Notifications (CA-NO)

Release 4.6C
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<tbody>
<tr>
<td>Using an Alternative Catalog Profile</td>
<td>569</td>
</tr>
<tr>
<td>Changing the Catalog Profile</td>
<td>570</td>
</tr>
</tbody>
</table>
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:

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

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)
Features

You record the information or problem to be documented in a notification. 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:

<table>
<thead>
<tr>
<th>Notification</th>
<th>Using these notifications, you can:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Notifications [Page 58]</td>
<td>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.</td>
</tr>
<tr>
<td>Maintenance Notifications [Page 163]</td>
<td>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.</td>
</tr>
<tr>
<td>Service Notifications [Page 173]</td>
<td>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).</td>
</tr>
<tr>
<td>Claims [Page 322]</td>
<td>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.</td>
</tr>
<tr>
<td>Change Notifications [Page 500]</td>
<td>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.</td>
</tr>
<tr>
<td>Feedback Notifications [Page 312]</td>
<td>Contact your responsible support group as a user of an SAP System, to receive support for IT-related problems</td>
</tr>
<tr>
<td>Internal Service Request [Page 49] (General information)</td>
<td>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).</td>
</tr>
</tbody>
</table>
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
- Log activities
- 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 for simplified notification processing
- Notification structure 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):

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

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).

Diagram:
- Notification Data
  - Subject matter
  - Partner information
  - Execution data
- Action Box
- Reference object
- Items
- Activities
- Tasks
- Causes
  - Maximum of five additional subscreens (Customizing)
  - Not active in the standard system
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.

   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.

<table>
<thead>
<tr>
<th>Functions on the Notification Screen</th>
<th>Menu path/Pushbutton</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change notification</td>
<td>Change notification pushbutton</td>
<td>You switch to the change mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.</td>
</tr>
<tr>
<td>Display notification</td>
<td>Display notification pushbutton</td>
<td>You switch to the display mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.</td>
</tr>
<tr>
<td>Notification (extended)</td>
<td>Notification (extended) pushbutton</td>
<td>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.</td>
</tr>
<tr>
<td>Put notification in process</td>
<td>Put in process pushbutton</td>
<td>You change the processing status of the notification; for additional information, see Process Notification [Page 531].</td>
</tr>
</tbody>
</table>
### Create Notification (in the SAP System)

<table>
<thead>
<tr>
<th>Action</th>
<th>Button Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postpone notification</td>
<td>Postpone pushbutton</td>
<td>You change the processing status of the notification; for additional information, see [Process Notification](Page 531).</td>
</tr>
<tr>
<td>Complete notification</td>
<td>Complete pushbutton</td>
<td>You change the processing status of the notification; for additional information, see [Process Notification](Page 531).</td>
</tr>
<tr>
<td>Give approval</td>
<td>Give approval pushbutton</td>
<td>You approve a notification so it can be processed further; for more information, see [Approval Requirement for Notifications](Page 526).</td>
</tr>
<tr>
<td>Refuse approval</td>
<td>Refuse approval pushbutton</td>
<td>You do not approve a notification for further processing; for more information, see [Approval Requirement for Notifications](Page 526).</td>
</tr>
<tr>
<td>Set default values</td>
<td>Default values pushbutton</td>
<td>See [Setting User Default Values](Page 530) for additional information.</td>
</tr>
<tr>
<td>Display object</td>
<td>Display object pushbutton</td>
<td>You display reference objects or reference documents that may be specified in the notification.</td>
</tr>
<tr>
<td>Display notification structure</td>
<td>Notification structure pushbutton</td>
<td>You display the current structure of the notification.</td>
</tr>
<tr>
<td>Print notification</td>
<td>Notification → Print → …</td>
<td>If you choose <em>Notification</em>, you print the contents of the notification.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you choose <em>Item selection</em>, you print individual items in the notification.</td>
</tr>
<tr>
<td>Notification address</td>
<td>Extras → Address</td>
<td>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.</td>
</tr>
<tr>
<td>Catalog profile</td>
<td>Extras → Settings → Catalog profile → …</td>
<td>If you choose <em>Display</em>, you can display the current catalog profile that is assigned to the notification type.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you choose <em>Catalog profile</em>, you can select an individual catalog profile.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information, see [Catalog Profile](Page 568).</td>
</tr>
</tbody>
</table>
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.

   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.

<table>
<thead>
<tr>
<th>Functions on the Notification Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Function</strong></td>
</tr>
<tr>
<td>Change notification</td>
</tr>
<tr>
<td>Display notification</td>
</tr>
</tbody>
</table>
### Create Notification (On the Intranet)

<table>
<thead>
<tr>
<th>Notification (extended)</th>
<th>Notification (extended) pushbutton</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Put notification in process</td>
<td>Put in process pushbutton</td>
<td>You change the processing status of the notification; for additional information, see <a href="#">Process Notification</a> [Page 531].</td>
</tr>
<tr>
<td>Postpone notification</td>
<td>Postpone pushbutton</td>
<td>You change the processing status of the notification; for additional information, see <a href="#">Process Notification</a> [Page 531].</td>
</tr>
<tr>
<td>Complete notification</td>
<td>Complete pushbutton</td>
<td>You change the processing status of the notification; for additional information, see <a href="#">Process Notification</a> [Page 531].</td>
</tr>
<tr>
<td>Give approval</td>
<td>Give approval pushbutton</td>
<td>You approve a notification so it can be processed further; for more information, see <a href="#">Approval Requirement for Notifications</a> [Page 526].</td>
</tr>
<tr>
<td>Refuse approval</td>
<td>Refuse approval pushbutton</td>
<td>You do not approve a notification for further processing; for more information, see <a href="#">Approval Requirement for Notifications</a> [Page 526].</td>
</tr>
<tr>
<td>Set default values</td>
<td>Default values pushbutton</td>
<td>See <a href="#">Setting User Default Values</a> [Page 530] for additional information.</td>
</tr>
<tr>
<td>Display object</td>
<td>Display object pushbutton</td>
<td>You display reference objects or reference documents that may be specified in the notification.</td>
</tr>
<tr>
<td>Display notification structure</td>
<td>Notification structure pushbutton</td>
<td>You display the current structure of the notification.</td>
</tr>
<tr>
<td>Print notification</td>
<td>Notification → Print → …</td>
<td>If you choose Notification, you print the contents of the notification. If you choose Item selection, you print individual items in the notification.</td>
</tr>
<tr>
<td>Notification address</td>
<td>Extras → Address</td>
<td>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.</td>
</tr>
<tr>
<td>Catalog profile</td>
<td>Extras → Settings → Catalog profile → …</td>
<td>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].</td>
</tr>
</tbody>
</table>
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.

   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.

---

<table>
<thead>
<tr>
<th>Functions on the Notification Screen</th>
<th>Menu path/Pushbutton</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create notification</td>
<td>Create notification pushbutton</td>
<td>You switch to the create mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.</td>
</tr>
<tr>
<td>Display notification</td>
<td>Display notification pushbutton</td>
<td>You switch to the display mode (provided you have the necessary authorization). Before switching modes, the system prompts you to save the notification.</td>
</tr>
</tbody>
</table>
### Process Notification

<table>
<thead>
<tr>
<th>Function</th>
<th>Pushbutton</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification (extended)</td>
<td>Notification (extended) pushbutton</td>
<td>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.</td>
</tr>
<tr>
<td>Put notification in process</td>
<td>Put in process pushbutton</td>
<td>You change the processing status of the notification of the notification; for additional information, see <a href="#">Process Notification</a>.</td>
</tr>
<tr>
<td>Postpone notification</td>
<td>Postpone pushbutton</td>
<td>You change the processing status of the notification of the notification; for additional information, see <a href="#">Process Notification</a>.</td>
</tr>
<tr>
<td>Complete notification</td>
<td>Complete pushbutton</td>
<td>You change the processing status of the notification of the notification; for additional information, see <a href="#">Process Notification</a>.</td>
</tr>
<tr>
<td>Set default values</td>
<td>Default values pushbutton</td>
<td>See <a href="#">Setting User Default Values</a> for additional information.</td>
</tr>
<tr>
<td>Display object</td>
<td>Display object pushbutton</td>
<td>You display reference objects or reference documents that may be specified in the notification.</td>
</tr>
<tr>
<td>Display notification structure</td>
<td>Notification structure pushbutton</td>
<td>You display the current structure of the notification.</td>
</tr>
<tr>
<td>Display action log</td>
<td>Action log pushbutton</td>
<td>You display changes in the notification via the action log [Page 525].</td>
</tr>
<tr>
<td>Print notification</td>
<td>Notification → Print → …</td>
<td>If you choose <em>Notification</em>, you print the contents of the notification. If you choose <em>Item selection</em>, you print individual items in the notification.</td>
</tr>
<tr>
<td>Notification address</td>
<td>Extras → Address</td>
<td>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.</td>
</tr>
<tr>
<td>Catalog profile</td>
<td>Extras → Settings → Catalog profile → …</td>
<td>If you choose <em>Display</em>, you can display the current catalog profile that is assigned to the notification type. If you choose <em>Catalog profile</em>, you can select an individual catalog profile. For more information, see <a href="#">Catalog Profile</a>.</td>
</tr>
</tbody>
</table>
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

   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

   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.

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

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):

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

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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Follow-on menu path</th>
<th>What you should know</th>
</tr>
</thead>
</table>
| 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

<table>
<thead>
<tr>
<th>Intranet</th>
<th>SAP System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered by</td>
<td>Person who processes/approves the request</td>
</tr>
</tbody>
</table>
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.
**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:


Integration with Other Quality Management Components

<table>
<thead>
<tr>
<th>If you want to</th>
<th>You must install</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access catalog code groups and codes to document the defect items, causes, and tasks in a quality notification</td>
<td>Catalog (QM-PT-BD-CAT)</td>
</tr>
<tr>
<td>Create quality notifications while processing an inspection to record quality-related problems</td>
<td>Quality Inspection (QM-IM)</td>
</tr>
<tr>
<td>Analyze the notification data using various evaluation tools</td>
<td>QM Information System (QM-QC-IS)</td>
</tr>
</tbody>
</table>
Create quality notifications for customer complaints over the Internet  

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

### Integration with Other R/3 Components

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

### 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:
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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a quality notification</td>
<td>1. Choose Logistics → Quality management → Quality notification → Create.</td>
<td>Notification types:</td>
</tr>
<tr>
<td></td>
<td>2. Enter the notification type and then choose Enter.</td>
<td><strong>Q2</strong> - Complaint against vendor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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).</td>
</tr>
<tr>
<td>Creating a user-specific quality notification</td>
<td>1. Choose Logistics → Quality management → Quality notification → Create.</td>
<td>To be able to create a user-specific notification, you must specify a user-specific notification type that has been predefined in Customizing.</td>
</tr>
<tr>
<td></td>
<td>2. Enter the notification type and then choose Enter.</td>
<td></td>
</tr>
<tr>
<td>Creating a quality notification with reference</td>
<td>1. Choose Logistics → Quality management → Quality notification → Create.</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>2. Enter the notification type.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Enter the number of the notification you want use as a copy model and choose Enter.</td>
<td></td>
</tr>
</tbody>
</table>
| 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.

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

Reference objects
For example:
• Organization
• Work center
• Execution
• Malfunction data
• Problem description
<table>
<thead>
<tr>
<th><strong>Tasks / Activities</strong></th>
<th><strong>Tasks / Activities</strong></th>
<th><strong>Tasks / Activities</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Header-related immediate tasks and activities</td>
<td>Header-related immediate tasks and activities</td>
<td>Header-related immediate tasks and activities</td>
</tr>
</tbody>
</table>

**Supplementary information**

For example:
- Quantities
- Material data
- Effect on system
- System availability
- Costs
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.
Partners in Quality 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.

<table>
<thead>
<tr>
<th>Predefined Partner Functions for the Standard Notification Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Type</td>
</tr>
</tbody>
</table>

For example:

- Implementing dept.
- Coordinator
### Partners in Quality Notification Processing

<table>
<thead>
<tr>
<th>Category</th>
<th>Role</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer complaint (Q1)</td>
<td>Sold-to party</td>
<td>User responsible</td>
</tr>
<tr>
<td></td>
<td>Contact person</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementing department Coordinator</td>
<td></td>
</tr>
<tr>
<td>Complaint against vendor (Q2)</td>
<td>Vendor</td>
<td>User responsible</td>
</tr>
<tr>
<td></td>
<td>Manufacturer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementing department Coordinator</td>
<td></td>
</tr>
<tr>
<td>Internal problem report (Q3)</td>
<td>Author</td>
<td>User responsible</td>
</tr>
<tr>
<td></td>
<td>Implementing department Coordinator</td>
<td></td>
</tr>
</tbody>
</table>

**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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Follow-on menu path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display partner data</td>
<td>Select a partner and choose Environment → Display object</td>
</tr>
<tr>
<td>Delete a partner</td>
<td>Select a partner and choose Delete partner assignment</td>
</tr>
<tr>
<td>Phone a partner</td>
<td>Select a partner and choose Phone partner</td>
</tr>
<tr>
<td>Sort partners by function</td>
<td>Choose Edit → Sort by partner function</td>
</tr>
<tr>
<td>Display, change, or delete partner addresses</td>
<td>Select a partner and choose the corresponding pushbutton</td>
</tr>
</tbody>
</table>

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.

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:

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

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
## Entering Items

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

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering item data in the notification header (notification type Q3 only)</td>
<td>Choose the <strong>Subject</strong> tab.</td>
<td>You can enter data for a <strong>single</strong> 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.</td>
</tr>
<tr>
<td>Entering item data in the item overview</td>
<td>Choose the <strong>Overview</strong> tab.</td>
<td>Enter the data for an item in the various columns of a single row.</td>
</tr>
<tr>
<td>Entering item data in the item detail screen</td>
<td>Choose the <strong>Overview</strong> tab. Selected item in the item overview and choose <strong>Detail view</strong> to display the dialog box for the item detail.</td>
<td>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 <strong>Next</strong> to go to the detail screen for the next item. To create a new item from the detail screen, choose <strong>New entry</strong>.</td>
</tr>
</tbody>
</table>
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.

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

**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 recurring.

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering immediate tasks for the notification header</td>
<td>Choose the Tasks tab.</td>
<td>Enter the data in the task overview.</td>
</tr>
<tr>
<td>Entering the immediate task data in task detail screen</td>
<td>Select a task in the task overview and choose Detail view.</td>
<td>Enter the data in the task detail screen.</td>
</tr>
<tr>
<td>Entering corrective tasks for a notification item</td>
<td>Choose the Items tab, select an item, and then choose the Item tasks tab.</td>
<td>Enter the task data for the item.</td>
</tr>
<tr>
<td>Entering the corrective task data in the task detail screen</td>
<td>Choose the Items tab and then select an item. Choose the Item tasks tab, select a task and then choose Detail view.</td>
<td>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]).</td>
</tr>
</tbody>
</table>

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](#).

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 Management for Tasks

<table>
<thead>
<tr>
<th>Status</th>
<th>The system completes these fields</th>
</tr>
</thead>
</table>
| 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering activities for the notification header</td>
<td>Choose the Activities tab.</td>
<td>Enter the data in the activity overview.</td>
</tr>
</tbody>
</table>
| 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.                                                 |

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:

- 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 Selection of an Alternative Catalog Profile [Page 103].

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:

<table>
<thead>
<tr>
<th>System message (message category)</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information message</td>
<td>The system copies the new catalog profile</td>
</tr>
<tr>
<td>Warning message</td>
<td>The system copies the new catalog profile</td>
</tr>
<tr>
<td>Error message</td>
<td>The system does not copy the new catalog profile; instead, it retains the existing catalog profile</td>
</tr>
</tbody>
</table>

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:

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

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
</table>
| 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. 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)
- Processing Return Deliveries to Vendors

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

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
</table>

Table: Features
**Action Box**

<table>
<thead>
<tr>
<th>Appearance of the action box</th>
<th>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:</th>
</tr>
</thead>
</table>
|                             | • **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). |

<table>
<thead>
<tr>
<th>Standard follow-up functions</th>
<th>The action box contains several follow-up functions that have been predefined in Customizing for <em>Notification Processing</em>. For more information about these functions, see:</th>
</tr>
</thead>
</table>
|                              | • [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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone contact using SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td>Telephone contact without SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td>Internal memo</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing the quality level</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Material</td>
</tr>
<tr>
<td></td>
<td>• Material / vendor</td>
</tr>
<tr>
<td></td>
<td>• Material / customer</td>
</tr>
<tr>
<td></td>
<td>• Material / manufacturer</td>
</tr>
<tr>
<td></td>
<td>• Material / vendor / customer / manufacturer</td>
</tr>
<tr>
<td></td>
<td>• Material / inspection type</td>
</tr>
<tr>
<td></td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td>When you save the notification, the system increases the inspection severity for the selected quality levels by executing a corresponding follow-up action.</td>
</tr>
<tr>
<td>Resetting the quality level</td>
<td>You can choose one or more quality levels in QM and reset the inspection severity to the initial inspection stages.</td>
</tr>
<tr>
<td></td>
<td>When you save the notification, the system resets the inspection severity for the selected quality levels by executing a corresponding follow-up action.</td>
</tr>
</tbody>
</table>
| 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. |
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 records 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**
  You 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

<table>
<thead>
<tr>
<th>Function</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printing a Quality Notification in Full</td>
<td>Printing out the complete notification including all items</td>
</tr>
<tr>
<td>Printing a Quality Notification Item</td>
<td>Printing out individual notification items</td>
</tr>
<tr>
<td>Printing Shop Papers for Several Notifications</td>
<td>Printing shop papers for several notifications at the same time</td>
</tr>
<tr>
<td>Faxing Shop Papers</td>
<td>Faxing notifications or notification items</td>
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<tr>
<td>Viewing the Print Log</td>
<td>Determining which parts of a notification have been printed</td>
</tr>
<tr>
<td>Archiving Shop Papers in SAP ArchiveLink</td>
<td>Storing notifications or notification items in ArchiveLink, the optical storage medium in the R/3 System</td>
</tr>
<tr>
<td>Downloading Quality Notifications</td>
<td>Downloading notifications from the R/3 System to PC application</td>
</tr>
</tbody>
</table>
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 Selecting Quality Notifications [Page 135].
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 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display notification header</td>
<td>Select a notification number and choose Display object.</td>
</tr>
<tr>
<td>Display reference objects (for example,</td>
<td>Select an object and choose Display object.</td>
</tr>
<tr>
<td>material, customer, sales order, and so on)</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display or change notifications, items, tasks or activities (branch to notification header)</td>
<td>Select one or more objects in the list and then choose Goto → Notification.</td>
</tr>
<tr>
<td>Display or change tasks (branch to task detail screen)</td>
<td>Select one or more objects in the list and then choose Goto → Tasks.</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose List → Portfolio.</td>
</tr>
</tbody>
</table>
### Selecting Notifications (Single-Level List)

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

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:
   a. **Execute** if you only want to display the list
   b. **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 system 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.

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

If you specified the notification number when you 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 be 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 to execute the following functions for repairs processing:

<table>
<thead>
<tr>
<th>Follow-up function in the Action Box</th>
<th>What you should know</th>
</tr>
</thead>
</table>
| 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:

<table>
<thead>
<tr>
<th>Data</th>
<th>What you should know</th>
</tr>
</thead>
</table>

April 2001
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 process flow diagram [Ext.]. 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating the notification</td>
<td>The quality notification for a complaint against a vendor can be created as follows:</td>
</tr>
<tr>
<td></td>
<td>• You can create the notification for a vendor complaint manually (notification type Q2).</td>
</tr>
<tr>
<td></td>
<td>• If you recorded defects in an inspection, you can activate a defect record (notification type F2) manually as a quality notification (notification type Q2).</td>
</tr>
<tr>
<td></td>
<td>• The system can automatically activate a defect record (notification type F2) as a quality notification (notification type Q2).</td>
</tr>
<tr>
<td>Action box:</td>
<td>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.</td>
</tr>
<tr>
<td>Assigning a vendor to the notification</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>The standard movement types for this stock posting are &quot;344&quot; in MM and &quot;309&quot; in WM.</td>
</tr>
<tr>
<td></td>
<td>The system prints out a goods issue slip that contains the pertinent material data and that you can affix to the goods.</td>
</tr>
</tbody>
</table>
## Functions for Processing Return Deliveries

<table>
<thead>
<tr>
<th>Action box:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Posting goods from unrestricted-use stock to inspection stock</strong></td>
<td>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 &quot;322&quot; in MM and &quot;321&quot; 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.</td>
</tr>
<tr>
<td><strong>Posting goods from blocked stock to unrestricted-use stock</strong></td>
<td>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 &quot;343&quot; in MM and &quot;309&quot; in WM. The system prints out a goods issue slip that contains the pertinent material data and that you can affix to the goods.</td>
</tr>
<tr>
<td><strong>Posting goods to scrap</strong></td>
<td>If you determine that the goods are no longer usable, you can post the goods to scrap.</td>
</tr>
<tr>
<td><strong>Creating transfer orders</strong></td>
<td>If the <em>Warehouse Management</em> (LE-WM) component is in use in your company, you can create a transfer order to move goods from one storage location to another.</td>
</tr>
<tr>
<td><strong>Recording the usage decision (Inspection lot)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Posting stocks while making the usage decision (Inspection lot)</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
### Functions for Processing Return Deliveries

| **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

<table>
<thead>
<tr>
<th><strong>Action box:</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
</table>
| **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. |
| **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. |
### Functions for Processing Return Deliveries

<table>
<thead>
<tr>
<th>Debiting the vendor</th>
<th>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:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Creates the incoming invoice himself based on the quantity of delivered goods and the terms specified in the purchasing contracts</td>
</tr>
<tr>
<td></td>
<td>• Sends the credit memo to the vendor by fax, as an EDI document or as a hard copy</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Authorization object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q_QMEL</td>
<td>Notification type</td>
</tr>
<tr>
<td>Q_TCODE</td>
<td>Transaction authorization for QMW1</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Development class:</th>
<th>QQM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction:</td>
<td>QMW1</td>
</tr>
<tr>
<td>Function group for screens:</td>
<td>SAPQMWWW</td>
</tr>
<tr>
<td>Function modules:</td>
<td>BAPI_QNOTIFICAT_CREATE</td>
</tr>
<tr>
<td></td>
<td>BAPI_QNOTIFICAT_GETCATALPROFIL</td>
</tr>
<tr>
<td></td>
<td>BAPI_QNOTIFICAT_GETLISTFORCUST</td>
</tr>
<tr>
<td></td>
<td>BAPI_QNOTIFICAT_GETMATLISTFCUST</td>
</tr>
</tbody>
</table>

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

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

- Item overview

- Item

- Individual notification-related defects

- Causes

- Tasks

- Activities

- Information related to a single defect item
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

Plant

Malfunction Requests Activity
- Notification
  - who
  - when
  - where
- Technical info
- Breakdown

Maint. planning

- Planning organizational tasks
- Order creation and planning
- Order execution
  - who
  - when, how long
  - what steps
  - account assignment
  - resources

Technical information
- Breakdown
- Causes
- Objects affected
- Activities

Work center

Completion (Workflow)

Execution
- Material withdrawals
- Procurement of resources/tools
- Work steps

Completion

Automatic data transfer

Order creation and planning order execution

Maintenance history
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.
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.
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](#)
- [Transfer of One-Time Customer Data](#)
- [Credit Limit Check](#)
- [Incoming Calls](#)
- [Outgoing Calls](#)
- [Notification Monitoring](#)
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]
Entry of Partner Data in a Service Notification
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:

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service notification</td>
<td>Service order</td>
</tr>
<tr>
<td>Service notification</td>
<td>Sales order</td>
</tr>
<tr>
<td>Service order</td>
<td>Service notification</td>
</tr>
<tr>
<td>Service order</td>
<td>Sales order (in resource-related billing)</td>
</tr>
<tr>
<td>Service order</td>
<td>Sales order (in advance shipment of spare parts)</td>
</tr>
<tr>
<td>Service order</td>
<td>Purchase requisition (delivery address for external processing)</td>
</tr>
</tbody>
</table>

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.
Task Determination and Notification Monitoring

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

<table>
<thead>
<tr>
<th>Counter</th>
<th>Days</th>
<th>Times</th>
<th>Response Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Monday - Friday</td>
<td>08.00 - 20.00</td>
<td>Local office hours</td>
</tr>
<tr>
<td>2</td>
<td>Thursday</td>
<td>20.00 - 22.00</td>
<td>Local office hours</td>
</tr>
<tr>
<td>3</td>
<td>Saturday</td>
<td>09.00 - 13.00</td>
<td>Local office hours</td>
</tr>
</tbody>
</table>

The response profile “Local office hours” contains the following codes and time intervals:

### Response Profile “Local Office Hours”

<table>
<thead>
<tr>
<th>Priority</th>
<th>Code</th>
<th>Description</th>
<th>Time Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>PHON</td>
<td>Call customer back</td>
<td>30 minutes</td>
</tr>
<tr>
<td>2</td>
<td>ONSI</td>
<td>Service technician on site</td>
<td>2 hours</td>
</tr>
<tr>
<td>1</td>
<td>PHON</td>
<td>Call customer back</td>
<td>15 minutes</td>
</tr>
<tr>
<td>1</td>
<td>ONSI</td>
<td>Service technician on site</td>
<td>1 hour</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Authorization Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I_BEGRP</td>
<td>Authorization group</td>
</tr>
</tbody>
</table>
Service Notifications in the Internet (CS-CM-SN)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I_IWERK</td>
<td>Planning plant</td>
</tr>
<tr>
<td>I_SWERK</td>
<td>Maintenance plant</td>
</tr>
<tr>
<td>I_QMEL</td>
<td>Notification type</td>
</tr>
<tr>
<td>I_TCODE</td>
<td>Transaction authorization for IWWW</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Development class:</th>
<th>IWWW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction:</td>
<td>IWWW</td>
</tr>
<tr>
<td>Function group for the screens:</td>
<td>SAPMIWOW</td>
</tr>
</tbody>
</table>
| 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Menu Path</th>
<th>What You Should Know:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a malfunction report (PM)</td>
<td>&lt;Notification&gt; → Create (special) → Malfunction report</td>
<td>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.</td>
</tr>
<tr>
<td>Create a maintenance request (PM)</td>
<td>&lt;Notification&gt; → Create (special) → Maintenance request</td>
<td></td>
</tr>
<tr>
<td>Create a customer notification (CS)</td>
<td>&lt;Notification&gt; → Create (special) → Customer notification</td>
<td></td>
</tr>
<tr>
<td>Create a service request (CS)</td>
<td>&lt;Notification&gt; → Create (special) → Service request</td>
<td></td>
</tr>
<tr>
<td>Create an activity report (PM/CS)</td>
<td>&lt;Notification&gt; → Create (special) → Activity report</td>
<td></td>
</tr>
<tr>
<td>Create a user-specific notification (PM/CS)</td>
<td>&lt;Notification&gt; → Create (general)</td>
<td>Here, you enter notifications:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For all notification types different from the standard type used in your company</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For standard notification types</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Specify the notification type and notification number on the initial screen.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If internal number assignment for notifications is used in your company, do not enter a number.</td>
</tr>
</tbody>
</table>
Creating, Changing and Displaying a Notification

<table>
<thead>
<tr>
<th>Operation</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a notification with reference (PM/CS)</td>
<td><code>&lt;Notification&gt;</code> → <code>Create</code> (general)</td>
<td>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].</td>
</tr>
<tr>
<td>Create a service notification for advance shipment (CS)</td>
<td></td>
<td>Creating a Service Notification for Advance Shipment [Ext. ]</td>
</tr>
<tr>
<td>Change a notification (PM/CS)</td>
<td><code>&lt;Notification&gt;</code> → <code>Change</code></td>
<td></td>
</tr>
<tr>
<td>Display a notification (PM/CS)</td>
<td><code>&lt;Notification&gt;</code> → <code>Display</code></td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Notification type</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malfunction report</td>
<td>The problem or malfunction that has occurred</td>
</tr>
<tr>
<td>Activity report</td>
<td>The activity performed to solve the problem or rectify the malfunction</td>
</tr>
<tr>
<td>Maintenance request</td>
<td>The activities requested by the maintenance department</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page/Symbol</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering item data</td>
<td>Items</td>
<td>You enter data for a <strong>single</strong> item directly in the group box Item on the tabstrip Notification.</td>
</tr>
</tbody>
</table>
### Entering Items

<table>
<thead>
<tr>
<th>Entering item data in the item overview</th>
<th>Items</th>
<th>For each item there is a row containing the most important data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering item data in the item detail screen</td>
<td>![icon]</td>
<td>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 ![icon] to go to the next item on the detail screen. To create a new item from the detail screen, choose <em>New entry</em>.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering the cause data for an item in the cause overview</td>
<td>Choose Causes.</td>
<td>You must select an item in the item overview before you can enter the cause data.</td>
</tr>
<tr>
<td>Entering the cause data for an item in the cause detail screen</td>
<td>Choose Causes. Select a cause item and then choose Detail view.</td>
<td>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.</td>
</tr>
</tbody>
</table>
# 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab Page/Menu Path</th>
<th>What You Should Know:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specifying system availability and condition</td>
<td>System availability</td>
<td>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.</td>
</tr>
<tr>
<td>Entering breakdown data and duration</td>
<td>Notification or Malfunction, breakdown</td>
<td>Refer to [Entering Breakdown Data and Downtimes (Page 211)]](Page 211)</td>
</tr>
<tr>
<td>Calling up location and account assignment data</td>
<td>Notification or Location data</td>
<td>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.</td>
</tr>
<tr>
<td>Calling up the scheduling overview</td>
<td>Notification or Scheduling overview</td>
<td>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.</td>
</tr>
<tr>
<td>Changing the reporter of the problem</td>
<td>Notification or Scheduling overview</td>
<td>Here, you enter the name of the person who reported the malfunction.</td>
</tr>
<tr>
<td>Calling up administrative data</td>
<td>Goto → Administrative data</td>
<td>The administrative data records who created the notification, when, who last changed it and when.</td>
</tr>
</tbody>
</table>
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 $\rightarrow$ Notification documents $\rightarrow$ 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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Menu Path</th>
<th>What You Should Know</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General settings</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You define the partner functions and the partner determination procedure</td>
<td>Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Basic Settings → Partners → Define Partner Determination Procedure and Partner Function</td>
<td>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.</td>
</tr>
<tr>
<td>You assign the partner functions to the partner determination procedure</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td><strong>Notification</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Partner tab should be visible in the notification</td>
<td>Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Notifications → Notification Creation → Notification Types → Set Screen Templates for the Notification Type</td>
<td></td>
</tr>
</tbody>
</table>
### 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

<table>
<thead>
<tr>
<th>Define field selection for partner data fields</th>
<th>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</th>
</tr>
</thead>
<tbody>
<tr>
<td>You want to set the fields for the additional partner address</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Order

<table>
<thead>
<tr>
<th>Define partner determination procedure and assign order types to partner determination procedure</th>
<th>Plant Maintenance and Customer Service → Maintenance and Service Processing → Maintenance and Service Orders → Partner → Define Partner Determination Procedure and Partner Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>You want to set the fields for the additional partner address</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th><strong>Customizing for Partners</strong></th>
<th><strong>General Settings → Field Display Characteristics → Configure Application Transaction Fields</strong></th>
<th>You can create a transaction variant per partner function, which defines the field selection.</th>
</tr>
</thead>
<tbody>
<tr>
<td>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</td>
<td><strong>Functional Locations</strong></td>
<td><strong>Partner Processing in the Order Header [Ext.]</strong></td>
</tr>
<tr>
<td>You want to process the partner in the order header.</td>
<td><strong>Define field selection for partner data fields</strong></td>
<td><strong>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</strong></td>
</tr>
<tr>
<td><strong>Functional Locations</strong></td>
<td><strong>Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → General Data → Set View Profiles for Technical Objects</strong></td>
<td><strong>Plant Maintenance and Customer Service → Master Data in Plant Maintenance and Customer Service → Technical Objects → Functional Locations → Define Category of Functional Location</strong></td>
</tr>
<tr>
<td><strong>Define field selection for partner data fields</strong></td>
<td>Assign functional location category to partner determination procedure</td>
<td><strong>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.</strong></td>
</tr>
<tr>
<td>The <em>Partner</em> tab should be visible in the functional location</td>
<td><strong>Equipment</strong></td>
<td><strong>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.</strong></td>
</tr>
<tr>
<td>Assign functional location category to partner determination procedure</td>
<td><strong>Define field selection for partner data fields</strong></td>
<td><strong>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.</strong></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Data source</th>
<th>Data destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master record of a functional location or of a</td>
<td>Notification when creating a notification for the</td>
</tr>
<tr>
<td>piece of equipment</td>
<td>reference object</td>
</tr>
<tr>
<td>Master record of a functional location or of a</td>
<td>Order when creating an order for the reference object</td>
</tr>
<tr>
<td>piece of equipment</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td>Order when creating an order for the notification</td>
</tr>
<tr>
<td>Delivery note</td>
<td>Serial number when posting goods issues</td>
</tr>
</tbody>
</table>

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 ⌁ Menu ⌁ Partner.

   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.

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>Reference Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malfunction report (PM)</td>
<td>Object at which the problem or malfunction occurred</td>
</tr>
<tr>
<td>Customer notification</td>
<td></td>
</tr>
<tr>
<td>(CS)</td>
<td></td>
</tr>
<tr>
<td>Activity report (PM/CS)</td>
<td>Object at which the activity was performed</td>
</tr>
<tr>
<td>Maintenance request (PM)</td>
<td></td>
</tr>
<tr>
<td>Service request (CS)</td>
<td>Object at which activities should be performed by the maintenance department</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page/Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering a reference object directly</td>
<td>Notification</td>
<td>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.</td>
</tr>
<tr>
<td>Changing the reference object</td>
<td>Notification</td>
<td>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.</td>
</tr>
<tr>
<td>Updating the reference object</td>
<td>Updating the reference object data</td>
<td>You use this function to adjust the location and account assignment data in the notification with the data from the reference object master record.</td>
</tr>
<tr>
<td>Not specifying a reference object</td>
<td>Location data</td>
<td>Leave the fields for the reference object on the tabstrip Notification empty, and instead enter the location data as precisely as possible.</td>
</tr>
</tbody>
</table>
### Specifying and Changing Reference Objects

<table>
<thead>
<tr>
<th>Changing the reference object view</th>
<th>Extras → Settings → Reference object view</th>
<th>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.</th>
</tr>
</thead>
</table>
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 \(\rightarrow\) Notifications \(\rightarrow\) 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 \(\rightarrow\) Plant maintenance \(\rightarrow\) Maintenance processing
   - Logistics \(\rightarrow\) Customer service \(\rightarrow\) 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 238]).
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab Page</th>
<th>What You Should Know:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering tasks for the notification header</td>
<td>Tasks</td>
<td>The tasks entered here apply to the entire notification.</td>
</tr>
<tr>
<td>Entering tasks for a <strong>single</strong> item</td>
<td>Tasks on the <strong>Items</strong> tab page</td>
<td>The tasks entered here apply to the respective item.</td>
</tr>
<tr>
<td>Entering tasks for one or more items</td>
<td>Tasks on the <strong>Items</strong> tab page</td>
<td>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 <strong>Items</strong> 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 <strong>New entry.</strong></td>
</tr>
<tr>
<td>Automatically determining tasks</td>
<td></td>
<td><strong>Automatic Determination of Tasks</strong> [Page 237]</td>
</tr>
</tbody>
</table>
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 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**

<table>
<thead>
<tr>
<th>Counter</th>
<th>Days</th>
<th>Times</th>
<th>Response Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Monday - Friday</td>
<td>08.00 - 20.00</td>
<td>Local office hours</td>
</tr>
<tr>
<td>2</td>
<td>Thursday</td>
<td>20.00 - 22.00</td>
<td>Local office hours</td>
</tr>
<tr>
<td>3</td>
<td>Saturday</td>
<td>09.00 - 13.00</td>
<td>Local office hours</td>
</tr>
</tbody>
</table>

The response profile "Local office hours" contains the following codes and time intervals:

**Response Profile “Local Office Hours”**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Code</th>
<th>Description</th>
<th>Time Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>PHON</td>
<td>Call customer back</td>
<td>30 minutes</td>
</tr>
<tr>
<td>2</td>
<td>ONSI</td>
<td>Service technician on site</td>
<td>2 hours</td>
</tr>
<tr>
<td>1</td>
<td>PHON</td>
<td>Call customer back</td>
<td>15 minutes</td>
</tr>
<tr>
<td>1</td>
<td>ONSI</td>
<td>Service technician on site</td>
<td>1 hour</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering activities for the notification header</td>
<td>Activities</td>
<td>The activities entered here apply to the entire notification.</td>
</tr>
<tr>
<td>Entering activities for a single item</td>
<td>Activities on the Item tabstrip</td>
<td>The activities entered here apply to the respective item.</td>
</tr>
<tr>
<td>Entering activities for one or more items</td>
<td>Activities on the Item tabstrip</td>
<td>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.</td>
</tr>
</tbody>
</table>

→

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.
Notifications (CA-NO)

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:

<table>
<thead>
<tr>
<th>System message</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information message</td>
<td>The system adapts the new catalog profile.</td>
</tr>
<tr>
<td>Warning message</td>
<td>The system adapts the new catalog profile.</td>
</tr>
<tr>
<td>Error message</td>
<td>The system does not adapt the new catalog profile, but retains the original one.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
</table>

April 2001
### 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](#)
- [Standard Follow-Up Functions for Tasks](#)

### 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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone contact using SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>To be able to use this function, the telephone and computer in your office must be interconnected and the SAPphone component must be active.</td>
</tr>
<tr>
<td>Telephone contact without SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td>Internal memo</td>
<td>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.</td>
</tr>
<tr>
<td>Solution database [Ext.]</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you find a symptom/solution in the database that applies to the problem in your current notification, you can:</td>
</tr>
<tr>
<td></td>
<td>• Document your database search as an activity in the notification</td>
</tr>
<tr>
<td></td>
<td>• Copy the tasks associated with the solution into your notification</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing the quality level</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Material</td>
</tr>
<tr>
<td></td>
<td>• Material / vendor</td>
</tr>
<tr>
<td></td>
<td>• Material / customer</td>
</tr>
<tr>
<td></td>
<td>• Material / manufacturer</td>
</tr>
<tr>
<td></td>
<td>• Material / vendor / customer / manufacturer</td>
</tr>
<tr>
<td></td>
<td>• Material / inspection type</td>
</tr>
<tr>
<td></td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td>When you save the notification, the system increases the inspection severity for the selected quality levels by executing a corresponding follow-up action.</td>
</tr>
<tr>
<td>Resetting the quality level</td>
<td>You can choose one or more quality levels in QM and reset the inspection severity to the initial inspection stages.</td>
</tr>
<tr>
<td></td>
<td>When you save the notification, the system resets the inspection severity for the selected quality levels by executing a corresponding follow-up action.</td>
</tr>
</tbody>
</table>
### Standard Follow-Up Functions (Tasks)

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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. |
### 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 records 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 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:
Notifications (CA-NO)

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 Notification → 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 Notification → 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 Notification → 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.

   ![Warning]

   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 Notification → 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.].

   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
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:

<table>
<thead>
<tr>
<th>Country</th>
<th>Certified Paging Provider</th>
<th>Supported Paging Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>Balloon</td>
<td>Telekom: For example, D1 SMS, Skyper, Cityruf, Scall</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mannesmann: D2 SMS</td>
</tr>
<tr>
<td>USA</td>
<td>RPA</td>
<td>MCI, Skytel</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Contact person</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Communication type PAG must be entered in the user master record under Further communication.</td>
</tr>
<tr>
<td>Personnel</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 of Short Messages Using 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 sending short messages using paging [Page 265]. 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:

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paging</td>
<td>PAG</td>
</tr>
<tr>
<td>E-mails over the Internet</td>
<td>INT</td>
</tr>
<tr>
<td>Mails using SAPoffice®</td>
<td>RML</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Service Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>If sub-type PAG exists</td>
<td>Paging is always proposed</td>
</tr>
<tr>
<td>If sub-type INT exists, but not sub-type PAG</td>
<td>The Internet is proposed</td>
</tr>
<tr>
<td>If sub-type RML exists, but neither PAG nor INT</td>
<td>SAPoffice® is proposed</td>
</tr>
</tbody>
</table>
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

   
   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.

<table>
<thead>
<tr>
<th>If order processing is active, the following applies:</th>
<th>If order processing is not active, the following applies:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An order can be generated for a task that has been requested in a notification, and assigned to the notification.</td>
<td>• An order cannot be generated for a task that has been requested in a notification.</td>
</tr>
<tr>
<td>• 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.</td>
<td>• 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.</td>
</tr>
<tr>
<td>• 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.</td>
<td>• You put the notification in process manually.</td>
</tr>
</tbody>
</table>

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 create or change mode [Page 200].
   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:

<table>
<thead>
<tr>
<th>Data</th>
<th>Section of the maintenance history</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master sketches</td>
<td>Usage history</td>
</tr>
<tr>
<td>Accessories</td>
<td></td>
</tr>
<tr>
<td>Functional location</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td>Order history</td>
</tr>
<tr>
<td>• Costs</td>
<td></td>
</tr>
<tr>
<td>• Materials</td>
<td></td>
</tr>
<tr>
<td>Working methods</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td>Notification history</td>
</tr>
</tbody>
</table>
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.
   
   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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Menu Path</th>
<th>What You Should Know:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print notifications</td>
<td>Notification → Print notification</td>
<td></td>
</tr>
<tr>
<td>Put notifications in process</td>
<td>Notification → Put in process</td>
<td>Putting in Process of Maintenance Notifications [Page 272]</td>
</tr>
<tr>
<td>Postpone notifications</td>
<td>Notification → Postpone</td>
<td></td>
</tr>
<tr>
<td>Complete notifications</td>
<td>Notification → Complete</td>
<td>Completion of Notifications [Page 285]</td>
</tr>
<tr>
<td>Create an order for several notifications</td>
<td>Notification → Create order</td>
<td>The system creates one order for all selected notifications.</td>
</tr>
<tr>
<td>Download notifications</td>
<td>Notification → Download notification</td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Menu Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selecting items</td>
<td>Notification → List of items → &lt;Change/Display&gt;</td>
</tr>
<tr>
<td>Selecting tasks</td>
<td>Notification → List of tasks → &lt;Change/Display&gt;</td>
</tr>
<tr>
<td>Selecting activities</td>
<td>Notification → List of activities → &lt;Change/Display&gt;</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Document</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract 40000149</td>
<td>30.03.1998</td>
<td>open</td>
</tr>
<tr>
<td>Notification 300001256</td>
<td>23.03.1998</td>
<td>in process, assigned to order</td>
</tr>
<tr>
<td>Order 905580</td>
<td>23.03.1998</td>
<td>open, pre-costed</td>
</tr>
<tr>
<td>Sales order 2155</td>
<td>24.03.1998</td>
<td>completed</td>
</tr>
<tr>
<td>Delivery 80001132</td>
<td>24.03.1998</td>
<td>completed</td>
</tr>
<tr>
<td>Goods movement 49008835</td>
<td>24.03.1998</td>
<td>completed</td>
</tr>
<tr>
<td>Invoice 900001082</td>
<td>24.03.1998</td>
<td>completed</td>
</tr>
</tbody>
</table>

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 it in the Document Flow Display screen using the 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page/Symbol</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displaying the status for a notification</td>
<td>Status field above the tabstrip</td>
<td>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.</td>
</tr>
<tr>
<td>Displaying system status and user status with short text</td>
<td>Status detail</td>
<td>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]).</td>
</tr>
<tr>
<td>Displaying task status</td>
<td>Tasks</td>
<td>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 it for it.</td>
</tr>
<tr>
<td>Displaying total status overview</td>
<td>Status detail and then Extras → Status, and then Extras → Overview</td>
<td>You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.</td>
</tr>
</tbody>
</table>
### Displaying a Status

<table>
<thead>
<tr>
<th>Displaying statuses that can be assigned</th>
<th><img src="image" alt="Status detail and then the tabstrip BusMgt transactions" /></th>
<th>You can see which processing steps are currently allowed or not allowed. By selecting <em>Transaction analysis</em>, you can find out which business transactions resulted in which statuses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displaying change documents for the status</td>
<td><img src="image" alt="Status detail and then Change documents→ To status" /></td>
<td>This enables you to see who set a status when using which function.</td>
</tr>
<tr>
<td>Displaying change documents for all statuses</td>
<td><img src="image" alt="Status detail and then Change documents→ All" /></td>
<td>You see a list of all the statuses that have been set or already reset.</td>
</tr>
<tr>
<td></td>
<td>Extras → Notification documents → Action log.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Extras → Notification documents → Action log.</td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Status</th>
<th>Menu path</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification printed</td>
<td>Notification → Print → &lt;nn&gt;</td>
<td>Shop Papers for Notifications [Page 254]</td>
</tr>
<tr>
<td>Notification in process</td>
<td>Notification → Functions → Put in process</td>
<td>Putting Notifications in Process [Page 272]</td>
</tr>
<tr>
<td>Order assigned</td>
<td>Notification → Functions → Order → Assign</td>
<td>Assignment of Notifications to Orders [Page 273]</td>
</tr>
<tr>
<td>Notification completed</td>
<td>Notification → Functions → Complete</td>
<td>Completing Notifications [Page 285]</td>
</tr>
</tbody>
</table>
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.
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• 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.
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:

<table>
<thead>
<tr>
<th>You want to:</th>
<th>What You Should Know</th>
<th>Menu Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>... Define a new notification type</td>
<td>The standard system we deliver contains two types of notification. The <strong>claim on customer or vendor</strong> is a claim made by your business against another business involved in the project. The <strong>claim by customer or vendor</strong> is a claim made against your business by another business involved in the project. You can create additional notification types if required.</td>
<td>Project System → Claim → Notification → Create Notification → Notification Type → Define Notification Types</td>
</tr>
<tr>
<td>... Define a number range for the notification type</td>
<td>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. <strong>Number range is already maintained for a notification type</strong> 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. <strong>No number range has been maintained.</strong> 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.</td>
<td>Project System → Claim → Notification → Create Notification → Notification Type → Define Number Ranges</td>
</tr>
</tbody>
</table>
## Creating and Processing Claims

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Process Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>... Configure screen templates for your notification types</strong></td>
<td>The information groups in the notification are assigned to particular registers and screen areas. Configure the screen templates to suit your requirements.</td>
<td><strong>Project System → Claim → Notification → Create Notification → Notification Type → Define Screen Templates</strong></td>
</tr>
<tr>
<td><strong>... Maintain catalogs for claim entry</strong></td>
<td>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 <strong>catalogs</strong>, 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).</td>
<td><strong>Project System → Claim → Notification → Create Notification → Notification Type → Maintain Catalogs</strong></td>
</tr>
<tr>
<td><strong>... Define a report structure</strong></td>
<td>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 <strong>Report Structures [Page 568]</strong> and <strong>Changing Report Structures [Page 570]</strong>.</td>
<td><strong>Project System → Claim → Notification → Create Notification → Notification Content → Define Report Profiles</strong></td>
</tr>
<tr>
<td><strong>... Define a partner structure for a notification type</strong></td>
<td>You use the partner structure to determine which partner roles (such as ordering party or person responsible) are permitted or required for claim processing.</td>
<td><strong>Project System → Claim → Notification → Create Notification → Partner → Define Partner Structures</strong></td>
</tr>
<tr>
<td><strong>... Stipulate priority types for notification types</strong></td>
<td>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.</td>
<td><strong>Project System → Claim → Notification → Notification Processing → Response Control → Define Priorities</strong></td>
</tr>
<tr>
<td><strong>... Define codes for long texts</strong></td>
<td>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.</td>
<td><strong>Project System → Claim → Claim-Specific Settings → Codes for Detailed Long Texts</strong></td>
</tr>
</tbody>
</table>

### 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 Incorporating Documents from the DMS [Page 548].

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**

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 System 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Follow-on menu path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display partner data</td>
<td>Select a partner and choose Environment → Display object.</td>
</tr>
<tr>
<td>Delete a partner</td>
<td>Select a partner and choose Delete partner assignment.</td>
</tr>
<tr>
<td>Phone a partner</td>
<td>Select a partner and choose Phone partner.</td>
</tr>
<tr>
<td>Contact partner via paging function</td>
<td>Select a partner and choose Send message to partner.</td>
</tr>
<tr>
<td>Sort partners by function</td>
<td>Choose Edit → Sort by partner function.</td>
</tr>
<tr>
<td>Display, change, or delete partner addresses</td>
<td>Select a partner and choose the corresponding pushbutton</td>
</tr>
</tbody>
</table>

   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 claim processing 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record immediate tasks for the notification header</td>
<td>Choose the <em>Tasks</em> tab page.</td>
<td>Enter the data on the task overview.</td>
</tr>
<tr>
<td>Record immediate tasks on task detail screen</td>
<td>Select a task on the task overview and choose <em>Detail view</em>.</td>
<td>Enter the data on the task detail screen.</td>
</tr>
<tr>
<td>Record corrective tasks for a notification item</td>
<td>Choose the <em>Items</em> tab, select an item, and then choose the <em>Item tasks</em> tab page.</td>
<td>Enter the task data for the item.</td>
</tr>
<tr>
<td>Record corrective tasks on the task detail screen</td>
<td>Choose the <em>Items</em> tab page and then select an item. Choose the <em>Item tasks</em> tab page, select a task and then choose <em>Detail view</em>.</td>
<td>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 <em>Status Management for Tasks</em> [Page 562]).</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task outstanding</td>
<td>The task was created in the notification.</td>
</tr>
<tr>
<td>Task released</td>
<td>The task can be executed.</td>
</tr>
<tr>
<td>Task completed</td>
<td>The task was executed.</td>
</tr>
<tr>
<td>Task successful</td>
<td>The result of the task was successful (for example, the problem was solved or damage was repaired).</td>
</tr>
</tbody>
</table>

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.

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 Management for Tasks

<table>
<thead>
<tr>
<th>Status</th>
<th>The system fills the following fields:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Released</td>
<td>Planned start with the current date/time</td>
</tr>
<tr>
<td></td>
<td>Planned end with either the current date/time or desired notification end date/time.</td>
</tr>
<tr>
<td></td>
<td>You can overwrite both fields.</td>
</tr>
<tr>
<td>Completed</td>
<td>Date completed <code>&lt;date&gt;</code> by <code>&lt;user name&gt;</code> with the current date/time and current user name.</td>
</tr>
<tr>
<td></td>
<td>You cannot overwrite these fields.</td>
</tr>
<tr>
<td>Successful</td>
<td>None</td>
</tr>
</tbody>
</table>

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 of 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 Entering Activities [Page 567].

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record activities for the notification header</td>
<td>Choose the <em>Activities</em> tab page.</td>
<td>Enter the data in the activity overview.</td>
</tr>
<tr>
<td>Record activities for the notification header in the activities detail screen</td>
<td>Select an activity in the activity overview and choose <em>Detail view.</em></td>
<td>Enter the data in the activity detail screen.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enter the date and time when the activity was performed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To create a new activity from the detail screen, choose <em>New entry.</em></td>
</tr>
<tr>
<td>Record activities for a single item</td>
<td>Choose the <em>Items</em> tab page, select an item, and then choose the <em>Item activities</em> tab page.</td>
<td>Enter the activity data for the item.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
</table>
| 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. 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. 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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone contact using SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td>Telephone contact without SAPphone</td>
<td>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.</td>
</tr>
<tr>
<td>Internal memo</td>
<td>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.</td>
</tr>
<tr>
<td>Solution database [Ext.]</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Document your database search as an activity for the notification</td>
</tr>
<tr>
<td></td>
<td>• Copy the tasks associated with the solution into your notification</td>
</tr>
</tbody>
</table>
## 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:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Type</th>
<th>You Require This Function Module:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Documents</td>
<td>Action</td>
<td>To link: PS_CLAIM_LINK_TO_BDN</td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note that, when creating a claim, you can only link it to a business document if you chose early number assignment in customizing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail or fax, no attachment</td>
<td>Task</td>
<td>To create: QM06_FM_TASK_CLAIM_SEND_PAPER</td>
</tr>
<tr>
<td>You enter an e-mail or fax, in which the system automatically records the most important data and long texts for the claim.</td>
<td></td>
<td>To save: QM06_CLAIM_SEND_PAPER_STEP2</td>
</tr>
<tr>
<td>Note that you cannot attach anything to this e-mail/fax.</td>
<td></td>
<td>To trigger the follow-up activity: QM06_CLAIM_SEND_PAPER_STEP3</td>
</tr>
<tr>
<td>Create claim</td>
<td>Task</td>
<td>To create: CLAIM_TASK_CREATE_CLAIM</td>
</tr>
<tr>
<td>You create a new claim from your existing one.</td>
<td></td>
<td>To trigger the follow-up activity: CLAIM_TASK_CREATE_CLAIM_STEP2</td>
</tr>
<tr>
<td>Create simulation version</td>
<td>Task</td>
<td>To create: CLM01_CREATE_SIMUL</td>
</tr>
<tr>
<td>You switch from the claim to creating a project simulation version.</td>
<td></td>
<td>To trigger the follow-up activity: CLM01_CREATE_SIMUL_STEP2</td>
</tr>
</tbody>
</table>
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 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display status information in the notification header</td>
<td></td>
<td>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 &quot;task outstanding&quot; (TSOS) is displayed. As long as this status is set, you cannot complete the notification.</td>
</tr>
<tr>
<td>Display status information for individual tasks</td>
<td>Tasks tab page</td>
<td>The task overview contains the status of all recorded tasks.</td>
</tr>
<tr>
<td>Display system and user statuses with short texts</td>
<td>Status detail pushbutton</td>
<td>All active system and user statuses for the notification are displayed on the Status tab page.</td>
</tr>
<tr>
<td>Display general status overview</td>
<td>Choose Status detail pushbutton and then Extras → Overview</td>
<td>You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.</td>
</tr>
<tr>
<td>Display statuses that can still be assigned</td>
<td>Choose Status detail and then the Business processes tab page</td>
<td>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).</td>
</tr>
</tbody>
</table>
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 670].

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

Process Flow

The Environment

<table>
<thead>
<tr>
<th>Intranet</th>
<th>SAP System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered by</td>
<td>Person who processes/approves the request</td>
</tr>
</tbody>
</table>
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 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 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  No 150  Small
Yes

Quest. 2  Yes

Quest. 3  Large 100

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).

Prerequisities
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:

- **Costing Structure**
  - Object to be costed
    - Costing node 1
      - Costing node 1.1
      - Costing node 1.2
      - Costing node 2
    - Structure node
      - Costing node 3.1

- **Worklists**
  - Planning forms

- **Entry screen**

- **Item View**
  - Costing items (for the selected costing node)
  - Itemization triggered

⚠️ 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 \[\text{\textcircled{1}}\]. Enter a description and choose \[\text{\textcircled{2}}\]. The node is added. You calculate the costs for each costing node separately.

To delete a costing node, select it and choose \[\text{\textcircled{3}}\]. Technically a costing is deleted this way.

You can use \[\text{\textcircled{4}}\] 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 \[\text{\textcircled{4}}\] again.

The document flow [Ext.] displays for each costing item whether documents have been posted through an Execution Service [Page 350] 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 \[\text{\textcircled{5}}\] immediately next to the node or choose \[\text{\textcircled{6}}\].

You can create, insert (\[\text{\textcircled{7}}\]), rename worklists and extend the display of worklists (from user-specific to role-specific or globally to all users), or restrict (\[\text{\textcircled{8}}\]) them. Using \[\text{\textcircled{9}}\] you can call up any worklists that are in the system but have not yet been displayed. To delete worklists, choose \[\text{\textcircled{10}}\]. To remove subdirectories or planning forms from a worklist choose \[\text{\textcircled{11}}\]. To save your worklists, choose \[\text{\textcircled{12}}\] 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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The log of the costing node currently selected is displayed.</td>
</tr>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>Revaluate [Ext.] the costing items with the current prices.</td>
</tr>
<tr>
<td></td>
<td>Refresh the totals and subtotals</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>Goto → Triggered itemization on/off</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>By choosing <img src="image3" alt="Icon" /> you can multiply the quantities of individual costing items by a factor. The change is accepted immediately and the costing repeated.</td>
</tr>
</tbody>
</table>

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

| ![Icon](image4) | Show Execution Services |
|                 | After cost planning you can trigger Execution Services [Page 380] for some objects. |
| ![Icon](image5) | Display header data |
| ![Icon](image6) | You can switch between various currencies. |
| ![Icon](image7) | Only displayed for ad hoc cost estimates [Page 378] |
| ![Icon](image8) | Explains all of the symbol legends in the costing structure |
| ![Icon](image9) | 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).](image)

![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.](image)
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 No.

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

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 company 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.
Executing Ad Hoc Cost Estimates

- 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:
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 ![Entry screen icon](image). The items relevant to the Execution Service are selected and, where applicable, expanded to include additional data. By using ![Document overview icon](image) 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 ![Document overview icon](image) 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 ![Workflow icon](image).

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:

<table>
<thead>
<tr>
<th>Column</th>
<th>Possible Entry/Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item category in template</td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>The key of this item category is not always the same as that of the costing item.</td>
</tr>
<tr>
<td>Description</td>
<td>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.</td>
</tr>
</tbody>
</table>
**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):

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

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record immediate tasks for the notification header</td>
<td>Choose the <em>Tasks</em> tab page.</td>
<td>Enter the data on the task overview.</td>
</tr>
<tr>
<td>Record immediate tasks on task detail screen</td>
<td>Select a task on the task overview and choose <em>Detail view</em>.</td>
<td>Enter the data on the task detail screen.</td>
</tr>
<tr>
<td>Record corrective tasks for a notification item</td>
<td>Choose the <em>Items</em> tab, select an item, and then choose the <em>Item tasks</em> tab page.</td>
<td>Enter the task data for the item.</td>
</tr>
<tr>
<td>Record corrective tasks on the task detail screen</td>
<td>Choose the <em>Items</em> tab page and then select an item. Choose the <em>Item tasks</em> tab page, select a task and then choose <em>Detail view</em>.</td>
<td>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 <em>Status Management for Tasks</em> [Page 562]).</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appearance of the action box</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Blue</strong>: The follow-up function is active and can be executed.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Black</strong>: The follow-up function is inactive and cannot be executed (yet).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Gray</strong>: The follow-up function has been executed and cannot be executed again.</td>
</tr>
<tr>
<td></td>
<td>If you set the <em>Action box: Table</em> 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).</td>
</tr>
</tbody>
</table>
### 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. 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
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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone contact using <em>SAPphone</em></td>
<td>You can use this function to make a telephone call using <em>SAPphone</em>. 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 <em>SAPphone</em> component must be active.</td>
</tr>
<tr>
<td>Telephone contact without <em>SAPphone</em></td>
<td>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.</td>
</tr>
<tr>
<td>Internal memo</td>
<td>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.</td>
</tr>
<tr>
<td>Solution database [Ext.]</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Document your database search as an activity for the notification</td>
</tr>
<tr>
<td></td>
<td>• Copy the tasks associated with the solution into your notification</td>
</tr>
</tbody>
</table>


### 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. |
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record activities for the notification header</td>
<td>Choose the Activities tab page.</td>
<td>Enter the data in the activity overview.</td>
</tr>
<tr>
<td>Record activities for the notification header in the activities detail screen</td>
<td>Select an activity in the activity overview and choose Detail view.</td>
<td>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.</td>
</tr>
<tr>
<td>Record activities for a single item</td>
<td>Choose the Items tab page, select an item, and then choose the Item activities tab page.</td>
<td>Enter the activity data for the item.</td>
</tr>
</tbody>
</table>
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 $ 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. 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.
Defining Scenarios

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 VISSIDZE.
- 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 redefine 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

1. 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.

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.
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

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 [Page 411]
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 specifying a logon language in the ~LANGUAGE parameter.

Result
The service is started using the HTTP address http://<ITS>:<Port>/scripts/wgate/<service>!
Notifications (CA-NO)

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 \textless structure name\textgreater 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 \texttt{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 \texttt{ISR_}\texttt{.}
- Characteristic names or structure field names should not be named as HTML business indicators (for example, \texttt{LABEL}, \texttt{NAME}, \texttt{VALUE}, \texttt{DIM}, \texttt{MAXSIZE}, \texttt{TYPE}, \texttt{EXIST}, \texttt{ENABLED} or \texttt{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:

- \texttt{Basis \rightarrow BC-ABAP Workbench \rightarrow Integration of Internet Services \rightarrow Web Application Builder [Page 432]}
- \texttt{Basis \rightarrow SAP Internet Applications \rightarrow SAP@Web Studio [Ext.]}
Define Form

Service Parameters

In an Internet service, you need the following parameters for an internal service request:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCENARIO</td>
<td>Scenario name</td>
</tr>
<tr>
<td>~TRANSACTION</td>
<td>QISR1</td>
</tr>
<tr>
<td>~WEBTRANSACTIONTYPE</td>
<td>EWT</td>
</tr>
<tr>
<td>~GENERATEDYNPRO</td>
<td>1</td>
</tr>
<tr>
<td>~STYLE</td>
<td>DHTML</td>
</tr>
<tr>
<td>~AUTOSCROLL</td>
<td>0</td>
</tr>
<tr>
<td>~LISTSCROLLING</td>
<td>0</td>
</tr>
<tr>
<td>~POPUPS</td>
<td>1</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Screen</th>
<th>HTML Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATE</td>
<td>110</td>
<td>saplqisr3_110.html</td>
</tr>
<tr>
<td>CHANGE</td>
<td>120</td>
<td>saplqisr3_120.html</td>
</tr>
<tr>
<td>DISPLAY</td>
<td>130</td>
<td>saplqisr3_130.html</td>
</tr>
</tbody>
</table>

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

```
`BUILDING_TO`
```

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Name in BADIs</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISR_HEADER-NOTIF_NO</td>
<td>Notification number</td>
<td>GENERAL_DATA-NOTIF_NO</td>
</tr>
<tr>
<td>ISR_HEADER-NOTIF_TYPE</td>
<td>Notification type</td>
<td>GENERAL_DATA-NOTIF_TYPE</td>
</tr>
<tr>
<td>ISR_HEADER-SCENARIO</td>
<td>Scenario</td>
<td>GENERAL_DATA-SCENARIO</td>
</tr>
<tr>
<td>ISR_HEADER-CREATION_DATE</td>
<td>Creation date</td>
<td>GENERAL_DATA-CREATION_DATE</td>
</tr>
<tr>
<td>ISR_HEADER-CREATION_TIME</td>
<td>Creation time</td>
<td>GENERAL_DATA-CREATION_TIME</td>
</tr>
<tr>
<td>ISR_HEADER-CALC_COSTS</td>
<td>Calculated costs</td>
<td>GENERAL_DATA-CALC_COSTS</td>
</tr>
<tr>
<td>ISR_HEADER-CALC_COSTS_CURR</td>
<td>Currency key for CALC_COSTS</td>
<td>GENERAL_DATA-CALC_COSTS_CURR</td>
</tr>
<tr>
<td>ISR_HEADER-LANGUAGE</td>
<td>Language</td>
<td>GENERAL_DATA-LANGUAGE</td>
</tr>
<tr>
<td>ISR_HEADER-START_DATE</td>
<td>Start date</td>
<td>GENERAL_DATA-START_DATE</td>
</tr>
<tr>
<td>ISR_HEADER-START_TIME</td>
<td>Start time</td>
<td>GENERAL_DATA-START_TIME</td>
</tr>
<tr>
<td>ISR_HEADER-REQ_DATE</td>
<td>Required date</td>
<td>GENERAL_DATA-REQ_DATE</td>
</tr>
<tr>
<td>ISR_HEADER-REQ_TIME</td>
<td>Required time</td>
<td>GENERAL_DATA-REQ_TIME</td>
</tr>
<tr>
<td>ISR_HEADER-PRIORITY</td>
<td>Priority</td>
<td>GENERAL_DATA-PRIORITY</td>
</tr>
<tr>
<td>ISR_PAGE</td>
<td>Current page number</td>
<td>PAGE</td>
</tr>
<tr>
<td>ISR_HEADER-EXT_REF_NUMBER</td>
<td>External reference number</td>
<td>GENERAL_DATA-EXT_REF_NUMBER</td>
</tr>
<tr>
<td>ISR_HEADER-SHORT_TEXT</td>
<td>Short text</td>
<td>GENERAL_DATA-SHORT_TEXT</td>
</tr>
</tbody>
</table>
### Define Form

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Key</th>
<th>Table Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISR_HEADER-ESTIM_COSTS</td>
<td>Estimated costs</td>
<td></td>
<td>GENERAL_DATA-ESTIM_COSTS</td>
</tr>
<tr>
<td>ISR_HEADER-ESTIM_COSTS_CURR</td>
<td>Currency key for ESTIM_COSTS</td>
<td></td>
<td>GENERAL_DATA-ESTIM_COSTS_CURR</td>
</tr>
<tr>
<td>ISR_MODE</td>
<td>Current mode (CREATE, DISPLAY, and so on)</td>
<td></td>
<td>MODE</td>
</tr>
<tr>
<td>ISR_FORM_VIEW</td>
<td>View</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ISR_CREATED_BY-USER_ID</td>
<td>Created by: User name</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-USER_ID</td>
</tr>
<tr>
<td>ISR_CREATED_BY-FIRSTNAME</td>
<td>Created by: First name</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-FIRSTNAME</td>
</tr>
<tr>
<td>ISR_CREATED_BY-LASTNAME</td>
<td>Created by: Last name</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-LASTNAME</td>
</tr>
<tr>
<td>ISR_CREATED_BY-FULLNAME</td>
<td>Created by: Full name</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-FULLNAME</td>
</tr>
<tr>
<td>ISR_CREATED_BY-TITLE</td>
<td>Created by: Title</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-TITLE</td>
</tr>
<tr>
<td>ISR_CREATED_BY-DEPARTMENT</td>
<td>Created by: Department</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-DEPARTMENT</td>
</tr>
<tr>
<td>ISR_CREATED_BY-BUILDING</td>
<td>Created by: Building</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-BUILDING</td>
</tr>
<tr>
<td>ISR_CREATED_BY-FLOOR</td>
<td>Created by: Floor</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-FLOOR</td>
</tr>
<tr>
<td>ISR_CREATED_BY-ROOM_NO</td>
<td>Created by: Room number</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-ROOM_NO</td>
</tr>
<tr>
<td>ISR_CREATED_BY-E_MAIL</td>
<td>Created by: eMail address</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-E_MAIL</td>
</tr>
<tr>
<td>ISR_CREATED_BY-TEL_NUMBER</td>
<td>Created by: Telephone</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-TEL_NUMBER</td>
</tr>
<tr>
<td>ISR_CREATED_BY-TEL_EXTENSION</td>
<td>Created by: Telephone extension</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-TEL_EXTENSION</td>
</tr>
<tr>
<td>ISR_CREATED_BY-FAX_NUMBER</td>
<td>Created by: Fax</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-FAX_NUMBER</td>
</tr>
<tr>
<td>ISR_CREATED_BY-FAX_EXTENSION</td>
<td>Created by: Fax extension</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-FAX_EXTENSION</td>
</tr>
<tr>
<td>ISR_CREATED_BY-COMPANY</td>
<td>Created by: Company</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-COMPANY</td>
</tr>
<tr>
<td>ISR_CREATED_BY-MASTER_CCTR</td>
<td>Created by: Master cost center</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-MASTER_CCTR</td>
</tr>
<tr>
<td>ISR_CREATED_BY-MASTER_COAREA</td>
<td>Created by: Master controlling area</td>
<td></td>
<td>ISRGENERAL_DATA-CREATED_BY-MASTER_COAREA</td>
</tr>
<tr>
<td>ISR_INITIATED_BY-</td>
<td>Person placing request</td>
<td></td>
<td>ISRGENERAL_DATA-INITIATED_BY-</td>
</tr>
<tr>
<td>ISR_APPROVED_BY-</td>
<td>Person approving request</td>
<td></td>
<td>ISRGENERAL_DATA-APPROVED_BY-</td>
</tr>
<tr>
<td>ISR_PROCESSOR-</td>
<td>Person processing request</td>
<td></td>
<td>ISRGENERAL_DATA-PROCESSOR-</td>
</tr>
<tr>
<td>ISR_CONTACT_PERSON-</td>
<td>Contact person for scenario</td>
<td></td>
<td>ISRGENERAL_DATA-CONTACT_PERSON-</td>
</tr>
</tbody>
</table>
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
  - 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 of Specific Form Elements in HTML Templates [Page 422]
Example: HTML Framework for HTML Templates
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:
```plaintext
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:
```plaintext
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.
SAP AG

Notifications (CA-NO)

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:
```html
\`SAP_ISRField( name="ISR_INITIALIZED_BY-FIRSTNAME" )`\n```

SAP_ISRPullDropdownField( 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:
```html
\`SAP_ISRPullDropdownField(name="BUILDING_TO", key="BUILDING_OPTION", content="BUILDING_OPTION")`\n```

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:
```html
....-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:

```html
<body onload="SAPBodyOnload()">
```

After the two statements necessary for the definition of the form:

```html
<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:

```javascript
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:

```javascript
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:
```javascript
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:
```html
<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:
```html
<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)
```html
<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.
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")>
  "you like the red color?"<br>

<input name="COLOR" value="green" type="radio" checked("COLOR",1,"green")>
  "or the green color?"<br>

<input name="COLOR" value="blue" type="radio" checked("COLOR",1,"blue")>
  "or the blue color?"<br>
```
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")>
  "you like the red color?"<br>
```
Example: Specific Form Elements in HTML Templates (SAP Design)

`CheckboxProlong("COLOR[2]")`

<input name="COLOR[2]" value="green" type="checkbox"
`Checked("COLOR",2,"green")` `disabled("COLOR")">and the green color? <br>

`CheckboxProlong("COLOR[3]")`

<input name="COLOR[3]" value="blue" type="checkbox"
`Checked("COLOR",3,"blue")` `disabled("COLOR")">and the blue color? <br>

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.

getTextFieldName(name, width)

Returns the name and the width.

Example:

<textarea wrap="physical" rows="5" cols="75"
name="GetTextFieldName("ISR_TEXT",75)" `readonly("ISR_TEXT")">

getTextFieldContent(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="GetTextFieldName("ISR_TEXT",75)" `readonly("ISR_TEXT")">

`GetTextFieldContent("ISR_TEXT")`

`end`

Example 2:  Input field for ISR long text

`if ( ISR_MODE != "DISPLAY" );`

<textarea wrap="physical" rows="5" cols="75"
name="GetTextFieldName("ISR_NEW_TEXT",75)" `readonly("ISR_NEW_TEXT")">

`GetTextFieldContent("ISR_NEW_TEXT")`

`end`
Web Application Builder

Purpose
The Web Application Builder allows you to create Web development objects within the ABAP Workbench. Existing R/3 transactions require 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 components 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 controls, 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.
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 template are displayed in the Editor. Only the static screen information is evaluated - an HTMLBusiness 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 HTMLBusiness.
Creating HTML Templates

See also:

Extending HTML Templates [Page 436]
Adding MIME Objects [Page 438]
Publishing Services [Page 410]
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 HTML Business Reference [Ext.].

Example

This example sets a hyperlink to a particular position on an HTML page:

```
`SAP_DynproLayerBegin(006, 005, 010, 001)`
`SAP_DynproLayerBegin(003, 012, 029, 003)`
`SAP_DynproLayerBegin(006, 013, 009, 001)`
`SAP_DynproLayerBegin(020, 013, 008, 001)`
`SAP_DynproLayerBegin(051, 002, 015, 001)`

`<a href="http://workbench.1988" style="color: rgb(187, 0, 0)">Workbench No</a>`
```

See also:
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:
Publishing Web Applications [Page 410]
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.

<table>
<thead>
<tr>
<th>Intranet</th>
<th>SAP System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered by</td>
<td>Person who processes/approves the request</td>
</tr>
</tbody>
</table>

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.
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.
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.
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.
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.
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
Approval Requirement for Notifications

Use

For optimal notification processing in your company, you can activate 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:

<table>
<thead>
<tr>
<th>Object</th>
<th>Type of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost centers [Ext.]</td>
<td>Create, change, lock</td>
</tr>
<tr>
<td>Internal orders [Ext.]</td>
<td>Change</td>
</tr>
<tr>
<td>G/L accounts [Ext.]</td>
<td>Create, change</td>
</tr>
<tr>
<td>Vendors [Ext.]</td>
<td>Create, change, delete</td>
</tr>
<tr>
<td>Customers [Ext.]</td>
<td>Create, change, delete</td>
</tr>
</tbody>
</table>

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 workplace, 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:

<table>
<thead>
<tr>
<th></th>
<th>With Worklist</th>
<th>Without Worklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Notifications</td>
<td>Office → Notification → Worklist → Notifications.</td>
<td>Office → Notification → Change</td>
</tr>
<tr>
<td>For Tasks</td>
<td>Office → Notification → Worklist → Tasks.</td>
<td>Office → Notification → Task → Process</td>
</tr>
</tbody>
</table>
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, you 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
Notifications (CA-NO)

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

<table>
<thead>
<tr>
<th>Desired processing type</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Put notification in process</td>
<td>Call up the notification in the create or change mode and then choose Notification → Functions → Put in process.</td>
</tr>
<tr>
<td>Postpone notification</td>
<td>Call up the notification in the change mode, choose Notification → Functions → Postpone, and then save the notification.</td>
</tr>
<tr>
<td>Complete notification</td>
<td>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.</td>
</tr>
<tr>
<td>Delete notification</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>If you want to</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select only the notifications that are assigned</td>
<td>Set the For processing by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>to you for processing</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications that were created</td>
<td>Set the Created by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>by you</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications that were last</td>
<td>Set the Last processed by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>processed by you</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications assigned to you as a</td>
<td>Set the In my role as indicator on the on the My worklist tab page</td>
</tr>
<tr>
<td>specific partner (for example, in your capacity as</td>
<td>and choose a partner function in the list field.</td>
</tr>
<tr>
<td>an “author”)</td>
<td></td>
</tr>
</tbody>
</table>
Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Select notifications that were created within a specific time period</th>
<th>Set the indicator:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 1 week, if you want to select notifications that were created up to one week before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 month, if you want to select notifications that were created up to one month before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 3 months, if you want to select notifications that were created up to three months before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 year, if you want to select notifications that were created up to one year before the current date.</td>
</tr>
<tr>
<td></td>
<td>• Defined by me and enter the desired time interval if you want to select notifications that were created within a specific time period.</td>
</tr>
</tbody>
</table>

| Select a specific notification or several notifications of a specific notification type | Enter the desired notification number or notification type. |

<table>
<thead>
<tr>
<th>Format the list display to meet your own specific requirements</th>
<th>Choose the desired layout in the Layout list field.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You can store the following information in a layout:</td>
</tr>
<tr>
<td></td>
<td>• List column structure</td>
</tr>
<tr>
<td></td>
<td>• Sort criteria</td>
</tr>
<tr>
<td></td>
<td>• Filter conditions</td>
</tr>
</tbody>
</table>
### Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Specify which criterion the monitor column in the list of notifications references</th>
<th>In the list field <em>Reference field for monitor</em>, choose a reference field. The monitor column is then displayed with the corresponding status.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If you do not choose a reference field, the monitor column is not displayed.</td>
</tr>
<tr>
<td></td>
<td>For example, if you chose the desired start/end date as a reference field, the colors in the monitor column have the following meaning:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Green</strong>: the desired start date has not been reached</td>
</tr>
<tr>
<td></td>
<td>- <strong>Yellow</strong>: the desired start date has been reached, but the desired end date has not been reached</td>
</tr>
<tr>
<td></td>
<td>- <strong>Red</strong>: the desired end date has been surpassed.</td>
</tr>
<tr>
<td></td>
<td>The notifications displayed in red are critical and should be processed with the highest priority.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select notifications with a specific status</th>
<th>Select the corresponding indicator on the <em>General selection</em> tab page or enter the desired selection profile.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select notifications that have been assigned specific partners</td>
<td>In the <em>Partner</em> area of the <em>General selection</em> tab page, choose the desired partner function(s) and/or enter the partner number.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch between the <em>Display notification</em> and <em>Change notification</em> transactions</td>
<td>Choose the <em>Change &lt;-&gt; Display</em> pushbutton.</td>
</tr>
<tr>
<td>Display a graphic (for example, how many notifications were created on a particular date or for a specific material)</td>
<td>Position the cursor on a column header text, select the desired objects in the list, and then choose <em>Graphic.</em></td>
</tr>
<tr>
<td>Export notification list to MS Excel</td>
<td>Choose <em>Spreadsheet.</em></td>
</tr>
</tbody>
</table>
Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Display document flow for one or more notifications</th>
<th>Select one or more objects in the list and then choose \textit{Display document flow.}</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate an outgoing telephone call (\textit{SAPphone} component must be active)</td>
<td>Select a notification and then choose \textit{Telephone call.}</td>
</tr>
<tr>
<td>Display notification long text</td>
<td>Select a notification and then choose \textit{Long text.}</td>
</tr>
<tr>
<td>Display or change notifications (branch to notification header)</td>
<td>Select one or more objects in the list and then choose \textit{Notification.}</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose \textit{List → Portfolio.}</td>
</tr>
<tr>
<td>Compare notification processing dates (requested start and end dates)</td>
<td>Select one or more objects in the list and then choose \textit{Goto → Schedule graphic.}</td>
</tr>
<tr>
<td>Display report documentation</td>
<td>Choose \textit{Goto → Report documentation}</td>
</tr>
<tr>
<td>Print one or more notifications</td>
<td>Select one or more objects in the list and then choose \textit{Notification → Print notification.}</td>
</tr>
</tbody>
</table>

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 \textit{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.
Notifications (CA-NO)

SAP AG

Partner in Notification Processing

Partners for Notification Header
(Based on the notification type)

Partners for Tasks
(Based on the notification 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
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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Follow-on menu path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display partner data</td>
<td>Select a partner and choose Environment → Display object.</td>
</tr>
<tr>
<td>Delete a partner</td>
<td>Select a partner and choose Delete partner assignment.</td>
</tr>
<tr>
<td>Phone a partner</td>
<td>Select a partner and choose Phone partner.</td>
</tr>
<tr>
<td>Contact partner via paging function</td>
<td>Select a partner and choose Send message to partner.</td>
</tr>
<tr>
<td>Sort partners by function</td>
<td>Choose Edit → Sort by partner function.</td>
</tr>
<tr>
<td>Display, change, or delete partner addresses</td>
<td>Select a partner and choose the corresponding pushbutton</td>
</tr>
</tbody>
</table>

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 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

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

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

April 2001
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.

<table>
<thead>
<tr>
<th>If you want to</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select only the tasks that are assigned to you</td>
<td>Set the For processing by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>for processing</td>
<td></td>
</tr>
<tr>
<td>Select only the tasks that were created by you</td>
<td>Set the Created by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>Select only the tasks that were completed by you</td>
<td>Set the Completed by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>Select only the tasks assigned to you as a specific</td>
<td>Set the In my role as indicator on the on the My worklist tab page and choose a partner function in the list field.</td>
</tr>
<tr>
<td>partner (for example, in your capacity as an &quot;author&quot;)</td>
<td></td>
</tr>
</tbody>
</table>
Select and Process Tasks Using Worklist

<table>
<thead>
<tr>
<th>Select tasks for notifications that were created within a specific time period</th>
<th>Set the indicator:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select tasks on the basis of a specific task code group, task code, or a selection profile</td>
<td>Enter the desired code group, task code, or selection profile.</td>
</tr>
<tr>
<td>Select tasks for specific notifications</td>
<td>Enter the desired notification number(s) or notification type(s).</td>
</tr>
<tr>
<td>Format the list display to meet your own specific requirements</td>
<td>Choose the desired layout in the <em>Layout</em> list field.</td>
</tr>
</tbody>
</table>

You can store the following information in a layout:

- List column structure
- Sort criteria
- Filter conditions
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.

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch between the <em>Display notification</em> and</td>
<td>Choose the <em>Display &lt;-&gt; Change</em> pushbutton.</td>
</tr>
<tr>
<td><em>Change notification</em> transactions, as well as</td>
<td></td>
</tr>
<tr>
<td>the <em>Display task</em> and <em>Change task</em> transactions</td>
<td></td>
</tr>
<tr>
<td>Export list of tasks to MS Excel</td>
<td>Choose <em>Spreadsheet</em>.</td>
</tr>
<tr>
<td>Display graphic</td>
<td>Position the cursor on a column header text, select the desired objects in the list, and then choose <em>Graphic</em>.</td>
</tr>
</tbody>
</table>
Select and Process Tasks Using Worklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate an outgoing telephone call <em>(SAPphone component must be active)</em></td>
<td>Select a task and then choose <em>Telephone call</em>.</td>
</tr>
<tr>
<td>Display long text</td>
<td>Select a task and then choose <em>Long text</em>.</td>
</tr>
<tr>
<td>Display or change notifications (branch to notification header)</td>
<td>Select one or more objects in the list and then choose <em>Notification</em>.</td>
</tr>
<tr>
<td>Display or change tasks (branch to notification header)</td>
<td>Select one or more objects in the list and then choose <em>Task</em>.</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose <em>List → Portfolio</em>.</td>
</tr>
<tr>
<td>Compare task processing times (requested start and end times)</td>
<td>Select one or more objects in the list and then choose <em>Goto → Schedule graphic</em>.</td>
</tr>
<tr>
<td>Display report documentation</td>
<td>Choose <em>Goto → Report documentation for...</em></td>
</tr>
<tr>
<td>Print one or more notifications</td>
<td>Select one or more objects in the list and then choose <em>Notification → Print notification</em>.</td>
</tr>
</tbody>
</table>

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 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display status information in the notification header</td>
<td></td>
<td>The current system statuses are displayed in the <em>Status</em> field of the notification header. If user statuses also exist for the notification, they are also displayed. The <em>Status</em> field also displays the task status. If at least one notification task is still outstanding or released, the status &quot;task outstanding&quot; (<em>TSOS</em>) is displayed. As long as this status is set, you cannot complete the notification.</td>
</tr>
<tr>
<td>Display status information for individual tasks</td>
<td><em>Tasks</em> tab page</td>
<td>The task overview contains the status of all recorded tasks.</td>
</tr>
<tr>
<td>Display system and user statuses with short texts</td>
<td><em>Status detail</em> pushbutton</td>
<td>All active system and user statuses for the notification are displayed on the <em>Status</em> tab page.</td>
</tr>
<tr>
<td>Display general status overview</td>
<td>Choose <em>Status detail</em> pushbutton and then <em>Extras</em> → <em>Overview</em></td>
<td>You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.</td>
</tr>
<tr>
<td>Display statuses that can still be assigned</td>
<td>Choose <em>Status detail</em> and then the <em>Business processes</em> tab page</td>
<td>You can see which processing steps are currently allowed or not allowed. If you choose <em>Transaction analysis</em>, 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).</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task outstanding</td>
<td>The task was created in the notification.</td>
</tr>
<tr>
<td>Task released</td>
<td>The task can be executed.</td>
</tr>
<tr>
<td>Task completed</td>
<td>The task was executed.</td>
</tr>
<tr>
<td>Task successful</td>
<td>The result of the task was successful (for example, the problem was solved or damage was repaired).</td>
</tr>
</tbody>
</table>

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.

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 I47].

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 Management for Tasks

<table>
<thead>
<tr>
<th>Status</th>
<th>The system fills the following fields:</th>
</tr>
</thead>
</table>
| 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
Document Flow

- 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

<table>
<thead>
<tr>
<th>Intranet</th>
<th>SAP System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person who makes the entry</td>
<td>Person who processes/approves the request</td>
</tr>
</tbody>
</table>

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

You choose the scenario *Removal request*. The entry form for the removal request is displayed.

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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Partner Role</th>
<th>Type of Item</th>
<th>Costing Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move PC</td>
<td>Task processor</td>
<td>Activity item</td>
<td>If the number of PCs is greater than zero, an activity item is created with the:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• <em>Sending cost center</em> = PC cost center</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• <em>Activity type</em> = PCMOVE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• <em>Receiver</em> = Requesting cost center</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• <em>Quantity</em> = Number of PCs</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Change telephone</th>
<th>Task processor</th>
<th>Activity item</th>
<th>If the number of telephones is greater than zero, an activity item is created with the:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Sending cost center = Telephone cost center</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Activity type = PHONEMOVE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Receiver = Requesting cost center</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Quantity = Fixed quantity one</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Type of Item</th>
<th>Stored Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity item</td>
<td>• Sending cost center</td>
</tr>
<tr>
<td></td>
<td>• Activity type</td>
</tr>
<tr>
<td></td>
<td>• Quantity</td>
</tr>
<tr>
<td>Material item</td>
<td>• Material number</td>
</tr>
<tr>
<td></td>
<td>• Storage location</td>
</tr>
<tr>
<td></td>
<td>• Plant</td>
</tr>
<tr>
<td></td>
<td>• Quantity</td>
</tr>
</tbody>
</table>
Example: Entering And Processing An Internal Service Request

<table>
<thead>
<tr>
<th>External activity</th>
<th>Material number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Vendor</td>
</tr>
<tr>
<td></td>
<td>Purchasing organization</td>
</tr>
<tr>
<td></td>
<td>Quantity</td>
</tr>
</tbody>
</table>

- 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 forwarded 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.
Example: Entering And Processing An Internal Service Request

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](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
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.

<table>
<thead>
<tr>
<th>If you want to</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select only the notifications that are assigned to you for processing</td>
<td>Set the <code>For processing by me</code> indicator on the <code>My worklist</code> tab page.</td>
</tr>
<tr>
<td>Select only the notifications that were created by you</td>
<td>Set the <code>Created by me</code> indicator on the <code>My worklist</code> tab page.</td>
</tr>
<tr>
<td>Select only the notifications that were last processed by you</td>
<td>Set the <code>Last processed by me</code> indicator on the <code>My worklist</code> tab page.</td>
</tr>
<tr>
<td>Select only the notifications assigned to you as a specific partner (for example, in your capacity as an &quot;author&quot;)</td>
<td>Set the <code>In my role as</code> indicator on the on the <code>My worklist</code> tab page and choose a partner function in the list field.</td>
</tr>
</tbody>
</table>
### Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Select notifications that were created within a specific time period</th>
<th>Set the indicator:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <em>1 week</em>, if you want to select notifications that were created up to one week before the current date.</td>
</tr>
<tr>
<td></td>
<td>• <em>1 month</em>, if you want to select notifications that were created up to one month before the current date.</td>
</tr>
<tr>
<td></td>
<td>• <em>3 months</em>, if you want to select notifications that were created up to three months before the current date.</td>
</tr>
<tr>
<td></td>
<td>• <em>1 year</em>, if you want to select notifications that were created up to one year before the current date.</td>
</tr>
<tr>
<td></td>
<td>• <em>Defined by me</em> and enter the desired time interval if you want to select notifications that were created within a specific time period.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select a specific notification or several notifications of a specific notification type</th>
<th>Enter the desired notification number or notification type.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Format the list display to meet your own specific requirements</th>
<th>Choose the desired layout in the <em>Layout</em> list field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can store the following information in a layout:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• List column structure</td>
</tr>
<tr>
<td></td>
<td>• Sort criteria</td>
</tr>
<tr>
<td></td>
<td>• Filter conditions</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch between the Display notification and Change notification transactions</td>
<td>Choose the Change &lt;-&gt; Display pushbutton.</td>
</tr>
<tr>
<td>Display a graphic (for example, how many notifications were created on a particular date or for a specific material)</td>
<td>Position the cursor on a column header text, select the desired objects in the list, and then choose Graphic.</td>
</tr>
<tr>
<td>Export notification list to MS Excel</td>
<td>Choose Spreadsheet.</td>
</tr>
</tbody>
</table>
Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display document flow for one or more notifications</td>
<td>Select one or more objects in the list and then choose Display document flow.</td>
</tr>
<tr>
<td>Initiate an outgoing telephone call (SAPphone component must be active)</td>
<td>Select a notification and then choose Telephone call.</td>
</tr>
<tr>
<td>Display notification long text</td>
<td>Select a notification and then choose Long text.</td>
</tr>
<tr>
<td>Display or change notifications (branch to notification header)</td>
<td>Select one or more objects in the list and then choose Notification.</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose List → Portfolio.</td>
</tr>
<tr>
<td>Compare notification processing dates (requested start and end dates)</td>
<td>Select one or more objects in the list and then choose Goto → Schedule graphic.</td>
</tr>
<tr>
<td>Display report documentation</td>
<td>Choose Goto → Report documentation</td>
</tr>
<tr>
<td>Print one or more notifications</td>
<td>Select one or more objects in the list and then choose Notification → Print notification.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
</table>
| 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). |
Notifications (CA-NO)

**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. 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. 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:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Use</th>
<th>What you ought to know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create ECR</td>
<td>You select this activity if the subject described causes a change.</td>
<td>This function is used to create an engineering change request. With this, you initiate the change process with Engineering Change Management.</td>
</tr>
<tr>
<td>Assign ECR</td>
<td>You select this activity if the subject is already known and you have already created an engineering change request.</td>
<td>If necessary, create the relevant object management record. If you save the ECR, the system assigns the ECR to the change notification.</td>
</tr>
<tr>
<td>Create change notification</td>
<td>You select this activity if the subject described causes different changes in several areas.</td>
<td>If necessary, you forward the new notification to the user responsible.</td>
</tr>
<tr>
<td>Document flow</td>
<td>With the help of the document flow, you get an overview of which ECRs have been created as a result of which change notification.</td>
<td>The document flow can be displayed in both the intranet and in an ECR.</td>
</tr>
</tbody>
</table>

See also:
- Action box [Page 520]
- Standard activities [Page 523]
- Document flow [Page 527]
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 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display status information in the notification header</td>
<td></td>
<td>The current system statuses are displayed in the <strong>Status</strong> field of the notification header. If user statuses also exist for the notification, they are also displayed. The <strong>Status</strong> field also displays the task status. If at least one notification task is still outstanding or released, the status &quot;task outstanding&quot; (TSOS) is displayed. As long as this status is set, you cannot complete the notification.</td>
</tr>
<tr>
<td>Display status information for individual tasks</td>
<td><strong>Tasks</strong> tab page</td>
<td>The task overview contains the status of all recorded tasks.</td>
</tr>
<tr>
<td>Display system and user statuses with short texts</td>
<td><strong>Status detail</strong> pushbutton</td>
<td>All active system and user statuses for the notification are displayed on the <strong>Status</strong> tab page.</td>
</tr>
<tr>
<td>Display general status overview</td>
<td>Choose <strong>Status detail</strong> pushbutton and then Extras → Overview</td>
<td>You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.</td>
</tr>
<tr>
<td>Display statuses that can still be assigned</td>
<td>Choose <strong>Status detail</strong> and then the <strong>Business processes</strong> tab page</td>
<td>You can see which processing steps are currently allowed or not allowed. If you choose <em>Transaction analysis</em>, 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).</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appearance of the action box</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Blue:</strong></td>
</tr>
<tr>
<td></td>
<td>The follow-up function is active and can be executed.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Black:</strong></td>
</tr>
<tr>
<td></td>
<td>The follow-up function is inactive and cannot be executed (yet).</td>
</tr>
<tr>
<td></td>
<td>• <strong>Gray:</strong></td>
</tr>
<tr>
<td></td>
<td>The follow-up function has been executed and cannot be executed again.</td>
</tr>
<tr>
<td></td>
<td>If you set the <em>Action box: Table</em> 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).</td>
</tr>
</tbody>
</table>
### 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:
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Can execute more than once and independently of other follow-up functions in the action box</td>
</tr>
<tr>
<td>• Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)</td>
</tr>
</tbody>
</table>

| Control parameters for a follow-up function | In Customizing, you can specify:
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes)</td>
</tr>
<tr>
<td>• In which transactions a follow-up function will be displayed for use (for example, in the create or change mode)</td>
</tr>
<tr>
<td>• Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing</td>
</tr>
<tr>
<td>• 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</td>
</tr>
</tbody>
</table>

| 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
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

<table>
<thead>
<tr>
<th>Follow-up function</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone contact using <em>SAPphone</em></td>
<td>You can use this function to make a telephone call using <em>SAPphone</em>. The system records the details of your phone call as a notification activity.</td>
</tr>
<tr>
<td></td>
<td>To use this function, the telephone and computer in your office must be interconnected and the <em>SAPphone</em> component must be active.</td>
</tr>
<tr>
<td>Telephone contact without <em>SAPphone</em></td>
<td>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.</td>
</tr>
<tr>
<td>Internal memo</td>
<td>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.</td>
</tr>
<tr>
<td>Solution database [Ext.]</td>
<td>You can use this function to search the solution database for symptoms and solutions that are similar to the problem you are currently processing.</td>
</tr>
<tr>
<td></td>
<td>If you find a symptom or solution in the database that applies to the problem in your current notification, you can:</td>
</tr>
<tr>
<td></td>
<td>• Document your database search as an activity for the notification</td>
</tr>
<tr>
<td></td>
<td>• Copy the tasks associated with the solution into your notification</td>
</tr>
<tr>
<td>Standard Follow-Up Functions</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Send notices</strong></td>
<td></td>
</tr>
</tbody>
</table>
| 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 activate 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, you 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

<table>
<thead>
<tr>
<th>Desired processing type</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Put notification in process</td>
<td>Call up the notification in the create or change mode and then choose Notification → Functions → Put in process.</td>
</tr>
<tr>
<td>Postpone notification</td>
<td>Call up the notification in the change mode, choose Notification → Functions → Postpone, and then save the notification.</td>
</tr>
<tr>
<td>Complete notification</td>
<td>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.</td>
</tr>
<tr>
<td>Delete notification</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>If you want to</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select only the notifications that are assigned to</td>
<td>Set the For processing by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>you for processing</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications that were created by</td>
<td>Set the Created by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>you</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications that were last</td>
<td>Set the Last processed by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>processed by you</td>
<td></td>
</tr>
<tr>
<td>Select only the notifications assigned to you as</td>
<td>Set the In my role as indicator on the on the My worklist tab page</td>
</tr>
<tr>
<td>a specific partner (for example, in your capacity</td>
<td>and choose a partner function in the list field.</td>
</tr>
<tr>
<td>as an &quot;author&quot;)</td>
<td></td>
</tr>
</tbody>
</table>
Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Select notifications that were created within a specific time period</th>
<th>Set the indicator:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 1 week, if you want to select notifications that were created up to one week before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 month, if you want to select notifications that were created up to one month before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 3 months, if you want to select notifications that were created up to three months before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 year, if you want to select notifications that were created up to one year before the current date.</td>
</tr>
<tr>
<td></td>
<td>• Defined by me and enter the desired time interval if you want to select notifications that were created within a specific time period.</td>
</tr>
</tbody>
</table>

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**.

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch between the <strong>Display notification</strong> and <strong>Change notification</strong> transactions</td>
<td>Choose the <strong>Change &lt;-&gt; Display</strong> pushbutton.</td>
</tr>
<tr>
<td>Display a graphic (for example, how many notifications were created on a particular date or for a specific material)</td>
<td>Position the cursor on a column header text, select the desired objects in the list, and then choose <strong>Graphic</strong>.</td>
</tr>
<tr>
<td>Export notification list to MS Excel</td>
<td>Choose <strong>Spreadsheet</strong>.</td>
</tr>
</tbody>
</table>
Select and Process Notifications Using Worklist

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display document flow for one or more notifications</td>
<td>Select one or more objects in the list and then choose Display document flow.</td>
</tr>
<tr>
<td>Initiate an outgoing telephone call (SAPphone component must be active)</td>
<td>Select a notification and then choose Telephone call.</td>
</tr>
<tr>
<td>Display notification long text</td>
<td>Select a notification and then choose Long text.</td>
</tr>
<tr>
<td>Display or change notifications (branch to notification header)</td>
<td>Select one or more objects in the list and then choose Notification.</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose List → Portfolio.</td>
</tr>
<tr>
<td>Compare notification processing dates (requested start and end dates)</td>
<td>Select one or more objects in the list and then choose Goto → Schedule graphic.</td>
</tr>
<tr>
<td>Display report documentation</td>
<td>Choose Goto → Report documentation</td>
</tr>
<tr>
<td>Print one or more notifications</td>
<td>Select one or more objects in the list and then choose Notification → Print notification.</td>
</tr>
</tbody>
</table>

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:

- 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.

<table>
<thead>
<tr>
<th>If you want to</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select only the tasks that are assigned to you for processing</td>
<td>Set the For processing by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>Select only the tasks that were created by you</td>
<td>Set the Created by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>Select only the tasks that were completed by you</td>
<td>Set the Completed by me indicator on the My worklist tab page.</td>
</tr>
<tr>
<td>Select only the tasks assigned to you as a specific partner (for example, in your capacity as an “author”)</td>
<td>Set the In my role as indicator on the My worklist tab page and choose a partner function in the list field.</td>
</tr>
</tbody>
</table>
### Select and Process Tasks Using Worklist

<table>
<thead>
<tr>
<th>Select tasks for notifications that were created within a specific time period</th>
<th>Set the indicator:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 1 week, if you want to select notifications that were created up to one week before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 month, if you want to select notifications that were created up to one month before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 3 months, if you want to select notifications that were created up to three months before the current date.</td>
</tr>
<tr>
<td></td>
<td>• 1 year, if you want to select notifications that were created up to one year before the current date.</td>
</tr>
<tr>
<td></td>
<td>• Defined by me and enter the desired time interval if you want to select notifications that were created within a specific time period.</td>
</tr>
</tbody>
</table>

| 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). |

<table>
<thead>
<tr>
<th>Format the list display to meet your own specific requirements</th>
<th>Choose the desired layout in the Layout list field.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You can store the following information in a layout:</td>
</tr>
<tr>
<td></td>
<td>• List column structure</td>
</tr>
<tr>
<td></td>
<td>• Sort criteria</td>
</tr>
<tr>
<td></td>
<td>• Filter conditions</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Select only the outstanding tasks</th>
<th>Select the corresponding indicator on the <em>General selection</em> tab page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select tasks that have been assigned specific partners</td>
<td>Select the corresponding partner function in the list field on the <em>General selection</em> tab page.</td>
</tr>
<tr>
<td>Select notifications that have been assigned specific partners</td>
<td>In the <em>Partner</em> area of the <em>General selection</em> tab page, choose the desired partner function(s) and/or enter the partner number.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch between the <em>Display notification</em> and <em>Change notification</em> transactions, as well as the <em>Display task</em> and <em>Change task</em> transactions</td>
<td>Choose the <em>Display &lt;-&gt; Change</em> pushbutton.</td>
</tr>
<tr>
<td>Export list of tasks to MS Excel</td>
<td>Choose <em>Spreadsheet</em>.</td>
</tr>
<tr>
<td>Display graphic</td>
<td>Position the cursor on a column header text, select the desired objects in the list, and then choose <em>Graphic</em>.</td>
</tr>
</tbody>
</table>
### Select and Process Tasks Using Worklist

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate an outgoing telephone call (<em>SAPphone component must be active</em>)</td>
<td>Select a task and then choose <em>Telephone call</em>.</td>
</tr>
<tr>
<td>Display long text</td>
<td>Select a task and then choose <em>Long text</em>.</td>
</tr>
<tr>
<td>Display or change notifications (branch to notification header)</td>
<td>Select one or more objects in the list and then choose <em>Notification</em>.</td>
</tr>
<tr>
<td>Display or change tasks (branch to notification header)</td>
<td>Select one or more objects in the list and then choose <em>Task</em>.</td>
</tr>
<tr>
<td>Display a portfolio</td>
<td>Position the cursor on a column header and then choose <em>List → Portfolio</em>.</td>
</tr>
<tr>
<td>Compare task processing times (requested start and end times)</td>
<td>Select one or more objects in the list and then choose <em>Goto → Schedule graphic</em>.</td>
</tr>
<tr>
<td>Display report documentation</td>
<td>Choose <em>Goto → Report documentation for...</em>.</td>
</tr>
<tr>
<td>Print one or more notifications</td>
<td>Select one or more objects in the list and then choose <em>Notification → Print notification</em>.</td>
</tr>
</tbody>
</table>

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 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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display status information in the notification header</td>
<td></td>
<td>The current system statuses are displayed in the <em>Status</em> field of the notification header. If user statuses also exist for the notification, they are also displayed. The <em>Status</em> field also displays the task status. If at least one notification task is still outstanding or released, the status &quot;task outstanding&quot; (<em>TSOS</em>) is displayed. As long as this status is set, you cannot complete the notification.</td>
</tr>
<tr>
<td>Display status information for individual tasks</td>
<td><em>Tasks</em> tab page</td>
<td>The task overview contains the status of all recorded tasks.</td>
</tr>
<tr>
<td>Display system and user statuses with short texts</td>
<td><em>Status detail</em> pushbutton</td>
<td>All active system and user statuses for the notification are displayed on the <em>Status</em> tab page.</td>
</tr>
<tr>
<td>Display general status overview</td>
<td>Choose <em>Status detail</em> pushbutton and then <em>Extras</em> → <em>Overview</em></td>
<td>You can see which processing steps have already been performed. All active and inactive system and user statuses for the notification are displayed.</td>
</tr>
<tr>
<td>Display statuses that can still be assigned</td>
<td>Choose <em>Status detail</em> and then the <em>Business processes</em> tab page</td>
<td>You can see which processing steps are currently allowed or not allowed. If you choose <em>Transaction analysis</em>, 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).</td>
</tr>
</tbody>
</table>
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

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.
**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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Follow-on menu path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display partner data</td>
<td>Select a partner and choose Environment → Display object.</td>
</tr>
<tr>
<td>Delete a partner</td>
<td>Select a partner and choose Delete partner assignment.</td>
</tr>
<tr>
<td>Phone a partner</td>
<td>Select a partner and choose Phone partner.</td>
</tr>
<tr>
<td>Contact partner via paging function</td>
<td>Select a partner and choose Send message to partner.</td>
</tr>
<tr>
<td>Sort partners by function</td>
<td>Choose Edit → Sort by partner function.</td>
</tr>
<tr>
<td>Display, change, or delete partner addresses</td>
<td>Select a partner and choose the corresponding pushbutton</td>
</tr>
</tbody>
</table>

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.

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.

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record cause data for an item in the cause overview</td>
<td>Choose Causes tab page.</td>
<td>Before you can enter the cause data, you must select an item in the item overview.</td>
</tr>
<tr>
<td>Record cause data for an item in the cause detail screen</td>
<td>Choose Causes tab page. Select a cause item and then choose Detail view.</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record immediate tasks for the notification header</td>
<td>Choose the <em>Tasks</em> tab page.</td>
<td>Enter the data on the task overview.</td>
</tr>
<tr>
<td>Record immediate tasks on task detail screen</td>
<td>Select a task on the task overview and choose <em>Detail view</em>.</td>
<td>Enter the data on the task detail screen.</td>
</tr>
<tr>
<td>Record corrective tasks for a notification item</td>
<td>Choose the <em>Items</em> tab, select an item, and then choose the <em>Item tasks</em> tab page.</td>
<td>Enter the task data for the item.</td>
</tr>
<tr>
<td>Record corrective tasks on the task detail screen</td>
<td>Choose the <em>Items</em> tab page and then select an item. Choose the <em>Item tasks</em> tab page, select a task and then choose <em>Detail view</em>.</td>
<td>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]).</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task outstanding</td>
<td>The task was created in the notification.</td>
</tr>
<tr>
<td>Task released</td>
<td>The task can be executed.</td>
</tr>
<tr>
<td>Task completed</td>
<td>The task was executed.</td>
</tr>
<tr>
<td>Task successful</td>
<td>The result of the task was successful (for example, the problem was solved or damage was repaired).</td>
</tr>
</tbody>
</table>

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.

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 I47].

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 Management for Tasks

<table>
<thead>
<tr>
<th>Status</th>
<th>The system fills the following fields:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Released</td>
<td>\textit{Planned start} with the current date/time  \  \textit{Planned end} with either the current date/time or desired notification end date/time.  \  You can overwrite both fields.</td>
</tr>
<tr>
<td>Completed</td>
<td>\textit{Date completed} \textit{&lt;date&gt;} by \textit{&lt;user name&gt;} with the current date/time and current user name.  \  You cannot overwrite these fields.</td>
</tr>
<tr>
<td>Successful</td>
<td>None</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Tab page / Pushbutton / Menu path</th>
<th>What you should know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record activities for the notification header</td>
<td>Choose the Activities tab page.</td>
<td>Enter the data in the activity overview.</td>
</tr>
<tr>
<td>Record activities for the notification header in the activities detail screen</td>
<td>Select an activity in the activity overview and choose Detail view.</td>
<td>Enter the data in the activity detail screen.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enter the date and time when the activity was performed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To create a new activity from the detail screen, choose New entry.</td>
</tr>
<tr>
<td>Record activities for a single item</td>
<td>Choose the Items tab page, select an item, and then choose the Item activities tab page.</td>
<td>Enter the activity data for the item.</td>
</tr>
</tbody>
</table>
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 Copying Another Catalog Profile [Page 569].

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.

<table>
<thead>
<tr>
<th>System message (message type)</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information message</td>
<td>The system copies the new catalog profile</td>
</tr>
<tr>
<td>Warning message</td>
<td>The system copies the new catalog profile</td>
</tr>
<tr>
<td>Error message</td>
<td>The system does not copy the new catalog profile; instead, it retains the existing catalog profile</td>
</tr>
</tbody>
</table>

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

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.