, it specifies the person responsible for the task; for causes, the person responsible for the notification.
	The system determines dates for the tasks as follows:
	• If the task has already been completed, it specifies the completion date and includes the text "completed."
	• If the task has not been completed yet, but an end date has been planned, it specifies the planned end date and includes the text "planned."
	• If no date has been specified for a task, it record the text "outstanding."
	If you want to use your own form for an 8D report, assign your form to the shop paper "8D_C" in the print control for the quality notification.

Permission to Deviate from Specification	Using this follow-up function, you can contact a notification partner to obtain permission to a deviate from a specification. For example, if parts delivered by a vendor are found to be out of tolerance, you can document this as a defect in a quality notification. When you process the notification, you can execute this function to obtain permission from an internal or external notification partner, for example, to allow you to use the out-of-tolerance parts in production.
	This function starts the following workflow:
	• It sends an e-mail to the partner that contains a description of the problem and an address (URL).
	• Using the URL, the partner can access his or her workflow inbox (provided he or she has an Internet user) where the work item can be processed.
	• Once the partner has processed the work item by entering a response and a decision, this information is documented as a long text in the original quality notification.
	• Both the processor (partner) and the person who initiated the workflow receive a confirmation mail.

See also:

Functions for Repairs Processing [Page 147]

Functions for Processing Return Deliveries [Page 151]

Shop Papers

Definition

Documents created for the processing of maintenance notifications.

Structure

The standard system provides three different types of shop papers for maintenance notifications:

- Notification overview

    The maintenance overview is a complete printout of a maintenance notification, so that the maintenance planning department has an overview of the notification.

- Activity report

    The activity report serves as the basis for work if a malfunction is to be repaired without a maintenance order. It comprises a list of activities for each maintenance notification item. The person repairing the malfunction simply has to check the activities that they have performed, and can confirm the completion of the work using this list.

- Breakdown report

    The breakdown report is a complete printout of the information regarding downtime and system availability.

Furthermore, your company can also define user-specific shop papers. The control tables for the print functions are defined centrally within your company in such a way that you can display the relevant shop papers using the online help functions, and select the ones you require.

Printing and Faxing of Shop Papers

Use

In many cases, it is useful not only to display the shop papers for notifications on screen, but also to process them in the following ways:

- Print out a paper version

- Send as a fax

- Keep a copy in the ArchiveLink optical storage system

- Transfer to an Access database

Although a number of different media are involved here, the procedures used are similar.

> When printing and faxing, remember that the first printout is always the original; all subsequent issues are treated as copies. For example, if you first send the breakdown analysis as a fax and then make a printout, the fax is the original and the paper printout is the copy.

Reasons for Printout

The following situations are possible:

- The service or maintenance planner would like an overview of all the notifications that fulfill a certain criterion, and therefore requires a printout of the screen display.

- The service or maintenance planner would like to use the printed version of notification data as shop papers, in other words, as the basis for performing certain activities, for example, because:

  - Immediate action is required for a malfunction, without the activity being planned in an order first

  - The company does not use service or maintenance orders and is therefore unable to create shop papers from them

    In principle, the shop papers that are printed on the basis of the order are more detailed than those printed on the basis of the notification, since the order contains detailed service or maintenance planning.

- For verification purposes, the service or maintenance planner needs to see a notification exactly as it would appear in print, and therefore saves it in ArchiveLink.

- The service technician requires the data on site in his notebook rather than a paper printout, and therefore loads it from the SAP System to an Access database.

- The service or maintenance planner wants to send a notification to a service technician on site, who requires the shop papers urgently by fax.

Features

The following functions are available to you:

Printing and Faxing of Shop Papers

- Printing a notification in full [Page 257]

  You use this procedure to print out a notification with all its items at once.

- Printing a notification item [Page 258]

  You use this procedure to print out individual items for a notification.

- Printing shop papers for several notifications [Page 259]

  You use this procedure to print shop papers for several notifications at the same time.

- Viewing the print log [Page 261]

  You use this procedure to determine which parts of the notification have been printed.

- Faxing shop papers [Page 260]

  You use this procedure to fax a notification or particular notification items.

- Printing shop papers for notifications and orders at the same time

  If a notification and order have been assigned to one another, you can print all the shop papers for the notification and order at the same time. You can start the printing process from either order or notification processing. You can also print out all the notification and order data on one shop paper.

Additional Functions

- Archiving shop papers in ArchiveLink [Page 262]

  You use this procedure to store a notification or particular notification items in ArchiveLink, the optical storage medium in the R/3 System.

- Downloading notifications [Page 264]

  You use this procedure to view and process a notification using a PC on site.

Printing a Maintenance Notification in Full

1. Call up the notification in change mode.

   The screen *Change Notification: <Notification type>* is displayed.

2. Choose N*otification → Print → Notification.*

   The dialog box *Select Shop Papers* is displayed together with a list of all the shop papers that are possible for this notification type, and that you can print out.

3. Select the shop papers that you want to print out. Individual shop papers may already be selected on the basis of particular entries in the corresponding control tables. Check the other entries in the dialog box and change them where necessary.

   If you want to fax the shop papers, you must delete the output device and enter the fax number and country key of the recipient (see Faxing Shop Papers [Page 260]).

4. When you have selected all required shop papers, choose *Print/Fax.*

Result

The system saves the notification and prints the selected shop papers on the specified printer. Each item is printed on a separate page that always contains the notification header data in the first section. The notification is assigned the status *printed.*

You cannot simultaneously print and fax a certain shop paper. However, in the dialog box, you can determine whether each individual shop paper should be printed or faxed (for example, you can print the notification overview and at the same time send the activity report by fax).

Printing a Notification Item

1. Call up the notification in change mode.

    The screen *Change Notification: <Notification type>* is displayed.

2. Choose N*otification* → *Print* → *Item selection.*

    The dialog box *Print item: Selection* is displayed.

3. Select the item that you want to print shop papers for, and choose *Continue.*

    The dialog box *Select Shop Papers* is displayed, with a list of all the shop papers that are possible for this notification type, and that you can print out.

4. Select the shop papers that you want to print out. Individual shop papers may already be selected on the basis of particular entries in the corresponding control tables. Check the other entries in the dialog box and change them where necessary.

    If you want to fax the shop papers, you must delete the output device and enter the fax number and country key of the recipient (see also Faxing Shop Papers [Page 260]).

5. When you have selected all required shop papers, choose *Print/Fax.*

Result

The system saves the notification and prints the selected shop papers for each selected notification item on the specified printer. Each item is printed on a separate page that always contains the notification header data in the first section. The notification is assigned the status *printed.*

> If particular activities described in the activity report have already been performed and their completion has been entered in the system, the printout will contain a remark to that effect.

> If an item is printed out again, the system displays a warning message informing you that the item has already been printed. If you then print it out anyway, the title of the shop paper contains the word *Copy*. In this way you know that it is not the original shop paper.

Printing/Faxing Shop Papers for Several Notifications

1. Depending on the application component in which you are working, choose:

   – *Logistics → Plant maintenance → Maintenance processing*

   – *Logistics → Customer service → Service processing*

   The screen for maintenance or service processing appears.

2. Choose *Notifications → List editing → Change*.

3. Create a list of all notifications according to the required selection criteria. For more information about creating lists, see Working with Lists [Ext.].

4. In the list generated, select the notifications, for which you want to print shop papers, and choose *Notification → Print notification*.

5. The dialog box *Select Shop Papers* is displayed with the shop papers that can be printed and print information.

6. Select the shop papers that you want to print.

   Check all the information already entered by the system based on Customizing settings. Make changes as required.

   ➡

   To fax the shop papers, you must delete the output device and enter the fax number and country key of the recipient (see Faxing Shop Papers [Page 260]).

7. Choose *Print/fax*.

Result

The system prints or faxes the shop papers for the selected objects based on your specifications.

The selected objects are assigned the status *Printed*.

Faxing Shop Papers

1. Call up the notification in change mode.

   The screen *Change PM Notification: <Notification type>* is displayed.

2. Choose N*otification* → *Print* → *Notification.*

   The dialog box *Select shop papers* is displayed.

3. If you want to send **individual** papers to **different** recipients, simply select the desired shop papers, delete the output device if one has been entered and enter the fax number and the country key of the respective recipient for every shop paper selected.

   If you want to send **several** papers to one **particular** recipient, simply select the desired shop papers, choose *Collective fax* and enter the fax number and the country key of the recipient in the dialog box displayed.

4. Choose *Print/Fax* or *Continue.*

Result

The shop papers will be sent by fax. The notification is assigned the status *printed.*

   You cannot simultaneously print and fax a certain shop paper. However, in the dialog box, you can determine whether each individual shop paper should be printed or faxed (for example, you can print the notification overview and at the same time send the activity report by fax).

Viewing the Print Log

Use

As soon as a notification has been printed in full or individual items from it have been printed or faxed, the notification has the status *printed*. The parts that have been printed are listed in the print log. Therefore, if you want to print a notification or individual items from it, and the notification already has the status *printed*, you should always check in the print log who has printed what and when.

The output device in the print log shows you whether the shop paper was printed internally or sent by fax.

Procedure

1. Call up the notification in change mode.

    The screen *Change Notification: <Notification type>* is displayed.

2. Choose *Notification → Print → Display log*.

    The print log is displayed.

    If you delete an item from the notification, it is automatically deleted from the print log as well. If another printout of the item exists within the company, this can lead to inconsistencies under certain circumstances.

Archiving Shop Papers in ArchiveLink

Use

You can archive shop papers in ArchiveLink. ArchiveLink is the optical memory of the R/3 system. For more information on ArchiveLink, see BC - SAP ArchiveLink - Scenarios in Applications [Ext.]

Archiving Shop Papers

1. Call up the notification in change mode.

    The screen *Change Notification: <Notification type>* is displayed.

2. Choose N*otification* → *Print* → *Notification.*

    The dialog box *Select shop papers* is displayed.

3. Choose 🖼 *Select.*

    A dialog box is displayed.

4. Enter the archiving mode *Archive only* or *Print and archive* and choose *Continue.*

    You return to the dialog box *Select shop papers.*

5. Choose *Print/fax.*

    The system will archive the shop papers in ArchiveLink.

Displaying Shop Papers in ArchiveLink

1. Call up the notification in display or change mode.

2. Choose *Environment* → *Object links.*

A dialog box is displayed.

3. Choose the required object link.

Downloading a Notification

Use

Service technicians have an alternative to a paper printout of notifications. If they are using a PC on site and want to view and process the notifications that initiated their site visit, they can download notifications from the R/3 System to a Microsoft Access® database.

To do this, the relevant entry must have been made in Customizing.

>   ➡️
>
>   For this download, the R/3 System provides the data for the notifications; the
>   customer is responsible for the PC application used to process the data at the
>   customer site.

Prerequisites

To make such a download, the following hardware and software requirements must be met:

- Front-end server using Windows 3.1® or Windows NT®

- Microsoft Access®, Version 2.0 or higher

Downloading a List of Notifications

1. Depending on the application component in which you are working, choose:

   – *Logistics → Plant maintenance → Maintenance processing*

   – *Logistics → Customer service → Service processing*

   The screen for maintenance or service processing appears.

2. Choose *Notification → List editing → Change*.

3. Create a list of all the notifications according to the required selection criteria. For more information about creating lists, see Working with Lists [Ext.].

4. Choose *List → Access*.

   The system loads the list into the MS Access® database. From there, additional processing depends on the tools used.

Downloading an Individual Notification

1. Call up the notification that you want to download.

2. Choose *Notification → Print → Download*.

   The system downloads the notification into the MS Access® database. From there, additional processing depends on the tools used.

Sending of Short Messages Using Paging

Use

When processing notifications and orders, you can send short messages to one or more partners using paging. This is possible from various screens:

- Partner screen for the notification or order

- Notification or order header

- Graphical monitor for resource planning

Depending on where you are sending short messages from, you can reach different partners. The following partner types are available:

- Contact person

- User

- Personnel

- Customer

Integration

The components *SAPoffice®* and *SAPconnect* must be implemented to use the paging function. For more information, see *BC – Basis Services / Communication Interface.*

SAP provides a complete installation routine based on Install Shield. This can be used to install the required server programs on the communication server (Windows® 95, NT®). You should consult your certified SAP partner regarding extensions to ini-files.

Connection Between the Individual Components

```
                    ┌─────────────────────────┐
                    │   Notification / Order  │
                    └─────────────────────────┘
   Data transfer              │     ▲  Status confirmation
                              │  Event
                              ▼     ┊
                    ┌─────────────────────────┐
                    │  SAPoffice/SAPconnect   │
                    └─────────────────────────┘
   R/3 System                 │        │
          ▲            RFC     │        │   RFC
          │                    │        │
━━━━━━━━━━┿━━━━━━━━━━━━━━━━━━━━┿━━━━━━━━┿━━━━━━━━━━
          ▼                    │        │
   External                    ▼        │
   communication     ┌─────────────────────────┐
   server            │      Paging server      │
                     └─────────────────────────┘
                              │  Provider  ▲
                              │  interface │
                              ▼            │
                     ┌─────────────────────────┐
                     │     Paging provider     │
                     └─────────────────────────┘
```
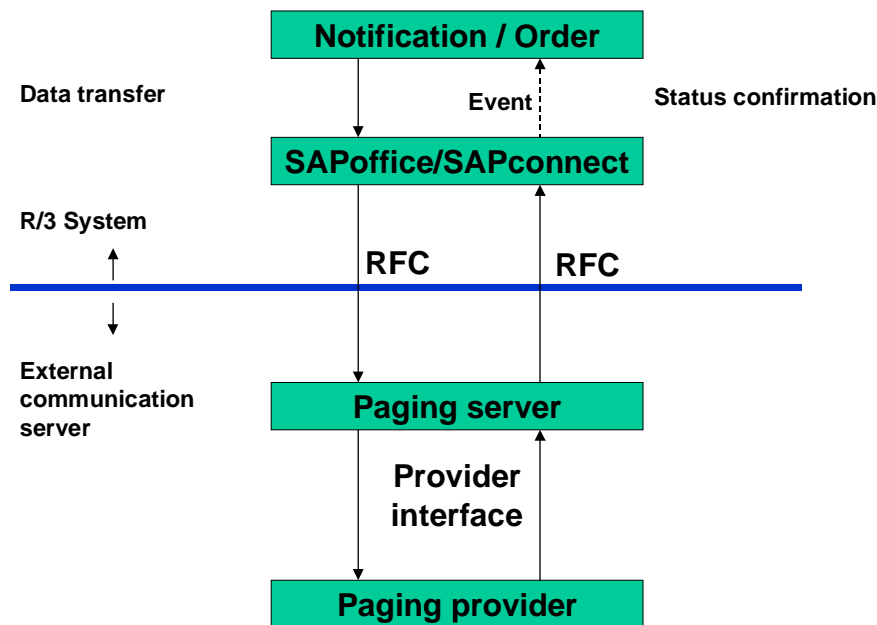
Prerequisites

General Prerequisites

To send short messages, you must define sub-types for the pager services in Customizing by choosing *Cross-Application Components → General Application Functions → Address Management*.

When defining sub-types, you should consider the information made available by the certified paging provider for the R/3 System. This includes, for example:

Country	Certified Paging Provider	Supported Paging Services
Germany	Balloon	Telekom: For example, D1 SMS, Skyper, Cityruf, Scall
		Mannesmann: D2 SMS
USA	RPA	MCI, Skytel

Prerequisites for Sending from the Partner Screen

From the partner screen, you can send short messages to partners of the following partner types:

- Contact person
- User
- Personnel

- Customer

The partner function, which you specify on the partner data screen, must be assigned to one of these partner types using the partner determination procedure. The following data must also be defined for the partners:

Contact person Customer	These partner types are linked to the central address management function. Communication type PAG must be entered in the address data for these partners under *Further communication*.
User	Communication type PAG must be entered in the user master record under *Further communication*.
Personnel	The personnel master record must be assigned to info type 105 (communication) and a system user name. Communication type PAG must be entered in the assigned user master record under *Further communication*.

You must also define the sub-types for the pager services, which are available to the partner, in each address or user master record and select one as the standard service.

Prerequisites for Sending from the Notification Header

To send short messages from the header screen, you must define in Customizing the partner function for paging in the partner determination procedure, which is assigned to the notification or order type.

- For notification types, choose:

  Plant Maintenance and Customer Service → Maintenance and Service Processing → Basic Settings → Partner Determination Procedure → Define Partner Functions, Order Types and Other Notification Parameters

- For order types, choose:

  Plant Maintenance → Maintenance and Service Processing → Maintenance and Service Orders → Partner Determination Procedure → Assign Partner Determination Procedure to Order Types

In the standard system, a short message is always sent to one user. This means that communication type PAG must be entered in the user master record under *Further communication*. You must also define the sub-types for the pager services, which are available to the partner, and select one as the standard service.

Prerequisites for Sending from the Graphical Monitor

To send short messages from the graphical monitor, you must define the following data in the personnel master record for the technician:

- You assign the personnel master record to a work center using *Organizational Assignment*.

- You enter info type 105 (communication) and assign the system user name. You must also define the sub-types for the pager services in the assigned user master record and select one as the standard service.

You enter the personnel master record in the accompanying order under *Technician*.

Sending of Short Messages Using Paging

Features

You can send short messages one after another to one or more partners. These short messages can also be predefined standard texts [Page 271].

The integrated partner determination function offers the following advantages:

- When you create a notification and specify a reference object, the partners from the reference object are copied to the notification.

- When you create an order and specify a reference object or make reference to a notification, the partners are automatically copied from the reference object or notification to the order.

In both cases, you do not need to enter the partners first, but can contact them directly.

It is only possible to send short messages if the notification or order has not yet been completed. In addition, the notification or order must not be flagged for deletion. You can restrict the sending of short messages with user statuses.

When the first short message is sent, the system status PAGE is set automatically.

The short messages are only sent when the notification or order is saved. After the message has been transmitted, the pager provider confirms various communication or paging statuses. The following statuses are possible:

- Triggered

- Successful

- Warning

- Error

> The pager provider does not inform the R/3 System whether the short message has reached its recipient.

The paging status can be displayed from the header screen, partner screen and graphical monitor. For the partner selected, you see all of the notifications and orders, from which short messages have been transmitted. The last status transmitted by the paging provider is displayed for each short message.

When using list editing, you can select notifications or orders according to particular paging statuses.

In the action log for a notification or an order, you can find an overview of all the short messages sent for each partner. For each address and message sent, the system generates an entry with the corresponding status.

All the short messages sent and the send history appear in the document flow for the notification and order. From there, you can also display the texts.

All short messages and their statuses are archived together with the notifications or orders.

Activities

Sending from the Header Screen

Choose *Paging*.

Sending from the Partner Screen

Select the required partner and choose *Paging*.

Sending from the Graphical Monitor

To send a short message with reference to the order, position the cursor on the order and choose *Paging*. The system proposes a standard text if one has been predefined for the order type.

To send a short message without reference to the order, position the cursor on the technician name and choose *Paging*. The system does not propose a standard text.

Sending of Messages Using the Internet and *SAPoffice®*

Use

When processing notifications and orders, you can send messages to one or more partners not only using paging, but also as:

- E-mail over the Internet

- Mail using *SAPoffice®*

Prerequisites

The prerequisites are the same as those for <u>sending short messages using paging [Page 265]</u>. However, note the following differences:

Depending on partner type, the following data must be entered in the address or user master record under *Further communication*:

• Paging	PAG
• E-mails over the Internet	INT
• Mails using *SAPoffice®*	RML

You must also define the sub-types for the pager services, which are available to the partner, in each address or user master record and select one as the standard service.

When sending messages, the system proposes this standard service automatically. If you use several different sub-types, the selection sequence is as follows:

• If sub-type PAG exists	Paging is always proposed
• If sub-type INT exists, but not sub-type PAG	The Internet is proposed
• If sub-type RML exists, but neither PAG nor INT	*SAPoffice®* is proposed

Use of Standard Texts

Use

You can use predefined standard texts when sending short messages. The system proposes the appropriate standard text depending on the notification or order type. You can change or supplement this standard text, and also extend it using a customer exit.

You can define one standard text for each notification or order type. The length of the text to be sent depends on the type of pager being used.

Prerequisites

1. You create standard texts using *Tools → SAPscript → Standard texts*.

    You can also use variable text symbols, which are replaced automatically when the short message is sent.

2. You assign the standard texts to the notification or order types in Customizing.

    –   For notification types, choose:

        Plant Maintenance → Maintenance and Service Processing → Notifications → Notification Types

    –   For order types, choose:

        Plant Maintenance → Maintenance and Service Processing → Maintenance and Service Orders → Functions and Settings for Order Types

Putting Notifications in Process

Use

Within the framework of notification processing, the meaning of the term "put in process" depends on whether the order processing component of the Customer Service or Plant Maintenance application components is active or not.

If order processing is **active**, the following applies:	If order processing is **not** active, the following applies:
• An order can be generated for a task that has been requested in a notification, and assigned to the notification.	• An order **cannot** be generated for a task that has been requested in a notification.
• You plan the tasks in detail in the order. The order forms the basis for performing the tasks. A notification that has been put in process means that someone has already taken over further processing of it.	• Since the order is missing as a means of documenting the work processing, you must document in the notification when the planning stage is finished, and that the tasks are now being or should be performed.
• You put the notification in process manually. However, this is not absolutely necessary. A notification can be created and then assigned to an order. If an order is created from a notification, the status *In process* is set automatically.	• You put the notification in process manually.

Activities

Call up the notification in change mode, and choose *Notification* → *Functions* → *Put in process.*

The status field now displays the abbreviation for the status *In process*.

Assignment of Notifications to Orders

Use

To plan and execute the tasks requested in a notification in detail, you need a service or maintenance order, to which the notification must be assigned.

Detailed planning means, for example, that the individual work steps are described in detail, the required materials and production resources/tools are specified, the budget and account assignment details have been defined for subsequent cost allocation, and permits are assigned. Once all the work steps have been executed, and the order thereby completed, the costs incurred are billed to the party responsible (for example, the cost center that owns the piece of equipment) and the order is completed.

When planning concrete tasks in the order, you can refer to several notifications or technical objects. For this, you can use object lists, which contain all the relevant notifications and technical objects.

On the one hand, you can combine several notifications that refer to a particular object in a single order. This could be the case, for example, if several object defects are to be repaired on one maintenance or service date.

On the other hand, you can combine several notifications that refer to different objects in a single order. This would be advisable, for example, if connected object defects need to be repaired on one maintenance or service date.

However, you can also create an order directly, without having to create a notification first.

> Technical findings, such as data regarding system downtimes, system statuses, and tasks can only be entered in the notification, not in the order. For more information, see Entry of Technical Findings [Page 290].

Features

To assign a notification to an order, which does not exist in the system, you can choose one of the following procedures:

- Creating an order from a notification in the background [Page 277]

  You create an order from the notification, but do not branch into it. Usually, the order is created in the background, using the existing notification data. You access this function using: *Order → Create → In background*.

- Creating an order from a notification for immediate processing [Page 278]

  You create an order from the notification, and branch to it in order to process it immediately. You access this function using *Order → Create → Direct*.

To assign a notification to an order, which already exists in the system, you can choose one of the following procedures:

- Assigning an order to a notification [Page 279]

  During notification processing, you can enter the number of the existing order in the notification. You can thereby assign an order to the notification.

Assignment of Notifications to Orders

- Assigning a notification to an order [Page 280]

   During order processing, you can enter the number of a notification. You thereby assign a notification to the order.

- Creating a notification for the order [Page 281]

   During order processing, you can create a notification.

You are also able to delete assignments.

- Deleting an assignment between notification and order [Page 283]

Activities

Once you have saved the assignment between order and notification, the object list for the order contains the number of the assigned notification, and the notification contains the number of the assigned order.

Whenever the notification is called up from the order, the system reads the current notification data, but does not copy any notification data to the order. This enables you to change the notification, even though it is assigned to an order. The order always reads the current status of the notification.

Worklist for Planned Maintenance

Purpose

You can generate a worklist for planned maintenance from maintenance planning.

You can combine several notifications that were generated from maintenance plans and for which joint processing makes sense in a maintenance or service order using the list editing function for notifications ("Worklist"). For example, you can combine all notifications for a certain building or all notifications for a certain work center.

> A specialist visits your company every three weeks and requires an analysis kit for some maintenance activities.
>
> Previously, the specialist received several orders in which the activities to be performed were described. The result of this was that business requirements analysis and completion confirmations were very awkward and time-consuming (for example, through a high number of printouts and completion confirmations for individual orders).
>
> You can combine all relevant notifications for the specialist in **one** order using the worklist. You can select the notifications according to work center, location, room or equipment, for example. The specialist receives only one order and less paper is wasted. This means that the processing and confirmation of the activities performed are greatly simplified.

Prerequisites

The following prerequisites must be fulfilled for this process:

- You have specified a maintenance plan category [Ext.] with a maintenance call object [Ext.] "maintenance or service notification" for the maintenance plan.

- You have assigned a task list to the maintenance item in the maintenance plan.

- In order to combine the notifications in an order, you must call up the notification worklist in Change mode.

Process Flow

1. You create separate maintenance plans with the maintenance call object "notification" for all planned activities in your company. To do this, you enter a task list in the maintenance item for the maintenance plan in which the activities are precisely described.

2. Using maintenance plan scheduling, the system generates a notification for each maintenance item of a maintenance plan when maintenance calls are due.

3. If you call up the list editing function for notifications in Change mode, you can display the notifications thus generated and select those that should be combined in an order ("worklist").

4. When you create an order from list editing, the selected notifications are combined as follows:

Worklist for Planned Maintenance

- The individual notifications are displayed in the object list for the order. You can identify the maintenance plan from which a notification has originated.

- If you have specified a task list in the maintenance item of a maintenance plan, the system copies the operations of the task list to the order. The sequence of the operations corresponds to the sequence of notifications in the object list.

5. You can print out and process the order with all operations.

6. You post a completion confirmation for the completed activities to the order.

The system will only copy the operations from the task list, if you combine the notifications together in an order using the worklist. The operations will not be copied if you manually include the notifications in an order.

Creating an Order from a Notification in the Background

1. Call up the notification in .

    The screen *Create/Change Notification: <Notification Type>* appears.

2. Choose *Notification → Order → Create → In background*.

    The system displays a dialog box containing fields for the order type and the main work center with plant. The order type is proposed based on the notification type, and the work center based on the piece of equipment or functional location entered. You can overwrite these default values.

    If there is no default entry for the work center, you must enter one.

3. Choose *Continue*.

Result

The system saves the notification, creates the order, and an object list where necessary. It then displays a corresponding message.

The notification now has the statuses *Order assigned* and *In process*. The new order number appears in the field *Order* on the header data screen for the notification.

The new order contains the basic dates and the reference object that you specified in the notification. The notification number appears in its object list.

When you save, the order, notification, and object list are saved simultaneously.

Creating an Order Directly from a Notification

1. Call up the notification in create or change mode [Page 200].

    The screen *Create/Change Notification: <Notification Type>* appears.

2. Choose *Notification → Order → Create → Direct*.

    The screen *Create Order* appears.

    - If you have not already done so, enter the plant and main work center, and choose *Continue* to display the central header data screen for the order.

    - If you have already entered the plant, choose *Continue* and the screen *Create Order: Central Header* appears.

3. Enter data as required.

    The order is released using *Order → Save*.

    The notification number is entered automatically in the object list for the order.

4. Save the order.

Result

The system saves the notification, order and object list. The notification is assigned the statuses *Order assigned* and *Notification in process*. The number of the assigned order appears in the field *Order* in the notification header.

If you save whilst in the notification, the order and object list are also saved and vice versa.

As soon as the notification and order have been assigned to one another, you can process the order from the notification and vice versa.

Assigning an Order to a Notification

1. Call up the notification in change mode [Page 200].

    The screen *Change Notification: <Notification Type>* appears.

2. Choose *Notification → Order → Assign.*

    The dialog box *Notification for Order* appears.

3. Enter the order number in the field *Order*. Once you have released the data, you can check
    the order number and view the order type and short text.

    If you have the correct order number, choose *Close* to assign the order to the
    notification.

Result

The system informs you that it has saved the notification and assigned it to the order. As a result,
the notification is automatically assigned the statuses *Assigned to order* and *In process.*

Assigning a Notification to an Order

1. Depending on the application component in which you are working, choose:

    –   *Logistics → Plant maintenance → Maintenance processing*

    –   *Logistics → Customer service → Service processing*

    The screen for service or maintenance processing appears.

2. Choose *Orders → Change*.

    The *Change Order: Initial* screen appears.

3. Enter the number of the order and choose *Header data*.

    The *Change Order: Central Header* screen appears.

4. Choose *Objects*.

    The *Object List for Order* screen appears.

5. Enter data as required.

6. Enter the number of the notification and choose *Enter*.

    If a reference object is specified in the notification, the number and short text for the reference object now appear in the object list.

    You can assign other notifications to the order. Enter one notification in each column of the object list as described above.

7. When you have entered all the notifications in the object list, save the data.

Result

The system saves the order, object list and notification. The system automatically enters the order number in the notifications, which are contained in the object list for the order. The notification also obtains the status *Assigned to order*.

Creating a Notification for the Order

Use

If you determine during the processing of an order that maintenance tasks need to be performed, for which a notification does not yet exist, you can enter a new notification from the object list for the order using the *Change order* function. This notification is automatically assigned to the order when you save it.

For more information about the functions in the object list for the order, see *PM - Maintenance Orders*.

Procedure

1. Depending on the application component in which you are working, choose:

   − *Logistics → Plant maintenance → Maintenance processing*

   − *Logistics → Customer service → Service processing*

   The service or maintenance processing screen appears.

2. Choose *Orders → Change*.

   The *Change Order: Initial* screen appears.

3. Enter the number of the order and choose *Continue*.

   The *Change Order: Central Header* screen appears*.*

4. Choose *Objects.*

   The *Object List for Order* screen appears. Several blocks are displayed on this screen. Each block contains fields for the notification number and the reference object numbers.

5. To create the new notification for a particular reference object, you can enter its number in the corresponding fields for the object list. It is then copied automatically to the new notification.

6. Choose *Edit → Create notification.* A dialog box appears, in which you enter the required notification type.

7. Choose *Continue.* The *Create Notification: <Notification Type>* screen appears.

8. Enter the notification in the usual way and save it.

Result

When you save, the order and notification are saved simultaneously. The notification is copied to the object list for the order. If you have entered a reference object in the notification, this is copied with its number and short text to the object list.

The notification obtains the status "Assigned to order".

> If you used this option to assign the notification and order to one another, you can delete the assignment (refer to Deleting an Assignment Between Notification and Order [Page 283]).

Creating a Notification for the Order

Deleting an Assignment Between Notification and Order

Use

It may be that a notification was inadvertently assigned to an order. If you no longer want a notification to be assigned to a particular order, you must remove this assignment from the notification.

⚠

You can only remove an assignment if the order and notification were created independently and only subsequently assigned to one another. If the order was created with reference to a notification, the system informs you of this.

You can no longer cancel an assignment once the order has been completed.

Procedure

1. Call up the notification in change mode [Page 200].

    The *Change Notification: <Notification Type>* screen appears.

2. Choose *Notification* → *Functions* → *Order* → *Delete assignment*.

    The system displays a confirmation prompt.

3. Confirm that you want to delete the assignment.

Postponement of Notifications

Use

A task requested using a notification should only be executed at a future date, which has already been defined. For this reason, the notification should be postponed until this date.

> A task can only be performed when a technical system has been shut down. A deferred revision of the technical system could be chosen as the time when the task should be performed.

Features

If the postponed tasks for this date are to be checked, planned again, and put in process, you - as a service or maintenance planner - can use the notification status and selection functions for notifications to request and evaluate a list of all the relevant notifications.

Activities

Call up the notification in change mode [Page 200], and choose *Notification* → *Functions* → *Postpone*.

The status field now displays the abbreviation for the status *Postponed*.

Notification Completion

Use

During notification completion, the notification and accompanying business scenarios are completed. "Completion" means that the notification is transferred with particular data to the maintenance history. The data can be used to evaluate previous tasks and to plan future tasks.

Some companies use the term "archiving" instead of "completion".

Integration

The data from the notifications is copied to the notification history [Page 286].

Prerequisites

You should only complete a notification once it has been processed completely. This means the following:

* All data relating to the reference object for the notification is present and correct.

* All relevant item data is present and correct.

* All relevant task data is present and correct.

* All tasks have been completed or released; there are no more outstanding tasks.

* All technical data relating to system breakdown and availability is present and correct.

The history can only be compiled usefully for future analysis if the notifications contain this data.

Features

When you complete a notification, the following occurs:

* The reference time is defined: The system proposes this based on the data in the notification, but you can overwrite it.

    The reference time is the date and time, at which the notification is listed in the history with the location and account assignment data valid specifically for the reference object.

* The system enters the notification in the history with the exact location and account assignment data that was valid for the reference object at the reference time.

* The notification is now blocked for changes, in other words, you can no longer change the notification data.

Activities

There are two ways of completing a notification:

* Directly in the change function (refer to Completing a Notification Directly [Page 287]).

* From the order, to which it is assigned (refer to Completing a Notification from the Order [Page 288]).

Notification History

Definition

The maintenance history contains important object-related technical data. This means that it contains information for each object on,

- what malfunctions occurred

- the causes of these malfunctions

- what findings were to be noted, and

- what maintenance activities were performed

The maintenance notifications form the basis of the notification history. Technical maintenance data can only be stored for long periods of time if maintenance notifications are used.

The maintenance history, together with the usage history (master data) and the order history (processing data), form the maintenance history.

For more information on the maintenance history, see *PM - Maintenance History.*

Structure

The following table illustrates which data is transferred to which part of the maintenance history:

Data	Section of the maintenance history
Master sketches Accessories Functional location	Usage history
Order - Costs - Materials Working methods	Order history
Notification	Notification history

Completing a Notification Directly

1. Call up the notification in change mode [Page 200].

2. Choose *Notification* → *Functions* → *Complete*.

   The *Complete* dialog box appears.

3. Check the information. Change it where necessary.

4. Choose *Complete*.

   The notification now has the status *Complete*.

5. Save this change using *Notification* → *Save*.

Completing the Maintenance Notification from the Order

1. Choose *Logistics → Customer service → Service processing* or *Logistics → Plant maintenance → Maintenance processing.*

   You reach service processing or maintenance processing.

2. Choose *Orders → Change.*

3. Enter the order number and call up the header data screen or the operation overview.

   For information on how to enter technical findings when completing the order, see Entering Technical Findings [Page 290].

4. Choose *Order → Functions → Complete → Complete (techn.).*

   The dialog box *Complete* is displayed.

5. Check the information in the dialog box and change it where necessary. If you want to complete the notifications contained in the object list at the same time, choose *Complete notifications.*

6. Choose *Complete.*

   The system completes the order technically, assigns the relevant status to it, and saves it.

   It completes all notifications with the appropriate status. If assigned notifications cannot be completed, a message is displayed by the system informing you of this.

7. Process these notifications accordingly and then complete them.

   You can do this either directly with the change function for notifications, or from the order.

   As before, call up the order using the change function, and choose

   Order → Functions → Complete → Complete notifications

   Once you save the order, the outstanding notifications are also completed.

Putting a Notification in Process Again

Use

If you have completed a notification and then later realize that data still has to be entered or changed, you can put the notification in process again.

Procedure

1. Call up the notification in change mode [Page 200].

2. Choose *Notification → Functions → In process again*.

Result

The system saves the notification and locks all the fields. If you call up the notification again using *Continue*, all the fields are ready for input again.

The notification now has the status *In process*.

Entering Technical Findings

Use

Technical findings, such as data regarding system downtimes, system statuses, and tasks are stored in the notification. However, you usually enter this data immediately before completing an order.

Notification Exists

You have created an order on the basis of a notification. When completing the order, perform the following:

1. Call up the order object list for processing from the notification.

    If a notification has not yet been assigned to the order, you can find and assign the notification by selecting the pushbutton *Notif. selection*.

    The system displays the notification that is assigned to the order.

2. Using *Notifications → Change*, you enter the technical findings in the notification and save the data.

    The system saves both the notification and the order.

Notification Does Not Yet Exist

You have created an order directly, and this means that no order exists yet. When completing the order, perform the following:

1. From the order object list, choose *Edit → Create for notification*.

    The system creates automatically a notification for the selected object in the order object list, and copies all relevant data from the order.

2. Enter the technical findings in the notification and save the data.

    The system saves both the notification and the order.

See also

Processing Different Notification Data [Page 209]

Entering Tasks [Page 234]

Deletion of Notifications

Use

You may want to delete a notification (for example, because the malfunction reported is covered by another malfunction report, or an activity report was inadvertently entered twice).

However, you cannot delete a notification directly online. Usually, you set a deletion flag in the notification, which informs the system that this notification can be deleted.

At certain intervals, an archiving program will be started in your company. This program checks the notifications with deletion flags, converts the deletion flags into deletion indicators, and then deletes the notifications from the database and copies them to an archive.

Prerequisites

Before you delete a notification, you should ensure it is no longer required.

Features

You can no longer change a notification once it has a deletion flag. It obtains the statuses *Deletion flag* and *Completed*. You can now only display it. For more information about notification statuses, see Status Management [Page 305].

When you set the deletion flag in the notification header, the individual tasks for the notification are also flagged for deletion.

You can reset the deletion flag, provided that it has not been converted to a deletion indicator.

Activities

To set the deletion flag, call up the notification in change mode [Page 200], and choose *Notification → Functions → Deletion flag → Set*.

To reset the deletion flag, choose *Notification → Functions → Deletion flag → Reset*.

See also:

Archiving of Maintenance Notifications (PM-WOC-MN) [Ext.]

Archiving of Service Notifications (CS-CM-SN) [Ext.]

Selection of Notifications

Use

There are a number of occasions when you will need system support in selecting notifications, tasks and items. For example, you may want to:

- Change or display a particular notification, but do not know the number.

- Change or display several notifications with particular characteristics.

- Perform specific functions simultaneously for several notifications with particular characteristics.

- Obtain an overview of all the notification tasks that fulfill certain criteria.

- Obtain a list of all the notification items that fulfill certain criteria.

Activities

As a result of the search you obtain either:

- A specific notification that the system offers directly for editing or displaying

- A list of several notifications, from which you can select one or more notifications for editing or displaying

You can display the notifications in either a single or multi-level list.

For more information about creating and editing lists, see Working with Lists [Ext.].

See also:

Execution of Functions for Several Notifications [Page 293]

Selecting Items, Tasks and Activities [Page 295]

Execution of Functions for Several Notifications

Use

In the change mode of the list editing function, you can select several notifications at once, and immediately execute a particular function for each of the notifications selected, in other words, without having to call up the individual processing screens for each notification.

Features

For example, you can perform the following functions for several notifications simultaneously:

- Printing

- Putting in process

- Completing

Activities

In the list that you generate using the list editing function [Ext.], select the required notifications and call up the function as follows:

Function	Menu Path	What You Should Know:
Print notifications	*Notification* → *Print notification*	
Put notifications in process	*Notification* → *Put in process*	Putting in Process of Maintenance Notifications [Page 272]
Postpone notifications	*Notification* → *Postpone*	
Complete notifications	*Notification* → *Complete*	Completion of Notifications [Page 285]
Create an order for several notifications	*Notification* → *Create order*	The system creates **one** order for **all** selected notifications. Creating an Order for Several Notifications [Page 294]
Download notifications	*Notification* → *Download notification*	

Creating an Order for Several Notifications

1. Call up a list of notifications that have been created using list editing [Ext.].

2. Select the notifications for which you want to create **an** order, and choose *Notification* → *Create order*.

   The initial screen for creating orders is displayed.

3. Check the data and choose *Header data*.

4. If notifications have different reference objects, the system copies one of the reference objects in the notification header and all others automatically into the object list.

   The system also automatically copies the notifications that you have selected in the list into the object list for the order.

5. Save the newly-created order using *Order* → *Save.*

Selecting Items, Tasks and Activities

1. Depending on the application component in which you are working, choose:

   – *Logistics → Plant maintenance → Maintenance processing*

   – *Logistics → Customer service → Service processing*

   The screen for maintenance or service processing appears.

2. Choose the required function:

Function	Menu Path
Selecting items	*Notification → List of items → <Change/Display>*
Selecting tasks	*Notification → List of tasks → <Change/Display>*
Selecting activities	*Notification → List of activities → <Change/Display>*

3. In the fields provided, enter the criteria that the system should use to find items, tasks or activities.

   The selection process is the same as described in Working with Lists [Ext.].

   You use the selection criterion *Reference field for monitor* to determine the criterion to which the monitor column refers in the list to be generated.

4. After you have entered data as required, choose *Program → Execute* or, if you want the list printed out, *Program → Execute and print*.

   A list appears, which contains all the notifications that meet the required criteria.

Result

From here you can:

- Call up notifications

   To display or process data for notifications, items, tasks or activities, call up one of the menu functions available. You call up the notification data screens using *Goto,* and the functions for processing the notification using *Notification*.

- Display a portfolio [Page 296]
- Call up graphics [Page 297]

The monitor column shows which notifications, items, tasks or activities are escalating, in other words, which notifications, items, tasks or activities should already be in process or completed by now, but are not. The notifications, items, tasks or activities with a red light are critical and should be processed with top priority.

Displaying the Portfolio

If you want to see the selection statistics, call *List* → *Portfolio graphics*.... The system displays a graphic illustrating the relationship between the column selected and the total number of notifications and/or notification items.

For more information, see *BC - SAP Graphics: User's Guide*.

Calling up Graphics

If you want to display a frequency distribution graphic for a particular object, select the column and select *List* → *Graphic....* The system displays a graphic of the frequency distribution.

For more information, see *BC - SAP Graphics: User's Guide*.

Document Flow

Use

The document flow shows the development of a PM or CS document and provides an overview of preceding and subsequent documents and their status.

The individual documents form document chains. All preceding and subsequent documents will be shown for each document you call up.

Document	Date	Status
Contract 40000149	30.03.1998	open
. Notification 300001256	23.03.1998	in process, assigned to order
.. Order 905580	23.03.1998	open, pre-costed
.. Sales order 2155	24.03.1998	completed
… Delivery 80001132	24.03.1998	completed
…. Goods movement 49008835	24.03.1998	completed
…. Invoice 900001082	24.03.1998	completed

Integration

The document flow includes notifications and orders for the application components Customer Service (CS), Plant Maintenance (PM) and Quality Management (QM).

Within the logistics supply chain, the document flow is integrated with the application components

- Materials Management (MM)

  for example, via purchase requisitions or goods receipt documents, and

- Sales and Distribution (SD)

  for example, via invoices or credit memos.

Features

You can display the following objects in the document flow:

- Service contract
- Maintenance plan item
- Service notification
- Service order
- Paging object (for example, a document)

- Purchase requisition

- Purchase order

- Sales order

- Confirmation in time

- Debit memo request

- Debit memo

- Returns

- Returns delivery

- Credit memo request

- Invoice

- Invoice cancellation

- Credit memo

- Credit memo cancellation

- Delivery

- Goods movement

- Goods movement cancellation

Displaying Document Flow for Notifications or Orders

1. Depending on the application component in which you are working, select one of the following menu paths:

- *Logistics → Plant Maintenance → Maintenance Processing*

- *Logistics → Customer Service → Service Processing*

2. Call up the notification or order in the display or change mode.

3. In the notification or order, use the menu bar sequence *Extras → <Notification documents/Order documents> → Document flow*.

    The *Document Flow* screen appears.

    ➡️

    If object links already exist for a notification or order, the dialog box *Display Object Links* will first be displayed. You can display objects that are linked to the notification or order by selecting the relevant object type and choosing *Select*.

4. You can select the desired document and display in it in the *Document Flow Display* screen using he menu bar sequence *Environment → Display document*.

5. If object links already exist for a notification or order, the documents are highlighted in green in the list. You can display objects that are linked to the notification or order by selecting the relevant object type and using the menu bar sequence *Environment → Object links*.

Document Selection

Use

This function enables you to display a specific document and its position within the document flow.

You can for example search for an invoice using the invoicing number, for a sales order using the sales document or for a service notification using customer data.

Features

In the *Document Flow Display* screen, you can specify criteria for selecting documents as well as filter criteria for displaying data.

If you select the field *Object links,* the system will display the existing links in a dialog box. This concerns documents that are not directly part of the document flow but that are assigned to a specific document (for example because they were used as a copy model or reference object).

Activities

Use the menu bar sequence *Service processing → History → Document flow list* to display the document selection.

After you have made your selection the *Document Flow* screen is displayed. You can select the desired document in this screen and use the menu bar sequence *Environment → Display document* to display the detail data or the sequence *Environment → Object links* to display the existing object links.

Obtaining Maintenance Contract Information from the Document Flow

Use

Using this function you can call up all necessary information on the maintenance contract within the document flow on the screen *Display document flow*.

Integration

The system automatically branches out into the PM - Maintenance Planning function.

Prerequisites

A maintenance contract must be shown in the document flow.

Features

You can call up the following information:

- Maintenance items
- Maintenance calls
- Generated orders and notifications

Activities

Select the maintenance contract in the list of documents. Then use the menu bar sequence *Environment → Maintenance contract*.

Evaluation of Notifications

Use

The data of completed notifications and orders is of great importance for the effective planning of future maintenance activities, and for a meaningful analysis of past problems, malfunctions and activities.

This data is stored on a long-term basis in the maintenance history, where it is available for evaluations.

Features

The following options are available to you in the R/3 System for evaluating maintenance data:

- You can evaluate notifications separately (see below, and *PM - Maintenance History* for historical notifications).

- You can evaluate orders separately (see *PM - Maintenance Orders*).

- You can perform a comprehensive evaluation of maintenance processes using key figures (see *Logistics Information System*).

Advantages of Evaluating Historical Data

The analysis of past maintenance activities, especially those prompted by a malfunction, is of great importance for the smooth processing of business operations. Only in this way can weak points be recognized and the appropriate measures taken to avoid the same or similar malfunctions reoccurring.

Weak Point Analysis

If the analysis of malfunction reports reveals that among the same objects, those that were manufactured in a particular year break down the most frequently, then you should consider exchanging those objects specifically.

If the analysis of the malfunction reports reveals, for example, that the gaskets always become porous after a particular period of operation, then you should ensure that these gaskets are always replaced shortly before the end of this time period as a preventive measure.
You should perform evaluations of this sort using the Plant Maintenance Information System. There, you can obtain meaningful results with little effort, as all the important key figures are already defined.

Notifications as a Basis for Planning

Historical notifications can actively support you as a maintenance planner during the processing and planning of new notifications, as they can help you to answer the following questions:

- Has a similar malfunction occurred before?

- Has a similar request been made before?

- How was the maintenance notification processed in the corresponding order at that time? What maintenance task lists and work centers were used? How long did it take to process? What were the ensuing costs?

Evaluation of Notifications

If there has already been a similar malfunction report or maintenance request in the past, then you can use the notification that was created at that time as the basis for planning the new notification.

Activities

1. You have the following options for analyzing historical notifications in the *Maintenance Processing* screen:

   − *Notifications* → *List editing* → *<Required processing mode>*

   − *History* → *Notification list* → *< Required processing mode>*

2. Select the field *completed* in the first line of the selection criteria. Enter all further relevant criteria and start the evaluation.

   You can perform the evaluation of maintenance data either for a particular technical object, for a number of particular objects, or also evaluate data independently of individual objects.

   However, when doing this, you should note that evaluations with selection criteria other than technical objects can sometimes have very long runtimes, because the system can no longer directly access the history using the object numbers.

Status Management in Notifications

Use

The individual processing steps during the planning and execution stages for notifications and orders, represent business transactions in the system that a user performs for the notification or order. Each of these business transactions is documented in the SAP System by means of a status.

Only a few of the possible statuses need to be set at a particular point in time. If one of these statuses is missing, the system refers you to it before you can perform any further functions.

A notification can have two types of status:

- System status

    System statuses are set when you perform a particular function for the notification. For example, you perform the system function "Print notification", which sets the status *printed* for the notification.

- User status

    User statuses enable you to further limit the functions that are permitted for a notification due to a system status. You can assign and delete user statuses directly if you have the authorization for doing this.

Prerequisites

System statuses are preset by SAP and **cannot** be changed.

User statuses are defined by the system administrator within a status profile for notifications in Customizing for Plant Maintenance and Customer Service.

Displaying a Status

To execute the individual functions in the table, call up the notification in change or display mode.

Function	Tab page/Symbol	What you should know
Displaying the status for a notification	Status field above the tabstrip	You can see the current system status to the left of the status field while the current user status is located to the right of this field. If no user statuses can be assigned for the notification, this row is not displayed.
		The current status indicates the processing phase of the notification.
		The status field also contains the task status [Page 235]. As long as at least one notification task is *still outstanding* or has been *released*, the status field contains the status *Outstanding task(s) exist(s)*. While this status is set, you cannot complete the notification.
Displaying system status and user status with short text	🛈 *Status detail*	All active system statuses of the notification are displayed in the column *System status.*
		You can see the user status in the columns *Status with status number* and *Status without status number* (see Assigning User Status [Page 309]).
Displaying task status	*Tasks*	The current task status [Page 235] is located in the respective task line.
		If you want to see detailed information for a task, select the task and choose 🛈 for it.
Displaying total status overview	🛈 *Status detail* and then *Extras → Status*, and then *Extras → Overview*	You can see which processing steps have already been performed.
		All active and inactive system and user statuses for the notification are displayed.

Displaying statuses that can be assigned	🚹 *Status detail* and then the tabstrip *BusMgt transactions*	You can see which processing steps are currently allowed or not allowed. By selecting *Transaction analysis*, you can find out which business transactions resulted in which statuses.
Displaying change documents for the status	🚹 *Status detail* and then *Change documents→ To status*	This enables you to see who set a status when using which function.
	Extras → Notification documents → Action log.	
Displaying change documents for all statuses	🚹 *Status detail* and then *Change documents→ All*	You see a list of all the statuses that have been set or already reset.
	Extras → Notification documents → Action log.	

Assigning System Statuses Automatically

Use

The system status of a notification is always assigned automatically when you perform the corresponding functions.

Procedure

1. Call up the notification in create or change mode.

2. The following table shows a number of statuses and the function which causes the status to be set:

Status	Menu path	See
Notification printed	*Notification → Print → <nn>*	Shop Papers for Notifications [Page 254]
Notification in process	*Notification → Functions → Put in process*	Putting Notifications in Process [Page 272]
Order assigned	*Notification → Functions → Order → Assign*	Assignment of Notifications to Orders [Page 273]
Notification completed	*Notification → Functions → Complete*	Completing Notifications [Page 285]

Setting/Resetting User Status

Prerequisites

In the Customizing function for the Plant Maintenance and Customer Service application components, you have

- Defined status profiles for notifications

- Assigned the status profiles to notification types

You can define a user status that applies to the whole notification as well as to tasks. Moreover, you can also assign a status number to the user status. This defines the sequence in which you can set the user status. You will find more information on status numbers in Customizing.

Procedure

1. Call up the notification in create or change mode.

    The current system status and current user status are located respectively to the left and right of the status field above the tabstrips.

2. Choose 🖌.

    A dialog box is displayed. The user status for which you have assigned a status number in Customizing appears in the upper group box, while the user status without a status number appears in the lower box.

3. To set a user status, select the required status.

    You can assign more than one status to a notification simultaneously, but you can only assign one status with a status number.

4. To reset a user status, cancel the selection.

    You can only set a user status with a status number to inactive by setting another user status with a status number.

5. Choose ✔.

    This takes you back to the initial screen.

    If you want to see both the system status and user status at the same time, choose 🗎 *Status detail*. You can also set or reset the user status here. For more information, see Displaying Information on Status [Page 306].

6. Save the notification.

Entering Responsibilities (Workflow Connection)

Purpose

Many areas of a company's organization are often involved in the planning and execution of maintenance tasks. The SAP Business Workflow enables these cross-functional processes to be controlled and processed automatically.

Using this tool, you can coordinate the persons involved, the steps necessary and the data to be processed in such a way that lead times and business process costs are optimized, and the quality and the transparency of processing are enhanced.

A detailed description of SAP Workflow Management can be found under *SAP Business Workflow.*

Process Flow

Maintenance notifications also play an important part within the framework of this Workflow connection. If SAP Business Workflow Management is active in your company, responsibilities and time frames are defined for particular business processes. When a certain event occurs, for example, when a maintenance notification is created, the system automatically informs the responsible company areas or persons and provides ready-defined steps.

The *Plant Maintenance (PM)* application component offers a workflow model, that represents the business process according to the following steps:

- Processing maintenance notifications

- Performing tasks

- Completing maintenance notifications

The workflow model represents the following scenario:

When a maintenance notification is created and SAP Business Workflow Management is active, the system recognizes the event "created" (= notification created) by means of status management. This event starts the workflow. For the task "Process notification", the system searches for possible responsible areas or persons and sends a work item to their inbox. A processor can display who received the notification as a work item (menu *Environment → Object links*) in the notification. As soon as one of the responsible persons has started processing the notification, the work items are deleted from the inboxes of the other responsible persons.

A workflow is then put in process for the processing of tasks. Once these tasks are completed, the relevant work items are deleted from the inbox. When all tasks are completed, the notification is assigned the status "all tasks completed". The event "all tasks completed" is then created. This event starts the workflow "complete notification".

The business object types available in the standard system are described online. Select *Tools → Business Workflow → Development*, and then *Definition tools → Object repository.* The business objects are under *Plant Maintenance - Maintenance Order Management - Maintenance Notifications.* You can obtain information on an object by clicking on it twice. BUS2038 refers to notifications while QMSM refers to tasks.

Support Line Feedback (SV-FDB)

Purpose

The SAP Support Line Feedback allows SAP users to contact their support group directly from within the SAP System. The support group can consist of the Customer Competence Center (CCC) or the SAP support group.

- SAP users can enter their inquiry or problem on a simple entry screen and send it to their responsible support group. To create notifications, they do not have to log onto another system.

- The responsible support unit may be able to process the notification more effectively. While an SAP user is recording a notification, the SAP System automatically enters the system data in the notification, which is needed for efficient processing.

- The CCC is linked directly to SAP. Employees in the CCC can forward the notifications in their system directly to SAP. They do not have to log onto the SAPNet - R/3 Frontend separately.

You can use the feedback notifications to directly link an SAP end user to:

- The Customer Competence Center (CCC)

- SAP

Features

The Support Line Feedback is supported by the following functions:

- Notifications in the SAP System: Tools to process and manage problems efficiently. Since these notifications are fully integrated in the SAP System infrastructure, potential interface problems are eliminated. To be able to use the functions in the Support Line Feedback effectively, you should be familiar with the notifications in the SAP System.

- The SAPNet - R/3 Frontend: an SAP-based service system that is available to all SAP customers worldwide as a central SAP installation. This system is the technical interface between your SAP System and SAP.

Support Line Feedback (SV-FDB)

Purpose

The SAP Support Line Feedback allows SAP users to contact their support group directly from within the SAP System. The support group can consist of the Customer Competence Center (CCC) or the SAP support group.

- SAP users can enter their inquiry or problem on a simple entry screen and send it to their responsible support group. To create notifications, they do not have to log onto another system.

- The responsible support unit may be able to process the notification more effectively. While an SAP user is recording a notification, the SAP System automatically enters the system data in the notification, which is needed for efficient processing.

- The CCC is linked directly to SAP. Employees in the CCC can forward the notifications in their system directly to SAP. They do not have to log onto the SAPNet - R/3 Frontend separately.

You can use the feedback notifications to directly link an SAP end user to:

- The Customer Competence Center (CCC)

- SAP

Features

The Support Line Feedback is supported by the following functions:

- Notifications in the SAP System: Tools to process and manage problems efficiently. Since these notifications are fully integrated in the SAP System infrastructure, potential interface problems are eliminated. To be able to use the functions in the Support Line Feedback effectively, you should be familiar with the notifications in the SAP System.

- The SAPNet - R/3 Frontend: an SAP-based service system that is available to all SAP customers worldwide as a central SAP installation. This system is the technical interface between your SAP System and SAP.

Notification Processing in the Customer Competence Center

Purpose

SAP users can create notifications in their SAP systems at any time, to send inquiries, problems, or confirmations to their relevant Customer Competence Center (CCC).

Process Flow

To create a notification, the SAP user records a short text and long text. All other important information needed to process the notification is supplied by the SAP System (for example, installation number, release, current transaction, support package). This information enables the CCC to reply to the notification quickly and effectively. This information consists of user-independent data that can be displayed at any time while creating a notification.

To send the notification, the user enters his or her user ID and password. A notification is then automatically created in the CCC's SAP System. The employees in the CCC can than process the notification in their SAP System.

If the CCC employee who is responsible for processing a notification cannot provide a solution, he or she can forward the notification to SAP via a bi-directional interface. The notification's processing status at SAP is updated in the notification.
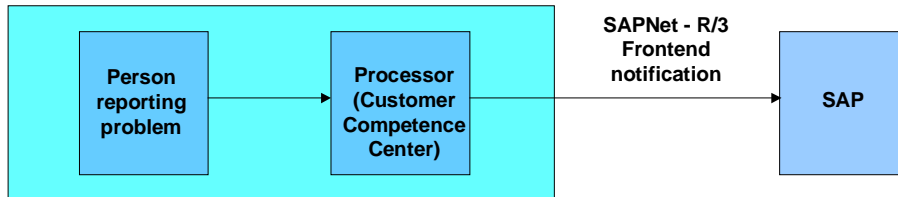
With respect to the flow of information, a distinction is made between the following persons:

Person reporting the problem: The person confronted with the problem, who reports it

Processor: A CCC employee who is responsible for processing incoming notifications

Recording Problems

Procedure

1. Choose *Help → Feedback*.

2. Specify the component and enter a short text and long text.

3. Save/send your notification.

You can display the associated system data by choosing the corresponding icon.

The logon screen of your Customer Competence Center's system appears.

4. Enter your user ID and password.

A dialog box appears displaying the notification number and transmission status.

Result

The transmitted problem is created as a notification in the CCC system.

Processing Notifications

Use

The persons responsible for processing notifications receive mails in their inboxes or worklists, informing them that notifications need to be processed. They can also use the search function to display an overview of all notifications for which they are responsible for processing.

A notification can be called up for processing in the following ways:

- Using your workflow inbox

- Using your worklist

- Changing the notification directly (provided the notification number is known)

Procedure

1. Depending on how you want to process the notification, choose one of the following options:
    - *Inbox → Inbox*
    - Worklist: *Notification → Change data*
    - *Notification → Change*

2. If you have not been specified as the notification processor, enter your name in the *Coordinator* field.

3. Display the notification long text by choosing the *Long text* tab.

4. Search for internal notes by choosing *Solution database* in the action box.

5. Search for SAP notes by choosing the *Notes* tab.

6. Once you have found a suitable note, choose *Create note* in the action box.

7. Enter the note number and note short text in the dialog box and then choose *Continue*. You can then display the note.

The remaining steps are optional.

8. If you placed a telephone call, you can document the details of the call by choosing *Log telephone call* in the action box.

9. If you want to record internal notes for the notification, choose *Create note* in the action box.

10. If you want to forward the notification after checking the subject matter, enter a coordinator and save the notification.

Processing Notifications

Sending a Notification to SAP

If the CCC cannot solve your problem, proceed as follows:

1. Choose *Info for SAP* in the action box.

2. Enter a problem description for SAP.

3. Choose *Send to SAP* in the action box and then save your data.

A notification is created at SAP. The notification at the CCC receives the status *SUB* (subsystem).

Updating Notifications

Use

The SAPNet - R/3 Frontend is essentially a passive system. This means that the CCC system must trigger the retrieval of any newly created data (for example, notes, replies, etc.) from the SAPNet - R/3 Frontend.

Procedure

To update all of the notifications that have been forwarded to the SAPNet - R/3 Frontend, proceed as follows:

1. Choose *Worklist → Refresh notif. → Manually*.

The system checks your SAPNet user. This means that you can only update the notifications for which you have the corresponding authorizations in SAPNet.

To *automatically* update all notifications that have been forwarded to the SAPNet - R/3 Frontend, have your system administrator proceed as follows:

1. Choose *Worklist → Update notifications → Plan batch job*.

By planning a batch job, you can have the system update the notifications forwarded to the SAPNet - R/3 Frontend at regular intervals. The job uses a standard user to log on to the SAPNet - R/3 Frontend. This user should have all SAPNet - R/3 Frontend authorizations for notifications.

To update a single notification, proceed as follows:

1. Choose *Notification → Change*.

2. Choose the *Update notifications* function in the action box.

Processing a Reply from SAP

Use

When you call up a notification, you can first check whether the notification was changed in the SAPNet - R/3 Frontend since the last update. If so, you must update the notification by choosing *Update notification* in the action box.

You can find SAP's reply by choosing the *Long text* tab. To view any assigned notes, choose the corresponding tab. If SAP's reply is not conclusive, you can send the notification back to SAP for further processing.

Procedure

If the Customer Competence Center is satisfied with SAP's solution, the notification can be confirmed as follows:

1. Call up the notification.

2. Choose *Confirm notification* in the action box.

Search Functions in the Customer Competence Center

Use

The system provides separate search functions for both SAP notifications and tasks. You can call up these search functions by choosing *Worklist → Notification → Change data* or *Worklist → Task → Change data*. The system then switches to the change mode.

Configuring the Support Line Feedback

Procedure

You must maintain the following attributes manually:

1. Choose *System settings → SAP Installation*.

2. Maintain the following data:

- SAP installation numbers

- SAP operating system, SAP database system, SAP Frontend, SAP Release, SAP system type, SAP add-on ID, SAP add-on release

- SAP URLs for calling up the note search in SAPNet

Choose *Environment* to maintain the following value:

- Coding for SAP notifications (QM catalog)

Direct Link to SAP Support

Purpose

With a direct link to SAP, users can also record notifications, inquiries, problems, or confirmations in their SAP System at any time.

In this case, the notification is sent directly to SAP and not to the Customer Competence Center. To create a notification, the user enters his or her user ID and password. The notification is then created in the SAPNet - R/3 Frontend, from where it can be sent to SAP.

Process Flow

Notification Creation (by Person Reporting Problem)

This procedure for creating notifications is the same as the one for processing notifications via the CCC. In this case, however, the person reporting the problem does not send the notification to the CCC; instead, he or she creates it in the SAPNet - R/3 Frontend.

Notification Processing (by Notification Processor)

For notification processing, the person responsible logs on to the SAPNet - R/3 Frontend and checks the existing notifications. This person can then forward the notifications directly to SAP or confirm them if they were solved.

Claim Management

Purpose

Things like delivery difficulties, price variations, and unforeseen capacity bottlenecks can cause your project to vary from what you planned. In such cases, the contracting parties need to establish who is responsible for the variance. You can use Claim Management to do this. Claim Management ensures that subsequent claims, resulting from variances, against the contract partner can be prepared and submitted at the appropriate moment, or claims by the contract can be headed off.

The Project System supports Claim Management using a notification type called "claim". You use these notifications to document variances from your project plan, name the person responsible, and initiate follow-up activities. The following are among the points you enter in the claim:

- Cause of the variance

- Person or group responsible

- Costs arising from the variance

- Actions and tasks to be initiated because of the variance

The integration of unit costing with the claim and the link to workflow functions in the R/3 System ensure efficient Claim Management execution.

Features

Creating and Displaying Claims

When you detect a variance from your project plan, you create a claim in the R/3 System or using an Internet application. This means you can document variances either at your R/3 work station, or at any computer that has Internet access. This makes claim entry easy and convenient. You can enter claims at a construction site, when traveling, and so on. The flexible user interface makes things even easier.

See Creating Claims [Page 324] and Entering Notifications in the Internet [Page 49]

You can enter details of the claim using long texts. In addition to the notification header long text, four other long text categories are available. You can use them to structure the information on the claims. For example, you can enter reasons for the variance from the project plan and the action to be taken as a result in different long text types. You can give the long text types any names you like. The facility for accessing information per long text type enables you to target information selection.

See Entering Notification Long Texts [Page 332].

You can add additional, detailed information to the claim in the form of business documents or DMS documents.

You can access all the information you define for a claim at any time, using the R/3 System. You can also access the most important information using the Internet. This ensures that everyone involved in the project can obtain information about claims relating to it.

Processing Claims

As claims usually cause additional costs, you can enter the costs you expect to arise either when you create the claim, or later, when more precise information is available. The following options are available:

- Enter the estimated costs manually.

- Create a unit costing from the claim or link it to an existing unit costing.

You can also enter the costs demanded and accepted manually.

Status management and workflow are two more high-performance tools you can use to process claims in the R/3 System. The link between claim management and status management means that you can make processing of a claim dependent on its status. You might, for example, stipulate that a claim cannot be closed until all the measures relating to it are complete.

See Status Management for Notifications [Page 541] and Status Management for Measures [Page 562]

Using workflow enables you to have information distributed automatically within your business. If, for example, you create a claim that requires approval, a work item automatically appears in the inbox of the person who must give that approval.

See Approval Requirement for Notifications [Page 526], Using Workflow to Process Notifications [Page 508] and Using Workflow to Process Tasks [Page 481]

The system documents all changes to the claim in the action log.

See Action Log [Page 525]

Once you have processed and closed your claim, you can archive it. A deletion program deletes the database records for claims successfully archived.

See Archiving Claims [Page 362]

Evaluating Claims

The worklists for notifications and tasks include an overview of the claims to be processed and the tasks associated with them.

For detailed evaluations of claims, go to the information system and access the overview reports for the claims.

As you can assign the claim to a project or WBS element either when you create the claim or later, you can display all the claims created for a project/WBS element in the information system.

See Evaluating Claims [Page 361]

You can use an evaluation program to display the data for claims already archived.

See Archiving Claims [Page 362]

Creating and Processing Claims

Prerequisites

You can apply the preconfigured settings we supply to Claim Management, so that there is no need for any customizing. However, if the preconfigured settings do not meet your requirements, maintain the following settings before you use Claim Management:

You want to:	What You Should Know	Menu Path
... Define a new notification type [Page 388]	The standard system we deliver contains two types of notification. The **claim on customer or vendor** is a claim made by your business against another business involved in the project. The **claim by customer or vendor** is a claim made against your business by another business involved in the project. You can create additional notification types if required.	*Project System → Claim → Notification → Create Notification → Notification Type → Define Notification Types*
... Define a number range for the notification type	A number range has been assigned to one or more notification types. When you assign a number range to the claim, the procedure depends on whether a number range has already been assigned to a notification type. **Number range is already maintained for a notification type** Execute transaction SM29. This takes you to the screen *Tables - Model Transfer*. In the *Command File* field, enter the file *p46c_clm_mel*. The system copies the customizing settings, but not the number ranges, from client zero to your client. Go to customizing and maintain the number range for the claim type. **No number range has been maintained.** Execute transaction QCCN. This takes you to the screen *Tables - Model Transfer*. The Command File field is already filled. Confirm the prompt. The system copies the number range object from client zero to your client. Now carry out transaction SM29, proceeding as described above.	*Project System → Claim → Notification → Create Notification → Notification Type → Define Number Ranges*

... Configure screen templates for your notification types	The information groups in the notification are assigned to particular registers and screen areas. Configure the screen templates to suit your requirements.	*Project System → Claim → Notification → Create Notification → Notification Type → Define Screen Templates*
... Maintain catalogs for claim entry	When creating a claim, you need to fill a number of input fields. The system offers a number of input options for these fields. The number and type of input options is determined by **catalogs**, which you create yourself. For example, you create a catalog that lists situations that can lead to variances from the project plan (such as human error or force majeure) or possible error locations (such as construction sites).	*Project System → Claim → Notification → Create Notification → Notification Type → Maintain Catalogs*
... Define a report structure	As your catalogs can be used for all notification types in the R/3 System, the code groups permitted in each catalog are assigned to a particular notification type by means of a report structure. For more information, see Report Structures [Page 568] and Changing Report Structures [Page 570].	*Project System → Claim → Notification → Create Notification → Notification Content → Define Report Profiles*
... Define a partner structure for a notification type	You use the partner structure to determine which partner roles (such as ordering party or person responsible) are permitted or required for claim processing.	*Project System → Claim → Notification → Create Notification → Partner → Define Partner Structures*
... Stipulate priority types for notification types	The system uses the priorities assigned to a relative start and finish date to determine the desired start and finish dates for a claim, taking the entry date as its starting point.	*Project System → Claim → Notification → Notification Processing → Response Control → Define Priorities*
... Define codes for long texts	You can assign four different long texts to a claim, each with a different description. You assign a catalog, code group, and code to each long text.	*Project System → Claim → Claim-Specific Settings → Codes for Detailed Long Texts*

Procedure

1. Choose *Logistics* or *Accounting → Project System → Notifications → Create Claim.*

   This brings you to the *Create Claim: Initial Screen*.

2. Enter the *Notification Type* and, if required, the *Partner Type*.

Creating and Processing Claims

You do not have to determine the partner type now. If you decide to do it later, do so in claim processing by choosing ⊞ *Change Partner Type.* Among other things, the partner type determines which reference documents the system offers in claim processing. If you do not specify a partner type, the system displays all available reference documents.

For more information, read Partners in Claims [Page 337] .

Do not enter a notification number, unless you have specified in customizing that the number range interval you have assigned to the notification type permits external number assignment.

⚠

If you want to enter the notification using the Internet, choose a number range interval that does **not** permit external number assignment.

3. Choose ✅ .

This brings you to the *Create Claim: <Notification Type>* screen.

4. Enter the necessary data.

5. To enter detailed information on the claim, use 📝 *Edit Text* to select a long text type. In the standard system, this button is on the *Facts* tab page.

🧭

We recommend that you enter either a long text for the notification header or the four long text type whose descriptions you have maintained in customizing.

For more information, read Entering Notification Long Texts [Page 332] .

6. Specify a priority for the claim. This indicates how important and urgent the claim is. In the standard system, this field is on the *Facts* tab page.

For more information, read Specifying Priorities [Page 553] .

7. Assign a reference object to the claim, either now or later. In the standard system, this field is on the *Assignment* tab page.

➡

Assigning a claim to a reference object allows targeted claim selection in the information system. Note that you can only view this assignment in Claim Management reporting. The assignment is not integrated with other reports, such as the structure overview in the Project System.

8. Enter the costs for the claim. In the standard system, the fields for this are on the *Costs* tab page.

You can estimate the costs or, if you have detailed information about the claim, have them calculated using unit costing [Ext.] .

9. To execute an activity, either enter the appropriate tasks and actions in the relevant tab pages or choose them from the activity string. The system documents the chosen activity in the relevant tab pages.

For more information, see Tasks [Page 560], Actions [Page 566], and Activity String [Page 520] .

10. To assign DMS (Document Management System) documents to the claim, enter the documents in the DMS tab page.

     For more information, see <u>Incorporating Documents from the DMS [Page 548]</u>.

11. Save the claim by choosing 🖫.

     This returns you to the *Create Claim: Initial Screen*.

Result

The system saves the claim and assigns a notification number.

Creating Claims Using the Internet

Use

Use the application form to create a claim using the Internet/intranet.

We supply a predefined form for claims. It is divided into different areas:

```
┌─────────────────────────────────────────────────────────┐
│                                                          │
│   ┌──────────────────────┐    ┌──────────────────────┐  │
│   │  Initiator           │    │  Entry Clerk         │  │
│   │                      │    │                      │  │
│   │                      │    │                      │  │
│   └──────────────────────┘    └──────────────────────┘  │
│                                                          │
│   ┌─────────────────────────────────────────────────┐   │
│   │  Claim Data                                      │   │
│   │                                                  │   │
│   └─────────────────────────────────────────────────┘   │
│                                                          │
│   ┌─────────────────────────────────────────────────┐   │
│   │  Remarks                                         │   │
│   │                                                  │   │
│   │                                                  │   │
│   └─────────────────────────────────────────────────┘   │
│                                                          │
│        ┌──────────┐      ┌──────────┐                   │
│        │  Check   │      │  Send    │                   │
│        └──────────┘      └──────────┘                   │
└─────────────────────────────────────────────────────────┘
```

Prerequisites

You have defined the form layout using SAP@Web Studios [Ext.].

If you access the form using *Create Internal Service Request* from the launchpad in the Employee Workplace, you must first choose the appropriate form.

Procedure

1. Enter the required data for the *Initiator*, *Entry Clerk*, and *Claim*.

    The system enters your data in the *Entry Clerk* and *Initiator* fields. You can overwrite the initiator data.

2. If you know who will be processing the claim, enter his or her name in the *Processed by* field.

3. If required, enter an explanatory text in the *Remarks* field.

    This is optional.

4. *Check* your specifications.

5. *Send* the application.

Result

The claim is transferred to the SAP Systerm and assigned to the appropriate person there for processing.

Notification Header

Definition

Information in the notification that applies to the overall notification.

Use

You use the notification header information to identify and process a notification.

Structure

The structure of a notification can be customized to meet user-specific needs. For this reason, the notification header may contain different types of information. The following table shows a selection of header and partner data for notification types delivered with the standard system.

General data	• Notification number • Notification type • Notification status
Problem information	• Problem description (for example, subject matter with coding and short text)
Reference objects/reference documents	• Reference objects (for example, material, serial number, functional location, equipment) • Reference documents (for example, sales order or production order)
Organizational information	• Organizational data • Work center • Malfunction data • System availability • Quantities • Basic dates
Execution data (internal)	• Organization (for example, coordinator or department responsible) • Address data • Priority • Notification start and end dates
Contact person	• Partners (for example, customer, vendor, or manufacturer)
Tasks / Activities	• Immediate tasks and activities for notification header

Entering Notification Long Texts

Prerequisites

Maintain codes in Project System customizing by choosing *Claim → Claim-Specific Settings → Codes for Detailed Long Texts*.

You are authorized to maintain long texts.

Procedure

1. Call up the claim in creation or change modes.

2. Enter a claim short text , such as a short description of the problem, in the *Description* field.

   In the standard system, this field is on the *Facts* tab page.

3. If the line provided is not enough for your description and you want to enter detailed information about the claim, choose 📝 *Edit Text* and select one of the long text types listed.

   There are five long text types to choose from. These are the long text for the notification header and the four you have defined and named in customizing.

   For more information, see Project System customizing under *Claim → Claim-Specific Settings → Codes for Detailed Long Texts.*

   We recommend you use the four long text types you can maintain in customizing if you want to structure your information.

   If you choose the notification header long text, the system displays the *Change Notification Long Text* screen.

   If you are processing one of the long texts you have defined yourself, a text input screen is displayed.

4. Enter your long text.

   Go to Project System customizing and choose *Claim → Notification → Create Notification → Notification Type → Define Screen Templates → Format Notification Long Text* to determine, among other things, the following:

   – Existing long text may be added to, but not changed.

   – The system logs each change to the long text, including who made it and when.

5. To save the long text and return to claim processing, choose 🔄 in the *Change Notification Long Text* screen and ✔ in the text input window.

Result

The system displays the texts in the text field.

If you only want to display one text type, choose 🔽 *Filters*. In the list field, you can stipulate that the system should display all long text types or just one particular type.

Displaying Administrative Information

Use

The system records administrative information for the notification header and for individual items, tasks and activities. This information specifies who created the notification, item, task, or activity, and who last changed these objects.

Procedure

Display Administrative Information for Notification

1. Call up a notification in the change or display mode.

2. Position the cursor anywhere on the notification screen except on an item, task, or activity, and then choose *Goto* → *Administrative data*.

   The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the notification.

3. Choose *Continue* to close the dialog box.

Display Administrative Data for an Item, Task, or Activity

1. Call up a notification in the change or display mode.

2. Choose the tab page for items, tasks, or activities.

3. Select an item, task, or activity, and then choose *Goto* → *Administrative data*

   The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the item, task, or activity.

4. Choose *Continue* to close the dialog box.

Action Log

Use

Changes to notifications are documented in the action log. You can use the action log to track:

- Which data or statuses were changed for selected fields

- Who made the changes

- When the changes were made

The action log also records the changes that were made to tasks, items, activities, and partners during notification processing.

Activities

1. Call up a notification in the change or display mode.

2. Choose *Extras → Notification documents → Changes*.

    The action log for the notification appears.

3. To display the changes to tasks, items, or activities, choose *Task/Item/Act.*, position the cursor on an object, and then choose *Detail action log*.

Partners in Notification Processing

Definition

A **business partner** is a business object that consists of a person, organization, group of persons, or group of organizations in which a company has a business interest. A business partner may also be a person, organization, or group within a company.

A business partner can have several **functions** at one time. Functions are characterized by function categories. A function category, for example, may be a sold-to party, interested person, payer, or payee.

A business partner can have relationships with other business partners. Relationships are characterized by **relationship types**. For example, relationship types can include the following: "is a subsidiary of," "is the contact person for," or "is identical to." A business partner can have several addresses. Addresses are defined by address types. An address type, for example, can consist of a delivery address or correspondence address.

A business partner can be assigned other business partners using the function determination. These business partners can then act on behalf of the original partner in their respective roles. For example, a business partner can be defined as a payee for another business partner.

For more information about business partners, refer to the documentation *Basic Functions and Master Data in Sales and Distribution*.

Use

In a notification, you can record all partners who are involved with subject matter/problem described in the notification. This includes the person who reported the subject matter/problem, the persons responsible for processing the notification, and those responsible for processing individual notification tasks. The partner data that you can maintain in a notification is predefined in Customizing for each notification type.

The following graphic shows how partners are used for notification processing.

Partners in Notification Processing

Structure

Partner type

Partners can be:

- Internal partners (for example, internal employees or partners in the *Human Resources* component)

- External partners (for example, customers, vendors, or manufacturers)

Partner function

The various partner types can be subdivided into **partner functions**. The partner function defines the rights, responsibilities and tasks of each partner when a business transaction is processed.

Partner determination procedure

The partner determination procedure specifies whether partners can be assigned to a notification and which partner functions can be used to process various business transactions. Your system administrator defines the partner determination procedure in Customizing.

Partners in Claims

Definition

When you create a claim, or each time you access the claim to change it, you assign it to a partner type. Claim Management offers the following partner types:

- Vendor

- Customer

- Internal

Depending on the partner type, the system determines the following in claim processing:

- A suitable partner

    If you have chosen the types "Customer" or "Vendor", the system does not offer the general partner overview for partner entry purposes, but:

    − For customers:
    Customer Address, where you can enter a customer who already exists in the system
    Contact Person Address, for the contact person at the customer
    Notification Address: for example, the customer's lawyer

    − For vendors:
    Vendor Address, where you can enter a vendor who already exists in the system
    Manufacturer Address
    Notification Address: for example, sales and distribution at the vendor

    You can enter a contact person in the notification address.

    If you change the partner type, for example, from customer to vendor, the system adopts all the partners and displays them in the partner overview.

    In the standard claim configuration, the contact person is always the customer contact person.

- Allowed reference documents

    For vendors, the purchasing document

    For customers, the sales order, delivery, and purchase order number

    For "internal", the sales order, delivery, purchase order number, and purchasing document

Processing the Partner Information

Prerequisites

You can only display the partner data screen if a partner determination procedure has been defined in Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner*.

Procedure

1. In a notification, choose *Goto → Partner.*

The screen for the partner data appears. If partner data already exists for the notification, it will be displayed in a table. In this screen, you can use the following functions:

Function	Follow-on menu path
Display partner data	Select a partner and choose *Environment → Display object*.
Delete a partner	Select a partner and choose *Delete partner assignment*.
Phone a partner	Select a partner and choose *Phone partner*.
Contact partner via paging function	Select a partner and choose *Send message to partner*.
Sort partners by function	Choose *Edit → Sort by partner function*.
Display, change, or delete partner addresses	Select a partner and choose the corresponding pushbutton

If you want to enter new partner data for the notification, enter the data directly in the table.

2. Go back to the notification header and save the new or changed partner data.

Configuring User Default Values

Use

It is a good idea to define user default values if you enter a lot of claims, but rarely use particular notification data.

The system automatically copies these values to the appropriate fields when you create a claim. You can overwrite them at any time.

Features

You can define the following default values and settings:

- General data

    - Notification type

    - WBS element

    - Partner type

    - Whether the system shows a status line/pushbutton when you enter or display long texts

- Appearance of the action box:: The system represents the action box as a table or an overview tree.

    If you choose the table, the system displays only the follow-up activities that can be carried out.

    If you choose the overview tree, the system displays all the available follow-up activities.

Activities

1. Choose *Extras → Settings → Default Values.*

    The *User Default Values* dialog box appears.

2. Enter the necessary data in the *General* and *Action Box* tab pages.

3. Choose 🖫 to save the data, then choose ✔.

    When you access claimprocessing again or create a new claim, the system uses your user default values.

Claim Tasks

Definition

A planned or completed activity that describes the planning and organizational measure in a claim. A task is defined by a code from the task catalog and if necessary accompanied by a text.

For more information, see the Implementation Guide *Project System → Claim → Notification → Create Notification → Notification Type → Maintain Catalogs.*

Use

A task allows you to plan the cooperation of various persons during the claim process and assures that the activities connected to the task are completed within a given timeframe. The task receives a status depending on its degree of completion.

You can enter data for a task on two different screens with varying degrees of detail.

- Overview screen

- Detail screen

The following entries are possible for each task:

- A table key for the tasks to be executed and a brief instruction describing what is to be done

- The task's planned start and end

- The task's status

- Responsible partner for carrying out the task

For more information, read Entering Tasks [Page 561]

> The documentation for processing tasks contains a note explaining how to create a task for a notification item. This is **not** possible in claim management because a claim does not recognize items. In claim management a task refers to the entire claim.

Integration

The system can automatically execute activities connected to a task as follow-up actions and trigger a workflow (for example, printing or calling up a particular SAP transaction). You can define the follow-up activities according to your own needs.

For more information, see the Implementation Guide *Project System → Claim → Claim-Specific Settings Activate Workflows and Assign Personnel* as well as Follow-Up Actions for Tasks [Page 99].

Entering Tasks

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record immediate tasks for the notification header	Choose the *Tasks* tab page.	Enter the data on the task overview.
Record immediate tasks on task detail screen	Select a task on the task overview and choose *Detail view.*	Enter the data on the task detail screen.
Record corrective tasks for a notification item	Choose the *Items* tab, select an item, and then choose the *Item tasks* tab page.	Enter the task data for the item.
Record corrective tasks on the task detail screen	Choose the *Items* tab page and then select an item. Choose the *Item tasks* tab page, select a task and then choose *Detail view*.	Enter the planned start and end dates for the task on this screen. The dates you enter may be changed based on the status you assign to the task (see Status Management for Tasks [Page 562]).

See also:

Automatic Determination of Tasks [Page 564]

Status Management for Tasks

Use

A task status provides information about a task's current processing stage. The system manages the following statuses for tasks:

Status	Meaning
Task outstanding	The task was created in the notification.
Task released	The task can be executed.
Task completed	The task was executed.
Task successful	The result of the task was successful (for example, the problem was solved or damage was repaired).

The system does not distinguish between notification header tasks (immediate tasks) and item tasks (corrective tasks). If the notification status information indicates that outstanding tasks exist in the notification, these tasks can consist of both immediate tasks and corrective tasks.

>
> A notification retains the status "outstanding tasks" as long as a task has not been completed (even if the task has already been released).

Integration

The various notification and task statuses, for the most part, are independent of one another. This means, for example, that you can put a notification in process even though it contains outstanding, unreleased tasks. As long as a notification still contains outstanding tasks, however, you cannot complete the notification.

For more information about the general status management function, see .

Features

You can use the status management function as follows:

- **Assign a status to a task**

  You assign a status to a task by choosing the corresponding function in the task overview or task detail screens. You must assign a status to each task individually. If you select several tasks in the overview screen and choose a status, the system assigns the status to all of the selected tasks.

- **Status information**

  Once you have assigned a status to a task, the corresponding status is displayed in the task overview screen and task detail screen. If you want to display the text for the status abbreviations, choose *Status detail*.

- **Date changes as a result of status assignments**

  When you assign a status to a task, the system automatically changes the relevant dates as follows:

Status	The system fills the following fields:
Released	*Planned start* with the current date/time
	Planned end with either the current date/time or desired notification end date/time.
	You can overwrite both fields.
Completed	*Date completed <date> by <user name>* with the current date/time and current user name.
	You cannot overwrite these fields.
Successful	None

The planned dates for a task must fall within the desired start and end dates of the notification. If you specify other dates for the task, the system displays a message to inform you of this.

Automatic Determination of Tasks

Use

You can have the system determine the tasks for a notification automatically on the basis the settings defined in Customizing for response monitoring. The **response profile** and **service profile** in Customizing together determine how and when a person responsible for processing a notification should respond.

- In the response profile, you specify one or more standard tasks that the system will propose on the basis of the notification priority. The system proposes these tasks automatically and they must be completed within a specified time interval. The system automatically assigns the determined tasks to the notification header.

- In the service profile, you define the time periods for individual workdays (service windows) during which a notification can be processed.

> You create a notification at 10:00 a.m. The response profile defines a time interval of two hours for the task code "Call back customer" and a time interval of 4 hours for the task code "Check whether technician is on site". The times defined in the service window are 8:00 a.m. to 12.00 noon and from 2:00 p.m. to 6:00 p.m.
>
> In this case, you must call back the customer by 12:00 noon to discuss or clarify the problem. If you need to send a technician to the customer site, the technician must arrive by 4:00 p.m.

Prerequisites

A response profile and service profile must be assigned to the notification type in Customizing for *Cross-Application Components* under *Notification → Notification Processing → Define Response Monitoring*.

Activities

Choose *Edit → Tasks → Determine* to automatically determine the tasks.

You can also choose *Edit → Tasks → Simulation(Det.)* to simulate the determination of tasks (without actually assigning the tasks to the notification).

Follow-Up Actions for Tasks

Use

You can define a follow-up action for a task that will automatically be triggered and executed by the system. A follow-up action can call one or more function modules that execute specific functions (for example, printing a shop paper or calling up a transaction).

Prerequisites

In Customizing for *Cross-Application Components* under:

- *Notification → Notification Creation → Notification Content → Maintain Catalogs*, the indicator for follow-up actions is set in the task catalog (catalog type 2)

- *Notification → Notification Processing → Additional Notification Functions → Define Follow-Up Actions for Tasks*, you have defined a follow-up action key and assigned one or more function modules to be called to this key

A follow-up function is only executed if the business transaction that is assigned to the follow-up action allows it.

Features

The system automatically executes a follow-up action after you have:

1. Entered a task code (for the notification header or for a notification item) that has a follow-up action assigned to it.

2. Saved the notification

    You can display a log on the task detail screen that lists all follow-up actions that were executed.

Claim Activity

Definition

Completed action or recorded information documented during the processing of a claim.

The main difference between an activity and a task is that an activity does not have a status and cannot be assigned to a partner. The activity is used strictly for documentation purposes.

Use

The following entries are possible for each activity:

- A key for the activity performed and a short text that can be changed

- Start and end of the activity

- Quantity factor (for example, if an activity consisted of sending three units of a material to a laboratory for testing, you can enter the value "3" for the quantity factor)

You can enter data for an activity on two different screens with varying degrees of detail.

- Overview screen

- Detail screen

For more information, read .

The documentation for processing activities contains a note explaining how to create an activity for a notification item. This is not possible in claim management because a claim does not recognize items. In claim management an activity refers to the entire claim.

Entering Activities

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record activities for the notification header	Choose the *Activities* tab page.	Enter the data in the activity overview.
Record activities for the notification header in the activities detail screen	Select an activity in the activity overview and choose *Detail view.*	Enter the data in the activity detail screen. Enter the date and time when the activity was performed. To create a new activity from the detail screen, choose *New entry*.
Record activities for a single item	Choose the *Items* tab page, select an item, and then choose the *Item activities* tab page.	Enter the activity data for the item.

Action Box

Use

When you process notifications, you can use the **action box** to execute **follow-up functions**. A follow-up function is a function that:

- Can either be executed as part of an overall business process or independently of such a process

- You can select and execute in the action box by means of a mouse click while you are processing a notification or task

Prerequisites

The follow-up functions in the action box are defined in Customizing for *Cross-Application Components* under *Notification → Notification processing → Additional Notification Functions*. The follow-up functions that:

- Have been predefined in the standard system can be used without any further preparations

- Are displayed in the action box, but which you do not need, can be deleted in Customizing

- You have programmed yourself and are to be included in the action box must also be defined in Customizing

Features

The following table contains the most important information you need to know about setting up and using the action box.

Function	What you should know
Appearance of the action box	In the standard system, the action box is displayed as an overview tree. In this display mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning: • Blue: The follow-up function is active and can be executed. • Black: The follow-up function is inactive and cannot be executed (yet). • Gray: The follow-up function has been executed and cannot be executed again. If you set the *Action box: Table* indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).

Follow-up functions and dependent follow-up functions	Depending on your settings in Customizing, the action box can include follow-up functions that you: • Can execute more than once and independently of other follow-up functions in the action box • Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)
Control parameters for a follow-up function	In Customizing, you can specify: • In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes) • In which transactions a follow-up function will be displayed for use (for example, in the create or change mode) • Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing • Whether a follow-up function will be documented as a task or activity in the notification, or whether it will not be documented at all That all follow-up functions documented as tasks or activities will be available for use in the action box when you create or change a notification The follow-up functions that are not documented will also be available for use in the action box when you display a notification
Assigning follow-up functions to scenarios	In addition to assigning follow-up functions to a notification type, you can also assign them to a scenario. For example, if you are processing a notification that has a scenario assigned to it, the action box will contain follow-up functions that are assigned to the notification type, as well as those that are assigned to the scenario.
Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing. For more information about these functions, see Standard Follow-Up Functions [Page 523].
Business transactions	In Customizing, you can assign a business transaction to a follow-up function. A business transaction determines whether a follow-up function can be executed, based on the current status of a notification.

Action Box

Authorization check	Each follow-up function that is documented as a task or activity is assigned a code group in Customizing. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function will not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.
Workflow link	You can link follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. The system can then trigger workflow tasks once a follow-up function (task) has been executed and the notification has been saved.
Difference between follow-up functions and follow-up actions	Follow-up functions in the action box are different from task-related follow-up actions [Page 565]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a notification. With a follow-up function, the system executes the function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information interactively in a dialog box. This is not possible with follow-up actions.

Activities

To execute a follow-up function in the action box, you click the text or double-click the symbol for a follow-up function (displayed in blue). A dialog box appears, in which you can enter the data that is required to execute the function.

> You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the input help for a catalog, the system does not execute a follow-up function.

The system then executes the selected function. Depending on the settings in Customizing, the follow-up function is:

- Documented as an activity in the notification
- Documented as a task for the notification header
- Not documented

Standard Follow-Up Functions

Use

The action box in the standard system contains several follow-up functions that can be used by all applications to make it easier to process notifications. When you execute one of these follow-up functions, the system documents the execution of this function as an activity or task for the notification header.

Features

Follow-up function	What you should know
Telephone contact using *SAPphone*	You can use this function to make a telephone call using *SAPphone*. The system records the details of your phone call as a notification activity. To use this function, the telephone and computer in your office must be interconnected and the *SAPphone* component must be active.
Telephone contact without *SAPphone*	You can use this function to record a telephone call that you initiated while processing a notification. The system records the details of your phone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system records the memo as a long text for an activity.
Solution database [Ext.]	You can use this function to search the solution database for symptoms and solutions that are similar to the problem you are currently processing. If you find a symptom or solution in the database that applies to the problem in your current notification, you can: • Document your database search as an activity for the notification • Copy the tasks associated with the solution into your notification

Standard Follow-Up Functions

Send notices	Using this function, you can postpone the processing of a notification. The system can then print this data or send it as a fax or e-mail to an internal or external address (Internet).
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal. You can change this text as necessary without changing the original long text. If the notification contains several partners, you can select a partner before you process the text.
	You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a **follow-up action**.
Send e-mail	You can use this follow-up function to send an e-mail (with or without an attachment) to a partner in the notification.
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal.

Function Modules for Claim-Specific Activities

Definition

In addition to the standard activities [Page 523], Claim Management offers a number of claim-specific activities in the action box., When you carry out one of these activities, the system documents the fact as either an action [Page 566] or a task [Page 560] in the appropriate tab page.

Use

The following activities are available:

Activity	Type	You Require This Function Module:
Business Documents You link a business document to a claim, and have the option of jumping from the claim to the business documents in change or display mode. Note that, when creating a claim, you can only link it to a business document if you chose early number assignment in customizing.	Action	To link: PS_CLAIM_LINK_TO_BDN
E-mail or fax, no attachment You enter an e-mail or fax, in which the system automatically records the most important data and long texts for the claim. Note that you cannot attach anything to this e-mail/fax.	Task	To create: QM06_FM_TASK_CLAIM_SEND_PAPER To save: QM06_CLAIM_SEND_PAPER_STEP2 To trigger the follow-up activity: QM06_CLAIM_SEND_PAPER_STEP3
Create claim You create a new claim from your existing one.	Task	To create: CLAIM_TASK_CREATE_CLAIM To trigger the follow-up activity: CLAIM_TASK_CREATE_CLAIM_STEP2
Create simulation version You switch from the claim to creating a project simulation version.	Task	To create: CLM01_CREATE_SIMUL To trigger the follow-up activity: CLM01_CREATE_SIMUL_STEP2

Outbound Telephone Calls

Use

When you process a notification, you can use this function to make a telephone call to a customer, vendor, or other partner directly from notification.

You can initiate an outbound telephone call in a notification from the:

- Partner overview screen

- Worklist screen for notification processing

- Action box as a follow-up function (provided the follow-up function for outbound telephone calls was activated in Customizing for the action box)

Prerequisites

The *SAPphone* component in Customizing for *Basis Components* (*Basis Services* → *Communication Interfaces*) is active. For more information, see SAPphone [Ext.].

Activities

You choose the function for outbound telephone calls in the partner overview screen, in a notification list, or in the action box.

Linking Documents from the DMS

Use

In the standard system, the notifications are linked to the SAP System's *Document Management System* (DMS). This allows you to link documents that are stored in the DMS to a notification. You can display or print a linked document at any time while you are processing a notification.

Prerequisites

In Customizing for the notification type, a tab page has been activated for the DMS (see Customizing for *Cross-Application Components* under *Notification → Notification Creation → Notification Type → Define Screen Templates*).

Activities

To link a document contained in the DMS to a notification, you call up the notification in the create or change mode and then choose the *DMS* tab page. A table is displayed in which you can retrieve, link, and display documents from the DMS.

Status Management for Notifications

Use

Notifications are supported by the SAP System's status management function. Whenever you create and process a notification, you execute certain business transactions for the notification. These business transactions are documented in the SAP System by a status. The current status of a notification tells you which processing stage the notification has reached and which steps have yet to be completed.

Of the available statuses in the system, only a few need to be set at any given time. Usually, a notification must have a certain status before you can process the it further. If such a status is missing, the system displays a message to inform you of this.

Features

A notification can have the following types of statuses:

- **System statuses**

    System statuses are set when you execute certain functions for a notification. For example, when you print a notification, the system sets the status "printed" *(NOPT)*. The system status tells you that a business transaction was carried out for the notification.

    The system statuses for notifications are predefined in the SAP System and cannot be changed.

- **User statuses**

    User statuses allow you to further restrict the functions that are allowed by a system status.

    Your system administrator defines user statuses in a status profile (see Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*). You can assign and delete user statuses if you have the necessary authorization.

See also:

Assigning and Changing User Statuses [Page 545]

Displaying Status Information

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Display status information in the notification header		The current system statuses are displayed in the *Status* field of the notification header. If user statuses also exist for the notification, they are also displayed.
		The *Status* field also displays the task status. If at least one notification task is still outstanding or released, the status "task outstanding" (*TSOS*) is displayed. As long as this status is set, you cannot complete the notification.
Display status information for individual tasks	*Tasks* tab page	The task overview contains the status of all recorded tasks.
Display system and user statuses with short texts	*Status detail* pushbutton	All active system and user statuses for the notification are displayed on the *Status* tab page.
Display general status overview	Choose *Status detail* pushbutton and then *Extras → Overview*	You can see which processing steps have already been performed.
		All active and inactive system and user statuses for the notification are displayed.
Display statuses that can still be assigned	Choose *Status detail* and then the *Business processes* tab page	You can see which processing steps are currently allowed or not allowed.
		If you choose *Transaction analysis*, you can see which business transactions can still be executed for the notification (green traffic light) and which ones can no longer be assigned (red traffic light).

Displaying Status Information

Assignment of System Statuses

Use

Whenever you execute a function in a notification that is influenced by the SAP System's status management function, the system automatically assigns a corresponding system status to the notification. On the basis of the current system status, you can determine what other functions can be executed for the notification.

Features

The system assigns a system status to a notification when you:

- Create a notification

- Postpone a notification

- Put a notification in process

- Assign an order to a notification

- Complete a notification

- Print a notification

- Create a task

- Release a task

- Complete a task

- Complete a task successfully

- Complete all tasks

- Activate an approval requirement for a notification

- Give an approval to a notification

- Refuse an approval for a notification

- Create a costing for a claim

Assigning and Changing User Statuses

Prerequisites

To be able to assign user statuses to a notification, the following conditions must be fulfilled in Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*:

- User statuses are defined in a status profile

- A status profile is assigned to the notification type to be processed.

You can only change a user status if the **status order numbers** assigned to the user status in Customizing allow it:

- The status order numbers defined for individual user statuses in the status profile determine the sequence in which the user statuses can be activated.

- If a user status does not have an order number assigned to it, the user status can always be set.

- It is not possible for several statuses with status order numbers to be active at the same time.

- You cannot delete the initial user status that has been set for a notification.

Procedure

1. Call up a notification in the change mode.

2. In the notification header, choose *Status detail*.

   The status information is displayed.

3. In the column for user statuses (right column), activate the desired user status and then choose *Back*.

   The notification header with the chosen user status is displayed.

4. Save the notification.

Evaluating Claims

Features

The project information system includes the following reports for analyzing claims:

- Claim Overview

    The system displays all the data entered for the claim selected, except for tasks and actions. If this is all the data you need, we recommend you use this report, for performance reasons.

- Claim Hierarchy

    The system displays all the data entered for the claim selected, including tasks and actions.

Activities

1. Choose *Logistics* or *Accounting → Project System → Information System → Claim →
   Overview* or *Hierarchy.*

The *Claim Overview* or *Claim Hierarchy* screen appears.

2. Enter the selection criteria you require and choose ⏱.

    The relevant report appears.

    Determine the layout of the lists yourself, using ⊞.

Archiving Claims

Prerequisites

The claim is closed.

Procedure

The archiving object CM_QMEL is available for claims. Claim archiving using transaction SARA involves the following steps:

1. **Preparation (RQARCCMV):**

   The preparation program assigns status MARC to the claims selected, thereby flagging them as ready for archiving and deletion. This also blocks the claims so flagged against further online changes.

2. **Archiving Run (RQARCCMA):**

   The archiving program writes the database tables for the claim to the archive. If the process was successful, the program deletes the data from the system immediately after it has been archived.

3. **Delete (RQARCCMD):**

   A deletion program deletes the database records for claims successfully archived. If the deletion program is not accessed automatically when the archiving action has been completed successfully, you must wait until archiving is complete altogether.

4. **Evaluation (RQARCCMS):**

   You can use the evaluation program to display the data for claims already archived.

Internal Service Requests

Use

Internal service requests enable you to request and process any service using a simple form, or a freely formulated text. You do not require SAP R/3 experience. This kind of request action could be a removal for example. The request is forwarded to the approving manager or the processor. If the service request incurs costs, you can send the request to a cost center manager or budget manager (who can execute an automatic cost calculation) for approval.

This function enables you to process numerous requests in the intranet that you previously processed by mail or telephone. You can enter the requests at any time of day or night, every day of the week. All those involved can also call up the status at any time. The integrated cost posting ensures that the data is transferred without errors to Controlling, and the costs of the line item reports are monitored.

The internal service request covers three business processes:

- Finding solutions to a particular problem [Page 442]

- Having the non-cost incurring request (such as: removal request) entered and processed [Page 444]

- Having the cost incurring request (such as: budget change) entered and processed [Page 447]

Advantages

You can create your own request forms without ABAP skills

You have **one** initial screen for entry and status query of the request.

The system finds the processors for the request using the details in the request form.

The SAP workflow is used to inform the request processors
For more information on the *SAP Workflow*, see *Basis → Business Management →* SAP Business Workflow [Ext.]**.**

You can use Easy Cost Planning to calculate incurred costs for the request
For more information, see the SAP Library under *Financials → Controlling → Product Cost Controlling → Product Cost Planning →* Easy Cost Planning and Execution Services [Page 370]*.*

Costs are automatically posted to the corresponding cost center or another *fixed account assignment object.*

Process Flow

The Environment

Intranet	SAP System
Entered by	Person who processes/approves the request

Internal Service Requests

Entry

You can select predefined standard services, or create your own service request scenarios in Customizing.

You can add notes to the service request at any time during the processing time.

You enter an internal service request via the LaunchPad in your my SAP.com Workplace.

Approval

In Customizing, you can specify under which conditions an approval for a service request is to be made.

The cost center manager or budget manager automatically receives an overview of all the service requests relevant for them. This overview is provided via a worklist or a workflow.

The manager can:

- Change the person responsible, and thus forward the service request The request can be forwarded automatically, for example, to a representative if someone is on vacation.

- Before approval, send a note with a query on the service request to the person who entered the request.

- Forward the service request for a "cost estimate" to the processor.

The cost center manager or budget manager can use a cost collector (such as an internal order) that is linked to the internal service request to monitor the request costs.

Carrying Out The Request

The service request processor is determined in the same way as the cost center manager or budget manager.

This person is informed about the service request, using the workflow.

If the processor indicates the service request as completed, then the incurred costs are posted via integrated cost posting.

You call up processing

- For the notification via:

- *Office → Notification → Change* or

- *Office → Notification → Worklist → Notifications.*

- For the notification task via:

- *Office → Task → Process* or

- *Office → Notification → Worklist → Tasks.*

Result

You sent a request that was processed or executed after approval (if required).

For more information on customizing internal service requests, see the implementation guide (IMG) under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Scenario Definition → Define Scenarios.*

Preparing The Internal Service Request

Use

To be able to use the internal service request [Ext.], you need to make some default settings in Customizing under *Cross-Application Components → Internet / Intranet Services → Internal Service Request Scenario Definition → *Define Scenarios [Ext.].
For more information, see also: Definition Of A Scenario [Page 367].

You can also create the form layout for each request yourself.

Prerequisites

Customizing for internal service requests includes the previous customizing settings.

For more information, see the implementation guide (IMG) under *Cross-Application Components → Internet / Intranet Services → Scenario Definition → *Prepare General Notification. [Ext.]

Features

Preparing internal service requests includes defining the characteristics for the general notification, and for the scenario.

Activities

You prepare the general notification in Customizing. As a minimum, you need to define notification types before you can set up scenarios. Use the notification types defined by SAP also.

Define a scenario.

Depending on the type of scenario, develop templates for calculation of the costs incurred by the execution of the request, or use Easy Cost Planning and Execution Services.
For more information, see the SAP Library under *Financials → Controlling → Product Cost Controlling →*Easy Cost Planning and Execution Services [Page 370].

Transport the template settings.

Definition Of A Scenario

Use

You need to define a scenario for each specific internal service request [Ext.] for which you want to later provide a form.

Prerequisites

As the internal service request is based on the general notification, you need to make the settings in Customizing for notifications. For more information, see the implementation guide (IMG) under *Cross-Application Components → Internet / /Intranet Services → Internal Service Request → Scenario Definition → Prepare General Notification [Ext.]*.

Features

In a scenario you specify the fields that are ready for input, which are visible in the request form, and you also specify their function.

Activities

To define scenarios, choose the following in Customizing: *Cross-Application Components → Internet- / Intranet Services → Internal Service Request → Definition of Scenarios → Define Scenarios [Ext.]*.

Note that there are already predefined scenarios that you can copy and adapt to your requirements.

In the basic data, you need to make the following minimum entries: a name, an explanatory short and long text, and a name for the ITS service.

Create characteristics and name them. Categorize the characteristic if required.

Create tasks and name them. Enter the name of a person responsible for each task (directly or using a standard role).

Scenario

Definition

Technical description of a particular internal service request [Ext.] in Customizing.

Use

A scenario specifies the appearance and the flow of an internal service request.

Structure

The following are some of the items stored in a scenario:

- A descriptive short and long text.

- For a cost-incurring scenario: Rules for calculating the incurred costs.

- The entry type for the request and the ITS service.

- The fields or characteristics that are to later appear on the request form.

- The tasks that are triggered by this request.

To define scenarios, choose the required default settings in Customizing under: *Cross-Application Components → Internet- / Intranet Services → Internal Service Request → Definition of Scenarios →* Define Scenarios. [Ext.]

Cost-Incurring Scenarios

If costs are incurred by the processing or execution of the internal service request [Ext.] that you are planning in the scenario, then you can mark the scenario as being cost-incurring. You can use the following to calculate the incurred costs:

- Enter a rough estimate

- Define a template, a costing variant and strategy
  For more information, see the SAP Library under *Financials → Controlling → Product Cost Controlling → Product Cost Planning →* Easy Cost Planning and Execution Services [Page 370].

Activities

To define a cost-incurring scenario, choose the following in Customizing: *Cross-Application Components → Internet- / Intranet Services → Internal Service Request → Scenario Definition →*Define Scenarios [Ext.].

In the basic data of the scenario activate the *Cost incurring* indicator*.*

Easy Cost Planning and Execution Services

Purpose

Easy Cost Planning and Execution Services is a simplified form of cost planning that is integrated into the SAP System. It is of particular use when several planners are involved or when your planning is carried out using similar methods.

Example of the Easy Cost Planning of a Project [Ext.]

You can use this method for the following:

- Internal orders [Ext.]

- WBS elements [Ext.]

- Internal Service Requests [Page 363]

- Appropriation requests [Ext.]

- Ad hoc cost estimates [Ext.]

The Execution Services enable you to trigger the following processes based on the costing results:

- Purchase requisitions [Ext.]

- Purchase orders [Ext.]

- Reservation [Ext.]

- Goods issue [Ext.]

- Internal activity allocation [Ext.] either with or without Workflow [Ext.]

For more information about how Easy Cost Planning can be used, see the following:

Easy Cost Planning for Internal Orders [Ext.]

Easy Cost Planning in the Project System [Ext.]

Cost-Incurring Scenarios [Page 369]

Easy Cost Planning for Appropriation Requests [Ext.]

Integration

Cost planning for the object concerned is carried out in the corresponding application component, namely Internal Orders (CO-OM-OPA) [Ext.], Project System (PS) [Ext.], Investment Management (IM) [Ext.], Product *Cost Planning* (CO-PC-PCP) or using the mySAP Workplace.

The following components are used (called up) in the background. User knowledge in these areas is not required.

In order to complete the respective Execution Service, the application components *Purchasing* (MM-PUR), *Inventory Management* (MM-IM), *Cost Center Accounting* (CO-OM-CCA), and/or *Activity-Based Costing* (CO-OM-ABC) are used, either with or without the *SAP Business Workflow*.

Easy Cost Planning uses unit costing from *Product Cost Planning* (CO-PC-PCP), the characteristics function of the *Classification system* (CA-CL) and the template [Ext.] function from *Activity-Based Costing* (CO-OM-ABC) to calculate the costs.

Features

Easy Cost Planning enables you to represent the structure of the planning processes in the system [Ext.]. These can then be used as planning forms by all cost planners [Page 373]. The use of this planning form ensures that all of the relevant cost incurring functions are included. This means you can avoid errors.

The intentions of the planner are translated into the terms and data of the unit costing [Ext.]. When planning, the planner enters the cost incurring functions in the form of characteristics, from which the system generates and then costs costing items for the unit costing.

The planning object can be structured whichever way the planner chooses, and the substructures that the user defines can be costed separately. Existing structures, such as those in the *Project System* for example, are included in the costing.

You can define the entry screen in accordance with your individual [Ext.] requirements for each planning form. It is automatically generated in HTML format and you can enhance it, for example with hyperlinks for the planner to determine additional data, and to include your company logo. You can also insert information in the form of explanatory text. A notes field has been created in the entry screen so that planners can enter notes either for themselves or other users who need to analyze the costing, which are saved together with the entries for the costing.

You can adapt the display of individual screens for individual roles [Ext.], for example to simplify the display for planners who only use this function occasionally and do not need to know about every single function.

The Execution Services function selects the costing items for the process to be triggered. You can change, delete and add the costing items selected. From this display it is possible to trigger the process for the selected items [Page 380].

It is possible for you to display existing postings, that are already in the system for the respective object, for the services selected. For example, if you want to trigger a purchase order for an internal order, you can display the existing postings for this order, in order to avoid a duplication of the purchase order.

Easy Cost Planning and Execution Services

Standardized Planning Method using Easy Cost Planning & Execution Services

| Request | Model Construction | Planning using Execution Services |

Idea of planning procedures to be completed that are always similar

Charact. 1
Charact. 2
Charact. 3

Entry screen

Question 1
Question 2
Question 3

Entry screen

Quest. 1 Yes
Quest. 2 100
Quest. 3 Large

Yes
50
Small

No
150
Small

Template

Cost Estimate

Execution Services
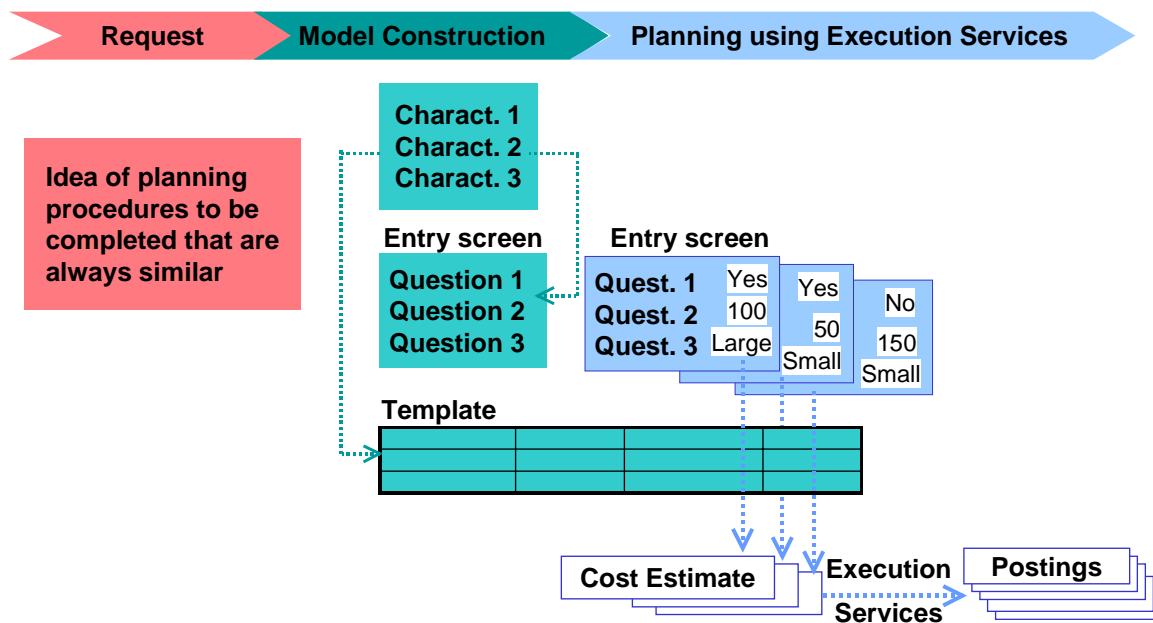
Postings

Constraints

You cannot use this costing method for the following unit costing reference objects:

- Materials

- Sales documents

- CO production orders

- General cost objects

- Network activities

You cannot use the Execution Services for appropriation requests. You can only use them for ad hoc cost estimates if you have assigned an account assignment object [Ext.] to the ad hoc cost estimate.

Using Easy Cost Planning

Use

Easy Cost Planning is used to determine the costs for a particular object (for example, internal order, WBS element, internal service requests, appropriation request) or generally to determine costs for a specific purpose using an ad hoc cost estimate.

Integration

To activate the cost planning, the corresponding application component is used, such as *Internal Orders* (CO-OM-OPA), *Project System* (PS), *SAP Internet Applications*, *Investment Management* (IM) or *Product Cost Planning* (CO-PC-PCP).

Prerequisites

If you want to use a planning from for the costing, you must have already defined this in the system. For more information, see Processing Costing Models and Assignment of Attributes [Ext.].

Features

The costing screen is constructed as follows:

⚠
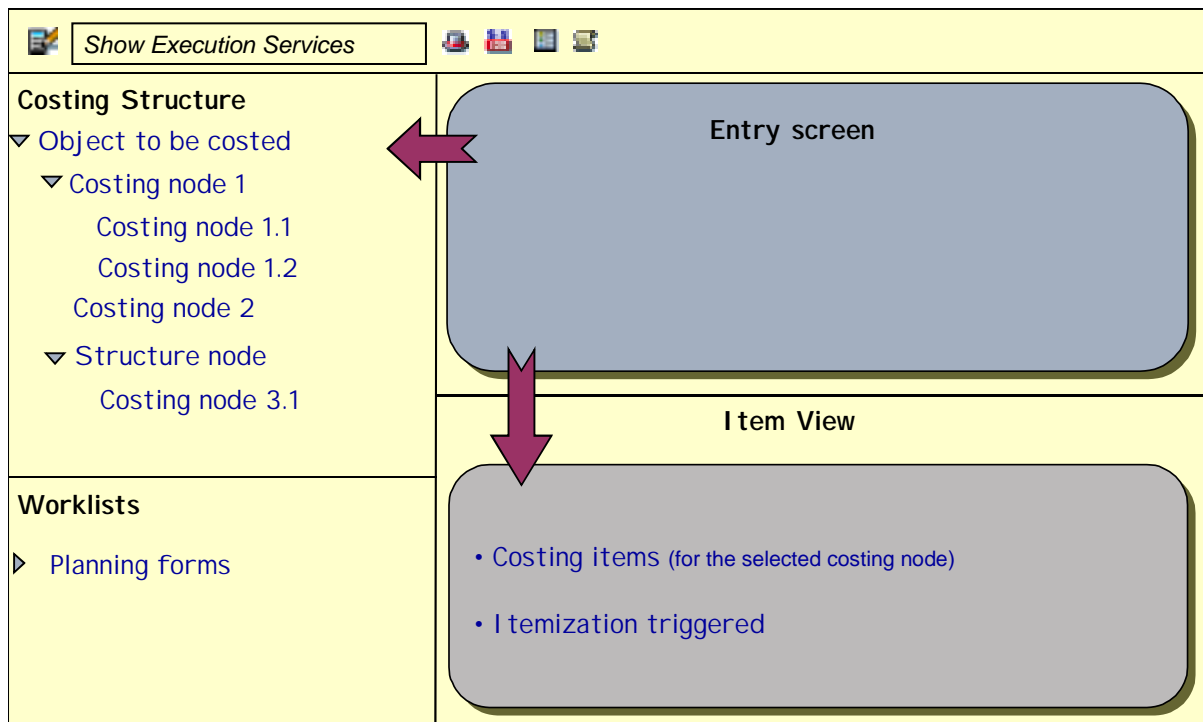
Depending on the settings for the Role [Ext.] to which you have been assigned, you may find that you are not able to use all of the functions set out below.

Using Easy Cost Planning

You are able to do the following:

- Change the size of the screen areas

- Display or hide the *costing structure*, *worklists* and *item view* as appropriate.

Screen area *Costing structure*

The top node is the object to be planned or the ad hoc cost estimate. You cannot cost structure nodes, meaning you cannot assign them a planning form. For project structures these are WBS elements which are not planning elements.

You can structure the object you wish to plan or your ad hoc cost estimate by adding new nodes (costing nodes). Select the node that you want to substructure and choose ⬚. Enter a description and choose ✔. The node is added. You calculate the costs for each costing node separately.

To delete a costing node, select it and choose 🗑. Technically a costing is deleted this way.

You can use 🚩 to close the cost estimate, to prevent further changes being made to it. The close is recorded in the history. You can check this in the header data. There you can undo or set the closing of a cost estimate. If you want to undo it, choose 🚩 again.

The document flow [Ext.] (🗂) displays for each costing item whether documents have been posted through an Execution Service [Page 380] already for this costing item and object to be planned.

Screen area *Worklist*

If you regularly create cost estimates using Easy Cost Planning, you can load the planning forms that you use frequently into your worklist. To do this either choose 📙 immediately next to the node or choose ⬚.

You can create, insert (⬚), rename worklists and extend the display of worklists (from user-specific to role-specific or globally to all users), or restrict (🔲) them. Using 📂 you can call up any worklists that are in the system but have not yet been displayed. To delete worklists, choose 🗑. To remove subdirectories or planning forms from a worklist choose 🗂. To save your worklists, choose 💾 in the screen area *Worklists.*

Screen area *Item view*

This area is used to enter, change and display costing items. For more information, see Creating Costing Items [Ext.] under the heading *Features*. It is not possible to make entries in the detail screen.

The item category for planning forms is *J*. For more information about item categories, see Master Data for Unit Costing [Ext.]. In Easy Cost Planning you cannot use item categories O and S.

> You should note that the *item number* is not necessarily the same as the item of the line in the item view. If you need this, define a layout that sorts using the item number.
>
> For WBS elements and internal orders you can define a period for a costing item by entering a *latest end date*. The costs are distributed evenly across the periods for the period you defined.

Further Item View Functions

📜	The log of the costing node currently selected is displayed.
📊	Revaluate [Ext.] the costing items with the current prices.
🔄	Refresh the totals and subtotals
📝	You can overwrite the price, cost element or the description for an item with the current plan and master data. To do this select the line.
Goto → Triggered itemization on/off	If you have costed several costing nodes in one structure, all of the costing items for all costing nodes in this structure are displayed in the itemization triggered. The top node in the costing structure must be selected for this. The display can be seen in the item view. By choosing 🔢 you can multiply the quantities of individual costing items by a factor. The change is accepted immediately and the costing repeated.

For more information on working with this kind of list display see SAP List Viewer [Ext.].

To cost the entries changes, choose *Confirm*.

Functions in the Upper Application Toolbar

Show Execution Services	After cost planning you can trigger Execution Services [Page 380] for some objects.
🎩	Display header data
💯	You can switch between various currencies.
📤	Only displayed for ad hoc cost estimates [Page 378]
📋	Explains all of the symbol legends in the *costing structure*
📜	The error messages are all displayed for every costing node.

Activities

- Create either the object you want to plan or an ad hoc cost estimate, or else call up an existing one in change mode. Choose the cost planning. For more information, see the documentation for the object to be planned:

  − For internal orders: Easy Cost Planning for Internal Orders [Ext.]

Using Easy Cost Planning

- − For WBS elements: Using Easy Cost Planning [Ext.]

- − For appropriation requests: editing cost estimates for appropriation requests [Ext.]

- − For ad hoc cost estimates: executing ad hoc cost estimates [Page 378]

- You have the following options for calculating the planned costs:

  With Planning Forms

  − Click on the node to be costed in the *costing structure*. Choose *Choose planning form* in the right hand screen area and select a planning form (*costing model*) or click on the corresponding node for the planning form in the worklist if you have already loaded the required planning form. The system displays the entry screen.

    If you have selected the wrong planning form you can assign a new one. To do so you have to select the costing node. You now have the following options:

    - From the worklist choose a new planning form by clicking on the corresponding node, and confirm the prompt with *Yes*.

    - Choose ⬚ and confirm the prompt with *Yes*, choose *Choose planning form* in the right hand screen area and select a new planning form.

  − Enter the required planning data and choose *Confirm*.

  − You can change the costing items in the *item view*.

  Without Planning Forms

    For this showing the *Item view* must not be excluded by your Role [Ext.] .

  − Click on the node to be costed in the *costing structure*. Enter the costing items directly in the *item view*.

Result

The results are displayed directly in the *costing structure* for every costing node. The costs are displayed subdivided according to costing items. In essence this display corresponds both in use and structure to the valuated BOMs [Ext.] of the unit costing. The symbols next to the costing items specify the item category. By choosing 📋 for the legends you can ascertain which item category you are dealing with.

The costing items are displayed in a non-hierarchical list in the *item view* This essentially corresponds to the display of the itemization. This means the respective costing items for the currently selected costing node are displayed The SAP standard delivery makes a variety of itemization layouts available to you. You can adapt these to meet your individual requirements by creating your own layouts [Ext.]. Using various factors you can calculate and delete subtotals [Ext.].

> If currencies are translated, the system uses the exchange rate applicable on the valuation date of the cost estimate (not the costing item, if this is different).

> ⚠
>
> If you leave Easy Cost Planning via ⟲ , you cost estimate is temporarily saved. The system saves to the database only when you save the object to be planned.

    Exception: Ad hoc cost estimates In this case you are asked whether the data is to be saved directly upon leaving Easy Cost Planning. If you choose *No*, the data is not saved and is lost.

    You can only save or leave the cost estimate if it does not contain any errors. Therefore, you can only leave a cost estimate which does contain errors by choosing .

For internal orders, WBS elements and ad hoc cost estimates you can now trigger particular Execution Services [Page 380].

See also:

Easy Cost Planning and Execution Services [Page 370]

Executing Ad Hoc Cost Estimates

Executing Ad Hoc Cost Estimates

Use

If you want to plan costs without creating an object in the system, you can use ad hoc costing to obtain a speedy result.

Prerequisites

If you want to use a planning from for the costing, you must have already defined this in the system. For more information, see Processing Costing Models and Assignment of Attributes [Ext.].

Procedure

Choose *Accounting → Controlling → Product Cost Controlling → Product Cost Planning → Easy Cost Planning & Execution Services → Edit Ad Hoc Cost Estimate*.

Creating Ad Hoc Cost Estimates

1. Enter a description for your planning projects and choose *Create*.

2. On the tab page *Additional data* enter a c*ompany code* or a *plant*.

3. To start an ad hoc cost estimate with a planning form directly, you have the following options on the tab page *Create with planning form*:

    –   Click on any planning form displayed. The cost estimate is started immediately.

        ⇨

        If no planning form is displayed for instance because you have not yet created an ad hoc cost estimate, then choose either *All planning forms* under *Subject area* or some other role-specific worklist.

    –   Under *With planning form*, enter the (technical) name of a planning form direct, and choose *Create*.

    –   To find a planning form enter a search term and choose *Find.* The search is made in the names and in the descriptions available in your logon language for the planning forms. You can also display the descriptions via 🖳 next to the planning forms.

4. For more information, see Using Easy Cost Planning [Page 373].

To forward a cost estimate to another user for further processing or analysis, choose the service *Send → Send object with note* from the object services in the title bar of the symbol.(🖳). You can find more information on object services under *Services for object* (🖳) *→ Help for the object services*. The user to whom the cost estimate has been sent accesses the display mode of the cost estimate on opening the attachment to the note.

Changing Ad Hoc Cost Estimates

You have the following options:

•   Under *Description* enter the name of the ad hoc cost estimate which you want to change and choose *Change.*

- Choose the tab page *Planning forms last used* and click on the ad hoc cost estimate that you want to change. You go directly to change mode.

For more information, see Using Easy Cost Planning [Page 373].

Triggering the Execution Service

To be able to trigger an Execution Service you have to assign an account assignment object [Ext.]. This is used to post all of the costs incurred through triggering the Execution Service (for instance through a purchase order).

1. You are in the create or change mode of the cost estimate. Choose .

2. Choose *Object type*.

3. Enter the key of the account assignment object that is to include the costs.

4. For more information, see Triggering the Execution Services [Page 380].

Triggering the Execution Services

Use

Having planned costs using Easy Cost Planning [Page 373], you want to trigger one of the following processes: Purchase requestion [Ext.], purchase order [Ext.], reservation [Ext.], goods issue [Ext.], or internal activity allocation [Ext.] with and without Workflow [Ext.]. To do this, the system will utilize the data that you entered for planning the costs.

This is possible for:

- Internal orders

- WBS elements

- Ad hoc cost estimates to which you have assigned an account assignment object.

Integration

The application components triggered for the Execution Service are the application components *Purchasing* (MM-PUR), *Inventory Management* (MM-IM), *Cost Center Accounting* (CO-OM-CCA), *Activity-Based Costing* (CO-OM-ABC) and SAP Business Workflow [Ext.].

Prerequisites

The required settings have been made in Customizing under *Execution Services*.

You have executed the cost planning, and the object (internal order or WBS element) exists in the system.

Showing the *Item view* must not be excluded by your Role [Ext.].

Features

The costing screen is constructed as follows:

Costing Structure	**Execution Services** ▽ 📝 📊
▽ For planned object	
▽ Structure nodes	• Entry screen
Costing node 1.1	• Document overview
Costing node 1.2	
Costing node 2	
Worklists	➡ **Item view**
▽ Planning templates	
	Costing items for Execution Services
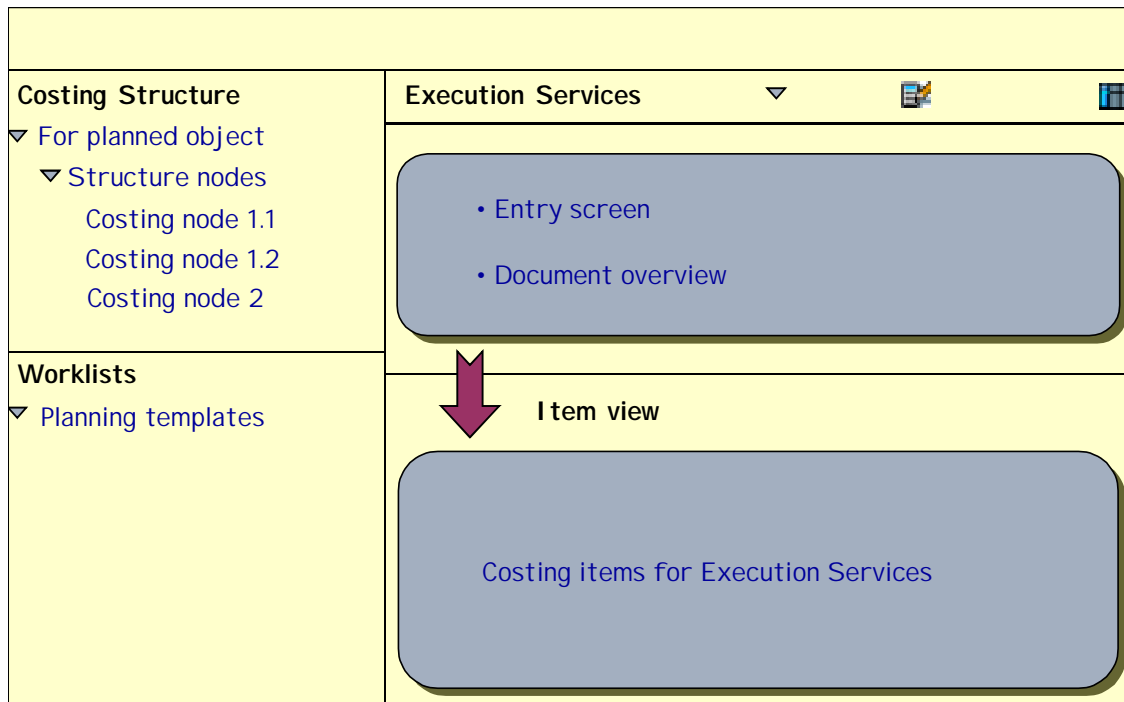
Under *Execution Services* you are offered all of the Execution Services that are possible for the object to be planned. Before you select an Execution Service, it is possible to obtain an overview of all the existing purchase requests, purchase orders and so on for the costing items that have been created through the Execution Service. Click on the costing item in the screen area *Costing structure*, and choose 📭.

The items relevant to the Execution Service are selected and, where applicable, expanded to include additional data. By using 📊 you can also display the *Document overview* for the Execution Service and the object in question, enabling you to avoid a double posting.

The Execution Service is posted in the system. Choose 🔷 in the *document overview* to display the document posted.

Activities

1. Choose *Show Execution Services* and select an Execution Service. The system automatically selects those items relevant to the Service you selected, for instance for internal activity allocations E (*internal activity*), P (Process - manual), X (Process costs ABC) and V (*variable*) items are selected.

2. Select the costing items for which the Execution Service is to be triggered. You can also change the items, for example by entering a different quantity.

3. Post the items.

If an employee of the cost center that supplied the internal activity is also to post the internal activity allocation, you can start a **Workflow**. Select *Internal activity allocation* in order to select the relevant costing items. Select the item(s) and choose 📭.

The screen *Change Document: Cost Center XYZ: Create Note* appears. In this screen, you can create messages for the workflow processor. Save (even if you have not created a message) and go back to the initial screen.

Triggering the Execution Services

Result:

The items are in the processor's workflow inbox [Ext.]. When the processor calls the task, the screen *Easy Cost Planning: Execution Services* appears. The processor can then post the internal activity allocation in this screen. By confirming the processing when leaving the screen, the task is deleted from the processor's inbox.

You cannot start a workflow for business process items.

See also:

SAP List Viewer [Ext.]

Template for Easy Cost Planning

Definition

The template is a dynamic calculation tool that uses functions [Ext.] and formulas [Ext.] to calculate numerical values and determine the results of Boolean expressions (true or false). Templates for Easy Cost Planning are created in environments 200, 205-208, and 214-215. The environment is defined automatically by the system depending on the object to be planned (internal order, WBS element, and so on). With the exception of environment 214, you cannot create environments through Customizing. Instead, you can only do so by defining a costing model [Ext.].

Structure

The template contains a table in which you can make the following line entries:

Column	Possible Entry/Process
Item category in template ➡ The key of this item category is not always the same as that of the costing item.	Comment line, process, calculation row (process), cost center/activity type, calculation row (cost center/activity type), costing model, external activities, subcontracting, material, service, base planning object, text item, variable item ➡ For the item category *calculation row*, you cannot call the editor or define methods in the object column. You can only select costing models that are valid either for all planning objects or for the same planning object as the costing model in which you want to insert this model as a submodel.
Description	The description is displayed in the cost estimate as the description for the costing items. The system determines the description for most of the item categories automatically once you have confirmed your entries. (The *description* is used in the case of the base planning object.) Consequently you only need to make an entry here if the description cannot be determined by the system or if you need to overwrite it.

Template for Easy Cost Planning

Object	Enter the object (such as a material), depending on the item category specified. You can either enter the object directly, or define methods [Ext.].
	For *item categories of the template J* to *R*, you can use the input help to make the required entries. Always enter a cost element if the system is unable to determine one. This applies to those item categories for which the cost element was requested in the possible entries help; with base planning objects the cost element can be determined via the master data providing you have entered one there. If the item does not have a cost element, it is not possible to assign the costs to a cost component. This means that the costs cannot be rolled up if they are incurred in a cost estimate which is part of a costing structure with superior cost estimates.
	For the categories *Process* and *Cost center/Activity type*, you can either predefine an object or determine dynamically one or more processes or cost centers/activity types. For more information, see Object Determination [Ext.].
Quantity	Enter a quantity or characteristic directly. You can enter the appropriate characteristic by defining a formula [Ext.].
	For more information, see Activity Quantity Determination [Ext.].
Activation	Specify the condition under which an item is active. For the *activation* of an item, you can predefine values as *active* or *inactive* or define a method that returns *active* or *inactive* at the point of evaluation. If you do not enter anything in the column, the item is active.
	The item (MATERIAL; Gravel; 0001 / GRAVEL01; M3; QUANTITY_ FILLER; METHOD) with method: FILLER = "Gravel" is only active if gravel was selected as the FILLER. For all other characteristic values, the item is not included in the costing.
	For more information, see Activation [Ext.].
Price	Price for a variable item This column is not utilized for any other item category.

Depending on the item category in the template, there are various functions available to define methods and formulas.

For more information on the costing item categories, refer to Master Data for Unit Costing [Ext.].

Creating Templates

Use

Using the template to create an internal service request [Ext.] is only useful if it is for a cost-incurring request, such as a removal. In a template, you store rules for calculation of the costs that are incurred during request processing.

Prerequisites

You have indicated the scenario as *cost-incurring.*

Tasks

You store the use of a template, and its definition in Customizing under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Definition of Scenarios → Define Scenarios [Ext.].*

After you have defined a template, it is not automatically transported with the other details that you stored in the scenario. To transport the template settings, go to Customizing, and choose *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Scenario Definition → Settings for Cost Incurring Scenarios →* Transport Template Settings. [Ext.]

⚠

Note that you can use **only** the kind of templates for costing scenarios that you defined in the scenario Customizing (see above).

You have provided your cost-incurring scenario with a template. This template calculates the incurred costs using the different fields filled in the request.

For more information on templates, see the SAP *Library* under *Financials → Controlling → Overhead Cost Controlling → Activity-Based Costing →* Template [Ext.].

Notification

Definition

Data record that a user can use to inform an application area about a particular subject matter.

Use

You can use the notifications in the SAP System and on the Intranet to record and process various business-related information. The notification supports you with a number of functions that you can use to process this information. The most important of these functions allow you to:

- Record problems or information
- Define and execute tasks [Page 560]
- Log activities [Page 566]
- Record costs
- Manage the status of notifications and tasks
- Communicate with persons or departments affected by the subject matter
- Evaluate notification data

Structure

In the SAP System, you can process notifications in a simplified or extended view. The structure of a notification differs on the basis of this processing view:

- Notification structure [Page 22] for simplified notification processing
- Notification structure [Page 44] for extended notification processing

If you have the appropriate authorization, you can switch between the simplified and extended processing view.

Integration

The SAP System currently supports the following notification categories:

- Quality notification
- Maintenance notification
- Service notification
- Claim
- Feedback notification (R/3 Support Line Feedback)
- Internal service request
- Change notification
- General notification

Notification Type

Definition

Key that specifies the origin, informational content, and other attributes of a notification. In the standard system, a notification type is assigned various notification origins, which in turn are grouped together in a notification category.

The standard system supports the following notifications (examples):

Notification Type	Notification Origin	Notification Category
M1 - Maintenance request	01 - Maintenance request	Maintenance notification
M2 - Malfunction report	02 - Malfunction report	
M3 - Activity report	03 - Activity report	
S1 - Problem notification	04 - Problem notification	Service notification
S2 - Service request	05 - Activity report (Service)	
S3 - Activity report	06 - General notification (Service)	
Q1 - Customer complaint	Q1 - Customer complaint	Quality notification
Q2 - Complaint against vendor	Q2 - Complaint against vendor	
Q3 - Internal problem notification	Q3 - Internal problem notification	
$$ - Feedback notification	R3 - Feedback notification	
C1 - Claim (internal)	C1 - Internal claim	Claim
C2 - Claim (external)	C2 - External claim	
G0 - General notification	G0 - General notification	General notification

In addition to the notification types listed above, the standard system may also contain other notification types.

Use

When you create a notification in the system, you choose a notification type that suits the subject matter of the notification from a business standpoint. You can either use the notification type that was predefined in Customizing or in the user default values (default notification type), or you can select another notification type.

You can also define your own notification types in Customizing. When you create a new notification type, you must assign a notification origin predefined in Customizing to this notification type. On the basis of this assignment, the system automatically determines the notification category.

You cannot define notification origins or notification categories in Customizing.

Task

Definition

Planned or completed activity that describes a planning and organizational measure in a notification. A task can:

- Apply to the notification as a whole or to individual items in a notification

- Have different statuses

Use

Using a task, you can plan how different people can interact to process a notification and track how various activities are completed within a specified period of time. The task data in a notification is displayed in varying levels of detail in the:

- Task overview

- Task detail screen

You can record task information for the notification header and for individual notification items:

- Tasks that apply to the notification as a whole (or notification header) are designated as "immediate tasks." These tasks usually provide a "quick fix" for a problem that requires immediate attention.

- Tasks for notification items are referred to as "corrective tasks." These tasks usually provide permanent solutions that will prevent the problem from reoccurring in the future.

For each task, you can enter the:

- Key for the task to be performed and a brief instruction describing what is to be done

- Planned start and end dates for the task

- Task status

Integration

If the appropriate data is maintained in Customizing, the system can trigger certain follow-up actions on the basis of the task code (for example, printing a paper or calling up an SAP transaction). You can define follow-up actions to meet your individual requirements. (For more information, see Follow-up Actions for Tasks [Page 99].)

Entering Tasks

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record immediate tasks for the notification header	Choose the *Tasks* tab page.	Enter the data on the task overview.
Record immediate tasks on task detail screen	Select a task on the task overview and choose *Detail view.*	Enter the data on the task detail screen.
Record corrective tasks for a notification item	Choose the *Items* tab, select an item, and then choose the *Item tasks* tab page.	Enter the task data for the item.
Record corrective tasks on the task detail screen	Choose the *Items* tab page and then select an item. Choose the *Item tasks* tab page, select a task and then choose *Detail view*.	Enter the planned start and end dates for the task on this screen. The dates you enter may be changed based on the status you assign to the task (see Status Management for Tasks [Page 562]).

See also:

Automatic Determination of Tasks [Page 564]

Follow-Up Actions for Tasks

Use

You can define a follow-up action for a task that will automatically be triggered and executed by the system. A follow-up action can call one or more function modules that execute specific functions (for example, printing a shop paper or calling up a transaction).

Prerequisites

In Customizing for *Cross-Application Components* under:

- *Notification → Notification Creation → Notification Content → Maintain Catalogs*, the indicator for follow-up actions is set in the task catalog (catalog type 2)

- *Notification → Notification Processing → Additional Notification Functions → Define Follow-Up Actions for Tasks*, you have defined a follow-up action key and assigned one or more function modules to be called to this key

A follow-up function is only executed if the business transaction that is assigned to the follow-up action allows it.

Features

The system automatically executes a follow-up action after you have:

3. Entered a task code (for the notification header or for a notification item) that has a follow-up action assigned to it.

4. Saved the notification

    You can display a log on the task detail screen that lists all follow-up actions that were executed.

Action Box

Use

When you process notifications, you can use the **action box** to execute **follow-up functions**. A follow-up function is a function that:

- Can either be executed as part of an overall business process or independently of such a process

- You can select and execute in the action box by means of a mouse click while you are processing a notification or task

Prerequisites

The follow-up functions in the action box are defined in Customizing for *Cross-Application Components* under *Notification → Notification processing → Additional Notification Functions*. The follow-up functions that:

- Have been predefined in the standard system can be used without any further preparations

- Are displayed in the action box, but which you do not need, can be deleted in Customizing

- You have programmed yourself and are to be included in the action box must also be defined in Customizing

Features

The following table contains the most important information you need to know about setting up and using the action box.

Function	What you should know
Appearance of the action box	In the standard system, the action box is displayed as an overview tree. In this display mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning:
	- Blue: The follow-up function is active and can be executed.
	- Black: The follow-up function is inactive and cannot be executed (yet).
	- Gray: The follow-up function has been executed and cannot be executed again.
	If you set the *Action box: Table* indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).

Action Box

Follow-up functions and dependent follow-up functions	Depending on your settings in Customizing, the action box can include follow-up functions that you: • Can execute more than once and independently of other follow-up functions in the action box • Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)
Control parameters for a follow-up function	In Customizing, you can specify: • In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes) • In which transactions a follow-up function will be displayed for use (for example, in the create or change mode) • Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing • Whether a follow-up function will be documented as a task or activity in the notification, or whether it will not be documented at all That all follow-up functions documented as tasks or activities will be available for use in the action box when you create or change a notification The follow-up functions that are not documented will also be available for use in the action box when you display a notification
Assigning follow-up functions to scenarios	In addition to assigning follow-up functions to a notification type, you can also assign them to a scenario. For example, if you are processing a notification that has a scenario assigned to it, the action box will contain follow-up functions that are assigned to the notification type, as well as those that are assigned to the scenario.
Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing. For more information about these functions, see <u>Standard Follow-Up Functions [Page 523]</u>.
Business transactions	In Customizing, you can assign a business transaction to a follow-up function. A business transaction determines whether a follow-up function can be executed, based on the current status of a notification.

Authorization check	Each follow-up function that is documented as a task or activity is assigned a code group in Customizing. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function will not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.
Workflow link	You can link follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. The system can then trigger workflow tasks once a follow-up function (task) has been executed and the notification has been saved.
Difference between follow-up functions and follow-up actions	Follow-up functions in the action box are different from task-related follow-up actions [Page 565]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a notification. With a follow-up function, the system executes the function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information interactively in a dialog box. This is not possible with follow-up actions.

Activities

To execute a follow-up function in the action box, you click the text or double-click the symbol for a follow-up function (displayed in blue). A dialog box appears, in which you can enter the data that is required to execute the function.

> You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the input help for a catalog, the system does not execute a follow-up function.

The system then executes the selected function. Depending on the settings in Customizing, the follow-up function is:

- Documented as an activity in the notification

- Documented as a task for the notification header

- Not documented

Standard Follow-Up Functions

Use

The action box in the standard system contains several follow-up functions that can be used by all applications to make it easier to process notifications. When you execute one of these follow-up functions, the system documents the execution of this function as an activity or task for the notification header.

Features

Follow-up function	What you should know
Telephone contact using *SAPphone*	You can use this function to make a telephone call using *SAPphone*. The system records the details of your phone call as a notification activity. To use this function, the telephone and computer in your office must be interconnected and the *SAPphone* component must be active.
Telephone contact without *SAPphone*	You can use this function to record a telephone call that you initiated while processing a notification. The system records the details of your phone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system records the memo as a long text for an activity.
Solution database [Ext.]	You can use this function to search the solution database for symptoms and solutions that are similar to the problem you are currently processing. If you find a symptom or solution in the database that applies to the problem in your current notification, you can: • Document your database search as an activity for the notification • Copy the tasks associated with the solution into your notification

Send notices	Using this function, you can postpone the processing of a notification. The system can then print this data or send it as a fax or e-mail to an internal or external address (Internet).
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal. You can change this text as necessary without changing the original long text. If the notification contains several partners, you can select a partner before you process the text.
	You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a **follow-up action**.
Send e-mail	You can use this follow-up function to send an e-mail (with or without an attachment) to a partner in the notification.
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal.

Activity

Definition

Completed action or information recorded during the processing of a notification.

Use

You can enter the following information for each activity:

- A key for the action performed and a short text that can be changed

- Start and end of the activity

- Quantity factor (for example, if an activity consisted of sending three units of a material to a laboratory for testing, you can enter the value "3" for the quantity factor)

An activity can apply to the notification header as well as to individual notification items. The activity data is displayed in various degrees of detail on two screens in the notification:

- On the activity overview

- On the activity detail screen

The activity overview and detail screens are the same for all notification types.

> The main difference between an activity and a task is that an activity does not have a status and cannot be assigned a partner. The activity is used strictly for documentation purposes.

Entering Activities

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record activities for the notification header	Choose the *Activities* tab page.	Enter the data in the activity overview.
Record activities for the notification header in the activities detail screen	Select an activity in the activity overview and choose *Detail view.*	Enter the data in the activity detail screen. Enter the date and time when the activity was performed. To create a new activity from the detail screen, choose *New entry*.
Record activities for a single item	Choose the *Items* tab page, select an item, and then choose the *Item activities* tab page.	Enter the activity data for the item.

Defining Scenarios

Use

You standardize the application and execution of a service request when you define its scenario.

Prerequisites

You need to create notification types first. In the notification type, you have specified whether the service request requires approval, and if so, who is to approve it. Note that you can use a notification type for more than one scenario.

Check whether all notification types from client 000 are in client 003. If you need notification types that are missing, import them using the **QISR_SM29** transaction from client 000. If these are not sufficient, then you can create your own notification types. The same procedure applies to catalogs.

For more information, see Customizing under *Cross-Application Components → Internet / Intranet Services → Scenario Definition → Prepare General Notification → Notification Creation → * Notification Type [Ext.]*.

Procedure

➡

All of the scenarios provided by SAP are in the *S*.namespace.

1. In Customizing, choose *Cross-Application Components → Internet-/Intranet Services → Internal Service request → Scenario Definition → * Define Scenarios [Ext.]*.

2. Choose *New entries.*

3. In the *general data,* enter the data required.

4. Use this opportunity to store a long text for the scenario. The system displays this description as an explanation when you call up the request form. You can also use this description to find a suitable request form in the intranet. You do not need to restrict your text to key words when you enter it. The search engine does not just filter the text using the words, but also includes their grammar, and uses word families for the search.
   For more information on the search machine, see the SAP Library under *Financials → Controlling → Cost Center Accounting → Information System → Interactive Information System*, then in *Report Documentation,* search under the *Document Search Using The Retrieval System*.

5. In the details for the form, decide how the internal request can be entered.
   You can choose between:

   - Text entry alone

   - Entry with form

   - Entry with notification transaction.

   If you chose *Entry with form*, then the following procedures apply.

   You only need to specify an ITS service if you selected the *Entry with form* entry type. You use an HTML form especially designed for the request scenario to enter the request.

To do this, you need to assign an internet service to the scenario. This internet service must contain the HTML templates and language-dependent resources that are required for the request. There is also a choice of business add-ins (BADIs) available, in which you can define specific requirements.
You can assign an Internet service to maximum one scenario.

6. To create a new Internet service, choose *Generate.*
    You have two options:

    - **Generate Internet Service With Reference**
      If you specify a scenario with an existing Internet service as a reference when you generate the Internet service, then this is copied to the new Internet service name.

    - **Generate New Internet Service (SAPDesign)**
      If you do **not** specify a scenario with an existing Internet service as a reference when you generate the Internet service, then the system copies the standard Internet service *SR00*. An Internet service generated in this way contains all the settings required for immediate testing of the scenario definition. The system automatically inserts a *Request data* area (with the corresponding entry fields) for the request-specific characteristics defined in the scenario.

    - **Generate New Internet Service (Plain HTML)**
      The same conditions apply as for generation using SAPDesign.

      ⚠

      This type of Internet service creation is only possible using Customizing for scenarios for internal service requests.

7. You need to manually publish the Internet service before you can test it.
    After generation, the processing screen for the Internet service in the Development Workbench automatically appears, where you can publish the entire Internet service. Next you can test the ITS service when in Customizing, by choosing *Test.*

8. To add processing logic to forms, choose *Business Add-In.*
    If you need special initializations or checks for the request, you can use a business add-in (*BADI QISR1*). For more information on BADIs, see the SAP *Library*, under *Basis → Change and Transport System - Overview → Transactions and Tools → BC Changes to SAP Standards →* Business-Add-In [Page 404]*.*
    As a standard measure, each scenario has its own BADI implementation (from the QISR1 BADI definition) assigned to it. However, you can use a BADI implementation for more than one scenario if required.

    - Assigning a BADI implementation to more than one scenario

    - Referencing a scenario to the BADI of another scenario
      This is particularly recommended, as you do not need to modify any existing BADI implementation.

9. To change the action box that appears in request processing, choose *Activity box.*
    All follow-up activities that were defined for the notification type appear. You can now add follow-up activities that are scenario-specific, or delete ones already defaulted for this scenario.
    For more information on the action box, see Action Box [Page 520].

10. Decide whether executing this scenario incurs costs.
    If you activate the *Cost incurring* indicator, you can either specify *estimated costs*, or store a

Defining Scenarios

> *template* with *costing variant* and *strategy,* which determines values for the cost allocation using the details in the form.
> For more information on the template, see Create Template [Page 385].

11. If you have not yet prepared a template, choose *Create template*.
    If you decide to use the costing with template, you can use the Easy Cost Planning functions.
    For more information, see the SAP Library under *Financials* → *Controlling* → *Product Cost Controlling* →Processing Costing Variants And Assigning Attributes [Ext.].

12. Choose *Characteristics* from the selection area.

13. Now enter the fields that you want to have in the form for the scenario.
    You can choose between:

    - Uncategorized characteristics
      Characteristic with up to 250 characters

    - Dictionary Type Characteristics
      Characteristic from the dictionary

    For data elements, the system transfers the category and description of the characteristic from the dictionary. For structures, the system takes all the data elements from the structure.
    The characteristic category is automatically included in the form.

    ⚠️

    The following restrictions apply to the definition of scenario characteristics:

    - Characteristic names or structure names must be unique within a scenario.

    - Characteristic names or structure names may not begin with ISR_

    - Characteristic names or structure names should not be named as HTML business indicators, for example LABEL, NAME, VALUE, DIM, MAXSIZE, TYPE, EXISTS, ENABLED or VISSIZE.

    - The length of the characteristic names or structure names should have a maximum of 28 characters.

    - The data length of the characteristic or structure fields is restricted to 250 characters.

14. Choose *Tasks* from the selection area.
    Use the workflow or worklists in the SAP System to specify the processing of the internal service request.
    For more information on tasks, see: Tasks [Page 560].

15. Give each task in the processing a description.

16. If you want to evaluate tasks, store a key.
    Follow-up activities are automatically filled if you choose a key. A follow-up activity is an action that is automatically executed when the task is processed.

17. You can store a subtemplate for a cost-incurring scenario
    For several tasks, a subtemplate enables you to group and assign the rules for the template to the task. You can assign items correctly using the subtemplate during Easy Execution.

18. To find the correct processor for the task, you can store a standard role. You can define some standard roles in the transaction **PFAC**.

In the container, you store characteristic names or field names from one of the following tables:

- **TQ80**

- **VIQMEL**

- **VIQMSM**

The stored fields enable the correct processor to be found, using the standard role. If one of the fields stored in the container is filled in the form, then the correct processor is found during runtime.

If you want your user-defined fields (not in the tables named above) to be used for standard role determination, use the business add-in **QISR3.**

For more information on roles, see the SAP Library under *Basis Components → Business Management → Organizational Management → Integration With SAP Business Workflow → Role Resolution → Role Definition → Define Roles Using Responsibilities.*

See also:

Definition Of The Form

Business Add-Ins

Business Add-Ins are a new SAP enhancement technique based on ABAP Objects. They can be inserted into the SAP System to accommodate user requirements too specific to be included in the standard delivery. Since specific industries often require special functions, SAP allows you to predefine these points in your software.

As with customer exits (SMOD/CMOD [Ext.]), two different views are available:

- In the definition view, an application programmer predefines exit points in a source that allow specific industry sectors, partners, and customers to attach additional software to standard SAP source code without having to modify the original object.

- In the implementation view, the users of Business Add-Ins can customize the logic they need or use a standard logic if one is available.

In contrast to customer exits, Business Add-Ins no longer assume a two-system infrastructure (SAP and customers), but instead allow for multiple levels of software development (by SAP, partners, and customers, and as country versions, industry solutions, and the like). Definitions and implementations of Business Add-Ins can be created at each level within such a system infrastructure.

SAP guarantees the upward compatibility of all Business Add-In interfaces. Release upgrades do not affect enhancement calls from within the standard software nor do they affect the validity of call interfaces. You do not have to register Business Add-Ins in SSCR.

The Business Add-In enhancement technique differentiates between enhancements that can only be implemented once and enhancements that can be used actively by any number of customers at the same time.

In addition, Business Add-Ins can be defined according to filter values. This allows you to control add-in implementation and make it dependent on specific criteria (on a specific *Country* value, for example).
All ABAP sources, screens, GUIs, and table interfaces created using this enhancement technique are defined in a manner that allows customers to include their own enhancements in the standard.

A single Business Add-In contains all of the interfaces necessary to implement a specific task. In Release 4.6A, program and menu enhancements can be made with Business Add-Ins.
The actual program code is enhanced using ABAP Objects. In order to better understand the programming techniques behind the Business Add-In enhancement concept, SAP recommends reading the section on ABAP Objects [Ext.].

More information about Business Add-Ins is contained in the following sections:

Business Add-Ins: Architecture [Ext.]

A Comparison of Different Enhancement Techniques [Ext.]

Defining Business Add-Ins [Ext.]

Calling Add-Ins from Application Programs [Ext.]

Implementing Business Add-Ins [Ext.]

Filter-Dependent Business Add-Ins [Ext.]

Multiple Use Business Add-Ins [Ext.]

Menu Enhancements [Ext.]

Business Add-Ins: Import Procedure [Ext.]

Definition Of A Form

Use

You store the form layout for an internal service request [Ext.] in the HTML template definition.

Prerequisites

You have made all Customizing settings under *Cross-Application Components →
Internet/Intranet Services → Internal Service Request → Definition of Scenarios →* Define
Scenarios [Ext.]

Flow

You can choose to work in either the Web Application Builder [Page 432], or the ITS-SAP@Web
Studio (BC-FES-ITS) [Ext.].

For more information on the adaptation tools, see the SAP Library under

- *Basis → BC-ABAP Workbench → Integration of Internet Services →* Web Application Builder

- *Basis → Frontend Services (BC-FES) →* ITS-SAP@Web Studio (BC-FES-ITS)

See also:

Define Form [Page 414]

Preparing The Internet Service

You are in Customizing for the internal service request [Ext.] under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Definition Of A Scenario → Define Scenarios [Ext.]*.

Before you can use the scenario in the intranet as an internal service request, you need to generate and publish an internet service.

After you have done this, you can process the request form.

See also:

Generate Service [Page 408]

Publishing The Service [Page 410]

Definition Of The Form [Page 413]

Generating Services

Use

You require an internet service as the form for the internal service request.

Prerequisites

In Customizing under *Cross-Application Components → Internet-/Intranet Services → Internal Service Request → Scenario Definition → Define Scenario [Ext.],* you selected *Entry with form* as the *entry type* for the *web entry.*

You now need to generate an *internet service* automatically.

Procedure

➡

> You can assign **one** ITS service to maximum **one** scenario.

1. For the internet service, enter a name that has not yet been used.

2. Choose *Generate.*
   You can generate a new internet service in three ways:

   a. **Generate Internet Service With Reference**
      If you specify a scenario with an existing Internet service as a reference when you generate the Internet service, then this is copied to the new Internet service name.
      You can copy an existing Internet service in the SAP@Web-Studio or Web Application Builder. However, you then need to manually adapt the internet service parameter *SCENARIO* to the new scenario.
      For more information on the SAP@Web-Studio, see the *SAP Library* under *Basis Components → Frontend Services (BC-FES) →* ITS-SAP@Web Studio (BC-FES-ITS) [Ext.] *or Basis Components→ BC-ABAP Workbench → Integration of Internet Services → Web Application Builder [Page 432].*

   b. **Generate New Internet Service (SAPDesign)**
      If you do **not** specify a scenario with an existing Internet service as a reference when you generate the Internet service, then the system copies the standard Internet service *SR00*.
      An Internet service generated in this way contains all the settings required for immediate testing of the scenario definition. The system automatically inserts a *Request data* area (with the corresponding entry fields) for the request-specific characteristics defined in the scenario.

   c. *Generate New Internet Service (Plain HTML)*
      The same conditions apply as for generation using SAPDesign.

      ⚠

      > The last two methods of internet service creation are only possible using Customizing for internal service requests.

   d. You need to manually publish the internet service before you can test it.
      You go automatically to processing for the internet service in the web application builder.

3. Select the service and choose *Publish → Entire service.*
   Next you can test the internet service in Customizing, by choosing *Test.*

Result

You have created the required HTML templates for the form for your scenario. Next you can adapt the request form according to your requirements.

See also:

Define Scenario

 [Page 400]Publish Services [Page 410]

Define Form

 [Page 414]Web Application Builder [Page 432]

Publishing a Service

Use

In order for an Internet service to be executed by the ITS, it must be stored in the ITS file system. This is known as publishing the service. You can choose to publish the entire service or just parts of it. When you publish the whole service, the corresponding Internet service and its HTML templates are placed in the file system of the AGate server, and the MIME objects are placed in the file system of the WGate server.

⚠️

> Note that by default, the Internet service is published on all Internet Transaction Servers. However, you can choose to restrict the publication to an ITS assigned to your particular R/3 System. To do this, choose *Utilities → Settings* and then, under *ITS*, enter the required server. For further information, refer to User Settings [Ext.].

Prerequisites

At least one ITS must have been assigned to the R/3 System, and it must be active.

Procedure

To publish an entire Internet service from the object list:

1. Right-click the relevant service.

2. Choose *Publish → Entire service* from the context menu.

   If an error occurs while the system is publishing the service, a log is generated containing the relevant message texts.

   If no errors occur, the system displays the message *The object has been published successfully*.

Result

Once you have published the entire service, you can start your Web application.

See also:

User Settings for Internet Services [Ext.]

Executing a Service

Use

Use this function to test a Web transaction or MiniApp from the ABAP Workbench.

Prerequisites

You must already have published the entire service on the ITS. The ITS must be active.

Procedures

To start the Web application from the Object Navigator:

1. Select the relevant service.

2. Choose *Execute*.

   The system starts the Web browser and displays a logon window.

3. Check the logon language, and log onto the ITS by choosing *Logon*.

4. Run the Web application.

   You can suppress the logon window by specifiying a logon language in the ~LANGUAGE parameter.

Result

The service is started using the HTTP address **http://<ITS>:<Port>/scripts/wgate/<service>/!**

Executing a Service

⚠️

The way in which a Web transaction is displayed depends on the classification of the underlying R/3 transaction. *Professional User Transactions* are displayed with the normal R/3 menus, command field, standard toolbar, and application toolbar in the Web browser. *Easy Web Transactions* (EWTs), on the other hand, are displayed with a special EWT header.

Form Definition

Use

In the HTML template definition, you store the form layout for an internal service request [Ext.].

Prerequisites

In Customizing, under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Definition of Scenarios →* Define Scenarios [Ext.] you have made all Customizing settings.

Flow

To define the HTML template, you can choose between working in the web application builder, and the SAP@WEB-Studio.
For more information on adaptation tools, see the SAP Library under:

* *Basis → BC-ABAP Workbench → Integration of Internet Services →* Web Application Builder [Page 432]

* *Basis → Frontend Services (BC-FES) →* ITS-SAP@Web Studio (BC-FES-ITS) [Ext.]

See also:

Defining Forms [Page 414]

Define Form

Use

You define a form for a specific internal service request scenario [Ext.]. This form is later called up and filled out by the person entering the request.

Prerequisites

1. In Customizing under *Cross Application Components → Internet-/Intranet Services → Internal Service Request → Scenario Definition →* Define Scenario [Ext.], you defined a scenario.
   For more information on the scenario, see Definition of A Scenario [Page 367].

> You define special fields for the request in Customizing for scenarios. You can use the following characteristic categories for this:
>
> - Characteristics with a reference to a category=data element
> - Characteristics with a reference to a category=structure
> - Uncategorized characteristics

You can evaluate characteristics on the HTML template under the name specified there.
The only exceptions are *characteristics with reference to a structure.* In this case, the structure fields can be used with their names (without the prefix of <structure name> or similar names) in the HTML template. This means that structures are continuously broken down for the request and can, therefore, be seen as a more compact definition instead of a selection of single characteristics that refer to data elements.

In all three cases, the characteristic description is available as a field label in the HTML template as well as the name and the characteristic content.
For the categorized characteristics, the field length is also available. In addition, the input/output format is executed for characteristics that refer to data elements or structure fields, in the same way as for screen fields.

Uncategorized characteristics have the implicit **CHAR250** category without input/output conversion.

The following restrictions apply to the definition of scenario characteristics:

- Characteristic names or structure field names must be unique within a scenario.

- Characteristic names or structure field names may not begin with ISR_

- Characteristic names or structure field names should not be named as HTML business indicators (for example, LABEL, NAME, VALUE, DIM, MAXSIZE, TYPE, EXISTS, ENABLED or VISSIZE).

- The length of the characteristic names or structure field names should have a **maximum** of 28 characters.

- The data length of the characteristic or structure fields is restricted to 250 characters.

2. You have generated and published an ITS service.
   For more information on generating an ITS service, see: Generating Services [Page 408].

Process Flow

An *Internet service* for an internal service request has the following components:

- Service file with ITS parameters

- HTML templates for the different processing modes in the request

- File with the language-dependent resources from the HTML template.

You can process Internet services in the SAP@Web-Studio, or in the Web Application Builder (access from Customizing for scenarios). However, compared with the Web Application Builder, the SAP@Web-Studio has several advantages (syntax check, an editor that is easy to use, clearer management for each of the components and several Internet services at the same time, and improved help functions). You can also switch between tools during processing. You can use the source control in the SAP@Web-Studio to check Internet services in and out of the SAP@Web-Studio.

For more information on adaptation tools, see the SAP Library under:

- *Basis → BC-ABAP Workbench → Integration of Internet Services →* Web Application Builder [Page 432]

- *Basis → SAP Internet Applications →* SAP@Web Studio [Ext.]

Define Form

Service Parameters

In an *Internet service,* you need the following parameters for an internal service request:

Parameter	Value
SCENARIO	Scenario name
~TRANSACTION	QISR1
~WEBTRANSACTIONTYPE	EWT
~GENERATEDYNPRO	1
~STYLE	DHTML
~AUTOSCROLL	0
~LISTSCROLLING	0
~POPUPS	1

HTML Templates

When you start the internal service request, you call up the **QISR1** transaction in the SAP System (**SAPLQISR3** program). This goes to one of the following screens, regardless of processing mode: For each of these subscreen containers, you can define your own HTML template to generate the corresponding HTML form:

Mode	Screen	HTML Templates
CREATE	110	saplqisr3_110.html
CHANGE	120	saplqisr3_120.html
DISPLAY	130	saplqisr3_130.html

All HTML templates should be assigned to *Default-Theme 99.* You can leave out the HTML template for processing modes that you do not require.

If you do not require any variants for the request for the different processing modes, define the HTML template for the *display* mode. You can enter the following HTML business statement for all other HTML templates:

> `` `include(~theme="99", ~language="", ~name="saplqisr3_110.html")` ``

This statement ensures that for each HTML template, the *saplqisr3_110.html* HTML template for the *create* mode is referenced.

In the HTML template for *creating,* if you use the functions from the ISR-HTML library (for SAP Design) or from the ISR-Plain-HTML-Library (for Plain HTML), then the entry fields are automatically switched to *Not ready for input* depending on the processing mode.

Definition Of An HTML Template For The ISR

The simplest HTML template contains the HTML code for displaying the request in the web browser. You can embed the HTML business statement into the HTML template for a dynamic HTML page layout.

For more information on HTMLBusiness, see the *SAP@Web-Studio* or the *Web Application Builder* under *Application Help*. You can use HTML business to create HTML statements under certain circumstances for example (*if* (...) ... *else ... end;*) or in loops (*for ... ;*). In the HTML template, the following generally applies:

- Statements included in ` (backtick) contain HTML business code

- Statements not included in ` (backtick) contain HTML-Code, which is generated directly into the HTML page.

You can also refer to data from the SAP R/3 System in the HTML template, using HTML business. For example, the

<div align="center">

`*BUILDING_TO*`

</div>

statement means that the *BUILDING_TO* characteristic is output in the HTML page that was created using the template.

As well as the special characteristics defined in Customizing for scenarios, you can use the following general data from the internal service request in the HTML template.

Name	Description	Name in BADIs
ISR_HEADER-NOTIF_NO	Notification number	GENERAL_DATA -NOTIF_NO
ISR_HEADER-NOTIF_TYPE	Notification type	GENERAL_DATA-NOTIF_TYPE
ISR_HEADER-SCENARIO	Scenario	GENERAL_DATA-SCENARIO
ISR_HEADER-CREATION_DATE	Creation date	GENERAL_DATA-CREATION_DATE
ISR_HEADER-CREATION_TIME	Creation time	GENERAL_DATA-CREATION_TIME
ISR_HEADER-CALC_COSTS	Calculated costs	GENERAL_DATA-CALC_COSTS
ISR_HEADER-CALC_COSTS_CURR	Currency key for CALC_COSTS	GENERAL_DATA-CALC_COSTS_CURR
ISR_HEADER-LANGUAGE	Language	GENERAL_DATA-LANGUAGE
ISR_HEADER-START_DATE	Start date	GENERAL_DATA-START_DATE
ISR_HEADER-START_TIME	Start time	GENERAL_DATA-START_TIME
ISR_HEADER-REQ_DATE	Required date	GENERAL_DATA-REQ_DATE
ISR_HEADER-REQ_TIME	Required time	GENERAL_DATA-REQ_TIME
ISR_HEADER-PRIORITY	Priority	GENERAL_DATA-PRIORITY
ISR_PAGE	Current page number	PAGE
ISR_HEADER-EXT_REF_NUMBER	External reference number	GENERAL_DATA-EXT_REF_NUMBER
ISR_HEADER-SHORT_TEXT	Short text	GENERAL_DATA-SHORT_TEXT

Define Form

ISR_HEADER-ESTIM_COSTS	Estimated costs	GENERAL_DATA-ESTIM_COSTS
ISR_HEADER-ESTIM_COSTS_CURR	Currency key for ESTIM_COSTS	GENERAL_DATA-ESTIM_COSTS_CURR
ISR_MODE	Current mode (CREATE, DISPLAY, and so on)	MODE
ISR_FORM_VIEW	View	*Default:* ISR_REQUEST *If processor calls the form for the message:* ISR_PROCESS
ISR_CREATED_BY-USER_ID	Created by: User name	ISR_GENERAL_DATA-CREATED_BY-USER_ID
ISR_CREATED_BY-FIRSTNAME	Created by: First name	ISR_GENERAL_DATA-CREATED_BY-FIRSTNAME
ISR_CREATED_BY-LASTNAME	Created by: Last name	ISR_GENERAL_DATA-CREATED_BY-LASTNAME
ISR_CREATED_BY-FULLNAME	Created by: Full name	ISR_GENERAL_DATA-CREATED_BY-FULLNAME
ISR_CREATED_BY-TITLE	Created by: Title	ISR_GENERAL_DATA-CREATED_BY-TITLE
ISR_CREATED_BY-DEPARTMENT	Created by: Department	ISR_GENERAL_DATA-CREATED_BY-DEPARTMENT
ISR_CREATED_BY-BUILDING	Created by: Building	ISR_GENERAL_DATA-CREATED_BY-BUILDING
ISR_CREATED_BY-FLOOR	Created by: Floor	ISR_GENERAL_DATA-CREATED_BY-FLOOR
ISR_CREATED_BY-ROOM_NO	Created by: Room number	ISR_GENERAL_DATA-CREATED_BY-ROOM_NO
ISR_CREATED_BY-E_MAIL	Created by: eMail address	ISR_GENERAL_DATA-CREATED_BY-E_MAIL
ISR_CREATED_BY-TEL_NUMBER	Created by: Telephone	ISR_GENERAL_DATA-CREATED_BY-TEL_NUMBER
ISR_CREATED_BY-TEL_EXTENSION	Created by: Telephone extension	ISR_GENERAL_DATA-CREATED_BY-TEL_EXTENSION
ISR_CREATED_BY-FAX_NUMBER	Created by: Fax	ISR_GENERAL_DATA-CREATED_BY-FAX_NUMBER
ISR_CREATED_BY-FAX_EXTENSION	Created by: Fax extension	ISR_GENERAL_DATA-CREATED_BY-FAX_EXTENSION
ISR_CREATED_BY-COMPANY	Created by: Company	ISR_GENERAL_DATA-CREATED_BY-COMPANY
ISR_CREATED_BY-MASTER_CCTR	Created by: Master cost center	ISR_GENERAL_DATA- CREATED_BY-MASTER_CCTR
ISR_CREATED_BY-MASTER_COAREA	Created by: Master controlling area	ISR_GENERAL_DATA- CREATED_BY-MASTER_COAREA
ISR_INITIATED_BY- …	Person placing request	ISR_GENERAL_DATA-INITIATED_BY- …
ISR_APPROVED_BY- …	Person approving request	ISR_GENERAL_DATA-APPROVED_BY- …
ISR_PROCESSOR- …	Person processing request	ISR_GENERAL_DATA-PROCESSOR- …
ISR_CONTACT_PERSON- …	Contact person for scenario	ISR_GENERAL_DATA-CONTACT_PERSON- …

The following functions are available in the SAP General HTML-Business-Functions Library to enable you to create the most important form elements (buttons, fields, labels etc.) quickly and easily:

- ## SAPDesign

    To make the creation of HTML templates for internal service requests even easier, there is an extension of the *SAP General HTML-Business-Functions Library* for internal service requests. You include this library in HTML templates using the following statement:

    **`include(~service="sr_library", ~theme="99", ~language="",
    ~name="ISR_Template_Library.html")`**

    If you use this library, you can automatically use the functions of the *SAP General HTML-Business-Functions Library*.

    See also:

    Example: Framework of HTML Templates for Internal Service Requests

    [Page 420]Example of Specific Form Elements in HTML Templates (SAPDesign) [Page 422]

- ## Plain HTML

    To make it easier to create Plain-HTML-Templates, you can use the following statement to include a library in your template:

    **`include(~service="sr_library", ~theme="99", ~language="",
    ~name="ISR_Template_Library_Plain_HTML.html")`**

    See also:

    Example: Specific Form Elements in HTML Templates (Plain HTML) [Ext.]

Example: HTML Framework for HTML Templates

The framework of every HTML template for internal service requests should appear as follows:

`` `include(~service="sr_library", ~theme="99", ~language="", ``
`` ~name="ISR_Template_Library.html")` ``

`` `SAP_TopInclude()` ``

`<html>`

` <head>`
`   ` `SAP_PageTitle()` `
`   ` `SAP_Stylesheet()` `
`   ` `SAP_JavaScript()` `
` <head>`

` <body ` `SAP_TemplateBodyAttributes()` ` onload="` `SAP_OnloadJavaScript()` `">`

`  ` `SAP_LoadInfoTable()` `
`  ` `SAP_TemplateHeader()` `

`  ` `SAP_BodyContentBegin()` `
`  ` `SAP_ISRFormBegin()` `
`…` `SAP_TemplateFormEnd()` `
`…` `SAP_BodyContentEnd()` `
`  </body>`
`<html>`

The part of the HTML template that is specific to the scenario begins after the statement `` `SAP_ISRFormBegin()` ``.
In this specific part of the HTML template, you can define the form elements for the request.

See also:

Example: Specific Form Elements in HTML Templates (SAP Design)

The part of the HTML template that is specific to the scenario begins after the statement `*SAP_ISRFormBegin()'*.

You can use the following functions to define the form elements for the request.
The functions are defined in the *sr_library* Internet Service, in the *isr_template_library* template.

> To study the functions, load the form elements in the SAP@Web-Studio, or display the **SR_LIBRARY** internet service in the Web Application Builder. You find the functions using the syntax check.
> For more information, see the SAP Library under *Basis → SAP Internet Applications → SAP@Web Studio [Ext.] or Basis → BC-ABAP Workbench → Integration of Internet Services →* Web Application Builder [Page 432]*.*

Form Elements

> The examples come from the standard scenario *Room change request (SR01).* To study the examples described, call this scenario.

SAP_ISRGetLabel(name)
This returns the *name* of the description of a special or general characteristic.
Example:
`*myLabel = SAP_ISRGetLabel(name="BUILDING_TO")*`
Result:
The *myLabel* variant defined by assignment contains the text "By building".

SAP_ISRGetMaxSize(name)
Returns the maximum length for the *name* characteristic.
Example:
`*myLabel = SAP_ISRGetLabel(name="BUILDING_TO")*`
Result:
The *mySize* variant defined by assignment contains the value 2.

SAP_ISRAdjustMode(mode)

Converts the mode for an entry field, dependent on the current processing mode (CREATE or DISPLAY).
Example:
`` `myMode = SAP_ISRAdjustMode(mode)` ``
Result:
If you call the request in *Display* mode, *myMode* contains the value *disabled*. In all other cases, it contains the value transferred using the *mode* parameter.

SAP_ISRFieldListBegin(left, top, labelWidth=SAP_ISRdefaultLabelWidth)

and

SAP_ISRFieldListEnd( )

Defines a list of form elements that are arranged under each other in rows. The starting point of the list is defined by *left* (columns from the right edge of the form) and *top (*rows from the top of the form). *labelWidth* (optional parameter with the default value SAP_ISRdefaultLabelWidth = 30) determines the width of the labels for the input fields in the list.
Example:
`` `x = 1; y = 1` ``
`` `SAP_ISRFieldListBegin( x , y , 018)` ``
  `` `SAP_ISRLabel( labelText="from office", left = x+13);` ``
  `` `SAP_ISRField( name="ISR_INITIATED_BY-BUILDING" )` ``
  `` `SAP_ISRField( name="ISR_INITIATED_BY-FLOOR" )` ``
  `` `SAP_ISRField( name="ISR_INITIATED_BY-ROOM_NO" )` ``
`` `SAP_ISRFieldListEnd( )` `` ``

SAP_ISRFieldListRowBegin( )

and

SAP_ISRFieldListRowEnd( )

Defines a series of form elements in a list of form elements that was created using SAP_ISRFieldListBegin().
Example:
`` `x = 1; y = 1` ``
`` `SAP_ISRFieldListBegin( x , y ,018)` ``
  `` `SAP_ISRField( name="ISR_INITIATED_BY-FIRSTNAME" )` ``
  `` `SAP_ISRFieldListRowBegin( )` ``
   `` `SAP_ISRField( name="ISR_INITIATED_BY-TEL_NUMBER" )` ``
   `` `SAP_ISRLabel( labelText="-", left = x+23);` ``
   `` `SAP_ISRField( name="ISR_INITIATED_BY-TEL_EXTENSION", ``
fieldLabel="noLabel", left=x+22)`
`` `SAP_ISRFieldListRowEnd( )` ``
  `` `SAP_ISRField( name="ISR_INITIATED_BY-E_MAIL" )` ``
  `` ` SAP_ISRField( name="ISR_INITIATED_BY-DEPARTMENT" )` ``
`` `SAP_ISRFieldListEnd( )` ``

SAP_ISRFieldListRowEnd( )

Example: Specific Form Elements in HTML Templates (SAP Design)

Defines an empty row a list of form elements that was created using SAP_ISRFieldListBegin()**.**

SAP_ISRField(id="", fieldLabel="noLabelSpec", fieldLabelWidth=0, name, mode="enabled", size=0, maxLength=0, inspectionText="",left=0, top=0)
Defines an input field with a label and optional text after the input field.
The individual parameters mean the following:

id
optional
The ID of the form element, if you want to work in JavaScript.

fieldLabel
optional
Label before the input field. *Label="noLabel"* results in no label being output.

fieldLabelWidth
optional
Label width.
It is not necessary to specify a width in a field list (see above).

name
Name of the characteristic for which you create the input field.

mode
Optional
enabled (ready for input) or *disabled* (not ready for input)
If you define an input field as *ready for input* but call up the request in the *display* mode, then the system automatically switches to *not ready for input.*

size
optional
Output length of the input field.
If you do not specify an output length, the system automatically determines the output length of the field.

maxLength
Optional
Maximum length of the entry in the input field.
If you do not specify an output length, the system automatically determines it.

inspectionText
optional
Text after the input field.

left
optional
Position of the input field, calculated in columns from the left edge of the form.
If you use a field list, the coordinate is calculated automatically.

Example: Specific Form Elements in HTML Templates (SAP Design)

top
optional
Position of the input field, calculated in rows from the top edge of the form.
If you use a field list, the coordinate is calculated automatically.

Example:
`` `*SAP_ISRField( name="ISR_INITIATED_BY-FIRSTNAME" )* `` `

SAP_ISRPulldownField(id="", fieldLabel="noLabelSpec", fieldLabelWidth=0, name, key, content="", mode="enabled", size=0, maxLength=0, inspectionText="", onchange="", left=0, top=0)
Defines a combo box with a label and optional text after the combo box. In the *mode="disabled"* mode, the system displays a field not ready for entry (rather than a combo box) that contains the value currently selected.
The meaning of a parameter corresponds to its function in **SAP_ISRField( )**.
If you use a field list, the coordinate is calculated automatically.
Additional parameters:

key

Name of the table containing the key values for the combo box (for example, you can create the table in *BADI SCENARIO_SET_ADDITIONAL_VALUES*). Values from the *key* table are not issued. If you select a row in the combo box, the corresponding value from the *key* table is set in the characteristic as *name*.

content
Name of the table containing the labels for the combo box (for example, you can create the table in *BADI SCENARIO_SET_ADDITIONAL_VALUES*). These are issued in the combo box list.
Example:

`` `*SAP_ISRPulldownField(name="BUILDING_TO",*
key="BUILDING_OPTION", content="BUILDING_OPTION") `` `

SAP_ISRUserName(id="", fieldLabel="noLabelSpec", fieldLabelWidth=0, name, user, mode="enabled", size=0, maxLength=0, inspectionText="",left=0, top=0)
Defines input fields for the parts of a name:
...-FIRSTNAME
...-LASTNAME
...-FULLNAME
A special feature of this function is that if you enter an ambiguous name, or a part of a name and a wild card (*), in the name field, the system generates all users that match this entry. Instead of an input field for the parts of the name, the system presents these users in a combo box, from which you make your selection. The name of the user chosen is copied to the input fields for the parts of the name.
The meaning of a parameter corresponds to its function in **SAP_ISRField( ).**
Additional parameters:

user
Name of the characteristic for the *UserID* that belongs to the *name* entered in the input fields.
Example:

Example: Specific Form Elements in HTML Templates (SAP Design)

`*SAP_ISRUserName( name="ISR_INITIATED_BY-LASTNAME", user="ISR_INITIATED_BY-USER_ID")*`

SAP_ISRGroupBox(left, top, width, height, groupBoxLabel)
Defines a group box by the coordinates *left*, *top*, *width* and *height*.
GroupBoxLabel is the label for the box.
Example:
`*SAP_ISRGroupBox(001, 001, 034, 008, FRAME_INITIATED_BY.label)*`
or
`*SAP_ISRGroupBox(001, 001, 034, 008, „Rahmentext")*`
Result:
Draws box for the person making request, or box with the label *Rahmentext*.

SAP_ISRLongTextInput(cols=80, rows=4, left=0, top=0)
Defines the input field for the request long text by its position from the *left* and *top,* and with *cols* (columns) and *rows*.
Example:
`*SAP_ISRLongTextInput(cols=110, rows=5, left = 1, top = 1)*`

SAP_ISRCheckBox(id="", name, mode="enabled", text="noTextSpec", left=0, top=0, labelWidth=0)`
Defines a check box for the *name* field by its position from the *left* and *top,* with the label *text* and *labelWidth.* If you use a field list, the coordinate is calculated automatically.
Example:
`*SAP_ISRCheckBox( name="CHANGE_PHONE" )*`

SAP_ISRLabel (labelText="", labelIconName="", id="" , left=0, top=0)
Defines a simple text on the form.
If you use a field list, the coordinate is calculated automatically.
Example:
`*SAP_ISRLabel( labelText="einText" )*`

SAP_ISRStandardButtons(left , top, buttonWidth=018)
Outputs the necessary standard pushbuttons for each session in the *left, top* position.
buttonWidth is the width of every button.
Example:
`*SAP_ISRStandardButtons( 1 , 20 )*`

Example: Specific Form Elements in HTML Templates (SAP Design)

To execute the output of error messages, you call the JavaScript function *SAPBodyOnload()* in the body tag:

<body onload="SAPBodyOnload()">

After the two statements necessary for the definition of the form:

<form id="myForm" name="myForm" action="`wgateURL()`" method="post">

*`include(~service="sr_library", ~theme="99", ~language="",
~name="ISR_Template_Library_Plain_Html.html")`*

there is the part of the HTML template that is specific to the scenario.

You can use the following functions to define the form elements for the request.
The functions are defined in the *sr_library* Internet Service.

> To study the functions, load the form elements in the SAP@Web-Studio, or display the **SR_LIBRARY** internet service in the Web Application Builder. You find the functions using the syntax check.
> For more information, see the SAP Library under *Basis → SAP Internet Applications → SAP@Web Studio [Ext.] or Basis → BC-ABAP Workbench → Integration of Internet Services → Web Application Builder [Page 432]*.

Form Elements

getLabel(name)
This returns the *name* of the description of a special or general characteristic.
Example**:**
`myLabel = getLabel(name="BUILDING_TO")`
Result**:**
The *myLabel* variant defined by assignment contains the text "To building".

getSize(name, maxwidth)
This returns the *name* length of a characteristic. To enter a maximum length, you use the optional parameter *maxwidth*.
Example:
`mySize = getSize(name="ISR_HEADER-NOTIF_TYPE")`
Result:
The *mySize* variant defined by assignment contains the value 2.

getName(name, index)
This returns the *name* of the characteristic. To specify a row index for access to tables, you can use the optional parameter *index*.

Example: Specific Form Elements in HTML Templates (SAP Design)

Example:
`myName = GetName(name="BUILDING_TO")`
Result:
The *myName* variant defined by assignment contains the text "To building".

Disabled(name)
This sets the display mode for the *name* to correspond to the request mode (create, display, change). You use this function in the HTML tag <input type="text" ...> <input type="radio" ...> <input type="checkbox" ...> and <select …>.
Example:
<input type="text" name="BUILDING_TO" value="`BUILDING_TO`"
`Disabled("BUILDING_TO")`>
Result:
 The input field is ready for input in the *Create* and *Change* request modes only, not in *Display* mode.

Readonly(name)
This sets the display mode for the *name* to correspond to the request mode (create, display, change). You use this function in the HTML tag `<textarea...>`.
Example:
<textarea wrap="physical" rows="12" cols="65"
name="`GetTextAreaName("MY_TEXT",65)`" `readonly("MY_TEXT")`>
Result:
The text field is ready for input in the *Create* and *Change* modes only, not in *Display* mode.

Selected(name, value)
This sets the correct entry in a dropdown list box dependent on the *name* value. You use this function in the HTML tag <option...>.
Example: Dropdown list box (variant 1)
    <select id="COLOR" name="COLOR" size=1 `disabled("COLOR")`>

      <option value="red" `Selected("COLOR","red")` > you like the red color?

      <option value="green" `Selected("COLOR","green")`> or the green color?

      <option value="blue" `Selected("COLOR","blue")`> or the blue color?

    </select>
Result:
If you chose the "or the green color?" entry, the value "green" is assigned to the characteristic *"COLOR"*. If you call up the sent form in display mode, the "or the green color?" entry is displayed automatically.

Example: Specific Form Elements in HTML Templates (SAP Design)

SetOptions(name, options, labels)
This enables you to set up a dropdown list box for the *name* characteristic using the corresponding *options* and *labels*. You use this function after the HTML tag <select...>.
Example: Dropdown list box (variant 2)

> `*`COLOR_Option[1] = "red";*
>
> *COLOR_Option[2] = "green";*
>
> *COLOR_Option[3] = "blue";*
>
> *COLOR_Label[1] = "you like the red color?";*
>
> *COLOR_Label[2] = "or the green color?";*
>
> *COLOR_Label[3] = "or the blue color?";`*

> *<select id="COLOR" name="COLOR" size="1" `disabled("COLOR")`>*
>
> *`SetOptions("COLOR","COLOR_OPTION","COLOR_LABEL")`*
>
> *</select>*

Result:
If you chose the "or the green color?" entry, the value "green" is assigned to the characteristic *"COLOR"*. If you call up the sent form in display mode, the "or the green color?" entry is displayed automatically.

Checked(name, index, value)
This sets the correct selection for radio buttons and checkboxes dependent on the *name* value. You use this function in the HTML tags <input type="radio" ...> and <input type="checkbox" ...>.
Example: Radio buttons

> *<input name="COLOR" value="red" type="radio" `checked("COLOR",1,"red")`*
> *`disabled("COLOR")`>you like the red color?
*
>
> *<input name="COLOR" value="green" type="radio" `checked("COLOR",1,"green")`*
> *`disabled("COLOR")`>or the green color?
*
>
> *<input name="COLOR" value="blue" type="radio" `checked("COLOR",1,"blue")`*
> *`disabled("COLOR")`>or the blue color?
*

Result:
If you chose the "or the green color?" entry, the value "green" is assigned to the characteristic "*COLOR*". If you call up the sent form in display mode, the "or the green color?" entry is selected automatically.

CheckboxProlog(name, index)
Necessary prolog for the implementation of checkboxes. This sets the correct entry in checkboxes dependent on the *name* value. You use this function directly before the HTML tag <input type="checkbox" ...>.
Example: Checkbox

> *`CheckboxProlog("COLOR[1]")`*
>
> *<input name="COLOR[1]" value="red" type="checkbox" `Checked("COLOR",1,"red")`*
> *`disabled("COLOR")`>you like the red color?
*

Example: Specific Form Elements in HTML Templates (SAP Design)

  `*CheckboxProlog("COLOR[2]")*`

  <input name="COLOR[2]" value="green" type="checkbox"
`*Checked("COLOR",2,"green")*` `*disabled("COLOR")*>and the green color?
*

  `*CheckboxProlog("COLOR[3]")*`

  <input name="COLOR[3]" value="blue" type="checkbox"
`*Checked("COLOR",3,"blue")*` `*disabled("COLOR")*>and the blue color?
*
Result:
If you chose both the "and the green color?" and "and the blue color?" entries, the values "green" and "blue" are assigned to the characteristic *"COLOR"* in the second and third rows respectively. If you call up the sent form in display mode, the "and the green color?" and "and the blue color?" entries are selected automatically.

getTextAreaName(name, width)
Returns the *name* and the *width*.
Example:
<textarea wrap="physical" rows="5" cols="75"
name="`GetTextAreaName("ISR_TEXT",75)`" `readonly("ISR_TEXT")`>

getTextAreaContent(name)
Returns the *name*.

⚠️

> Normally you use both *ISR_NEW_TEXT,* for the entry of new comments, and *ISR_TEXT,* for the display of existing comments (see examples 1 + 2 below). The comments are logged chronologically in the long text for the message.

Example 1: Output field for ISR long text

`if ( ISR_MODE != "CREATE" );`
  <textarea wrap="physical" rows="5" cols="75"
name="`GetTextAreaName("ISR_TEXT",75)`" `readonly("ISR_TEXT")`>

  `GetTextAreaContent("ISR_TEXT")`

  </textarea>
`end`

Example 2: Input field for ISR long text

`if ( ISR_MODE != "DISPLAY" );`
  <textarea wrap="physical" rows="5" cols="75"
name="`GetTextAreaName("ISR_NEW_TEXT",75)`" `readonly("ISR_NEW_TEXT")`>

  `GetTextAreaContent("ISR_NEW_TEXT")`

  </textarea>
`end`

Web Application Builder

Purpose

The Web Application Builder allows you to create Web development objects within the ABAP Workbench. Existing R/3 transactions requre these objects to allow them to run as Web transactions in a Web Browser. You can also use the Web Application Builder as an integrated environment for creating MiniApps.

Integration

The Web Application Builder is a fully integrated tool within the ABAP Workbench. Objects that you create with it, such as service files, HTML templates, and MIME objects, are stored in the R/3 Repository and are connected to the R/3 Change and Transport System.

Features

- Creating Internet services for existing R/3 transactions or MiniApps.

- Implementing the dialog logic.

- Generating the HTML templates for the screens of a transaction. These contain standard HTML and HTML[Business] statements that map the screen layout.

- Editing the generated HTML templates using HTML and HTML[Business] to develop them further.

- Including MIME objects (icons, graphics, Java applets, animation...) to improve the layout further.

- Creating language-specific texts (language resources).

- Publishing the services or individual service ocmponents on the Internet Transaction Server (ITS)

- Executing the complete Web transaction from the ABAP Workbench.

- Connection to the Change and Transport System (CTS).

- Connection to Version Management.

Constraints

Certain functions are not yet available:

- There is no syntax check

- HTML[Business] and the flow logic are not yet integrated with the Debugger.

Creating HTML Templates

Use

When you implement a MiniApp, you must create HTML templates. The dialog logic of a MiniApp runs on the ITS, not in R/3.

For each transaction, you can choose whether you want to generated HTML templates for all screens, for some screens (mixed mode [Ext.]), or at all. Templates that you create explicitly are identical to the HTML documents that are generated automatically by the WebGUI.

Generating templates explicitly is useful if the WebGUI features are insufficient for your needs and you would need to adapt the standard generated template anyway. This will particularly be the case if you are trying to improve the layout of a screen or if you want to include hyperlinks.

> Standard template generation from the WebGUI should be sufficient for most transactions. The WebGUI can display the screen elements of a simple transaction (text fields, input/output fields, checkboxes, radio buttons, tabstrip controls, table contorls, subscreens...) without you having to go to the effort of creating a template.

Prerequisites

- You must already have created the service.

- You have sufficient knowledge of HTML and HTML^{Business} to take advantage of the template-based approach.

Procedure

To create an HTML template from the tree display in the object list:

3. Right-click the name of the service.

4. From the context menu, choose *Create* → *Template*.

    The *Create Template* dialog box appears.

5. Enter the theme for the service and fill out the remaining fields.

    If the Web application is a Web transaction and you want to generate a template for a particular screen, select *Generate HTML from screen* and enter the program name and screen number.

    If the application has no corresponding R/3 screen (MiniApps), select *Name of template* and enter the name.

Creating HTML Templates

6.   Confirm by choosing ✔ *Save.*

       The *Create Object Catalog Entry* dialog box appears.

7.   Assign the template to a development class and choose 🖫.

Result

The generated template appears in the object list under *Templates.* The generated contents of the tempalte are displayed in the Editor. Only the static screen information is evaluated - an HTML[Business] function is inserted in the template for each screen element. These are highlighted in blue. You can now change the contents of the template using standard HTML and HTML[Business].
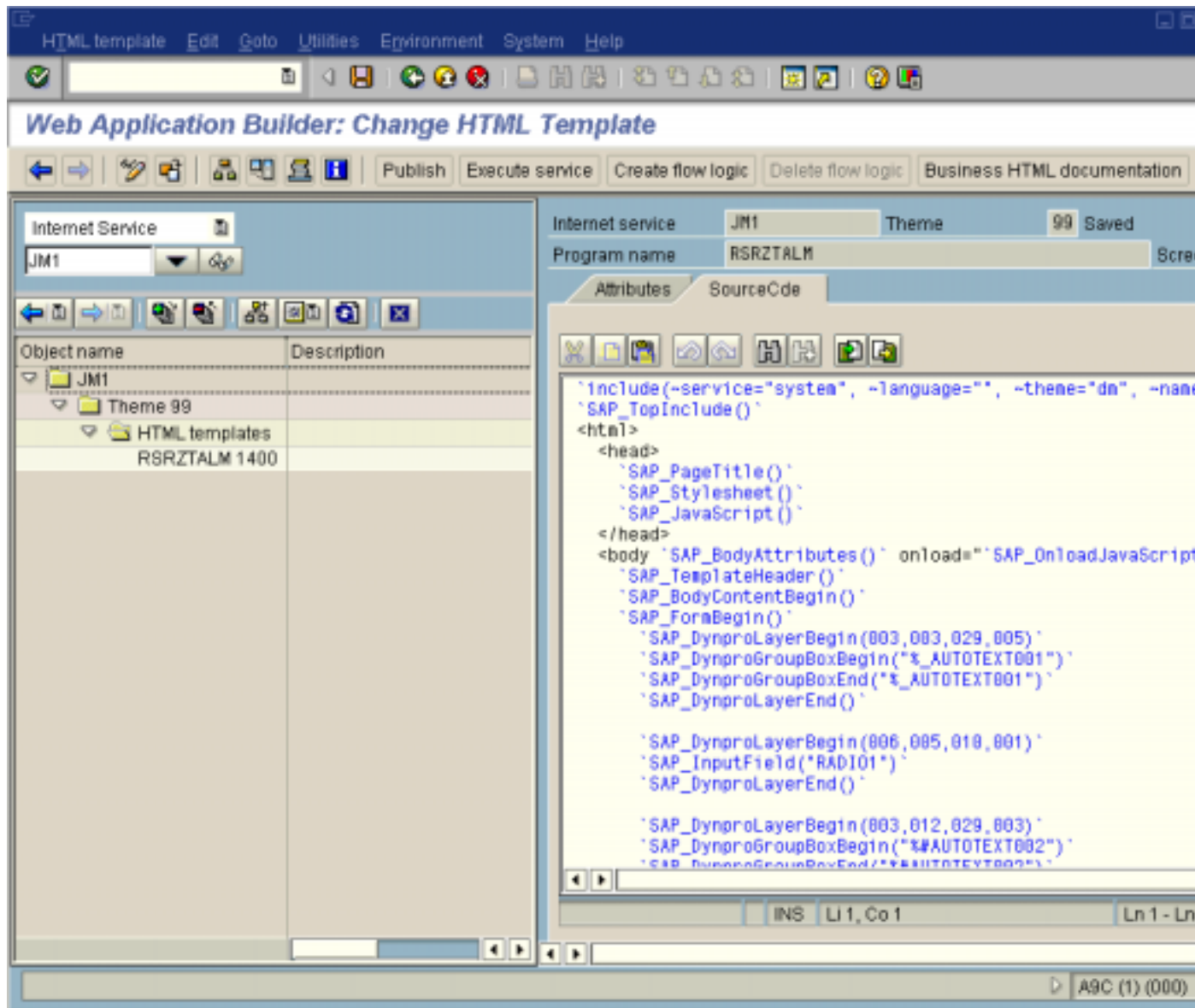
See also:

Extending HTML Templates

Once you have created an HTML template, you can change the generated source code.

To do this, you must be familiar with the basics of HTML and HTML^{Business}.

HTML^{Business} is an extension of standard HTML developed by SAP to allow R/3 screen data to be merged dynamically with information on HTML templates and to make it easier for the ITS to exchange data between the R/3 System and the Web Server.

For further information, refer to HTMLBusiness Reference [Ext.].

Example

This example sets a hyperlink to a particular position on an HTML page:

Internet service	JM1	Theme	99 Saved	
Program name	RSRZTALM		Screen number	1400

Attributes | SourceCde

```
        `SAP_DynproLayerBegin(006,005,010,001)`
        `SAP_InputField("RADIO1")`
        `SAP_DynproLayerEnd()`

        `SAP_DynproLayerBegin(003,012,029,003)`
        `SAP_DynproGroupBoxBegin("%#AUTOTEXT002")`
        `SAP_DynproGroupBoxEnd("%#AUTOTEXT002")`
        `SAP_DynproLayerEnd()`

        `SAP_DynproLayerBegin(006,013,009,001)`
        `SAP_Button("PUSH1")`
        `SAP_DynproLayerEnd()`

        `SAP_DynproLayerBegin(020,013,008,001)`
        `SAP_Button("PUSH2")`
        `SAP_DynproLayerEnd()`

    `SAP_FormEnd()`
    `SAP_BodyContentEnd()`

    'SAP_DynproLayerBegin(051,002,015,001)'
      <a href="http://workbench:1080" style="color: rgb(187,0,0)">Workbench Ne|
    'SAP_DynproLayerEnd()'
    </body>
```

`*` INS | Li 38, Co 5 - Li 41, Co 1 | Ln 18 - Ln 42 of 42 lines

See also:

Publishing a Service [Page 410]

Adding MIME Objects [Page 438]

Adding MIME Objects

Use

You can use MIME objects (icons, graphics, audio files, animations...) to improve the layout of your Web applications.

Prerequisites

You must already have created an Internet service.

Procedure

To add a MIME object to an Internet service from the object list:

8. Right-click the relevant service.

9. In the context menu, choose *Create → Mime*.

    The *Read from Local File* dialog box appears:
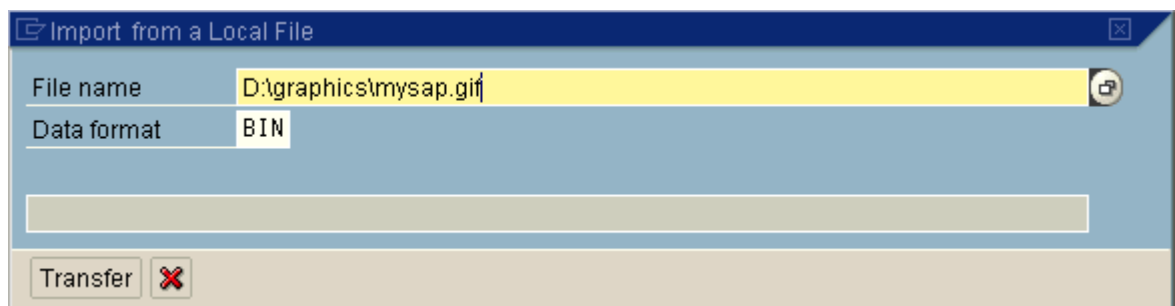
10. Enter the path name of the file you want to import, and ensure that the file format is correct.

11. Choose *Import*.

    The *Create Mime* dialog box appears.

12. Enter the theme and the name for the MIME object.

13. In the Name field, you can create a subdirectory, separated from the name of the MIME object by a forward slash ("/").
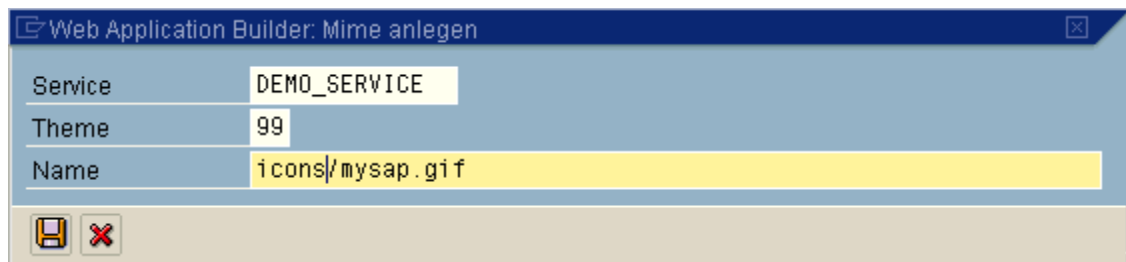
14. Choose 🖫 to continue.

    The *Create Object Catalog Entry* dialog box appears.

15. Assign the MIME object to a development class and choose 🖫.

Result

The MIME object has been inserted in the R/3 Repository as a standalone object. It appears under Mimes in the object list display, and, if it is a graphic, its contents are displayed.

You can now use this object in your interface design.

When you publish the service, the MIME objects are not stored in an ITS directory. Instead, they are stored on the HTTP server under the name and subdirectory you specified in step 5 above.

See also:

Entering An Internal Service Request

Use

You want to apply for a business transaction (such as a service or change to data in the SAP System), or you are looking for a solution to a problem.

Integration

The internal service request represents a flow between the intranet and the SAP System.

Intranet	SAP System
Entered by	Person who processes/approves the request

Prerequisites

You are working in the employee work place, or you can call up a special internal service request from the SAP System.

Features

The internal service request covers the following business processes:

- Searching for a solution [Page 442]

- Requests that do not require approval [Page 444]

- Requests that require approval [Page 447]

Activities

You enter your internal service request in the employee work place.

The initial screen has the following structure:

Jeanette, what can I do for you?

Initiated by

Change

My request

Request or problem

Delete   Status   Solutions

Searching For Solutions: Flow

Use

You are looking for a solution to a certain problem.

Prerequisites

You are working in the mySAP.com Workplace.

You have called up the internal service request [Ext.] from your launchpad in the Workplace via *Create internal service request*.

Flow
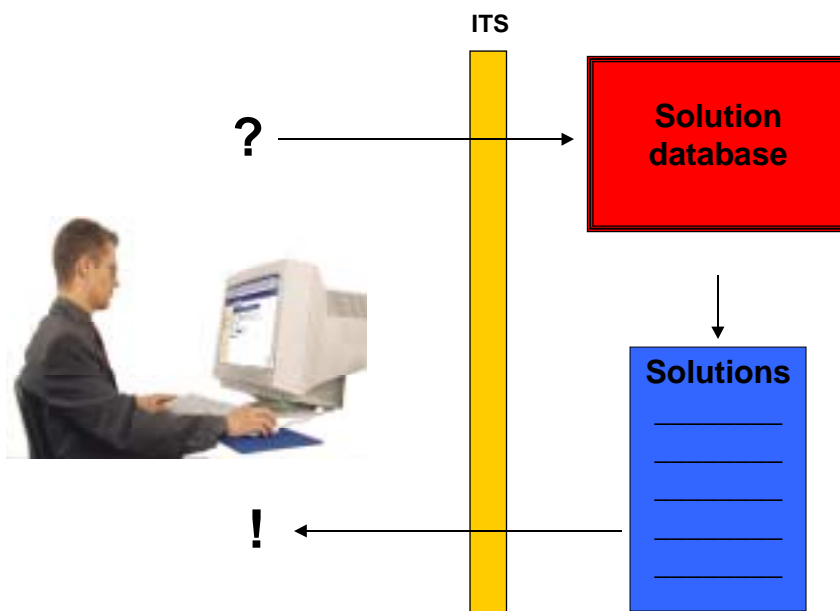
Activities

Enter a problem description. The system uses a search engine to find you solutions to this problem. You do not need to restrict your text to key words when you enter it. The search engine does not just filter the text using the words, but also includes their grammar, and uses word families for the search.
For more information on the search machine, see the SAP Library under *Financials →
Controlling → Cost Center Accounting → Information System → Interactive Information System*, then search for report documentation [Ext.] under the *Document Search Using The Retrieval System*.

Initiated by

Question

Display solutions

Solutions

Precise detail

Solutions

Result

You have found solutions for the problem.

Request Without Approval Requirement: Flow

Use

You want to apply for a business transaction (such as a service or change to data in the SAP System), or you are looking for a solution to a problem.

Prerequisites

You are working in the mySAP.com Workplace.

You have called up the internal service request [Ext.] from your launchpad in the Workplace via *Create internal service request*.

Flow

Activities

You are looking for a form suitable for your request.

Jeanette, what can I do for you?

Initiated by

[   ]   [   ]   **Change**

My request

[   ]

Request or problem

[   ]

Delete   **Status**   **Solutions**

You select a suitable request or the system suggests a form when you enter a free text describing your request. The system uses a search engine to find you solutions to this problem. You do not need to restrict your text to key words when you enter it. The search engine does not just filter the text using the words, but also includes their grammar, and uses word families for the search.

For more information on the search machine, see the SAP Library under *Financials →
Controlling → Cost Center Accounting → Information System → Interactive Information System*, then in *Report Documentation,* search under the *Document Search Using The Retrieval System*.

The system calls up the selected request.

Request Without Approval Requirement: Flow

Example of a request form

The system has already provided the *Entered by* field with your data.

If required, you enter the initiator name (if you are making an entry for a colleague for example)

The form displays all the fields that are important for your requirements,

in which you make your entries.

If required, enter an explanatory free text.

Now you send the request, and

the system finds the correct processor for your request and informs that person.

You can check your request status at any time.

See also:

Processing Notifications [Page 460]

Processing Tasks [Page 472]

Status Query [Page 482]

Example For Entering And Processing An Internal Service Request [Page 493]

Request With Approval Requirement: Flow

Use

You want to apply for a business transaction (such as a service or change to data in the SAP System), or you are looking for a solution to a problem.

Prerequisites

You are working in the mySAP.com Workplace.

You have called up the internal service request [Ext.] from your launchpad in the Workplace via *Create internal service request*.
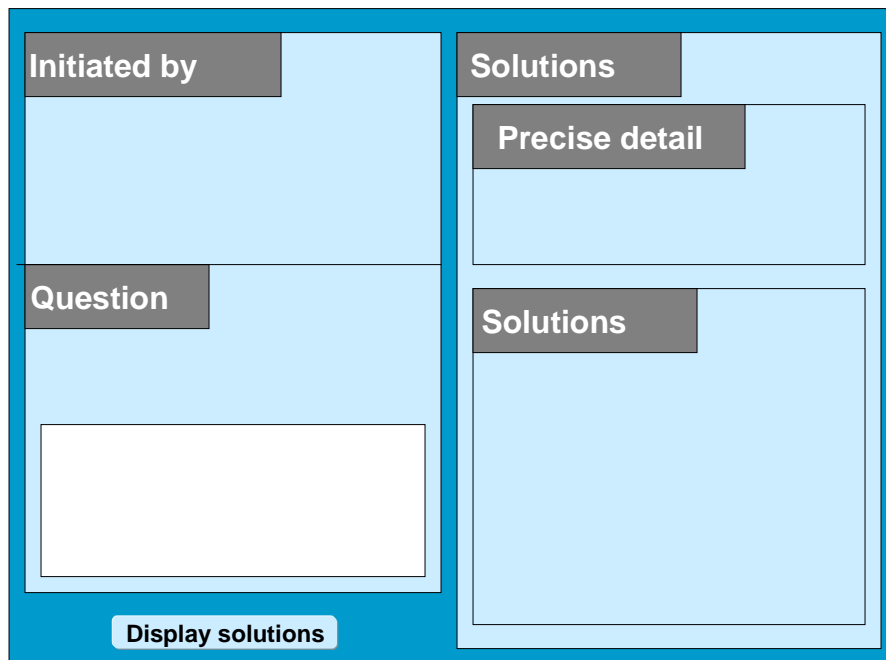
Flow

Activities

You are looking for a form suitable for your request.

Request With Approval Requirement: Flow

Jeanette, what can I do for you?

Initiated by

[　　　　　　]　　[　　　　　　]　　[Change]

My request

[　　　　　　　　　　　]

Request or problem

[　　　　　　　　　　　　　　　　]

[Delete]　　[Status]　　[Solutions]

You select a suitable request or the system suggests a form when you enter a free text describing your request. The system uses a search engine to find you solutions to this problem. You do not need to restrict your text to key words when you enter it. The search engine does not just filter the text using the words, but also includes their grammar, and uses word families for the search.

For more information on the search machine, see the SAP Library under *Financials →* *Controlling → Cost Center Accounting → Information System → Interactive Information System*, then in *Report Documentation,* search under the *Document Search Using The Retrieval System.*

The system calls up the selected request.

```
┌──────────────────────────────────────────────────────────┐
│  ┌──────────────────────┐   ┌──────────────────────┐      │
│  │ Initiated by         │   │ Entered by           │      │
│  │                      │   │                      │      │
│  └──────────────────────┘   └──────────────────────┘      │
│                                                            │
│  ┌──────────────────────────────────────────────────┐     │
│  │ Budget request                                    │     │
│  │                                                   │     │
│  │  ┌────────────────────┐    ┌───────────────────┐  │     │
│  │  │ Budget consumer    │    │ Budget object     │  │     │
│  │  │                    │    ├───────────────────┤  │     │
│  │  │                    │    │ Approved by       │  │     │
│  │  └────────────────────┘    └───────────────────┘  │     │
│  └──────────────────────────────────────────────────┘     │
│  ┌──────────────────────────────────────────────────┐     │
│  │ Remarks                                           │     │
│  │                                                   │     │
│  └──────────────────────────────────────────────────┘     │
│   ( Check )                          ( Send request )      │
└──────────────────────────────────────────────────────────┘
```

Example of a request form

The system has already provided the *Entered by* field with your data.

If required, you enter the initiator name (if you are making an entry for a colleague for example)

The form displays all the fields that are necessary for your requirements,

in which you make your entries.

If required, enter an explanatory free text.

Now you send the request.

As it requires approval, it is sent to the approving manager that you specified.

This manager approves the request (possibly after calculating the costs).

The system finds the correct processor for your request and informs that person.

You can check your request status at any time.

See also:

Approval Requirement For Notifications [Page 526]

Processing Notifications [Page 460]

Processing Tasks [Page 472]

Status Query [Page 482]

Example For Entering And Processing An Internal Service Request [Page 493]

Request With Approval Requirement: Flow

Request With Approval Requirement: Flow

Approval Requirement for Notifications

Use

For optimal notification processing in your company, you can active an approval step **for each notification type** in Customizing, which controls whether a newly created notification can be processed further. If an approval requirement exists for a newly created notification, it initially receives the status *Submit for approval* and it cannot be processed further at this point. When this status is set, a person or department responsible must explicitly make a decision about the approval requirement. For this purpose, the *SAP Business Workflow* starts a workflow that automatically informs this person or department that a notification is pending for approval. The following processing options are possible, depending on the decision that is made:

- The person or department responsible gives an approval.

  In this case, the notification is released for further processing (this means that the business transaction *Give approval* is executed, which simultaneously sets the statuses *Approval OK* and *Notification in process* in the notification). You can then process the notification in the usual manner (for example, tasks can be created).

- The person or department responsible **does not** give an approval.

  In this case, the notification is not released for further processing (this means that the business transaction *Refuse approval* is executed, which simultaneously sets the statuses *Approval refused* and *Notification completed* in the notification).

In this way, the person who created the notification can monitor the current notification status and the decision (in case of an approval requirement) from his or her workplace.

Prerequisites

In Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner → Define Partner Determination Procedure (Assign Partner Functions for Notification Type)*, the *Approval required* indicator is set for the desired **notification type**.

Scenarios Provided

The scenarios provided not only differ in their purpose, but also whether they incur costs or not.

You can copy these scenarios and adjust them to your requirements.

General Request

Purpose

You should only use the general request if you have not included a suitable scenario for your special internal service request [Ext.]. This could happen, for example, for unusual requests for which you do not have a user-defined scenario in Customizing.

Special Features

There are no request-specific fields in the general request. You can only enter your service request in a text.

See also:

Example For Entering And Processing An Internal Service Request [Page 493]

Request For Office Removal

Purpose

You use the removal request if you want to order a removal.

Special Features

As carrying out a removal request incurs costs, you can use a template for the cost calculation.

See also:

Example For Entering And Processing An Internal Service Request [Page 493]

Request For Budget Increase

Purpose

You want to apply for a budget increase for an order, network, network activity, or a WBS element.

You do **not** know who approves this operation.

Special Features

There are two different scenarios:

- *Request for budget increase* (scenario *SR61*)
  The form is sent to a processor, who changes the budget,
  and executes the budget transactions in the R/3 System.

- *Request for budget with approval* (scenario *SR62*)
  The form is sent to someone for approval.
  The manager approves the request. The request processor receives a message via the role determined in Customizing, and via workflow.
  For more information on Customizing scenarios, see the implementation guide (IMG) under *Cross-Application Components → Internet / Intranet Services → Internal Service Request → Scenario Definition → Define Scenarios [Ext.]*or in the *SAP-Library* under *Cross-Application Components → Internal Service Request [Page 363]*.

For more information on requests for budget increases, see the SAP *Library* under *Financials → Controlling → Internal Orders → Budget Management → Request For Budget Increase [Ext.]*.

Request For Master Data Change

Purpose

If you establish that certain master data needs to be changed, but do not know who the responsible processor is, you can make a request for master data changes. The request is transferred to the SAP R/3 System where it is automatically sent to the responsible processor.

You can request the following changes to master data:

Object	Type of Change
Cost centers [Ext.]	Create, change, lock
Internal orders [Ext.]	Change
G/L accounts [Ext.]	Create, change
Vendors [Ext.]	Create, change, delete
Customers [Ext.]	Create, change, delete

Special Features

You can call up the request form from the work place, and from different SAP applications (depending on the object).

Request Flow

1. You call up the request form and enter the required master data change.

2. Then you send the form.

    The request is then transferred to the SAP R/3 System.

3. The responsible processor receives the request in their worklist or workflow inbox.

    The processor can reject the request, forward it, or make the requested changes.

For more information, see: Request For Master Data Changes In The Intranet/Internet [Ext.].

Request For An Adjustment Posting

Purpose

If you establish that an error occurred during a posting, but you do not know who the responsible processor is, you can request an adjustment posting. The request is transferred to the SAP R/3 System where it is automatically sent to the responsible processor.

Special Features

You can call up the request form from the work place, and from the following SAP applications:

- Line item report (CO)
- General document display in Controlling (CO)
- General document display in Financial Accounting (FI)

Request Flow

4. You call up the request form and enter the required adjustment posting.

5. Then you send the form.

   The request is then transferred to the SAP R/3 System.

6. The responsible processor receives the request in their worklist or workflow inbox.

   The processor can reject the request, forward it, or make the requested changes.

For more information, see: Request An Adjustment Posting In The Intranet [Ext.].

Change Notification

Purpose

With a change notification, you arrange the changes to product data that is controlled by Engineering Change Management.

You create a change notification for example, if you want to inform the engineer of a design error or if you want to suggest a product improvement.

Special Features

The change notification:

- has to be approved

- does **not** carry costs

Order Process up to Execution

1. You create the subject as simple text in the change notification.

   In addition a little knowledge of the Engineering Change Management or of the work processes in design or work scheduling is essential.

2. The person responsible gets the notification via a workflow or in his worklist and then checks the subject.

3. The processor either approves or rejects the query.

   If the query is rejected, the process ends.

4. If the processor has approved the query, he carries out one or more of the following activities:

   – Create change notification (as follow-up notification)

   – Assign ECR

   – Create ECR

       The person, who created the ECR, defines the necessary settings such as the change type [Ext.]. The other processes in Engineering Change Management are controlled by the change type.

See also:

Activities for Change Notifications [Page 512]

ECR / ECO [Ext.]

Processing The Internal Service Request

After you entered an internal service request [Ext.], the system found the responsible processors using the details given in the request and their definitions in Customizing.

To process the internal service request, choose:

	With Worklist	**Without Worklist**
For Notifications	*Office → Notification → Worklist → Notifications.*	*Office → Notification → Change*
For Tasks	*Office → Notification → Worklist → Tasks.*	*Office → Notification → Task → Process*

Processing Notifications

To process the internal service request [Ext.], you can do the following:

- Processing notifications [Page 531]

- Processing notifications using the worklist [Page 503]

You call up processing via:

- *Office → Notification → Worklist → Notifications* or

- *Office → Notification → Change*

Process Notification

Use

Put notification in process

Once you have created a notification and entered all relevant information, you can put the notification in process. When you put a notification in process, you release the notification for processing.

A notification can be put in process in the following ways:

- You can put a notification in process manually.

- The system puts a notification in process automatically if an order was created for the notification.

When a notification is put in process, the system changes the status of the notification from "outstanding" (*OSNO*) to "notification in process" (*NOPR*).

Postpone notification

In some cases, it may be necessary to delay the processing of a notification (for example, if the assigned tasks cannot be carried out yet).

Using this function, you can postpone the processing of a notification. When you postpone a notification, it receives the status *NOPO* (*notification postponed*).

You cannot postpone a notification that has already been put in process.

Complete notification

You complete a notification when the problem has been solved and no further processing is necessary. Once you complete a notification, you can no longer change any data in the notification. You can then only display the notification.

When a notification is completed, it receives the status *NOCO* (*notification completed*).

You cannot complete a notification if outstanding tasks still exist in the notification.

Categorizing a notification problem

When you complete a notification, the system displays a dialog box with the current date and time. You can accept the displayed date and time as the completion time or you can change it. In this dialog box, you must specify whether the problem arose because of an internal or external cause. For example, if a vendor delivers a defective product, your are dealing with an externally caused problem.

Put notification in process again

You can put a completed notification in process again, if you determine that additional processing is necessary.

Archive completed notification

Process Notification

Completed notifications are automatically archived and are deleted from the database after a specific, predefined time interval. This time interval is defined in Customizing. Therefore, make sure you have finished processing the notification before you complete it.

Delete notification

In some cases, you may want to delete a notification. You cannot, however, delete a notification directly. You must set a deletion flag in the notification which identifies it as one that can be deleted.

A company typically runs an archiving program at regular intervals. This program searches for the notifications with deletion flags, converts the deletion flags to deletion indicators, and copies the notifications to an archive. The system then deletes the notifications from the database.

Before you delete a notification, make sure that it is no longer needed.

Once you set a deletion flag for a notification, you can no longer change the data in the notification. It then receives the status *Deletion flag* and *Completed*. You can now only display the notification. For more information about notification statuses, see .

If you set a deletion flag in the notification header, the system also sets deletion flags for the individual notification tasks.

You can cancel the deletion flag as long as it has not been converted to a deletion indicator. You can then put the notification back in process and change or display it in the usual manner.

Procedure

Desired processing type	What you should know
Put notification in process	Call up the notification in the create or change mode and then choose *Notification → Functions → Put in process.*
Postpone notification	Call up the notification in the change mode, choose *Notification → Functions → Postpone*, and then save the notification.
Complete notification	Call up a notification in the change mode and choose *Notification → Functions → Complete*. Specify the completion date/time and the cause of the problem; then close the dialog box and save the notification.
Delete notification	To set a deletion flag, call up the notification in change mode and then choose *Notification → Functions → Deletion flag → Set*. To reset the deletion flag, choose *Notification → Functions → Deletion flag → Deselect*.

Processing Notifications Using Worklist

Use

Using the worklist for notifications, you can select notifications on the basis of different criteria and process them. You can select the notifications as follows:

- You select the notifications using the *My worklist* function. The system then displays the following notifications for further selection and processing:

    - All notifications to be processed by you as the "person responsible" or that fall within your department's area of responsibility

    - All notifications to be processed by you as a *<Partner function>*

    - All notifications you created

    - All notifications that were last processed by you

- You select the notifications using the *General selection* function. The system then displays all notifications for further selection and processing. Make sure the preset selection criteria contain the values you want (for example, notification status, selection period).

Prerequisites

If you use the *General selection* function and you want to process notifications for which you are not responsible or which you did not create, you must have the corresponding authorization.

Activities

You choose *Logistics → Central Functions → Notification → Worklist → Notifications* to call up the worklist for notifications.

You enter the required data and choose *Execute*.

See also:

Select and Process Notifications Using Worklist [Page 533]

Select and Process Notifications Using Worklist

Use

You want to use the worklist for notifications to select and display a list of notifications. For example:

- You want to display or change a specific notification, but you do not know the number of the notification.

- You want to display or change several notifications with certain attributes.

- You want to perform certain functions simultaneously for several notifications with particular attributes.

- You want to select the notifications that you are responsible for processing.

Prerequisites

If you want to select notifications on the basis of partner functions:

- Partner functions must be defined in Customizing

- Users or departments must be assigned to the partner functions

Procedure

1. Choose *Logistics → Central Functions → Notification → Worklist → Notifications*.

   The dialog box *Worklist: Notifications* appears.

2. If you want to create your own **personal** worklist, choose the *My worklist* tab page.

   If you want to create a list of **all** notifications that meet certain selection criteria, choose the *General selection* tab page.

3. Enter the desired selection criteria.

If you want to	Then
Select only the notifications that are assigned to you for processing	Set the *For processing by me* indicator on the *My worklist* tab page.
Select only the notifications that were created by you	Set the *Created by me* indicator on the *My worklist* tab page.
Select only the notifications that were last processed by you	Set the *Last processed by me* indicator on the *My worklist* tab page.
Select only the notifications assigned to you as a specific partner (for example, in your capacity as an "author")	Set the *In my role as* indicator on the on the *My worklist* tab page and choose a partner function in the list field.

Select notifications that were created within a specific time period	Set the indicator: • *1 week*, if you want to select notifications that were created up to one week before the current date. • *1 month*, if you want to select notifications that were created up to one month before the current date. • *3 months*, if you want to select notifications that were created up to three months before the current date. • *1 year*, if you want to select notifications that were created up to one year before the current date. • *Defined by me* and enter the desired time interval if you want to select notifications that were created within a specific time period.
Select a specific notification or several notifications of a specific notification type	Enter the desired notification number or notification type.
Format the list display to meet your own specific requirements	Choose the desired layout in the *Layout* list field. You can store the following information in a layout: • List column structure • Sort criteria • Filter conditions

Select and Process Notifications Using Worklist

Specify which criterion the monitor column in the list of notifications references	In the list field *Reference field for monitor*, choose a reference field. The monitor column is then displayed with the corresponding status. ➡️ If you do not choose a reference field, the monitor column is not displayed. 💬 For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning: • **Green**: the desired start date has not been reached • **Yellow**: the desired start date has been reached, but the desired end date has not been reached • **Red**: the desired end date has been surpassed. The notifications displayed in red are critical and should be processed with the highest priority.
Select notifications with a specific status	Select the corresponding indicator on the *General selection* tab page or enter the desired selection profile.
Select notifications that have been assigned specific partners	In the *Partner* area of the *General selection* tab page, choose the desired partner function(s) and/or enter the partner number.

➡️

If you always want to use the same selection criteria in your worklist, enter the desired data and choose *My defaults*.

4. Choose *Execute*.

The system displays a list of notifications that meet your selection criteria.

5. You can use the functions described below to process selected objects in the list further.

Function	**Procedure**
Switch between the *Display notification* and *Change notification* transactions	Choose the *Change <-> Display* pushbutton.
Display a graphic (for example, how many notifications were created on a particular date or for a specific material)	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.
Export notification list to MS Excel	Choose *Spreadsheet*.

Display document flow for one or more notifications	Select one or more objects in the list and then choose *Display document flow*.
Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a notification and then choose *Telephone call*.
Display notification long text	Select a notification and then choose *Long text*.
Display or change notifications (branch to notification header)	Select one or more objects in the list and then choose *Notification*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.
Compare notification processing dates (requested start and end dates)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Display report documentation	Choose *Goto → Report documentation*
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.

If you selected more than one object in the list, the system displays the first selected object in the list (in the display or change mode). When you have finished processing the first object, choose *Goto → Back*. The next selected object is automatically displayed.

Processing Notifications Using Workflow

Use

If a notification is created or put in process in the system, the system can automatically notify the person(s) or department(s) responsible via the *SAP Business Workflow* that:

- The notification must be processed or tasks need to be defined

- Defined tasks need to be executed

- All notification tasks have been completed and the notification must either be completed or additional tasks must be defined for the notification

You receive the information about the notification that needs to be processed as a *work item* in your inbox (*Business Workplace).* Your inbox provides an overview of all notifications that you are responsible for processing. You can begin processing the work item directly from your business workplace.

Integration

You can access your business workplace by choosing *Office → Workplace* from the SAP menu. Then choose *Inbox → Workflow* to display any work items that may be present.

Prerequisites

The required system settings to activate the *SAP Business Workflow* have been made.

Activities

If there is a work item in your inbox, proceed as follows to begin processing the work item:

- You double click the work item to display a description of the notification.

- You choose *Execute* to process the work item. The system calls up the transaction to process a notification.

Partners in Notification Processing

Definition

A **business partner** is a business object that consists of a person, organization, group of persons, or group of organizations in which a company has a business interest. A business partner may also be a person, organization, or group within a company.

A business partner can have several **functions** at one time. Functions are characterized by function categories. A function category, for example, may be a sold-to party, interested person, payer, or payee.

A business partner can have relationships with other business partners. Relationships are characterized by **relationship types**. For example, relationship types can include the following: "is a subsidiary of," "is the contact person for," or "is identical to." A business partner can have several addresses. Addresses are defined by address types. An address type, for example, can consist of a delivery address or correspondence address.

A business partner can be assigned other business partners using the function determination. These business partners can then act on behalf of the original partner in their respective roles. For example, a business partner can be defined as a payee for another business partner.

For more information about business partners, refer to the documentation *Basic Functions and Master Data in Sales and Distribution*.

Use

In a notification, you can record all partners who are involved with subject matter/problem described in the notification. This includes the person who reported the subject matter/problem, the persons responsible for processing the notification, and those responsible for processing individual notification tasks. The partner data that you can maintain in a notification is predefined in Customizing for each notification type.

The following graphic shows how partners are used for notification processing.

Partners in Notification Processing

```
┌─────────────────────────────┐        ┌─────────────────────────────┐
│  Partners for Notification   │        │      Partners for Tasks      │
│           Header             │        │ (Based on the notification   │
│ (Based on the notification   │        │           type)              │
│           type)              │        │                              │
└─────────────────────────────┘        └─────────────────────────────┘
```

Partners who report problems	Partners responsible for notification processing	Partners responsible for task processing
For example: • **Customer** • **Vendor** • **Author** • **Contactperson**	For example : • **Dept. responsible** • **Coordinator**	For example : • **User responsible** (Immediate tasks in notification header) • **User responsible** (Corrective tasks for notification items)

Partner Screen
(Summary of all partners associated with notification)

For example:
• **Dept. responsible**
• **Coordinator**

Structure

Partner type

Partners can be:

- Internal partners (for example, internal employees or partners in the *Human Resources* component)

- External partners (for example, customers, vendors, or manufacturers)

Partner function

The various partner types can be subdivided into **partner functions**. The partner function defines the rights, responsibilities and tasks of each partner when a business transaction is processed.

Partner determination procedure

The partner determination procedure specifies whether partners can be assigned to a notification and which partner functions can be used to process various business transactions. Your system administrator defines the partner determination procedure in Customizing.

Processing the Partner Information

Prerequisites

You can only display the partner data screen if a partner determination procedure has been defined in Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner*.

Procedure

2. In a notification, choose *Goto → Partner.*

The screen for the partner data appears. If partner data already exists for the notification, it will be displayed in a table. In this screen, you can use the following functions:

Function	Follow-on menu path
Display partner data	Select a partner and choose *Environment → Display object*.
Delete a partner	Select a partner and choose *Delete partner assignment*.
Phone a partner	Select a partner and choose *Phone partner*.
Contact partner via paging function	Select a partner and choose *Send message to partner*.
Sort partners by function	Choose *Edit → Sort by partner function*.
Display, change, or delete partner addresses	Select a partner and choose the corresponding pushbutton

If you want to enter new partner data for the notification, enter the data directly in the table.

3. Go back to the notification header and save the new or changed partner data.

Task Processing

Purpose

Using the functions for task processing, you can change or display the tasks [Page 560] in a notification independently of the notification itself. In this way, you can:

- Process tasks quickly and easily

- Execute tasks using the functions of the action box

- Access the information in the associated notification at any time

Process Flow

2. You process the tasks using one of the following options, depending on your job duties or method of working:

- Worklist [Page 476]

  You call up the worklist for tasks to determine whether tasks exist that you must process.

- Workflow [Page 481]

  You check your workflow inbox determine whether tasks exist that you must process.

- Functions for Task Processing [Page 473]

  If you want to process a specific task in a specific notification, use the transactions for processing or displaying a task.

3. After you have selected and executed one of the above options, you process a task by either:

- Forwarding the task to another person, if you cannot process the task yourself

- Carrying out the instructions specified in the task

- Documenting the information for a task that has just been executed; for example, as a task long text or via a follow-up function in the action box (internal remark)

- Setting the status of the task to "completed," once you have carried out the instructions specified in the task

- Executing additional follow-up functions in the action box, if additional tasks need to be implemented

Result

Once you have processed and completed a task, you can complete the notification (provided there are no other tasks in the notification that need to be processed).

Process Specific Task in a Notification

Use

Using this function, you can process a specific task in a notification. You can process tasks for the notification header (immediate tasks) as well as tasks for individual items (corrective tasks). On the initial screen for this transaction, for example, you can:

- Call up the task to be processed directly by entering the notification number, item number, and task number

- Display a selection of tasks using the input help for the notification number and then select a specific task (for example, if you do not know the notification number, item number, and task number)

Procedure

Notification, item, and task numbers are known

5. Choose *Logistics → Central Functions → Notification → Task → Process*.

   The initial screen for processing a task is displayed.

3. Enter the notification, item, and task numbers and choose *Enter*.

   The screen for processing a task is displayed.

4. Use the functions listed in the table below to process the task.

Notification, item, and task numbers are unknown

2. Choose *Logistics → Central Functions → Notification → Task → Process*.

   The initial screen for processing a task is displayed.

3. Choose the input help for the *Notification* field and enter your selection criteria for the task in the dialog box.

   For example, you can select a task on the basis of the notification type, the person responsible, or various other views (for example, vendor, material, WBS element/project, etc.). If you do not enter any selection criteria, the system will select all tasks in the system.

4. Choose *Continue*.

   The system displays a list of tasks sorted by notification and item numbers.

   ➡️

   Tasks with an item number "0000" are immediate tasks. Tasks with an item number greater than "0000" are corrective tasks.

5. Select a task and then choose *Copy*.

   The initial screen reappears.

6. Choose *Enter*.

Process Specific Task in a Notification

The screen for processing a task is displayed. Use the functions listed in the table below to process the task.

Functions on the Task Screen		
Function	**Menu path/Pushbutton**	**What you should know**
Release task	*Release task* pushbutton	You release the task so it can be executed. For more information, see Status Management for Tasks [Page 562].
Complete task	*Complete task* pushbutton	You confirm that the task was executed. For more information, see Status Management for Tasks [Page 562].
Denote task as being successful	*Task successful* pushbutton	You confirm that the task solved the problem successfully. For more information, see Status Management for Tasks [Page 562]
Set user status	*Set status* pushbutton	If a user status was defined in a status profile, you can use this function to set the user status. For more information, see Status Management for Notifications [Page 541].
Display associated notification	*Notification (extended)* pushbutton	You display the notification that contains the task. Choose *Back* to return to the task processing screen.
Display object	*Display object* pushbutton	You display reference objects or reference documents that may be specified in the notification.
Display action log	*Action log* pushbutton	You display changes in the notification via the action log [Page 525].
Expand all screen areas	*Expand all (Expand all screen areas)* pushbutton	You expand all screen areas in the task processing screen.
Collapse all screen areas	*Collapse all (Collapse all screen areas)* pushbutton	You collapse all screen areas in the task processing screen.
Display notification	*Notifctn (Open)* pushbutton	You display a summary of the notification data, including short and long texts.
Expanding the individual screen areas	*Basic data, Planning* and *Item* pushbuttons	You expand the individual screen areas to display and process the corresponding task data.
Action box		You execute follow-up functions in the action box. For more information, see Action Box [Page 520].

Processing Tasks Using Worklist

Use

Using the worklist for tasks, you can select notification tasks on the basis of different criteria and process them. You can select the tasks as follows:

- You select the tasks using the *My worklist* function. The system then displays the following tasks for further selection and processing:

  - All outstanding tasks to be processed by you as the "person responsible"

  - All tasks to be processed by you as a <*Partner function*>

  - All tasks you created

  - All tasks you completed

- You select the tasks using the *General selection* function. The system then displays all tasks for further selection and processing. Make sure the preset selection criteria contain the values you want (for example, selection period, outstanding tasks only).

Prerequisites

If you use the *General selection* function and you want to process tasks for which you are not responsible or which you did not create, you must have the corresponding authorization.

Activities

You choose *Logistics* → *Central functions* → *Notification* → *Worklist* → *Tasks* to call up the worklist for tasks.

You enter the required data and choose *Execute*.

See also:

Select and Process Tasks Using the Worklist [Page 537]

Select and Process Tasks Using Worklist

Use

You can use the worklist for tasks to select and display a list of tasks. For example:

- You want to obtain an overview of all notification tasks that fulfill certain criteria.

- You want to select the tasks that you are responsible for processing.

Prerequisites

If you want to select notifications on the basis of partner functions:

- im Customizing Partnerrollen definiert sein

- Users or departments must be assigned to the partner functions

Procedure

2. Choose *Logistics → Central Functions → Notification → Worklist → Tasks*.

   The dialog box *Worklist: Tasks* appears.

3. If you want to create your own **personal** worklist, choose the *My worklist* tab page.

   If you want to create a list of **all** tasks that meet certain selection criteria, choose the *General selection* tab page.

4. Enter the desired selection criteria.

If you want to	Then
Select only the tasks that are assigned to you for processing	Set the *For processing by me* indicator on the *My worklist* tab page.
Select only the tasks that were created by you	Set the *Created by me* indicator on the *My worklist* tab page.
Select only the tasks that were completed by you	Set the *Completed by me* indicator on the *My worklist* tab page.
Select only the tasks assigned to you as a specific partner (for example, in your capacity as an "author")	Set the *In my role as* indicator on the on the *My worklist* tab page and choose a partner function in the list field.

Select and Process Tasks Using Worklist

Select tasks for notifications that were created within a specific time period	Set the indicator:
	• *1 week*, if you want to select notifications that were created up to one week before the current date.
	• *1 month*, if you want to select notifications that were created up to one month before the current date.
	• *3 months*, if you want to select notifications that were created up to three months before the current date.
	• *1 year*, if you want to select notifications that were created up to one year before the current date.
	• *Defined by me* and enter the desired time interval if you want to select notifications that were created within a specific time period.
Select tasks on the basis of a specific task code group, task code, or a selection profile	Enter the desired code group, task code, or selection profile.
Select tasks for specific notifications	Enter the desired notification number(s) or notification type(s).
Format the list display to meet your own specific requirements	Choose the desired layout in the *Layout* list field.
	You can store the following information in a layout:
	• List column structure
	• Sort criteria
	• Filter conditions

Specify which criterion the monitor column in the list of tasks references	In the list field *Reference field for monitor*, choose a reference field. The monitor column is then displayed with the corresponding status. If you do not choose a reference field, the monitor column is not displayed. For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning: • **Green**: the desired start date has not been reached • **Yellow**: the desired start date has been reached, but the desired end date has not been reached • **Red**: the desired end date has been surpassed.
Select only the outstanding tasks	Select the corresponding indicator on the *General selection* tab page.
Select tasks that have been assigned specific partners	Select the corresponding partner function in the list field on the *General selection* tab page.
Select notifications that have been assigned specific partners	In the *Partner* area of the *General selection* tab page, choose the desired partner function(s) and/or enter the partner number.

If you always want to use the same selection criteria in your worklist, enter the desired data and choose *My defaults*.

5. Choose *Execute*.

The system displays a list of notifications that meet your selection criteria.

6. You can use the functions described below to process selected objects in the list further.

Function	Procedure
Switch between the *Display notification* and *Change notification* transactions, as well as the *Display task* and *Change task* transactions	Choose the *Display <-> Change* pushbutton.
Export list of tasks to MS Excel	Choose *Spreadsheet*.
Display graphic	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.

Select and Process Tasks Using Worklist

Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a task and then choose *Telephone call*.
Display long text	Select a task and then choose *Long text*.
Display or change notifications (branch to notification header)	Select one or more objects in the list and then choose *Notification*.
Display or change tasks (branch to notification header)	Select one or more objects in the list and then choose *Task*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.
Compare task processing times (requested start and end times)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Display report documentation	Choose *Goto → Report documentation for...*
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.

➡️

If you selected more than one object in the list, the system displays the first selected object in the list (in the display or change mode). When you have finished processing the first object, choose *Goto → Back*. The next selected object is automatically displayed.

Processing Tasks Using Workflow

Use

If a task is created in a notification or if the person responsible for a task is changed, the system can automatically notify the person or department responsible via the *SAP Business Workflow* that a task needs to be processed.

You receive the information about the task that needs to be processed as a *work item* in your inbox (*Business Workplace)*. Your inbox provides an overview of all tasks that you are responsible for processing. You can begin processing the work item directly from your business workplace.

Integration

You can access your business workplace by choosing *Office → Workplace* from the SAP menu. Then choose *Inbox → Workflow* to display any work items that may be present.

Prerequisites

The required system settings to activate the *SAP Business Workflow* have been made.

Activities

If there is a work item in your inbox, proceed as follows to begin processing the work item:

- You double click the work item to display a description of the task to be executed.

- You choose *Execute* to process the work item. The system calls up the transaction to process the task.

Status Query

During the whole runtime of an internal service request [Ext.], you can obtain the current status.

See also:

- Status Management For Notifications [Page 541]

- Display Status Information [Page 542]

- Assigning System Statuses [Page 544]

- Assigning And Changing User Statuses [Page 545]

- Status Management For Tasks [Page 562]

Status Management for Notifications

Use

Notifications are supported by the SAP System's status management function. Whenever you create and process a notification, you execute certain business transactions for the notification. These business transactions are documented in the SAP System by a status. The current status of a notification tells you which processing stage the notification has reached and which steps have yet to be completed.

Of the available statuses in the system, only a few need to be set at any given time. Usually, a notification must have a certain status before you can process the it further. If such a status is missing, the system displays a message to inform you of this.

Features

A notification can have the following types of statuses:

- **System statuses**

  System statuses are set when you execute certain functions for a notification. For example, when you print a notification, the system sets the status "printed" *(NOPT)*. The system status tells you that a business transaction was carried out for the notification.

  The system statuses for notifications are predefined in the SAP System and cannot be changed.

- **User statuses**

  User statuses allow you to further restrict the functions that are allowed by a system status.

  Your system administrator defines user statuses in a status profile (see Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*). You can assign and delete user statuses if you have the necessary authorization.

See also:

Assigning and Changing User Statuses [Page 545]

Displaying Status Information

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Display status information in the notification header		The current system statuses are displayed in the *Status* field of the notification header. If user statuses also exist for the notification, they are also displayed.
		The *Status* field also displays the task status. If at least one notification task is still outstanding or released, the status "task outstanding" (*TSOS*) is displayed. As long as this status is set, you cannot complete the notification.
Display status information for individual tasks	*Tasks* tab page	The task overview contains the status of all recorded tasks.
Display system and user statuses with short texts	*Status detail* pushbutton	All active system and user statuses for the notification are displayed on the *Status* tab page.
Display general status overview	Choose *Status detail* pushbutton and then *Extras → Overview*	You can see which processing steps have already been performed.
		All active and inactive system and user statuses for the notification are displayed.
Display statuses that can still be assigned	Choose *Status detail* and then the *Business processes* tab page	You can see which processing steps are currently allowed or not allowed.
		If you choose *Transaction analysis*, you can see which business transactions can still be executed for the notification (green traffic light) and which ones can no longer be assigned (red traffic light).

Assignment of System Statuses

Use

Whenever you execute a function in a notification that is influenced by the SAP System's status management function, the system automatically assigns a corresponding system status to the notification. On the basis of the current system status, you can determine what other functions can be executed for the notification.

Features

The system assigns a system status to a notification when you:

- Create a notification

- Postpone a notification

- Put a notification in process

- Assign an order to a notification

- Complete a notification

- Print a notification

- Create a task

- Release a task

- Complete a task

- Complete a task successfully

- Complete all tasks

- Activate an approval requirement for a notification

- Give an approval to a notification

- Refuse an approval for a notification

- Create a costing for a claim

Assigning and Changing User Statuses

Prerequisites

To be able to assign user statuses to a notification, the following conditions must be fulfilled in Customizing for *Cross-Application Components* under *Notification Processing* → *Status Management* → *Define Status Profile*:

- User statuses are defined in a status profile

- A status profile is assigned to the notification type to be processed.

You can only change a user status if the **status order numbers** assigned to the user status in Customizing allow it:

- The status order numbers defined for individual user statuses in the status profile determine the sequence in which the user statuses can be activated.

- If a user status does not have an order number assigned to it, the user status can always be set.

- It is not possible for several statuses with status order numbers to be active at the same time.

- You cannot delete the initial user status that has been set for a notification.

Procedure

3. Call up a notification in the change mode.

4. In the notification header, choose *Status detail*.

   The status information is displayed.

4. In the column for user statuses (right column), activate the desired user status and then choose *Back*.

   The notification header with the chosen user status is displayed.

5. Save the notification.

Status Management for Tasks

Use

A task status provides information about a task's current processing stage. The system manages the following statuses for tasks:

Status	Meaning
Task outstanding	The task was created in the notification.
Task released	The task can be executed.
Task completed	The task was executed.
Task successful	The result of the task was successful (for example, the problem was solved or damage was repaired).

The system does not distinguish between notification header tasks (immediate tasks) and item tasks (corrective tasks). If the notification status information indicates that outstanding tasks exist in the notification, these tasks can consist of both immediate tasks and corrective tasks.

> A notification retains the status "outstanding tasks" as long as a task has not been completed (even if the task has already been released).

Integration

The various notification and task statuses, for the most part, are independent of one another. This means, for example, that you can put a notification in process even though it contains outstanding, unreleased tasks. As long as a notification still contains outstanding tasks, however, you cannot complete the notification.

For more information about the general status management function, see Status Management [Page 141].

Features

You can use the status management function as follows:

- **Assign a status to a task**

    You assign a status to a task by choosing the corresponding function in the task overview or task detail screens. You must assign a status to each task individually. If you select several tasks in the overview screen and choose a status, the system assigns the status to all of the selected tasks.

- **Status information**

    Once you have assigned a status to a task, the corresponding status is displayed in the task overview screen and task detail screen. If you want to display the text for the status abbreviations, choose *Status detail.*

- **Date changes as a result of status assignments**

    When you assign a status to a task, the system automatically changes the relevant dates as follows:

Status	The system fills the following fields:
Released	*Planned start* with the current date/time
	Planned end with either the current date/time or desired notification end date/time.
	You can overwrite both fields.
Completed	*Date completed <date> by <user name>* with the current date/time and current user name.
	You cannot overwrite these fields.
Successful	None

The planned dates for a task must fall within the desired start and end dates of the notification. If you specify other dates for the task, the system displays a message to inform you of this.

Document Flow

Use

You can use this function to display the document flow for a notification as a list or network graphic. The document flow allows you to identify:

- Preceding documents (documents from which the current notification originated)
- Subsequent documents (documents that originated from the current notification)
- "To-and-from" references between documents

Each document contains the following information:

- Document number
- Document number
- Additional data (if available)
- Logical system (if any of the other documents was created in a logical system other than the one in which the original notification was created)

You can also display the detailed information for each document.

Integration

The document flow is integrated in the following processes:

- *Materials Management* (MM)
- *Production Planning and Control* (PP)
- *Sales and Distribution* (SD)
- *Customer Service* (CS)
- *Plant Maintenance* (PM)
- *Financials* (FI)
- *Controlling* (CO)
- *Project System* (PS)

Features

The document flow, for example, can display the following objects (among others):

- Quality notification
- Service notification
- Maintenance notification
- General notification
- Claim
- Service order

- Sales order

- Production order

- Run schedule header

- Goods movement

- Purchase order

- Inspection lot

Displaying the Document Flow for a Notification

Procedure

1. Call up a notification in the create or change mode.

2. Choose one of the following menu paths, depending on whether you want to display the document flow as a list or graphic:

   – *Extras → Notification documents → Document flow → List*

   – *Extras → Notification documents → Document flow → Graphic*

   ➡

      The notifications that reference other subsequent documents in the list display are labeled with a *(Ref.)* designation.

3. If you displayed the document flow as a graphic, select a document and choose *Goto → Display document*.

   The detailed information for the selected document is displayed.

Example: Entering And Processing An Internal Service Request

To make an application for a removal in the intranet, you choose the scenario *Removal request.* In Customizing this request category is specified as requiring approval. Therefore once you send this notification, the approval process is triggered. When the removal is carried out, costs are posted to the requesting cost center.

The Environment

Intranet	SAP System
Person who makes the entry	Person who processes/approves the request

The *Removal Request* Form

The removal request in the intranet is structured as follows:

The title contains the request name, in this case *Removal Request*, and the company logo. Underneath the request creation function is the request number.

Under this, on the right-hand side is the *Entry data*, such as *Name* and *Telephone number* of the person who makes the entry, and the *Date entered.*
On the left-hand side is the *Removal data* with the following fields:

- *Who is moving? (initiated by)*

- *From building*

- *From room*

- *To building*

- *To room*

- *Removal date*

- *Number of PCs to be moved*

- *Change telephone?*

- *Number of packing boxes required*

Underneath this is a free text field called *Remarks.*

Next to the fields for the building or room, you may have included a pushbutton when you defined the request form. This pushbutton takes you to the building plan.

Creating The Removal Request

You choose *Internal Service Request* in the launchpad for your work place.

Example: Entering And Processing An Internal Service Request

Jeanette, what can I do for you?

Initiator

[   ]   [   ]   [Change]

My request

[   ]

Request Or Problem

[   ]

[Delete]   [Status]   [Solutions]

You choose the scenario *Removal request.*
The entry form for the removal request is displayed.

Initiator   **Entered by**

Request data

Remarks

[Check]   [Send request]

The fields for the person entering data are derived from the user data, and cannot be changed.

Example: Entering And Processing An Internal Service Request

As a standard setting the field *Initiated by* is defaulted with the name of the person making the entries, and can be changed.

The fields for the removal details are mandatory.

Once you have entered your data, you can choose from the following two options:

- *Check request*

- *Send request*

After you send the request, you receive a success message containing the notification number.

After The Removal Request Has Been Sent

The fields *Who is moving?* and *Removal date* are checked according to the entry format.

At the same time, the *Requesting controlling area* and *Requesting cost center* are derived from the initiator data.

A notification is created in the SAP R/3 System for the intranet request. The fields in the HTML form are transferred to the notification.
Three tasks are created for the notification.

Task	Partner Role	Type of Item	Costing Item
Move PC	Task processor	Activity item	If the number of PCs is greater than zero, an activity item is created with the: • *Sending cost center* = PC cost center • *Activity type* = PCMOVE • *Receiver* = Requesting cost center • *Quantity* = Number of PCs The requesting cost center and the quantity are transferred from the form. The service provider (the cost center and activity type) is stored in the Customizing (see below).

Example: Entering And Processing An Internal Service Request

Change telephone	Task processor	Activity item	If the number of telephones is greater than zero, an activity item is created with the: • *Sending cost center* = Telephone cost center • *Activity type* = PHONEMOVE • *Receiver* = Requesting cost center • *Quantity* = Fixed quantity one The requesting cost center and the quantity are transferred from the form. The service provider (the cost center and activity type) is stored in the Customizing (see below).
Move work place	Task processor	External activity	The *removal* service is provided by an external company.

The notification is automatically costed using three costing items.

The name of the person responsible for the notification is the cost center manager of the employee moving (this is a standard setting).

The notification is forwarded to the manager for approval.

Customizing Required For Automatically Transferring The Removal Request

You need to store certain data in Customizing to allow the system to forward the removal request to an SAP R/3 notification with notification items.

- You specified whether the request requires approval, and who is to approve it for the notification type *Removal request.*

- For each field from which a notification item is to be generated (for example, in this case, the *number of* PCs), the following was stored in Customizing independently of the requesting cost center:

Type of Item	Stored Data
Activity item	• Sending cost center • Activity type • Quantity
Material item	• Material number • Storage location • Plant • Quantity

External activity	• Material number
	• Vendor
	• Purchasing organization
	• Quantity

- These items are assigned to tasks.

The system displays the basic data for the request to the processors for the notification and task in the *Extended view* in the processing type.

Status Query By The Person Who Made The Request

If you make, enter, or initiate a request, you can check its status in the intranet.
The system displays (for example) the notification short text, who it was entered by, and on what date. You can see the notification priority and number for example, by using the worklist.

You can go from here to the notifications detail screen, or add a note.

In the *detail screen* for each notification, you can see the request form, which cannot be changed.
In addition, the following fields are displayed underneath:

- *Status*

- *Approved by*

Under this, there is a free text where you can enter more remarks.

Approval Of The Removal Request

You (the approving manager) also use the intranet. You receive a list of all service requests (regardless of request type) for approval.

The list contains the following fields:

- *Description of notification type, such as removal request*

- *Entered by*

- *Initiated by*

- *Date entered*

- *Required date*

- *Status*

You can go from here to the detail screen for a notification or to approve a notification.

In the *detail screen* for each notification you can see the request form, which cannot be changed.

Example: Entering And Processing An Internal Service Request

In addition, the following fields are displayed underneath:

- *Debited cost center*

- *Estimated costs*

Underneath this there is a free text in which you can store more remarks, for example, if you reject the request.

Once you have entered your data, you can choose from the following options:

- *Reject request*

- *Approve request*

After you approve the service request, the system sets the status to *Approved.* Each item is forward to the processor who is determined using the settings in Customizing.

Carrying Out The Removal

Each task has a different processor.

You (the processor) receive a list of all the tasks that are to be processed.
The list contains the following fields:

- *Service request number*

- *Required date*

- *Initiated by*

- *Date entered*

- As well as more data from the form

You can go from here to the detail screen for a task, or complete a task.

In the *detail screen* for each notification you can see the request form, which cannot be changed. Underneath this there is also a free text in which you can store more remarks, such as when a material no longer exists and is replaced by another.

Once you have entered your data, you can choose from the following two options:

- *Forward*
  Forwarding is useful if you are not responsible for this notification.
  You can enter the processor who is responsible.

- *Complete*
  There are two different situations for completing a notification that you can choose in Customizing for the service request type:

  - *Non-Integrated R/3 Posting*
    You complete your work in and outside of the SAP System (for example, you carry boxes and post the activity allocation manually in the SAP System using confirmation). In this case, only *Completed* is available. This only closes the task in R/3.

  - *Integrated R/3 Posting*
    You complete your work outside of the SAP System and want to make an integrated posting of the R/3 data upon completing the service request. In this case, you can use the action box for *Execution-Services*. A simple screen appears for the current application (such as activity entry, or for material issue) in which the relevant fields are defaulted with values from the plan data for the notification, and which you can change. You make your posting to the account assignment object stored in Customizing. The postings are integrated in R/3. The system prevents accidental double postings by issuing a warning, and preventing you from going to the document flow.

If all the notification tasks are completed, it receives the *Completed* status.

Cost Analysis By The Approver

You (the approver) can analyze the costs of the service request using a report for your cost center.

You go from the totals records report to the line item report. In the line items, the system displays the service request number if the line item was posted integrally from a service request. You can go from the line items of a service request to the service request itself.

Change Notifications

Purpose

The change notification enables you to report design errors or ask whether specific changes to a product are possible, without knowledge of the SAP System or of Engineering Change Management by using the functions of the **internal service request**. The change notification acts as the preliminary stage for a Change request [Ext.].

> For example, the sales employee would like to suggest an improvement to a product. Via the Intranet, he creates a change notification to ask whether a change is possible.

This function can be used by people that do not, or only occasionally, work directly in the SAP System. The employee subgroup that has access to the company Intranet includes not just employees from various departments (sales, service, purchasing and so on) but also business partners (customers, development partners, suppliers and so on).

Prerequisites

The prerequisites for Creating notifications in the Intranet [Page 49] apply.

Process Flow

1. You **create** a change notification as an internal service request using the Intranet in your web browser.

   Neither authorization nor knowledge are required to create a change notification, in order to meet all the necessary limitations for a Change request [Ext.] (such as change type, effectivity parameters, release key).

   You simply create the subject as simple text in the change notification.

2. The change notification is automatically forwarded to a central location where it is **processed** by the person responsible.

   This checks whether the suggested changes are useful and feasible and whether change requests with similar contents already exist.

3. According to each subject described in the change notifications the processor either rejects the query, creates a change request or assigns the change notification to a change request that already exists.

4. The person who created the change notification as an internal service request can find out about the status of the notification via the Intranet.

Change Notification

Purpose

With a change notification, you arrange the changes to product data that is controlled by Engineering Change Management.

You create a change notification for example, if you want to inform the engineer of a design error or if you want to suggest a product improvement.

Special Features

The change notification:

- has to be approved

- does **not** carry costs

Order Process up to Execution

3. You create the subject as simple text in the change notification.

   In addition a little knowledge of the Engineering Change Management or of the work processes in design or work scheduling is essential.

4. The person responsible gets the notification via a workflow or in his worklist and then checks the subject.

5. The processor either approves or rejects the query.

   If the query is rejected, the process ends.

6. If the processor has approved the query, he carries out one or more of the following activities:

   − Create change notification (as follow-up notification)

   − Assign ECR

   − Create ECR

      The person, who created the ECR, defines the necessary settings such as the change type [Ext.]. The other processes in Engineering Change Management are controlled by the change type.

See also:

Activities for Change Notifications [Page 512]

ECR / ECO [Ext.]

Notification Processing (All Notification Categories)

Purpose

In this processing mode, you use the extended processing view to create and process notifications of all notification types. You can create quality notifications, maintenance notifications, service notifications, claims, or general notifications. In contrast to the procedure for simplified notification processing, you cannot change the notification type once a notification has been created.

Prerequisites

All required settings have been made for the respective notification types in Customizing (see *Cross-Application Components → Notification → Overview of Notification Type*).

Process Flow

8. You create a notification to record a problem or information about a subject matter.

   When you create the notification, you select the desired notification type.

9. You record the required information for the notification (for example, short and long texts for subject matter, partner information, notification priority, items, tasks, and activities).

   Among other things, you can also:

   − Execute follow-up functions via the action box [Page 520]

   − Print the notification data

   − Change the processing status of the notification [Page 531] (for example, put the notification in process)

7. After you have entered all of the required data, you save the notification.

   The notification data is saved and the initial screen reappears.

Processing Notifications Using Worklist

Use

Using the worklist for notifications, you can select notifications on the basis of different criteria and process them. You can select the notifications as follows:

- You select the notifications using the *My worklist* function. The system then displays the following notifications for further selection and processing:

  - All notifications to be processed by you as the "person responsible" or that fall within your department's area of responsibility

  - All notifications to be processed by you as a *<Partner function>*

  - All notifications you created

  - All notifications that were last processed by you

- You select the notifications using the *General selection* function. The system then displays all notifications for further selection and processing. Make sure the preset selection criteria contain the values you want (for example, notification status, selection period).

Prerequisites

If you use the *General selection* function and you want to process notifications for which you are not responsible or which you did not create, you must have the corresponding authorization.

Activities

You choose *Logistics → Central Functions → Notification → Worklist → Notifications* to call up the worklist for notifications.

You enter the required data and choose *Execute*.

See also:

Select and Process Notifications Using Worklist

Use

You want to use the worklist for notifications to select and display a list of notifications. For example:

- You want to display or change a specific notification, but you do not know the number of the notification.

- You want to display or change several notifications with certain attributes.

- You want to perform certain functions simultaneously for several notifications with particular attributes.

- You want to select the notifications that you are responsible for processing.

Prerequisites

If you want to select notifications on the basis of partner functions:

- Partner functions must be defined in Customizing

- Users or departments must be assigned to the partner functions

Procedure

3. Choose *Logistics → Central Functions → Notification → Worklist → Notifications*.

   The dialog box *Worklist: Notifications* appears.

4. If you want to create your own **personal** worklist, choose the *My worklist* tab page.

   If you want to create a list of **all** notifications that meet certain selection criteria, choose the *General selection* tab page.

5. Enter the desired selection criteria.

If you want to	Then
Select only the notifications that are assigned to you for processing	Set the *For processing by me* indicator on the *My worklist* tab page.
Select only the notifications that were created by you	Set the *Created by me* indicator on the *My worklist* tab page.
Select only the notifications that were last processed by you	Set the *Last processed by me* indicator on the *My worklist* tab page.
Select only the notifications assigned to you as a specific partner (for example, in your capacity as an "author")	Set the *In my role as* indicator on the on the *My worklist* tab page and choose a partner function in the list field.

Select notifications that were created within a specific time period	Set the indicator: • *1 week*, if you want to select notifications that were created up to one week before the current date. • *1 month*, if you want to select notifications that were created up to one month before the current date. • *3 months*, if you want to select notifications that were created up to three months before the current date. • *1 year*, if you want to select notifications that were created up to one year before the current date. • *Defined by me* and enter the desired time interval if you want to select notifications that were created within a specific time period.
Select a specific notification or several notifications of a specific notification type	Enter the desired notification number or notification type.
Format the list display to meet your own specific requirements	Choose the desired layout in the *Layout* list field. You can store the following information in a layout: • List column structure • Sort criteria • Filter conditions

Select and Process Notifications Using Worklist

Specify which criterion the monitor column in the list of notifications references	In the list field *Reference field for monitor*, choose a reference field. The monitor column is then displayed with the corresponding status. ➡️ If you do not choose a reference field, the monitor column is not displayed. 💬 For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning: • **Green**: the desired start date has not been reached • **Yellow**: the desired start date has been reached, but the desired end date has not been reached • **Red**: the desired end date has been surpassed. The notifications displayed in red are critical and should be processed with the highest priority.
Select notifications with a specific status	Select the corresponding indicator on the *General selection* tab page or enter the desired selection profile.
Select notifications that have been assigned specific partners	In the *Partner* area of the *General selection* tab page, choose the desired partner function(s) and/or enter the partner number.

➡️

If you always want to use the same selection criteria in your worklist, enter the desired data and choose *My defaults*.

6. Choose *Execute*.

The system displays a list of notifications that meet your selection criteria.

7. You can use the functions described below to process selected objects in the list further.

Function	Procedure
Switch between the *Display notification* and *Change notification* transactions	Choose the *Change <-> Display* pushbutton.
Display a graphic (for example, how many notifications were created on a particular date or for a specific material)	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.
Export notification list to MS Excel	Choose *Spreadsheet*.

Display document flow for one or more notifications	Select one or more objects in the list and then choose *Display document flow*.
Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a notification and then choose *Telephone call*.
Display notification long text	Select a notification and then choose *Long text*.
Display or change notifications (branch to notification header)	Select one or more objects in the list and then choose *Notification*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.
Compare notification processing dates (requested start and end dates)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Display report documentation	Choose *Goto → Report documentation*
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.

If you selected more than one object in the list, the system displays the first selected object in the list (in the display or change mode). When you have finished processing the first object, choose *Goto → Back*. The next selected object is automatically displayed.

Processing Notifications Using Workflow

Use

If a notification is created or put in process in the system, the system can automatically notify the person(s) or department(s) responsible via the *SAP Business Workflow* that:

- The notification must be processed or tasks need to be defined

- Defined tasks need to be executed

- All notification tasks have been completed and the notification must either be completed or additional tasks must be defined for the notification

You receive the information about the notification that needs to be processed as a *work item* in your inbox (*Business Workplace).* Your inbox provides an overview of all notifications that you are responsible for processing. You can begin processing the work item directly from your business workplace.

Integration

You can access your business workplace by choosing *Office → Workplace* from the SAP menu. Then choose *Inbox → Workflow* to display any work items that may be present.

Prerequisites

The required system settings to activate the *SAP Business Workflow* have been made.

Activities

If there is a work item in your inbox, proceed as follows to begin processing the work item:

- You double click the work item to display a description of the notification.

- You choose *Execute* to process the work item. The system calls up the transaction to process a notification.

Action Box

Use

When you process notifications, you can use the **action box** to execute **follow-up functions**. A follow-up function is a function that:

- Can either be executed as part of an overall business process or independently of such a process

- You can select and execute in the action box by means of a mouse click while you are processing a notification or task

Prerequisites

The follow-up functions in the action box are defined in Customizing for *Cross-Application Components* under *Notification → Notification processing → Additional Notification Functions.* The follow-up functions that:

- Have been predefined in the standard system can be used without any further preparations

- Are displayed in the action box, but which you do not need, can be deleted in Customizing

- You have programmed yourself and are to be included in the action box must also be defined in Customizing

Features

The following table contains the most important information you need to know about setting up and using the action box.

Function	What you should know
Appearance of the action box	In the standard system, the action box is displayed as an overview tree. In this display mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning: • Blue: The follow-up function is active and can be executed. • Black: The follow-up function is inactive and cannot be executed (yet). • Gray: The follow-up function has been executed and cannot be executed again. If you set the *Action box: Table* indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).

Action Box

Follow-up functions and dependent follow-up functions	Depending on your settings in Customizing, the action box can include follow-up functions that you: • Can execute more than once and independently of other follow-up functions in the action box • Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)
Control parameters for a follow-up function	In Customizing, you can specify: • In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes) • In which transactions a follow-up function will be displayed for use (for example, in the create or change mode) • Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing • Whether a follow-up function will be documented as a task or activity in the notification, or whether it will not be documented at all That all follow-up functions documented as tasks or activities will be available for use in the action box when you create or change a notification The follow-up functions that are not documented will also be available for use in the action box when you display a notification
Assigning follow-up functions to scenarios	In addition to assigning follow-up functions to a notification type, you can also assign them to a scenario. For example, if you are processing a notification that has a scenario assigned to it, the action box will contain follow-up functions that are assigned to the notification type, as well as those that are assigned to the scenario.
Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing. For more information about these functions, see Standard Follow-Up Functions [Page 523].
Business transactions	In Customizing, you can assign a business transaction to a follow-up function. A business transaction determines whether a follow-up function can be executed, based on the current status of a notification.

Authorization check	Each follow-up function that is documented as a task or activity is assigned a code group in Customizing. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function will not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.
Workflow link	You can link follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. The system can then trigger workflow tasks once a follow-up function (task) has been executed and the notification has been saved.
Difference between follow-up functions and follow-up actions	Follow-up functions in the action box are different from task-related follow-up actions [Page 565]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a notification. With a follow-up function, the system executes the function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information interactively in a dialog box. This is not possible with follow-up actions.

Activities

To execute a follow-up function in the action box, you click the text or double-click the symbol for a follow-up function (displayed in blue). A dialog box appears, in which you can enter the data that is required to execute the function.

➡

You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the input help for a catalog, the system does not execute a follow-up function.

The system then executes the selected function. Depending on the settings in Customizing, the follow-up function is:

- Documented as an activity in the notification

- Documented as a task for the notification header

- Not documented

Activities for Change Notifications

Use

You use these activities when you process a change notification. In addition to the standard activities, special activities for change notifications are available in the action box.

Prerequisites

The activities described here are only available for change notifications.

Features

In the action box for change notifications, the following activities are also available:

Activity	Use	What you ought to know
Create ECR	You select this activity if the subject described causes a change.	This function is used to create an engineering change request. With this, you initiate the change process with Engineering Change Management.
Assign ECR	You select this activity if the subject is already known and you have already created an engineering change request.	If necessary, create the relevant object management record. If you save the ECR, the system assigns the ECR to the change notification.
Create change notification	You select this activity if the subject described causes different changes in several areas.	If necessary, you forward the new notification to the user responsible.
Document flow	With the help of the document flow, you get an overview of which ECRs have been created as a result of which change notification.	The document flow can be displayed in both the intranet and in an ECR.

See also:

Status Management for Notifications

Use

Notifications are supported by the SAP System's status management function. Whenever you create and process a notification, you execute certain business transactions for the notification. These business transactions are documented in the SAP System by a status. The current status of a notification tells you which processing stage the notification has reached and which steps have yet to be completed.

Of the available statuses in the system, only a few need to be set at any given time. Usually, a notification must have a certain status before you can process the it further. If such a status is missing, the system displays a message to inform you of this.

Features

A notification can have the following types of statuses:

- **System statuses**

    System statuses are set when you execute certain functions for a notification. For example, when you print a notification, the system sets the status "printed" *(NOPT)*. The system status tells you that a business transaction was carried out for the notification.

    The system statuses for notifications are predefined in the SAP System and cannot be changed.

- **User statuses**

    User statuses allow you to further restrict the functions that are allowed by a system status.

    Your system administrator defines user statuses in a status profile (see Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*). You can assign and delete user statuses if you have the necessary authorization.

See also:

Assigning and Changing User Statuses [Page 545]

Displaying Status Information

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Display status information in the notification header		The current system statuses are displayed in the *Status* field of the notification header. If user statuses also exist for the notification, they are also displayed. The *Status* field also displays the task status. If at least one notification task is still outstanding or released, the status "task outstanding" (*TSOS*) is displayed. As long as this status is set, you cannot complete the notification.
Display status information for individual tasks	*Tasks* tab page	The task overview contains the status of all recorded tasks.
Display system and user statuses with short texts	*Status detail* pushbutton	All active system and user statuses for the notification are displayed on the *Status* tab page.
Display general status overview	Choose *Status detail* pushbutton and then *Extras → Overview*	You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.
Display statuses that can still be assigned	Choose *Status detail* and then the *Business processes* tab page	You can see which processing steps are currently allowed or not allowed. If you choose *Transaction analysis*, you can see which business transactions can still be executed for the notification (green traffic light) and which ones can no longer be assigned (red traffic light).

Document Flow

Use

You can use this function to display the document flow for a notification as a list or network graphic. The document flow allows you to identify:

- Preceding documents (documents from which the current notification originated)

- Subsequent documents (documents that originated from the current notification)

- "To-and-from" references between documents

Each document contains the following information:

- Document number

- Document number

- Additional data (if available)

- Logical system (if any of the other documents was created in a logical system other than the one in which the original notification was created)

You can also display the detailed information for each document.

Integration

The document flow is integrated in the following processes:

- *Materials Management* (MM)

- *Production Planning and Control* (PP)

- *Sales and Distribution* (SD)

- *Customer Service* (CS)

- *Plant Maintenance* (PM)

- *Financials* (FI)

- *Controlling* (CO)

- *Project System* (PS)

Features

The document flow, for example, can display the following objects (among others):

- Quality notification

- Service notification

- Maintenance notification

- General notification

- Claim

- Service order

- Sales order

- Production order

- Run schedule header

- Goods movement

- Purchase order

- Inspection lot

Displaying the Document Flow for a Notification

Procedure

3. Call up a notification in the create or change mode.

4. Choose one of the following menu paths, depending on whether you want to display the document flow as a list or graphic:

   − *Extras → Notification documents → Document flow → List*

   − *Extras → Notification documents → Document flow → Graphic*

   > The notifications that reference other subsequent documents in the list display are labeled with a *(Ref.)* designation.

4. If you displayed the document flow as a graphic, select a document and choose *Goto → Display document*.

   The detailed information for the selected document is displayed.

General Notification Functions

The information in this section describes the functions that are valid for all categories of notifications. These are functions that may or may not be active during notification processing, depending on whether you are processing a notification in the simplified or extended processing view.

Action Box

Use

When you process notifications, you can use the **action box** to execute **follow-up functions**. A follow-up function is a function that:

- Can either be executed as part of an overall business process or independently of such a process

- You can select and execute in the action box by means of a mouse click while you are processing a notification or task

Prerequisites

The follow-up functions in the action box are defined in Customizing for *Cross-Application Components* under *Notification → Notification processing → Additional Notification Functions*. The follow-up functions that:

- Have been predefined in the standard system can be used without any further preparations

- Are displayed in the action box, but which you do not need, can be deleted in Customizing

- You have programmed yourself and are to be included in the action box must also be defined in Customizing

Features

The following table contains the most important information you need to know about setting up and using the action box.

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Follow-up functions and dependent follow-up functions	Depending on your settings in Customizing, the action box can include follow-up functions that you:
	• Can execute more than once and independently of other follow-up functions in the action box
	• Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)
Control parameters for a follow-up function	In Customizing, you can specify:
	• In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes)
	• In which transactions a follow-up function will be displayed for use (for example, in the create or change mode)
	• Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing
	• Whether a follow-up function will be documented as a task or activity in the notification, or whether it will not be documented at all That all follow-up functions documented as tasks or activities will be available for use in the action box when you create or change a notification The follow-up functions that are not documented will also be available for use in the action box when you display a notification
Assigning follow-up functions to scenarios	In addition to assigning follow-up functions to a notification type, you can also assign them to a scenario. For example, if you are processing a notification that has a scenario assigned to it, the action box will contain follow-up functions that are assigned to the notification type, as well as those that are assigned to the scenario.
Standard follow-up functions	The action box contains several follow-up functions that have been predefined in Customizing. For more information about these functions, see Standard Follow-Up Functions [Page 523].
Business transactions	In Customizing, you can assign a business transaction to a follow-up function. A business transaction determines whether a follow-up function can be executed, based on the current status of a notification.

Action Box

Authorization check	Each follow-up function that is documented as a task or activity is assigned a code group in Customizing. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function will not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.
Workflow link	You can link follow-up functions that are documented as **tasks** to the functions of the *SAP Business Workflow* component. The system can then trigger workflow tasks once a follow-up function (task) has been executed and the notification has been saved.
Difference between follow-up functions and follow-up actions	Follow-up functions in the action box are different from task-related follow-up actions [Page 565]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you **save** a notification. With a follow-up function, the system executes the function module as soon as **you execute the follow-up function** in the action box. Also, when you process follow-up functions, you enter information interactively in a dialog box. This is not possible with follow-up actions.

Activities

To execute a follow-up function in the action box, you click the text or double-click the symbol for a follow-up function (displayed in blue). A dialog box appears, in which you can enter the data that is required to execute the function.

> You can only execute a follow-up function if you select it from the action box. If you create an activity or task in the notification using the input help for a catalog, the system does not execute a follow-up function.

The system then executes the selected function. Depending on the settings in Customizing, the follow-up function is:

- Documented as an activity in the notification

- Documented as a task for the notification header

- Not documented

Standard Follow-Up Functions

Use

The action box in the standard system contains several follow-up functions that can be used by all applications to make it easier to process notifications. When you execute one of these follow-up functions, the system documents the execution of this function as an activity or task for the notification header.

Features

Follow-up function	What you should know
Telephone contact using *SAPphone*	You can use this function to make a telephone call using *SAPphone*. The system records the details of your phone call as a notification activity. To use this function, the telephone and computer in your office must be interconnected and the *SAPphone* component must be active.
Telephone contact without *SAPphone*	You can use this function to record a telephone call that you initiated while processing a notification. The system records the details of your phone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system records the memo as a long text for an activity.
Solution database [Ext.]	You can use this function to search the solution database for symptoms and solutions that are similar to the problem you are currently processing. If you find a symptom or solution in the database that applies to the problem in your current notification, you can: • Document your database search as an activity for the notification • Copy the tasks associated with the solution into your notification

Standard Follow-Up Functions

Send notices	Using this function, you can postpone the processing of a notification. The system can then print this data or send it as a fax or e-mail to an internal or external address (Internet).
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal. You can change this text as necessary without changing the original long text. If the notification contains several partners, you can select a partner before you process the text.
	You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a **follow-up action**.
Send e-mail	You can use this follow-up function to send an e-mail (with or without an attachment) to a partner in the notification.
	The system copies the long text associated with the corresponding code in the task catalog as a text proposal.

Action Log

Use

Changes to notifications are documented in the action log. You can use the action log to track:

- Which data or statuses were changed for selected fields

- Who made the changes

- When the changes were made

The action log also records the changes that were made to tasks, items, activities, and partners during notification processing.

Activities

4. Call up a notification in the change or display mode.

5. Choose *Extras → Notification documents → Changes*.

    The action log for the notification appears.

6. To display the changes to tasks, items, or activities, choose *Task/Item/Act.*, position the cursor on an object, and then choose *Detail action log*.

Approval Requirement for Notifications

Use

For optimal notification processing in your company, you can active an approval step **for each notification type** in Customizing, which controls whether a newly created notification can be processed further. If an approval requirement exists for a newly created notification, it initially receives the status *Submit for approval* and it cannot be processed further at this point. When this status is set, a person or department responsible must explicitly make a decision about the approval requirement. For this purpose, the *SAP Business Workflow* starts a workflow that automatically informs this person or department that a notification is pending for approval. The following processing options are possible, depending on the decision that is made:

* The person or department responsible gives an approval.

    In this case, the notification is released for further processing (this means that the business transaction *Give approval* is executed, which simultaneously sets the statuses *Approval OK* and *Notification in process* in the notification). You can then process the notification in the usual manner (for example, tasks can be created).

* The person or department responsible **does not** give an approval.

    In this case, the notification is not released for further processing (this means that the business transaction *Refuse approval* is executed, which simultaneously sets the statuses *Approval refused* and *Notification completed* in the notification).

In this way, the person who created the notification can monitor the current notification status and the decision (in case of an approval requirement) from his or her workplace.

Prerequisites

In Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner → Define Partner Determination Procedure (Assign Partner Functions for Notification Type)*, the *Approval required* indicator is set for the desired **notification type**.

Document Flow

Use

You can use this function to display the document flow for a notification as a list or network graphic. The document flow allows you to identify:

- Preceding documents (documents from which the current notification originated)

- Subsequent documents (documents that originated from the current notification)

- "To-and-from" references between documents

Each document contains the following information:

- Document number

- Document number

- Additional data (if available)

- Logical system (if any of the other documents was created in a logical system other than the one in which the original notification was created)

You can also display the detailed information for each document.

Integration

The document flow is integrated in the following processes:

- *Materials Management* (MM)

- *Production Planning and Control* (PP)

- *Sales and Distribution* (SD)

- *Customer Service* (CS)

- *Plant Maintenance* (PM)

- *Financials* (FI)

- *Controlling* (CO)

- *Project System* (PS)

Features

The document flow, for example, can display the following objects (among others):

- Quality notification

- Service notification

- Maintenance notification

- General notification

- Claim

- Service order

Document Flow

- Sales order

- Production order

- Run schedule header

- Goods movement

- Purchase order

- Inspection lot

Displaying the Document Flow for a Notification

Procedure

5. Call up a notification in the create or change mode.

6. Choose one of the following menu paths, depending on whether you want to display the document flow as a list or graphic:

   − *Extras → Notification documents → Document flow → List*

   − *Extras → Notification documents → Document flow → Graphic*

   The notifications that reference other subsequent documents in the list display are labeled with a *(Ref.)* designation.

5. If you displayed the document flow as a graphic, select a document and choose *Goto → Display document*.

   The detailed information for the selected document is displayed.

Setting User Default Values

Use

If you create notifications in which certain data is always the same, you can define user default values to make it easier to record the notification data. The system then automatically inserts these values into the corresponding data fields when you create a notification. You can, however, overwrite the proposed information.

Features

You can define the following default values or settings:

- General data

    - The notification type that should be proposed

    - The scenario that should be proposed

    - Whether a dialog box should be displayed when you print data from a list processing function

    - Whether a status line/pushbutton should be displayed for recording long texts

- Appearance of the action box (displayed as a table or tree)

Activities

To define default values for a notification, choose *Extras → Settings → Ctrl/Default values* and then enter the corresponding data on the appropriate tab pages.

Process Notification

Use

Put notification in process

Once you have created a notification and entered all relevant information, you can put the notification in process. When you put a notification in process, you release the notification for processing.

A notification can be put in process in the following ways:

- You can put a notification in process manually.

- The system puts a notification in process automatically if an order was created for the notification.

When a notification is put in process, the system changes the status of the notification from "outstanding" (*OSNO*) to "notification in process" (*NOPR*).

Postpone notification

In some cases, it may be necessary to delay the processing of a notification (for example, if the assigned tasks cannot be carried out yet).

Using this function, you can postpone the processing of a notification. When you postpone a notification, it receives the status *NOPO* (*notification postponed*).

> You cannot postpone a notification that has already been put in process.

Complete notification

You complete a notification when the problem has been solved and no further processing is necessary. Once you complete a notification, you can no longer change any data in the notification. You can then only display the notification.

When a notification is completed, it receives the status *NOCO* (*notification completed*).

> You cannot complete a notification if outstanding tasks still exist in the notification.

Categorizing a notification problem

When you complete a notification, the system displays a dialog box with the current date and time. You can accept the displayed date and time as the completion time or you can change it. In this dialog box, you must specify whether the problem arose because of an internal or external cause. For example, if a vendor delivers a defective product, your are dealing with an externally caused problem.

Put notification in process again

You can put a completed notification in process again, if you determine that additional processing is necessary.

Archive completed notification

Process Notification

Completed notifications are automatically archived and are deleted from the database after a specific, predefined time interval. This time interval is defined in Customizing. Therefore, make sure you have finished processing the notification before you complete it.

Delete notification

In some cases, you may want to delete a notification. You cannot, however, delete a notification directly. You must set a deletion flag in the notification which identifies it as one that can be deleted.

A company typically runs an archiving program at regular intervals. This program searches for the notifications with deletion flags, converts the deletion flags to deletion indicators, and copies the notifications to an archive. The system then deletes the notifications from the database.

Before you delete a notification, make sure that it is no longer needed.

Once you set a deletion flag for a notification, you can no longer change the data in the notification. It then receives the status *Deletion flag* and *Completed*. You can now only display the notification. For more information about notification statuses, see Status Management [Page 541].

If you set a deletion flag in the notification header, the system also sets deletion flags for the individual notification tasks.

You can cancel the deletion flag as long as it has not been converted to a deletion indicator. You can then put the notification back in process and change or display it in the usual manner.

Procedure

Desired processing type	What you should know
Put notification in process	Call up the notification in the create or change mode and then choose *Notification → Functions → Put in process.*
Postpone notification	Call up the notification in the change mode, choose *Notification → Functions → Postpone*, and then save the notification.
Complete notification	Call up a notification in the change mode and choose *Notification → Functions → Complete*. Specify the completion date/time and the cause of the problem; then close the dialog box and save the notification.
Delete notification	To set a deletion flag, call up the notification in change mode and then choose *Notification → Functions → Deletion flag → Set*. To reset the deletion flag, choose *Notification → Functions → Deletion flag → Deselect*.

Select and Process Notifications Using Worklist

Use

You want to use the worklist for notifications to select and display a list of notifications. For example:

- You want to display or change a specific notification, but you do not know the number of the notification.

- You want to display or change several notifications with certain attributes.

- You want to perform certain functions simultaneously for several notifications with particular attributes.

- You want to select the notifications that you are responsible for processing.

Prerequisites

If you want to select notifications on the basis of partner functions:

- Partner functions must be defined in Customizing

- Users or departments must be assigned to the partner functions

Procedure

4. Choose *Logistics → Central Functions → Notification → Worklist → Notifications.*

   The dialog box *Worklist: Notifications* appears.

5. If you want to create your own **personal** worklist, choose the *My worklist* tab page.

   If you want to create a list of **all** notifications that meet certain selection criteria, choose the *General selection* tab page.

6. Enter the desired selection criteria.

If you want to	Then
Select only the notifications that are assigned to you for processing	Set the *For processing by me* indicator on the *My worklist* tab page.
Select only the notifications that were created by you	Set the *Created by me* indicator on the *My worklist* tab page.
Select only the notifications that were last processed by you	Set the *Last processed by me* indicator on the *My worklist* tab page.
Select only the notifications assigned to you as a specific partner (for example, in your capacity as an "author")	Set the *In my role as* indicator on the on the *My worklist* tab page and choose a partner function in the list field.

Select and Process Notifications Using Worklist

Select notifications that were created within a specific time period	Set the indicator: • *1 week*, if you want to select notifications that were created up to one week before the current date. • *1 month*, if you want to select notifications that were created up to one month before the current date. • *3 months*, if you want to select notifications that were created up to three months before the current date. • *1 year*, if you want to select notifications that were created up to one year before the current date. • *Defined by me* and enter the desired time interval if you want to select notifications that were created within a specific time period.
Select a specific notification or several notifications of a specific notification type	Enter the desired notification number or notification type.
Format the list display to meet your own specific requirements	Choose the desired layout in the *Layout* list field. You can store the following information in a layout: • List column structure • Sort criteria • Filter conditions

Specify which criterion the monitor column in the list of notifications references	In the list field *Reference field for monitor*, choose a reference field. The monitor column is then displayed with the corresponding status.
	➡️
	If you do not choose a reference field, the monitor column is not displayed.
	💬
	For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning:
	• **Green**: the desired start date has not been reached
	• **Yellow**: the desired start date has been reached, but the desired end date has not been reached
	• **Red**: the desired end date has been surpassed.
	The notifications displayed in red are critical and should be processed with the highest priority.
Select notifications with a specific status	Select the corresponding indicator on the *General selection* tab page or enter the desired selection profile.
Select notifications that have been assigned specific partners	In the *Partner* area of the *General selection* tab page, choose the desired partner function(s) and/or enter the partner number.

➡️

If you always want to use the same selection criteria in your worklist, enter the desired data and choose *My defaults*.

7. Choose *Execute*.

   The system displays a list of notifications that meet your selection criteria.

8. You can use the functions described below to process selected objects in the list further.

Function	**Procedure**
Switch between the *Display notification* and *Change notification* transactions	Choose the *Change <-> Display* pushbutton.
Display a graphic (for example, how many notifications were created on a particular date or for a specific material)	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.
Export notification list to MS Excel	Choose *Spreadsheet*.

Select and Process Notifications Using Worklist

Display document flow for one or more notifications	Select one or more objects in the list and then choose *Display document flow*.
Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a notification and then choose *Telephone call*.
Display notification long text	Select a notification and then choose *Long text*.
Display or change notifications (branch to notification header)	Select one or more objects in the list and then choose *Notification*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.
Compare notification processing dates (requested start and end dates)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Display report documentation	Choose *Goto → Report documentation*
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.

If you selected more than one object in the list, the system displays the first selected object in the list (in the display or change mode). When you have finished processing the first object, choose *Goto → Back*. The next selected object is automatically displayed.

Select and Process Tasks Using Worklist

Use

You can use the worklist for tasks to select and display a list of tasks. For example:

- You want to obtain an overview of all notification tasks that fulfill certain criteria.

- You want to select the tasks that you are responsible for processing.

Prerequisites

If you want to select notifications on the basis of partner functions:

- im Customizing Partnerrollen definiert sein

- Users or departments must be assigned to the partner functions

Procedure

5. Choose *Logistics* → *Central Functions* → *Notification* → *Worklist* → *Tasks*.

   The dialog box *Worklist: Tasks* appears.

6. If you want to create your own **personal** worklist, choose the *My worklist* tab page.

   If you want to create a list of **all** tasks that meet certain selection criteria, choose the *General selection* tab page.

7. Enter the desired selection criteria.

If you want to	Then
Select only the tasks that are assigned to you for processing	Set the *For processing by me* indicator on the *My worklist* tab page.
Select only the tasks that were created by you	Set the *Created by me* indicator on the *My worklist* tab page.
Select only the tasks that were completed by you	Set the *Completed by me* indicator on the *My worklist* tab page.
Select only the tasks assigned to you as a specific partner (for example, in your capacity as an "author")	Set the *In my role as* indicator on the on the *My worklist* tab page and choose a partner function in the list field.

Select and Process Tasks Using Worklist

Select tasks for notifications that were created within a specific time period	Set the indicator: • *1 week*, if you want to select notifications that were created up to one week before the current date. • *1 month*, if you want to select notifications that were created up to one month before the current date. • *3 months*, if you want to select notifications that were created up to three months before the current date. • *1 year*, if you want to select notifications that were created up to one year before the current date. • *Defined by me* and enter the desired time interval if you want to select notifications that were created within a specific time period.
Select tasks on the basis of a specific task code group, task code, or a selection profile	Enter the desired code group, task code, or selection profile.
Select tasks for specific notifications	Enter the desired notification number(s) or notification type(s).
Format the list display to meet your own specific requirements	Choose the desired layout in the *Layout* list field. You can store the following information in a layout: • List column structure • Sort criteria • Filter conditions

Specify which criterion the monitor column in the list of tasks references	In the list field *Reference field for monitor*, choose a reference field. The monitor column is then displayed with the corresponding status. If you do not choose a reference field, the monitor column is not displayed. For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning: • **Green**: the desired start date has not been reached • **Yellow**: the desired start date has been reached, but the desired end date has not been reached • **Red**: the desired end date has been surpassed.
Select only the outstanding tasks	Select the corresponding indicator on the *General selection* tab page.
Select tasks that have been assigned specific partners	Select the corresponding partner function in the list field on the *General selection* tab page.
Select notifications that have been assigned specific partners	In the *Partner* area of the *General selection* tab page, choose the desired partner function(s) and/or enter the partner number.

If you always want to use the same selection criteria in your worklist, enter the desired data and choose *My defaults*.

8. Choose *Execute*.

The system displays a list of notifications that meet your selection criteria.

9. You can use the functions described below to process selected objects in the list further.

Function	Procedure
Switch between the *Display notification* and *Change notification* transactions, as well as the *Display task* and *Change task* transactions	Choose the *Display <-> Change* pushbutton.
Export list of tasks to MS Excel	Choose *Spreadsheet*.
Display graphic	Position the cursor on a column header text, select the desired objects in the list, and then choose *Graphic*.

Select and Process Tasks Using Worklist

Initiate an outgoing telephone call (*SAPphone* component must be active)	Select a task and then choose *Telephone call*.
Display long text	Select a task and then choose *Long text*.
Display or change notifications (branch to notification header)	Select one or more objects in the list and then choose *Notification*.
Display or change tasks (branch to notification header)	Select one or more objects in the list and then choose *Task*.
Display a portfolio	Position the cursor on a column header and then choose *List → Portfolio*.
Compare task processing times (requested start and end times)	Select one or more objects in the list and then choose *Goto → Schedule graphic*.
Display report documentation	Choose *Goto → Report documentation for...*
Print one or more notifications	Select one or more objects in the list and then choose *Notification → Print notification*.

If you selected more than one object in the list, the system displays the first selected object in the list (in the display or change mode). When you have finished processing the first object, choose *Goto → Back*. The next selected object is automatically displayed.

Status Management for Notifications

Use

Notifications are supported by the SAP System's status management function. Whenever you create and process a notification, you execute certain business transactions for the notification. These business transactions are documented in the SAP System by a status. The current status of a notification tells you which processing stage the notification has reached and which steps have yet to be completed.

Of the available statuses in the system, only a few need to be set at any given time. Usually, a notification must have a certain status before you can process the it further. If such a status is missing, the system displays a message to inform you of this.

Features

A notification can have the following types of statuses:

- **System statuses**

    System statuses are set when you execute certain functions for a notification. For example, when you print a notification, the system sets the status "printed" *(NOPT)*. The system status tells you that a business transaction was carried out for the notification.

    The system statuses for notifications are predefined in the SAP System and cannot be changed.

- **User statuses**

    User statuses allow you to further restrict the functions that are allowed by a system status.

    Your system administrator defines user statuses in a status profile (see Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*). You can assign and delete user statuses if you have the necessary authorization.

See also:

Assigning and Changing User Statuses [Page 545]

Displaying Status Information

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Display status information in the notification header		The current system statuses are displayed in the *Status* field of the notification header. If user statuses also exist for the notification, they are also displayed. The *Status* field also displays the task status. If at least one notification task is still outstanding or released, the status "task outstanding" (*TSOS*) is displayed. As long as this status is set, you cannot complete the notification.
Display status information for individual tasks	*Tasks* tab page	The task overview contains the status of all recorded tasks.
Display system and user statuses with short texts	*Status detail* pushbutton	All active system and user statuses for the notification are displayed on the *Status* tab page.
Display general status overview	Choose *Status detail* pushbutton and then *Extras → Overview*	You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.
Display statuses that can still be assigned	Choose *Status detail* and then the *Business processes* tab page	You can see which processing steps are currently allowed or not allowed. If you choose *Transaction analysis*, you can see which business transactions can still be executed for the notification (green traffic light) and which ones can no longer be assigned (red traffic light).

Assignment of System Statuses

Use

Whenever you execute a function in a notification that is influenced by the SAP System's status management function, the system automatically assigns a corresponding system status to the notification. On the basis of the current system status, you can determine what other functions can be executed for the notification.

Features

The system assigns a system status to a notification when you:

- Create a notification

- Postpone a notification

- Put a notification in process

- Assign an order to a notification

- Complete a notification

- Print a notification

- Create a task

- Release a task

- Complete a task

- Complete a task successfully

- Complete all tasks

- Activate an approval requirement for a notification

- Give an approval to a notification

- Refuse an approval for a notification

- Create a costing for a claim

Assigning and Changing User Statuses

Prerequisites

To be able to assign user statuses to a notification, the following conditions must be fulfilled in Customizing for *Cross-Application Components* under *Notification Processing → Status Management → Define Status Profile*:

- User statuses are defined in a status profile

- A status profile is assigned to the notification type to be processed.

You can only change a user status if the **status order numbers** assigned to the user status in Customizing allow it:

- The status order numbers defined for individual user statuses in the status profile determine the sequence in which the user statuses can be activated.

- If a user status does not have an order number assigned to it, the user status can always be set.

- It is not possible for several statuses with status order numbers to be active at the same time.

- You cannot delete the initial user status that has been set for a notification.

Procedure

5. Call up a notification in the change mode.

6. In the notification header, choose *Status detail*.

   The status information is displayed.

5. In the column for user statuses (right column), activate the desired user status and then choose *Back*.

   The notification header with the chosen user status is displayed.

6. Save the notification.

Notification Header

Definition

Information in the notification that applies to the overall notification.

Use

You use the notification header information to identify and process a notification.

Structure

The structure of a notification can be customized to meet user-specific needs. For this reason, the notification header may contain different types of information. The following table shows a selection of header and partner data for notification types delivered with the standard system.

General data	• Notification number
	• Notification type
	• Notification status
Problem information	• Problem description (for example, subject matter with coding and short text)
Reference objects/reference documents	• Reference objects (for example, material, serial number, functional location, equipment)
	• Reference documents (for example, sales order or production order)
Organizational information	• Organizational data
	• Work center
	• Malfunction data
	• System availability
	• Quantities
	• Basic dates
Execution data (internal)	• Organization (for example, coordinator or department responsible)
	• Address data
	• Priority
	• Notification start and end dates
Contact person	• Partners (for example, customer, vendor, or manufacturer)
Tasks / Activities	• Immediate tasks and activities for notification header

Linking Documents from the DMS

Use

In the standard system, the notifications are linked to the SAP System's *Document Management System* (DMS). This allows you to link documents that are stored in the DMS to a notification. You can display or print a linked document at any time while you are processing a notification.

Prerequisites

In Customizing for the notification type, a tab page has been activated for the DMS (see Customizing for *Cross-Application Components* under *Notification → Notification Creation → Notification Type → Define Screen Templates*).

Activities

To link a document contained in the DMS to a notification, you call up the notification in the create or change mode and then choose the *DMS* tab page. A table is displayed in which you can retrieve, link, and display documents from the DMS.

Entering a Notification Header Text

Procedure

1. Call up a notification in the create or change mode.

2. Enter a notification short text in the *Description* field (for example, a short description of the problem).

    For the notification types in the standard system, the *Description* field is located on one of the tab pages.

3. If the existing line is too short for the description, choose *Create text*.

    The SAP word processing screen appears.

4. Enter a long text and then choose *Back* to return to the notification header.

    In Customizing for *Cross Application Components* under *Notification → Notification Creation → Notification type → Define Screen Templates → Format Notification Long Text* you can specify that:

    −   The long text cannot be changed This prevents you from changing the existing long text when you process the notification again. However, you can enter and append a new text below the existing long text.

    −   Each long text change is logged with the user name and change date.

5. Save the data.

Partners in Notification Processing

Definition

A **business partner** is a business object that consists of a person, organization, group of persons, or group of organizations in which a company has a business interest. A business partner may also be a person, organization, or group within a company.

A business partner can have several **functions** at one time. Functions are characterized by function categories. A function category, for example, may be a sold-to party, interested person, payer, or payee.

A business partner can have relationships with other business partners. Relationships are characterized by **relationship types**. For example, relationship types can include the following: "is a subsidiary of," "is the contact person for," or "is identical to." A business partner can have several addresses. Addresses are defined by address types. An address type, for example, can consist of a delivery address or correspondence address.

A business partner can be assigned other business partners using the function determination. These business partners can then act on behalf of the original partner in their respective roles. For example, a business partner can be defined as a payee for another business partner.

For more information about business partners, refer to the documentation *Basic Functions and Master Data in Sales and Distribution*.

Use

In a notification, you can record all partners who are involved with subject matter/problem described in the notification. This includes the person who reported the subject matter/problem, the persons responsible for processing the notification, and those responsible for processing individual notification tasks. The partner data that you can maintain in a notification is predefined in Customizing for each notification type.

The following graphic shows how partners are used for notification processing.

```
┌──────────────────────────────┐          ┌──────────────────────────────┐
│ Partners for Notification    │          │   Partners for Tasks         │
│          Header              │          │  (Based on the notification  │
│ (Based on the notification   │          │           type)              │
│          type)               │          │                              │
└──────────────────────────────┘          └──────────────────────────────┘
```

Partners who report problems

For example:
- **Customer**
- **Vendor**
- **Author**
- **Contactperson**

Partners responsible for notification processing

For example :
- **Dept. responsible**
- **Coordinator**

Partners responsible for task processing

For example :
- **User responsible** (Immediate tasks in notification header)
- **User responsible** (Corrective tasks for notification items)

Partner Screen (Summary of all partners associated with notification)

For example:
- **Dept. responsible**
- **Coordinator**

Structure

Partner type

Partners can be:

- Internal partners (for example, internal employees or partners in the *Human Resources* component)

- External partners (for example, customers, vendors, or manufacturers)

Partner function

The various partner types can be subdivided into **partner functions**. The partner function defines the rights, responsibilities and tasks of each partner when a business transaction is processed.

Partner determination procedure

The partner determination procedure specifies whether partners can be assigned to a notification and which partner functions can be used to process various business transactions. Your system administrator defines the partner determination procedure in Customizing.

Processing the Partner Information

Prerequisites

You can only display the partner data screen if a partner determination procedure has been defined in Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner*.

Procedure

3. In a notification, choose *Goto → Partner*.

The screen for the partner data appears. If partner data already exists for the notification, it will be displayed in a table. In this screen, you can use the following functions:

Function	Follow-on menu path
Display partner data	Select a partner and choose *Environment → Display object*.
Delete a partner	Select a partner and choose *Delete partner assignment*.
Phone a partner	Select a partner and choose *Phone partner*.
Contact partner via paging function	Select a partner and choose *Send message to partner*.
Sort partners by function	Choose *Edit → Sort by partner function*.
Display, change, or delete partner addresses	Select a partner and choose the corresponding pushbutton

If you want to enter new partner data for the notification, enter the data directly in the table.

4. Go back to the notification header and save the new or changed partner data.

Specifying a Priority

Use

When you assign a priority to a notification, you can specify how important and urgent the notification is. If you specify a priority in a notification, the system automatically calculates the start and end dates for notification processing on the basis of this priority. You can change the priority of a notification as long as the notification has not been completed.

Prerequisites

The priorities and time intervals are defined in Customizing for *Cross-Application Components* under *Notification → Notification Processing → Response Control*.

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> In Customizing, your system administrator can define a processing interval for each priority. For example, priority "1" can mean that someone must begin processing the notification within 2 hours after it is created and the notification must be completed within 2 days.

Procedure

1. Call up a notification in the create or change mode.

2. Enter the desired key in the *Priority* field and choose *Continue*.

> The system calculates the start and end dates for the notification in the background and enters these dates in the corresponding fields of the notification. The newly calculated dates are displayed next to the *Priority* field.

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> The system calculates the dates on the basis of the factory calendar, provided a plant is specified.

> When you release a task, the system also sets the dates for the tasks based on the data in the notification. This occurs on the basis of the factory calendar. The dates for the tasks are displayed in the task overview screen.

3. Save the data.

Displaying Administrative Information

Use

The system records administrative information for the notification header and for individual items, tasks and activities. This information specifies who created the notification, item, task, or activity, and who last changed these objects.

Procedure

Display Administrative Information for Notification

3. Call up a notification in the change or display mode.

4. Position the cursor anywhere on the notification screen except on an item, task, or activity, and then choose *Goto* → *Administrative data*.

> The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the notification.

4. Choose *Continue* to close the dialog box.

Display Administrative Data for an Item, Task, or Activity

4. Call up a notification in the change or display mode.

5. Choose the tab page for items, tasks, or activities.

6. Select an item, task, or activity, and then choose *Goto* → *Administrative data*

> The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the item, task, or activity.

5. Choose *Continue* to close the dialog box.

Outbound Telephone Calls

Use

When you process a notification, you can use this function to make a telephone call to a customer, vendor, or other partner directly from notification.

You can initiate an outbound telephone call in a notification from the:

- Partner overview screen

- Worklist screen for notification processing

- Action box as a follow-up function (provided the follow-up function for outbound telephone calls was activated in Customizing for the action box)

Prerequisites

The *SAPphone* component in Customizing for *Basis Components* (*Basis Services → Communication Interfaces*) is active. For more information, see SAPphone [Ext.].

Activities

You choose the function for outbound telephone calls in the partner overview screen, in a notification list, or in the action box.

Item

Definition

Detailed information that applies to the subject matter of a notification.

Use

The item data can be displayed in various degrees of detail on the following screens:

- Notification header

- Item overview

- Item detail screen

You can record one or more items in a notification. If you created at least one item in a notification, you can:

- Evaluate the notification on the basis of the item data

- Classify the notification (provided you use the SAP *Classification System* in your company)

    You can only classify objects at the level of notification items. If the notification has only one item, the classification applies to the notification as a whole, even though you entered the data for an item. If the notification contains several items, the classification applies to each item.

Structure

A notification item contains the following information:

- Item number

- Item short text and long text

- Code group and code that identifies the subject matter of item

For each item, you can record causes, tasks, and activities.

Entering Items

1. Call up a notification in the create or change mode.

2. You can create or process an item in the following locations in a notification:

   - In a screen area (for example, on the *Subject* tab page)

   - On the item overview (*Items* tab page)

   - On the item detail screen (choose the Overview tab page, select an item in the item overview, and choose *Detail view* to display the dialog box for the item detail)

Cause for Item

Definition

A reason or event that caused an item to be recorded in a notification. A cause item contains the following information:

- Code group

- Code

- Short text

- Long text

Use

You can record one or more causes for an individual item in a notification. You can display the cause information in varying levels of detail on the following screens:

- Cause overview

- Cause detail screen

The cause overview and the cause detail screens are the same for all notification types.

Create Cause for Item

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page	What you should know
Record cause data for an item in the cause overview	Choose *Causes* tab page.	Before you can enter the cause data, you must select an item in the item overview.
Record cause data for an item in the cause detail screen	Choose *Causes* tab page. Select a cause item and then choose *Detail view.*	If you selected several causes in the cause overview, choose *Next cause* to go to the next cause detail screen. To create a new cause from the detail screen, choose *New cause.*

Task

Definition

Planned or completed activity that describes a planning and organizational measure in a notification. A task can:

- Apply to the notification as a whole or to individual items in a notification
- Have different statuses

Use

Using a task, you can plan how different people can interact to process a notification and track how various activities are completed within a specified period of time. The task data in a notification is displayed in varying levels of detail in the:

- Task overview
- Task detail screen

You can record task information for the notification header and for individual notification items:

- Tasks that apply to the notification as a whole (or notification header) are designated as "immediate tasks." These tasks usually provide a "quick fix" for a problem that requires immediate attention.
- Tasks for notification items are referred to as "corrective tasks." These tasks usually provide permanent solutions that will prevent the problem from reoccurring in the future.

For each task, you can enter the:

- Key for the task to be performed and a brief instruction describing what is to be done
- Planned start and end dates for the task
- Task status

Integration

If the appropriate data is maintained in Customizing, the system can trigger certain follow-up actions on the basis of the task code (for example, printing a paper or calling up an SAP transaction). You can define follow-up actions to meet your individual requirements. (For more information, see <u>Follow-up Actions for Tasks [Page 99]</u>.)

Entering Tasks

Procedure

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record immediate tasks for the notification header	Choose the *Tasks* tab page.	Enter the data on the task overview.
Record immediate tasks on task detail screen	Select a task on the task overview and choose *Detail view.*	Enter the data on the task detail screen.
Record corrective tasks for a notification item	Choose the *Items* tab, select an item, and then choose the *Item tasks* tab page.	Enter the task data for the item.
Record corrective tasks on the task detail screen	Choose the *Items* tab page and then select an item. Choose the *Item tasks* tab page, select a task and then choose *Detail view*.	Enter the planned start and end dates for the task on this screen. The dates you enter may be changed based on the status you assign to the task (see Status Management for Tasks [Page 562]).

See also:

Automatic Determination of Tasks [Page 564]

Status Management for Tasks

Use

A task status provides information about a task's current processing stage. The system manages the following statuses for tasks:

Status	Meaning
Task outstanding	The task was created in the notification.
Task released	The task can be executed.
Task completed	The task was executed.
Task successful	The result of the task was successful (for example, the problem was solved or damage was repaired).

The system does not distinguish between notification header tasks (immediate tasks) and item tasks (corrective tasks). If the notification status information indicates that outstanding tasks exist in the notification, these tasks can consist of both immediate tasks and corrective tasks.

> A notification retains the status "outstanding tasks" as long as a task has not been completed (even if the task has already been released).

Integration

The various notification and task statuses, for the most part, are independent of one another. This means, for example, that you can put a notification in process even though it contains outstanding, unreleased tasks. As long as a notification still contains outstanding tasks, however, you cannot complete the notification.

For more information about the general status management function, see <u>Status Management [Page 141]</u>.

Features

You can use the status management function as follows:

- **Assign a status to a task**

   You assign a status to a task by choosing the corresponding function in the task overview or task detail screens. You must assign a status to each task individually. If you select several tasks in the overview screen and choose a status, the system assigns the status to all of the selected tasks.

- **Status information**

   Once you have assigned a status to a task, the corresponding status is displayed in the task overview screen and task detail screen. If you want to display the text for the status abbreviations, choose *Status detail.*

- **Date changes as a result of status assignments**

   When you assign a status to a task, the system automatically changes the relevant dates as follows:

Status	The system fills the following fields:
Released	*Planned start* with the current date/time
	Planned end with either the current date/time or desired notification end date/time.
	You can overwrite both fields.
Completed	*Date completed <date> by <user name>* with the current date/time and current user name.
	You cannot overwrite these fields.
Successful	None

➡️

The planned dates for a task must fall within the desired start and end dates of the notification. If you specify other dates for the task, the system displays a message to inform you of this.

Automatic Determination of Tasks

Use

You can have the system determine the tasks for a notification automatically on the basis the settings defined in Customizing for response monitoring. The **response profile** and **service profile** in Customizing together determine how and when a person responsible for processing a notification should respond.

- In the response profile, you specify one or more standard tasks that the system will propose on the basis of the notification priority. The system proposes these tasks automatically and they must be completed within a specified time interval. The system automatically assigns the determined tasks to the notification header.

- In the service profile, you define the time periods for individual workdays (service windows) during which a notification can be processed.

> You create a notification at 10:00 a.m. The response profile defines a time interval of two hours for the task code "Call back customer" and a time interval of 4 hours for the task code "Check whether technician is on site". The times defined in the service window are 8:00 a.m. to 12.00 noon and from 2:00 p.m. to 6:00 p.m.
>
> In this case, you must call back the customer by 12:00 noon to discuss or clarify the problem. If you need to send a technician to the customer site, the technician must arrive by 4:00 p.m.

Prerequisites

A response profile and service profile must be assigned to the notification type in Customizing for *Cross-Application Components* under *Notification → Notification Processing → Define Response Monitoring*.

Activities

Choose *Edit → Tasks → Determine* to automatically determine the tasks.

You can also choose *Edit → Tasks → Simulation(Det.)* to simulate the determination of tasks (without actually assigning the tasks to the notification).

Follow-Up Actions for Tasks

Use

You can define a follow-up action for a task that will automatically be triggered and executed by the system. A follow-up action can call one or more function modules that execute specific functions (for example, printing a shop paper or calling up a transaction).

Prerequisites

In Customizing for *Cross-Application Components* under:

- *Notification → Notification Creation → Notification Content → Maintain Catalogs*, the indicator for follow-up actions is set in the task catalog (catalog type 2)

- *Notification → Notification Processing → Additional Notification Functions → Define Follow-Up Actions for Tasks*, you have defined a follow-up action key and assigned one or more function modules to be called to this key

A follow-up function is only executed if the business transaction that is assigned to the follow-up action allows it.

Features

The system automatically executes a follow-up action after you have:

5. Entered a task code (for the notification header or for a notification item) that has a follow-up action assigned to it.

6. Saved the notification

    You can display a log on the task detail screen that lists all follow-up actions that were executed.

Activity

Definition

Completed action or information recorded during the processing of a notification.

Use

You can enter the following information for each activity:

- A key for the action performed and a short text that can be changed

- Start and end of the activity

- Quantity factor (for example, if an activity consisted of sending three units of a material to a laboratory for testing, you can enter the value "3" for the quantity factor)

An activity can apply to the notification header as well as to individual notification items. The activity data is displayed in various degrees of detail on two screens in the notification:

- On the activity overview

- On the activity detail screen

The activity overview and detail screens are the same for all notification types.

> The main difference between an activity and a task is that an activity does not have a status and cannot be assigned a partner. The activity is used strictly for documentation purposes.

Entering Activities

To use the functions in the following table, call up the notification in the create or change mode.

Function	Tab page / Pushbutton / Menu path	What you should know
Record activities for the notification header	Choose the *Activities* tab page.	Enter the data in the activity overview.
Record activities for the notification header in the activities detail screen	Select an activity in the activity overview and choose *Detail view.*	Enter the data in the activity detail screen. Enter the date and time when the activity was performed. To create a new activity from the detail screen, choose *New entry*.
Record activities for a single item	Choose the *Items* tab page, select an item, and then choose the *Item activities* tab page.	Enter the activity data for the item.

Catalog Profile

Definition

A combination of code groups from different catalogs that are grouped together as allowed values for notification processing.

The catalog profile is created and assigned to a notification type in Customizing for *Cross-Application Components* under *Notification → Notification Creation → Notification Content → Define Catalog Profile*.

Standard catalog profile

This is the catalog profile assigned to a notification type in Customizing for *Notification Type*. The system proposes this catalog profile for all notifications of the corresponding notification type.

Using other catalog profiles

You can also select another catalog profile, if your Customizing settings allow it. If you copy another catalog profile into a notification, it becomes the standard catalog profile for this notification only.

For more information, see .

Use

The catalog profile has two primary functions for notification processing:

- It determines which code groups will be accessible from the various catalogs to record items, tasks, and activities in a notification.

- You can store a default class in the catalog profile with which an item can be classified in the SAP System's *Classification System* (provided the *Classification System* was activated for the notification type in Customizing).

You can use the catalog profile, for example, to limit the selection of codes to specific types of defects or damage according to the notification type being processed.

With the help of classes in the *Classification System*, you can record additional problem attributes if the existing criteria in the notification are not sufficient. For example, if you maintain the class "problems in production" along with the class characteristic "cause," you can record the causes of production problems as characteristic values.

The catalog profile controls the unit of measurement and the degree of accuracy for quantitative valuations during notification processing. You can valuate the item data quantitatively and, if necessary, assign a unit of measurement to the value.

Using an Alternative Catalog Profile

Use

Each notification type is normally assigned a catalog profile. The information in a catalog profile is usually general enough so you can use it to process a variety of problems. In some cases, however, you may have to use a catalog profile other than the one that is assigned to the notification type. In such a situation:

- The system can copy another catalog profile automatically.

    For example, if you specify a material in a notification which has a catalog profile assigned to it in the material master, the system automatically selects the catalog profile assigned the material.

- You can change the catalog profile manually (see "Prerequisites" below).

Prerequisites

You can only change a catalog profile manually if Customizing allows it. If you change the catalog profile in a notification manually or if you manually enter defect codes that do not exist in the assigned catalog profile, the system responds differently depending on which message type is specified for the catalog profile in Customizing for *Notification Contents*.

System message (message type)	Effect
Information message	The system copies the new catalog profile
Warning message	The system copies the new catalog profile
Error message	The system does not copy the new catalog profile; instead, it retains the existing catalog profile

For example, if a catalog profile applies to a specific notification type and you only want this catalog profile and its codes to be used by the person processing the notifications, then the message type "error message" must be specified in Customizing. This prevents you from using any other catalog profile, which means you can only use the codes in the current catalog profile to process a notification.

> If Customizing does not specify a message type for a catalog profile, the system will copy a new catalog profile without issuing a system message.

Activities

To determine which catalog profile applies for a notification, choose *Extras → Catalog profile → Display*.

Changing the Catalog Profile

1. On the notification screen, choose *Extras → Catalog profile → Catalog profile*.

   A dialog box appears. The *Current catalog profile* field displays the current catalog profile or the last one copied; the *Default catalog profile* field displays the catalog profile that was originally valid.

2. If you:

   – Want to copy the catalog profile proposed by the system, choose *Default transfer.* This catalog profile is then displayed in the *Current catalog profile* field.

   – Do not want to use the current or proposed catalog profile, you can specify another one. To specify an individual catalog profile, enter the desired catalog profile in the *Individual catalog profile* field and then choose *Individual transfer.*

      This catalog profile is then displayed in the *Current catalog profile* field.

      The individual catalog profile will now no longer be overwritten by the catalog profile assigned to a reference object. If this catalog profile should no longer be used, you must change it explicitly.

      If you create a new notification of this notification type, the system uses the standard catalog profile assigned to the notification type and not this individual catalog profile.

3. Close the dialog box and save the changes.

Filename: EXP_OOOO.doc
Directory: C:\TEMP\iwbprint0006
Template: C:\Users\templates\sapkeeh.dot
Title: Notifications (CA-NO)
Subject:
Author: SAP AG
Keywords:
Comments: Release 46C   24.07.2001
Creation Date: 24.07.01 08:58
Change Number: 2
Last Saved On: 24.07.01 08:58
Last Saved By: SAP AG
Last Printed On: 24.07.01 10:24
As of Last Complete Printing
    Number of Pages: 570
    Number of Words: 116.368 (approx.)
    Number of Characters: 616.755 (approx.)