

# SAP Chemical



ADDON.IDESISCH

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## Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

## Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options.  Cross-references to other documentation
<b>Example text</b>	Emphasized words or phrases in body text, titles of graphics and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, source code as well as names of installation, upgrade and database tools.
<b>Example text</b>	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key

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## SAP Chemical

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[Separate Filling of Bulk Materials \[Page 90\]](#)

[Direct Sales to Industrial Consumers \[Page 101\]](#)



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**Manual Planning and Consumption of Requirements**

## Manual Planning and Consumption of Requirements

### Purpose

This process describes the planning of “planned” independent requirements that will be consumed by incoming sales orders at a later time. These planned orders can be initiated by the planning of planned independent requirements or by sales orders.

You can find more information about this process under [i](#) [Page 9].

### Process Flow

You can find the data for this process under [?](#) [Page 10].

1. [Demand Planning \[Page 11\]](#)
2. [Executing MRP Single-Item Planning and Evaluating MRP for Components \[Page 14\]](#)
3. [Executing MRP Single-Item Planning and Evaluating MRP for Reorder Components \[Page 16\]](#)



## Additional Process Information

In demand management, you manually enter planned independent requirements with the quantities and dates required for the individual finished products (filled goods). The planned independent requirements are consumed by the incoming sales order later during net planning. You then execute MRP for each finished product. At each production level, the system generates planned orders or purchases requisitions for the in-house-produced materials (the production of bulk materials and related semi-finished products) and for externally procured materials (raw materials and packaging).

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material	CH_5102
Plant	1100
Version	00
Requirements type	VSF
Requested quantity	20000

## Demand Planning

### Use

In demand management, you enter the planned independent requirements for each of the next two months, 10,000 KG of material CH\_5102 (primer coat black 500 L canister). You enter the requirements dates on a monthly basis.

### Procedure

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Production - Process → Production Planning → Demand Management → Planned Independent Requirements → Create</i>
<b>Transaction Code</b>	MD61

Make sure that *Material* has been selected.


2. Enter the following data:

Field	Data
Material	CH_5102
Plant	1100
Version	00

3. Choose *Reqmts parameters*.
4. In the dialog box, enter the following data:

Field	Data
Plant	1100
Requirements type	VSF
Display – Period split	Select
Overview – Item screen	Select
Active	Select
History indicator	Select

5. Choose .

To confirm the message, choose .

The *Create Planned Independent Requirements: Initial Screen* appears.

6. Choose .




If a requirement already exists, a warning message appears. Confirm all further screens until you can create another independent requirement.


7. Select the item and choose the *Sched. lines* tab.


**Demand Planning**

8. Enter the following data:

Field	Data
P	M
Reqmts dt.	In 2 months (in format MMJJ)
Planned qty	10000
P	M
Reqmts dt.	In 3 months (in format MMJJ)
Planned qty	10000

9. Choose .

10. Choose .

11. Choose .

## Executing Single-Item MRP and Evaluating Requirements Planning

In materials requirements planning, the system determines production tasks as planned orders and procurement tasks as purchase requisitions. In this process, you execute multi-level requirements planning, starting with the finished product. This means that the system first determines the dependent requirements for the semi-finished products and raw materials defined in the BOM of material CH\_5102. The system then explodes the semi-finished product requirements via the BOMs of these materials, which at the same time determines the dependent requirements of the respective materials. This applies to all components for which MRP type *MRP* has been defined in the material master. The BOM also contains a packing material with MRP type *Reorder point planning* (CH\_3102). As soon as the system detects a shortfall in the reorder point, the material is procured again. This procurement activity takes place independently of the BOM explosion for material CH\_5102. The requirements planning run is also triggered independently.

## Executing Single-Item MRP and Evaluating MRP for Components

# Executing Single-Item MRP and Evaluating MRP for Components

To get an overview, choose [Executing Single-Item MRP and Evaluating MRP for Components \[Page 13\]](#).

You can find more information about this process under [i \[Page 17\]](#).

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Production - Process</i> node, choose <i>MRP → Planning → Single Item, Multi-Level</i>
<b>Transaction Code</b>	MD02

2. Enter the following data:

Field	Data
Material	CH_5102
Plant	1100
Processing key	NETCH
Create purchase req.	1
Delivery schedules	3
Create MRP list	1
Planning mode	3
Scheduling	1
Also plan unchanged components	Select
Display material list	Select

3. Choose .

To skip the information message, simply choose .

On the *Single Item, Multi-Level* screen, you see a statistical overview.

4. Choose  *Materials*.

The *Single-Item, Multi-Level* screen appears.

5. Select the first item in the list (independent requirement).

6. Choose  *Selected results*.

You see the planning results based on the planned orders generated during MRP for the finished product.


7. Choose  for your planned order. You can now analyze the details of the planned order.

8. Choose .

9. Choose .

---

**Executing Single-Item MRP and Evaluating MRP for Components**

10. On the *Single-Item, Multi-Level* screen, you can now investigate additional materials or planned orders of the dependent requirements.
11. Choose  until the overview tree appears.  
If a dialog box appears, choose Yes.

## Executing Single-Item MRP and Evaluating MRP for Reorder Components

# Executing Single-Item MRP and Evaluating MRP for Reorder Components

To get an overview, choose [Executing Single-Item MRP and Evaluating MRP for Components \[Page 13\]](#).

You can find more information about this process under [i \[Page 17\]](#).

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Planning</i> node, choose <i>Single Item, Single Level</i>
<b>Transaction Code</b>	MD03



2. Enter the following data:

Field	Data
Material	CH_3102
Plant	1100
Processing key	NETCH
Create purchase req.	1
Delivery schedules	3
Create MRP list	1
Planning mode	3
Scheduling	1
Display results before saving	Select

3. Choose .

To skip the information message, simply choose .

You see the plant stock, the quantity available in the task time and, if required, a purchase requisition generated by the system.

4. Choose .
5. Choose  until the overview tree appears.



## Additional Process Information

The MRP requirements planning is realized in the following steps:

1. Requirement and stock level comparison with planning segments for net planning.
2. Purchase order quantity calculation with calculation of the order quantities for planned orders and purchase requisitions for the requirements date of the material shortage quantity.
3. Order scheduling with the option to determine the capacity requirements for materials produced in-house.
4. Multi-level explosion of the material BOMs for the dependent requirements calculation regarding material staging quantity and date.
5. Components CH\_4102 and CH\_4103 (see data overview) are defined as semi-finished products. External procurement is not defined for material type HALB in the standard system. To restrict the amount of master data, however, we have defined external procurement for both of these material master records. Material CH\_4101 has a special setting: up to a lot size of 1000 kg the material is to be procured externally. If the lot size is bigger, the material is produced in-house.



Special system settings are required for the functionality described under 5.

Situation: A component is to be procured externally if the requirement exceeds 1000 kg per day. If it is bigger, the component is produced in-house.

Data:

CH\_4100 Finished product

CH\_4101 One of the components

Settings:

Material CH-4101

Quota arrangement usage 3 must be defined in the *MRP2* view.

As the lot-size procedure, you must use a procedure for which the split indicator has been set in Customizing.

Quota arrangement in the *Purchasing* component:

The following quota arrangement has been defined:

Plant 1100

Material CH\_4101

Minimum quantity for splitting quota: 1000

Procurement type for 1: *F*

Procurement type for 2: *E*

Vendor for 1: 1060. An info record must have been created for this.

Quota for 2: 100

Priority for 1: 1

---

**Additional Process Information**

Priority for 2: 2

Process:

„The minimum quantity for the splitting quota determines that the lot has to amount to the minimum quantity (at least) before it can be split to several sources of supply during the MRP run.“ (SAP Library *Material Requirements Planning*)

In this case, this means that the system applies the splitting quota if the lot size exceeds 1000 kg. This quota is 100 for in-house production and 0 for external procurement.

“If the lot size is smaller or the same as the minimum quantity, the normal quota arrangement logic is used.” (SAP Library *Material Requirements Planning*)

This means that the system applies the settings made beside the quota arrangement logic if the lot size is less than or equal to 1000 kg. Only the priorities remain. External procurement has first priority. This means that a purchase requisition/planned order with profile NB is created.

By deleting the priorities from the quota arrangement, you can easily proof that the priorities are decisive in the latter case. You then remove the setting from the material type, and for semi-finished product this means in-house production.

## Procuring the Stock Material

In the earlier planning steps, the R/3 System generates purchase requisitions. These purchase requisitions are assigned to a specific vendor, who is determined in the source list according to the given material. The purchase requisitions are converted into orders. For each material, you enter an order item, which contains the plant and the storage location. When the goods are delivered, you enter the goods receipt with reference to the purchase order.

You can find more information about this process under [i](#) [Page 20].

### Process Flow

You can find the data for this process under [?](#) [Page 21].

1. [Converting Purchase Requisitions into Purchase Orders \[Page 22\]](#)
2. [Posting the Goods Receipt with Reference to the Order \[Page 23\]](#)
3. [Entering the Batch Specifications \[Page 24\]](#)

---

**Additional Process Information****Additional Process Information**

For materials to be handled in batches, the R/3 System stores the batch specifications in characteristics. We have defined maintenance as obligatory when goods receipt occurs. The batch values can be maintained manually or transferred automatically from the quality inspection. In this process, the batch for material CH\_1302 receives values from QM.

## Data Used During This Process

Field	Data
Vendor	1060
Plant	1100
Purch. organization	1000
Purchasing group	024

## Converting Purchase Requisitions into Purchase Orders

# Converting Purchase Requisitions into Purchase Orders

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Purchasing → Purchase Order → Create → Via Requisition Assignment</i>
<b>Transaction Code</b>	ME58

2. Enter the following data:

Field	Data
Purchasing group	024
Purchasing organization	1000
Vendor	1060
Plant	1100
Scope of list	A

3. Choose .

The *Ordering for Assigned Requisitions: Overview of Assignments* screen appears









If you have already run this process, material stocks may already exist. This would mean that no purchase requisitions are generated for the materials. If this is the case, you can skip this process step.

4. Select the line for your purchase requisition, then choose *Process assignment*.
5. In the dialog box, enter the following data:

Field	Data
Order type	NB

6. Choose .

To ignore any warning messages, choose .


7. Select *Open requisitions* in the left window.
8. Choose .
9. To display your purchase order and its items, choose  *Header* or  *Item overview*.
10. Choose .
11. Make a note of the purchase order number.
12. Choose  until the overview tree appears.

## Posting the Goods Receipt with Reference to the Order

## Posting the Goods Receipt with Reference to the Order

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Materials Management</i> node, choose <i>Inventory Management</i> → <i>Goods Movement</i> → <i>Goods Receipt</i> → <i>For Purchase Order</i> → <i>PO Number Known</i>
<b>Transaction Code</b>	MIGO


2. Enter your purchase order number.
3. Choose .
4. Select the *OK* column for all materials and, if a material has already been selected, select *Item OK* for this material.



You need to enter batch specifications for all of the items to be handled in batches. For most of the batches, we have defined a manual characteristic value assignment with the goods receipt. For the rest, the R/3 System automatically enters this via QM. The quality inspection is prepared during the incoming inspection. For material CH\_1302, the system has stored an inspection lot in the background for the incoming inspection.

5. To specify the batches for those materials that are to be handled in batches (for example, Solvesso CH\_1206), click on the line number.

You now see the corresponding detailed data.


6. On the *Batch* tab, choose *Classification*.
7. You can enter values for the batch. This is done in the next process *Entering the Batch Specifications*.
8. Choose  until you get to the *Goods Receipt Purchase Order ### <Your Name>* screen.

## Entering Batch Specifications

### Entering Batch Specifications

1. You are on the *Goods Receipt Purchase Order ### <Your Name>* screen.
2. The batch specifications for material CH\_1302 are entered in the quality check and are then automatically transferred to the batch master.
3. Select material CH\_1306 (Solvesso).
4. On the *Batch* tab, choose *Classification*.
5. Enter the following data:

Field	Data
Solvent color tone	Choose the value help, then choose 040, Murky
Viscosity	70
Density	0.9

6. Choose .



If required, repeat this procedure for the second item.

7. Select material CH\_4101 (Black clay paste).
8. On the *Batch* tab, choose *Classification*.
9. Enter the following data:

Field	Data
Solids content	65
Paint color tone	Choose the value help, then choose 80, Black



When you have entered *80, Black*, you may need to choose .

10. Choose .




If required, repeat this procedure for the second item.

11. Select material CH\_4103 (Butanol).
12. On the *Batch* tab, choose *Classification*.
13. Enter the following data:

Field	Data
Solvent color tone	Choose the value help, then choose 040, Murky
Viscosity	80
Density	1.0



## Entering Batch Specifications

14. Choose .




If required, repeat this procedure for the second item.

15. Select material CH\_4102 (Butylacetate).

16. On the *Batch* tab, choose *Classification*.

17. Enter the following data:


Field	Data
Solvent color tone	Choose the value help, then choose 020, Yellow
Viscosity	70
Density	0.9

18. Choose .



If required, repeat this procedure for the second item.

19. Choose *Post*.

20. Choose  until the overview tree appears.



If you did not assign values to the characteristics at goods receipt, you can still maintain the batch specifications at any time. Choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → *Change*.

---

## Incoming Inspection

# Incoming Inspection

## Purpose

In this process, you can check the goods receipt.

You can find more information about this process under [i](#) [Page 27].

## Process Flow

You can find the data for this process under [?](#) [Page 28].

1. [Checking the Stock \[Page 29\]](#)
2. [Recording Results by Lot \[Page 30\]](#)
3. [Inspection Lot Completion \[Page 32\]](#)

## Additional Process Information

In the earlier planning steps, the R/3 System generates purchase requisitions (see Logistics Planning). These purchase requisitions are assigned to a specific vendor, who is determined in the source list according to the given material. The purchase requisitions are converted into orders.

For each material, you enter an order item, which contains the purchase order quantity, the price, plant and the storage location. When the goods are delivered, you enter the goods receipt with reference to the purchase order. The batch numbers are assigned by the system.

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material	CH_1302
Vendor	1060
Plant	1100


## Checking the Stock

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Environment → Stock → Stock Overview</i>
<b>Transaction Code</b>	MMBE

2. Enter the following data:

Field	Data
Material	CH_1302
Plant	1100
Storage location (database selections)	No entry


3. Choose .

You now see the unrestricted-use stock, the stock currently undergoing quality inspection, and the reserved quantities.



The warehouse stock is listed hierarchically by company code, individual plants, individual storage locations, and individual batches.

Note that the quantity posted for material CH\_1302 is currently in quality inspection.

4. Choose  until the overview tree appears.

## Recording Results by Lot


## Recording Results by Lot

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Quality Management → Quality Inspection → Worklist → Results Recording</i>
<b>Transaction Code</b>	QE51N



2. Enter the following data:

Field	Data
Plant	1100
Insp. lot origin	01
Material	CH_1302

3. Choose .




There may be two inspection lots for material CH\_1302.

4. Choose  to select the lines *Viscosity*, *Density*, and *Solids content* for the first inspection lot and then choose .

The *Record Results for CH\_1302 ####: Single Values for Characteristic* screen for characteristic 9501, *Viscosity* appears.


5. Enter the following data:

Field	Data
Measured value (single value)	Measured value from the area <i>Specs Fixed insp.scope values between Upper lim. &amp; Lower lmt</i>

6. Choose  and repeat this entry for the remaining measured values.



In the *Results* screen area, you see the number of results checked and the number of results with errors. The system calculates the mean value and the standard deviation based on your entries.

7. If the system has not yet reported completion (in the status bar), choose .



The status is now 5 (*Processing completed*).

8. Choose .


You can now enter the results for the characteristic 9502 *Density*.

9. Enter the following data:

Field	Data


Recording Results by Lot

Mean value	A measured value that lies within the upper and lower tolerance levels.
------------	---

10. Choose .



The status is now 5 (*Processing completed*). The characteristic is accepted.


11. Choose .

You can now enter the results for the characteristic *9503 Solids content*.

12. Enter the following data:


Field	Data
Measured value (single value)	Valid measured value that lies within the upper and lower tolerances

13. Choose .

To skip any information dialog boxes, choose .

Repeat this entry for a total of three measured values.


14. Choose .

15. Choose .

16. Write down the inspection lot number in the *Inspection lot* field.

17. Choose .

You are back on the *Results Recording Worklist* with a list of inspection lots.


18. To branch into the inspection lot that is currently being processed, choose .

Green indicates that the individual inspections have been carried out, and that the system has accepted the results.

19. If any other batches exist, carry out the inspections as described above. Update the inspection lot list each time and check the status of the individual inspections and the complete inspection lot using the color legend.



The system highlights all inspection lots and individual inspections in color. The light red color indicates that the inspection lot or the individual checks have not yet been executed.

20. Choose  until the overview tree appears.

If a dialog box should appear, choose Yes.

## Inspection Lot Completion

## Inspection Lot Completion


1. Call up the transaction as follows:





<b>Menu Path</b>	From the <i>Quality Inspection</i> node, choose <i>Inspection Lot</i> → <i>Usage Decision</i> → <i>Record</i>
<b>Transaction Code</b>	QA11

2. Enter the following data:

Field	Data
Inspection lot	Your number



- In the *Inspection lot* field, you see the number of the inspection lot. The system holds the latest number used by a user.
- You can also search for the current inspection lot for your material. Choose the value help. A dialog box appears. Position your cursor on the *Short text* line. Choose  and select the inspection lot.

3. Choose .
4. On the *Record Usage Decision: Characteristic Overview* screen, choose the *Characteristics* tab and position your cursor on the *UD Code* field.
5. Choose the value help.  
A dialog box appears. Choose *A2 (Acceptance: Stock window background)*.
6. Choose *Extras* → *Batches* → *Batch values*.  
When you save the usage decision, the system transfers the inspection results to the batch.  
You can check these values in the dialog box after saving.
7. Choose .
8. Choose *Batch status*.
9. In the *Batch Status Management* dialog box, select *Unrestr.* in the *New batch status* section, then choose .
10. Choose .




The system informs you that the *Usage decision for lot ### has been saved*. In the background, the system posts the quantity from the inspection stock to the unrestricted-use stock.

If you have created more than one inspection lot, record the usage decision for each inspection lot as described here.





To check the stock changes, choose [Checking the Stock \[Page 29\]](#).

11. Choose  until the overview tree appears.

---

**Stock Adjustment for Bulk Materials (Optional)**

## Stock Adjustment for Bulk Materials (Optional)

### Purpose

If you run the complete PP-PI scenario, you first perform material requirements planning, which triggers procurement or in-house production. If you would like to shorten the complete scenario, you must check the stocks and post any missing material components.

In this process, you enter the stock without reference to a purchase order. To record the stock, choose [Required Quantities \[Page 37\]](#).

You can find more information about this process under [i \[Page 35\]](#).

### Prerequisites

You should only run this process if you have **not** yet run the processes *Procuring the Stock Material* and *Incoming Inspection*.

To run the process, you need a certain level of raw materials and semi-finished products. The level of the stock depends on the required production quantity. In this process, we assume a production quantity of 10,000 kg CH\_5102 (primer coat black). The quantities change proportionately to changes in the production quantity.

### Process Flow

You can find the data for this process under [? \[Page 36\]](#).

1. [Goods Receipts for New Batches w/o Ref. to a Purchase Order \[Page 39\]](#)
2. [Entering the Batch Specifications \[Page 41\]](#)
3. [Posting Stock w/o Reference to a Purchase Order \[Page 43\]](#)

## Additional Process Information

There are three ways to adjust stock levels:

1. You want to add batches that do not yet have a batch master record in the system.  
Choose [Goods Receipts for New Batches w/o Ref. to a Purchase Order \[Page 39\]](#).
2. You want to increase the stock levels of existing batches.  
Choose [Posting Stocks w/o Reference to a Purchase Order \[Page 43\]](#).
3. You want to decrease the stocks so that you can recreate requirements in MRP.  
Choose Stock Corrections Due to Goods Issues.

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material	CH_1103
Material	CH_1104
Material	CH_1105
Material	CH_1302
Material	CH_1306
Material	CH_4101
Material	CH_4102
Material	CH_4103
Material	CH_3102
Plant	1100
Movement type	501

## Required Quantities



If you want to produce a quantity other than that specified in this process, you need to convert the quantities in proportion to the requirements. The quantities given here relate to a production of 10,000 kg CH\_5102.

Material	Batch mgmt requirement	Quantity	Storage location	Plant Europe / USA
CH_1103	x	120	0004	1100
CH_1104		2977.5	0088	1100
CH_1105		312.5	0003	1100
CH_1302	x	4872.5	0002	1100
CH_1306	x	200	0088	1100
CH_4101	x	125	0003	1100
CH_4102	x	862.5	0088	1100
CH_4103	x	530	0004	1100
CH_3102		2000	0002	1100



You can display the current stock situation.

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Environment → Stock → Stock Overview</i>
<b>Transaction Code</b>	MMBE

2. Enter the following data:

Field	Data
Material	Material number to be checked
Plant	1100

3. Choose .


You see the number of pieces currently held in the material warehouse. If this quantity is less than that specified in the basic settings and you wish to skip requirements planning, you need to post stock manually.

4. Choose .



Repeat steps 2 to 4 for all materials.

**Required Quantities**

5. Choose  until the overview tree appears.

## Goods Receipts for New Batches w/o Ref. to a Purchase Order

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Receipt → Other</i>
<b>Transaction Code</b>	MB1C

2. Enter the following data:

Field	Data
Movement type	501
Plant	1100

3. Choose .

4. Enter the following data:

Field	Data
Material	Material numbers of the materials subject to batch management
Quantity	Quantity of the material subject to batch management
SLoc	Enter the storage location specified in the material overview <i>Required quantities</i>

5. Choose *Environment → Stock overview → Stock material*.

Compare the unrestricted-use stock with the required quantity.


6. Choose .

*Automatic Batch Number Assignment* is active. If the material is subject to batch management, the system asks whether you wish to assign the batch number internally. Choose Yes.

For most materials, you need to assign a characteristic value at goods receipt. In this case you make these entries manually. If the *Other Goods Receipts: Classification* screen appears, continue the posting for your material with the process step *Entering the Batch Specification*, then return to this process step.

7. As the quantity, enter the difference between the unrestricted-use stock and the required quantity.


8. Choose .

To ignore any warning messages, choose .

9. Enter the data for the next material in the list on the *Enter Other Goods Receipts: Collective Processing* screen and continue with step 5.




If there are not enough input fields, choose *Edit → New items*.

10. If you have entered all materials, choose .

---

**Goods Receipts for New Batches w/o Ref. to a Purchase Order**

11. Choose .





## Entering the Batch Specification

You are now on the screen for the characteristic value assignment for the batch for material *CH\_1103*.

1. On the *Enter Other Goods Receipts: Classification* screen, enter the following data:

Field	Data
Color pigment	Choose the value help, then choose 1, White

2. Choose .
3. Choose .

You are now on the screen for the characteristic value assignment for the batch for material *CH\_1302*.

4. Enter the following data:

Field	Data
Solids content	60
Viscosity	19
Density	1.1

5. Choose .

You are now on the screen for the characteristic value assignment for the batch for material *CH\_1306*.

6. Enter the following data:

Field	Data
Solvent color tone	Choose the value help, then choose 040, Murky
Viscosity	70
Density	0.9

7. Choose .

You are now on the screen for the characteristic value assignment for the batch for material *CH\_4101*.

8. Enter the following data:

Field	Data
Solids content	65
Paint color tone	Choose the value help, then choose 80, Black


9. Choose .

You are now on the screen for the characteristic value assignment for the batch for material *CH\_4102*.

10. Enter the following data:

**Entering the Batch Specification**


Field	Data
Solvent color tone	Choose the value help, then choose 020, Yellow
Viscosity	80
Density	1.0

11. Choose .

You are now on the screen for the characteristic value assignment for the batch for material CH\_4103.

12. Enter the following data:

Field	Data
Solvent color tone	Choose the value help, then choose 040, Murky
Viscosity	70
Density	0.9

13. Choose .



If you have enough stock in the warehouse, but you would like to run requirements planning, you need to issue some material. This creates a material shortage, which can be filled by MRP by triggering a procurement. Choose Stock Corrections Due to Goods Issues

## Posting Stock w/o Reference to a Purchase Order


## Posting Stock w/o Reference to a Purchase Order

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Goods Movement</i> node, choose <i>Goods Receipt</i> → <i>Other</i>
<b>Transaction Code</b>	MB1C

2. Enter the following data:

Field	Data
Movement type	501
Plant	1100
Storage location	Depends on the material


3. Choose .

4. Enter the following data:

Field	Data
Material	Material numbers of the materials to be changed


5. Choose *Environment* → *Stock overview* → *Stock material* (or enter all data, then choose .

6. Compare the unrestricted-use stock with the required quantity.

7. Choose .

8. As the quantity, enter the difference between the unrestricted-use stock and the required quantity. Enter the storage location/batch to which you wish to post.

9. Choose .

To ignore any warning messages, choose .



To search for existing data, you could also enter \* in the storage location/batch field. In this case, enter the total quantity to be posted in the *Unit of entry* field and distribute this to the relevant batches/storage locations.


Choose .

10. Enter the next material in the list, then continue with step 5.



If there are not enough input fields, choose *Edit* → *New items*.

11. When you have entered all materials, choose .

12. Choose  until the overview tree appears.

---

**Creating and Releasing a Process Order**

## Creating and Releasing a Process Order

You can find more information about this process under [i](#) [Page 45].

### Process Flow

You can find the data for this process under [?](#) [Page 46].

1. [Evaluating MRP and Creating the Process Order \[Page 47\]](#)
2. [Processing and Releasing the Process Order \[Page 49\]](#)

## Additional Process Information

In the earlier planning steps, you create planned orders. From the current stock/requirements list, the system converts a planned order into a process order. This triggers the creation of a production order for the manufacture of a batch that includes all of the data relevant for production based on a master recipe.

You can then make any changes or corrections required to release the process order (for example, resource selection or batch determination). When you release the order, the system checks whether an order can be released for production processing. The system also starts batch determination for several components. When you save the process order, the system generates an inspection lot in quality control.



Batch determination is triggered in the process order. It is possible for the system to find and transfer more than one batch. If such a batch split occurs, you cannot use material quantity calculation in the standard system. A customer-specific program is required. We use a user exit for this purpose. Do not execute material quantity calculation in this IDES process, because it refers only to the standard system.

---

**Data Used During This Process****Data Used During This Process**

<b>Field</b>	<b>Data</b>
Material number	CH_4100
Material number	CH_1103
Material number	CH_1104
Material number	CH_1105
Material number	CH_1302
Material number	CH_1306
Material number	CH_4101
Material number	CH_4102
Material number	CH_4103
Material number	CH_3102
Plant	1100

## Evaluating MRP and Creating the Process Order

### Use

From the current stock/requirements list, the system converts a planned order into a process order. By creating the process order, the system generates an order for the manufacture of a material or a batch that includes all of the data relevant for production based on a master recipe. The following functions are carried out: determine master recipe (through the production version in the planned order), schedule process order, determine planned costs, create batch master record for the material to be produced, carry out batch determination for the components.







### Procedure

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Production – Process → MRP → Evaluations → Stock/Requirements List</i>
<b>Transaction Code</b>	MD04


2. Enter the following data:

Field	Data
Material	CH_4100
Plant	1100

3. Choose .
4. Choose  for the first planned order (PIOrd.) you want to convert.
5. Choose *-> Proc. order (Convert planned order into process order)*.  
The system generates a process order. The *Create Process Order: Header – General Data* screen appears.
6. Choose the *Master data* tab.  
In the *ProdVersion* field, check whether a master recipe has been determined. This is indicated by the value 1 (*Production version*).
7. To schedule the order, choose .
8. Choose  *Operations*.
9. On the *Create Process Order: Operation Overview* screen, select operation 100 and its phases (110-140) to check scheduling.
10. Choose .
11. Choose the *Dates* tab.
12. Choose .
13. Choose the *Goods recpt* tab. You can now create the batch that is to be produced with this order.
14. On the *Create Process Order: Header - Goods Receipt* screen, enter the following data:

**Evaluating MRP and Creating the Process Order**


Field	Data
Batch	CH_C any three-character number


15. Choose .



If this batch master record does not yet exist, the *Batch Handling* dialog box appears. Choose Yes.


16. Note the batch number.

17. Choose .

18. Choose .

You can now check whether the planned order has been converted into a process order.

19. Note the order number.

20. Choose  until the overview tree appears.



## Processing and Releasing the Process Order

### Use

You can now make any changes or corrections required to release the process order.

When you release the process order, the system checks whether the order can be released for production processing.




### Procedure

1. Call up the transaction as follows:


<b>Menu Path</b>	From the <i>Production - Process</i> node, choose <i>Process Order → Process Order → Change</i>
<b>Transaction Code</b>	COR2






2. Enter the following data:

Field	Data
Process order	Your number: accept default

3. Choose .
4. Choose  *Operations*.
5. To select the resource, select operation 200, then choose .
6. In the dialog box, select resource CH\_R203.



To check the classification of the resource, choose *Classification*. To check the resource selection conditions, choose *Selection condition*. Then choose .

7. To confirm the resource, choose  *Choose*.
8. To schedule the order, choose .
9. Choose .
10. Choose  *Materials*.
11. Select items 0010 and 0080 for batch determination.
12. To trigger batch determination, choose .



Batch determination is triggered manually for both components (items 0010 and 0080) in the production order. For all other components, batch determination is triggered automatically when you release the production order. An exception to this is component CH\_4102. This component is to be confirmed via WM in the process order. This is controlled by a setting in the material master (MRP view).


## Processing and Releasing the Process Order

Note that batch selection for item 0010 is carried out according to BOM classification. The selection criteria are defined in the material list by the component classification.

Note that batch selection for item 0080 is carried out according to the component strategy. The selection criteria are defined in the batch search strategy.


13. To ignore any warning messages, choose .


The *Batch Determination CO: Select Batches* screen appears. When you call up this transaction for the first time, the *Change Process Order: Material List* screen appears. The batches for this material are proposed in the lower screen section.

14. Select the first batch, then choose  *Copy*.


15. To ignore any warning messages, choose .


The *Batch Determination CO: Select Batches* screen appears.

16. Select the first batch, then choose  *Copy*.


17. Choose .

The *Change Process Order: Header - General Data* screen appears.

18. To release the order, choose .

To ignore any warning messages, choose .

The system now checks the material availability:

- If the material is available, the system displays a confirmation message.
- If the material is not available, a dialog box appears. Choose *Missing Parts List*. Choose . To continue processing, choose *Release order*.



If you have not procured enough materials, you can now correct the stocks. To do this, see the IDES process *Stock Adjustment for Bulk Materials (Optional)*.

19. Choose .

20. On the *Change Process Order: Initial Screen*, choose *Process order* → *Display*.

21. Enter the following data:

Field	Data
Process order	Your number: accept default

22. Choose .

The *Display Process Order: Header - General Data* screen appears.


23. Choose  *Materials*.

In the *Batch* field of the relevant component, you see the results of the batch determination.

---


**Processing and Releasing the Process Order**

The item in the material list is split up into a totals record and one or more single batch records, depending on whether a batch split has occurred.

24. Choose .
25. Choose the *Assignments* tab.
26. In the *Inspection lot* field, check whether an inspection lot has been generated for the quality inspection.
27. Note the inspection lot number.



Note that you must save the process order before you can display the inspection lot. You cannot navigate to the inspection lot while you create the process order.

28. Choose  until the overview tree appears.

---

**Material Staging of Components**

## Material Staging of Components

### Purpose

A transfer requirement is created via production for the components managed in the warehouse management system. This is processed in WM. The component transfer to the production storage bin is confirmed by WM.

You can find more information about this process under [i \[Page 53\]](#).

### Process Flow

You can find the data for this process under [? \[Page 54\]](#).

1. [Requesting Material Staging of the Components for the Order \[Page 55\]](#)
2. [Generating and Confirming the Transfer Order in the WM System \[Page 56\]](#)

## Additional Process Information

Three components are managed in the warehouse management system. You can see this in the process order under the special withdrawal storage location '088'. Together with the goods receipt for the order, the WM stores the components in the background on the storage locations planned for the materials. Production then requires the material staging of the components to a production storage bin. You create a transfer requirement in WM. The transfer requirements from production are then converted into transfer orders in WM. In this process, we create the transfers online and convert them manually into a transfer order. You could also process them automatically. A confirmation in WM confirms the successful transfer, and you also confirm to the process order which batch of materials CH\_4102 has been transferred by the WM. The stock transfer can be traced in the WM stock overview. From an MM Inventory Management perspective, the R/3 System has not posted anything. The stock is still listed at storage location 088.

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material number	CH_1104
Material number	CH_1306
Material number	CH_4102





## Requesting Material Staging of Components for the Order

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Process Order</i> node, choose <i>Tools</i> → <i>WM Material Staging</i> → <i>For Order</i>
<b>Transaction Code</b>	LP10

2. Enter the following data:

Field	Data
Order	Your order number
Quantity proposal – Request rem.	Select
Plant	1100
Screen control	Foreground

3. Choose .
4. Choose .
5. Choose *WM material staging*.
6. Choose .
7. Choose .

## Generating and Confirming the Transfer Order in the WM System



# Generating and Confirming the Transfer Order in the WM System

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Logistics Execution → Internal Whse Processes → Bins and Stock → Display → Total Stock per Material (Warehouse Management)</i>
<b>Transaction Code</b>	LS26

2. Enter the following data:



Field	Data
Warehouse number	001
Material number	CH_1104 or one of the other material numbers listed for this process
Plant	1100

3. Choose .
4. Note the stocks for various stock types. At the end of this process, the stock in storage type 100 should have increased.
5. Choose  until the overview tree appears.
6. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Internal Whse Processes</i> node, choose <i>Transfer Requirement → Display → By Storage Type</i>
<b>Transaction Code</b>	LB10

7. Enter the following data:

Field	Data
Warehouse number	001
Dest.storage type	100
Status: open	Select

8. Choose .
9. Select the transfer requirement for your process order number, then choose *TO in foreground*.
10. Choose *Generate TO Item*.
11. Choose *Transfer order → Post*.
12. Choose  until the overview tree appears.
13. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Internal Whse Processes</i> node, choose <i>Stock Transfer → Display Transfer Order → By Storage Type</i>
------------------	---





**Generating and Confirming the Transfer Order in the WM System**

<b>Transaction Code</b>	LT22
-------------------------	------


14. Enter the following data:

Field	Data
Warehouse number	001
Storage type	100
Reference – stor.type s.	Select <i>Dest</i>

15. Choose .

16. On the *Transfer Orders for Storage Type* screen, select the first component by clicking the red field, then choose .

Repeat this step for all components. The R/3 System selects the "CS" field in the right margin of the list for each item in your transfer order. When all items are confirmed, you have confirmed to the R/3 System that the required component quantity has arrived in the production storage bin.

17. Choose  until the overview tree appears.

18. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Internal Whse Processes</i> node, choose <i>Bins and Stock</i> → <i>Display</i> → <i>Total Stock per Material (Warehouse Management)</i>
<b>Transaction Code</b>	LS26

19. On the *Stock Overview* screen, enter the following additional data:

Storage type	100
--------------	-----

20. Choose .

**Result**

In the stock overview, you can now see that material staging was successful.

## Producing Bulk Materials with Process Management

### Purpose

Bulk materials are produced as semi-finished products to be filled at a later time. Each production step has its own process order. The system components *Process Manufacturing*, *Materials Management*, *Batch Management*, and *Quality Control* appear as an integrated unit within the PI sheet.

You can find more information about this process under [i](#) [Page 59].

### Process Flow

You can find the data for this process under [?](#) [Page 60].

1. [Creating a Control Recipe \[Page 61\]](#)
2. [Sending the PI Sheet \[Page 62\]](#)
3. [Maintaining the PI Sheet for Production \[Page 63\]](#)
4. [Maintaining the PI Sheet for Inspection \[Page 69\]](#)
5. [Sending Process Messages \[Page 71\]](#)

## Additional Process Information

The PI sheet comprises:

- Control information for the process operator (displayed to the left)
- Input fields for actual data to be reported:
  - Displayed to the right if only one value is reported
  - Displayed below the control instruction if several values are reported
- Fields for values that are calculated by the system:
  - Displayed to the right. A question mark (“?”) is displayed as long as the value has not been calculated.
- Pushbutton to record inspection results:
  - Displayed to the right, next to the control instruction

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material number	CH_4100
Plant	1100
Order type	PI01

## Creating a Control Recipe

### Use

The control recipe contains all of the process instructions required to execute a process order. The R/3 System creates one control recipe (PI sheet) for production and one for the inspection. The following functions are performed: generate process instructions automatically, trigger control recipe creation.





### Procedure

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Production - Process → Process Order → Process Order → Change</i>
<b>Transaction Code</b>	COR2

2. Enter the following data:

Field	Data
Process order	Your number: accept default

3. Choose .
4. On the *Change Process Order: Header – General Data* screen, choose .
5. Choose *Goto → Logs → On PI generation / ctrl. recipe creation*.
6. On the *Change Process Order: Header – General Data* screen, choose .  
The system created a control recipe for destinations L1 and P1.
7. Choose  until the overview tree appears.  
In the dialog box, choose Yes.

## Sending the PI Sheet

## Sending the PI Sheet

### Use

You now send control recipes to the control recipes destinations L1 "Inspection" and P1 "Production". The following functions are performed: send PI sheet, update control recipe status.




### Procedure

1. Call up the transaction as follows:



<b>Menu Path</b>	From the <i>Production - Process</i> node, choose <i>Process Management</i> → <i>Control Recipe</i> → <i>Control Recipe Monitor</i>
<b>Transaction Code</b>	CO53

2. Enter the following data:

Field	Data
Plant	1100
Process order	Your number
Status	Select all
Mode	Select <i>No test</i>

3. Choose  *Display*.
4. Choose  to select the control recipe for control recipe destination L1 (LABORATORY) and P1 (PRODUCTION).
5. Write down the control recipe numbers for L1 and P1.
6. Choose  *Send*.

The system sends the control recipes to the relevant destinations.

7. To check the status, choose . You can see that the status has changed from *Created* to *Sent*.
8. Choose  until the overview tree appears.

## Maintaining the PI Sheet for Production

### Use

You can find more information about this process under [i \[Page 59\]](#).


### Procedure

1. Call up the transaction as follows:


<b>Menu Path</b>	From the <i>Process Management</i> node, choose <i>PI Sheet</i> → <i>Find</i>
<b>Transaction Code</b>	CO60

2. Enter the following data:

Field	Data
Control recipe	Control recipe number for destination P1
Alternatively, search by Plant	1100
Ctrl rec.destination	P1
Material number	CH_4100
All other entry fields	Delete default values

3. Choose .
4. Double-click your process order number to select the PI sheet.
5. Choose *PI sheet* → *Display* → *Maintain*.
6. The system first requests a signature. In this way, the start of phase 110 is reported.

Field	Data
Phase start 0110	Your user ID

7. Choose .



Once you enter the signature, no more changes can be made. The system also blocks the entry fields for the material withdrawal.









8. To report material withdrawal in phase 0110, enter the following data:



Choose the value help to call up a proposal for the material quantity to be consumed by the relevant component, the batch from which it is to be taken, and the storage location. The data is transferred from the process order. If the material is not subject to batch management, the *Batch number* field remains empty.

Field	Data
Material	CH_1302

## Maintaining the PI Sheet for Production

Material quantity (batch number/storage location)	Choose the value help, then choose  Copy.
Material	CH_4103
Material quantity (batch number/storage location)	Choose the value help, then choose  Copy.
Material	CH_1103
Material quantity (batch number/storage location)	Choose the value help, then choose  Copy.
Material	CH_1104
Material quantity (storage location)	Choose the value help, then choose  Copy.
Material	CH_4102
Material quantity (batch number/storage location)	Choose the value help, then choose  Copy.
Material	CH_1105
Material quantity	Choose the value help, then choose  Copy.
Material	CH_4101
Material quantity	Choose the value help, then choose  Copy.
Material	CH_1306
Material quantity (storage location)	Choose the value help, then choose  Copy.



If you assigned multiple batches during batch determination, the system displays entry fields for the material quantity, the batch number and for the storage location for each batch.

9. The system requests another signature. In this way, the end of phase 110 is reported.

Field	Data
Phase end 0110	Your user ID

10. Choose .



Maintaining the PI Sheet for Production

11. Enter the signature for the start of phase 120.

Field	Data
Phase start 0120	Your user ID

12. To calculate a value (average temperature), enter the following data for phase 120 / process instruction 0010:

Field	Data
Temperature	30


13. Choose . A second line is displayed in which you can repeat your entry.

Temperature	40
-------------	----

14. Double-click on *Average temperature* to trigger automatic calculation of the average temperature. The system displays the average temperature.

15. Enter the signature for the end of phase 120.

Field	Data
Phase end 0120	Your user ID

16. Choose .

17. Enter the signature for the start of phase 130.

Field	Data
Phase start 0130	Your user ID

18. Choose .


19. Enter the signature for the end of phase 130.

Field	Data
Phase end 0130	Your user ID

20. Choose .

21. Enter the signature for the start of phase 140.

Field	Data
Phase start 0140	Your user ID

22. Choose .



23. To call up results recording for Quality Management, double-click *Record inspection results (yellow)* in phase 140 /, process instruction 0010.


24. On the *Record Results: Characteristic Overview* screen, double-click inspection characteristic 010 *Viscosity* to get to the *Record Results for CH\_4100 ###: Characteristic Single Screen*.

25. Enter the following data:

Field	Data
Mean value	Valid measured value that lies within the upper and lower tolerances

### Maintaining the PI Sheet for Production


26. Choose . The status of the line is set to 5 (Processing is completed), and the characteristic is accepted () since the measurement value was within the tolerances.

27. Choose .

You return to the *PI Sheet: Maintain* screen.


28. Enter the signature for the end of phase 140.

Field	Data
Phase end 0140	Your user ID

29. Choose .


30. Enter the signature for the start of phase 210.

Field	Data
Phase start 0210	Your user ID

31. Choose .


32. Enter the signature for the end of phase 210.

Field	Data
Phase end 0210	Your user ID

33. Choose .

34. Enter the signature for the start of phase 220.

Field	Data
Phase start 0220	Your user ID



35. Choose .

36. To call up results recording for Quality Management, double-click *Record inspection results (yellow)* in phase 220 /, process instruction 0010.

37. On the *Record Results: Characteristic Overview* screen, double-click inspection characteristic 010 to get to the *Record Results for CH\_4100: Characteristic Single Screen*.

38. Enter the following data:

Field	Data
Mean value	Valid measured value that lies within the upper and lower tolerances

39. Choose . The status of the line is set to 5 (Processing is completed), and the characteristic is accepted () since the measurement value was within the tolerances.


40. Choose .

You return to the *PI Sheet: Maintain* screen.

41. Enter the signature for the end of phase 220.


Field	Data
Phase end 0220	Your user ID

Maintaining the PI Sheet for Production

42. Choose .

43. Enter the signature for the start of phase 310.

Field	Data
Phase start 0310	Your user ID

44. Choose .


45. Enter the signature for the end of phase 310.

Field	Data
Phase end 0310	Your user ID

46. Choose .


47. Enter the signature for the start of phase 320.

Field	Data
Phase start 0320	Your user ID

48. Choose .


49. Enter the signature for the end of phase 320.

Field	Data
Phase end 0320	Your user ID


50. Choose .

51. Enter the signature for the start of phase 330.

Field	Data
Phase start 0330	Your user ID


52. Choose .

53. To report the yield (goods receipt) enter the following data in the section for phase 340 /, process instruction 0010:


Field	Data
Report yield:	Choose the value help, then choose  Copy.

54. Enter the signature for the end of phase 330.

Field	Data
Phase end 0330	Your user ID

55. Choose .

56. Choose *PI sheet* → *Set to complete*.



57. Choose  until you get to the *Find PI Sheet* screen with the selection fields for PI sheet selection.

**Maintaining the PI Sheet for Production**




## Maintaining the PI Sheet for Inspection

1. On the *Find PI sheet* screen, enter the following data:



Field	Data
Control recipe	Control recipe number for destination L1
Alternatively, search by Plant	1100
Ctrl rec.destination	L1
Material number	CH_4100
All other entry fields	Delete default values

2. Choose .
3. Double-click your process order number to select the PI sheet.
4. Choose *PI sheet* → *Display* → *Maintain*.
5. To call up results recording for Quality Management, double-click *Record inspection results (yellow)* in phase 410 /, process instruction 0010.
6. Choose .
7. On the *Record Results: Characteristic Overview* screen, double-click inspection characteristic 010, *Degree of hardness* to get to the *Record Results for CH\_4100: Characteristic Single Screen*.
8. Enter the following data:

Field	Data
Mean value	Valid measured value that lies within the upper and lower tolerances

9. Choose . The status of the line is set to 5 (Processing is completed), and the characteristic is accepted () since the measurement value was within the tolerances.
10. Choose . You now see characteristic 020.
11. On the *Record Results for CH\_4100: Single Values for Characteristic* screen, enter the following data:

Field	Data
Measured value	Valid measured value that lies within the upper and lower tolerances

12. Choose . The status of the line is set to 5 (Processing is completed), and the characteristic is accepted () since the measurement value was within the tolerances.

13. Choose .



You return to the *PI Sheet: Maintain* screen.

14. Enter the signature for the end of phase 410.

Field	Data
Phase end 0410	Your user ID

---

**Maintaining the PI Sheet for Inspection**

15. Choose .
16. Choose *PI sheet* → *Set to complete*.
17. Choose  until the overview tree appears.







## Sending the Process Message

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Process Management</i> node, choose <i>Message</i> → <i>Message Monitor</i>
<b>Transaction Code</b>	CO54

2. Enter the following data:

Field	Data
Plant	1100
Process order	Your number

3. Choose .
4. Choose .
5. Choose  *Send*.
6. Choose .
7. Check the entry in the *Detailed sender status* column.
8. To check the sender log, select a line, then choose  *Log*. Choose  to confirm the message.

## Final Checking of Bulk Materials and Inspection Lot Completion

You can find more information about this process under [i](#) [Page 73].

### Process Flow

You can find the data for this process under [?](#) [Page 74].

1. [Recording Results by Lot \[Page 75\]](#)
2. [Inspection Lot Completion \[Page 77\]](#)



## Additional Process Information

The quality of the bulk material is checked twice. The first quality inspection takes place in the PI sheet during production and the second inspection is carried out after production during the goods receipt in the warehouse. In both cases, the system generates an inspection lot that has to be closed, at least formally, with a usage decision. Quality management distinguishes both cases by the inspection type. Inspection type *03* is used for an inspection during production, where the master recipe contains the inspection characteristics. Inspection type *04* is used for goods receipt from production. The incoming inspection is independent from the master recipe and uses its own inspection plan or material specification.

For the inspection during production, we have already entered the results during the production of the bulk materials. For technical reasons, we still have to take the usage decision for the inspection lot. This completes the operation, and the inspection lot can be reorganized.

The quality inspection of the goods receipt from production (incoming inspection) still needs to be carried out. In this case, the usage decision triggers an inventory posting: If quality control releases the goods produced, the system automatically posts the inspection stock to the unrestricted-use stock.

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material number	CH_4100
Plant	1100


## Recording Results by Lot


1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Quality Management → Quality Inspection → Worklist → Results Recording</i>
<b>Transaction Code</b>	QE51N

2. Enter the following data:

Field	Data
Plant	1100
Insp. lot origin	04
Material	CH_4100



3. Choose .


4. Choose .

5. Choose .

6. Enter the following data:

Field	Data
Measured value	Valid measured value that lies within the upper and lower tolerances


7. Choose . The status of the line is set to 5 (Processing is completed), and the characteristic is valuated with  since the measurement value was within the tolerances.

8. Choose .

You can now enter the results for the characteristic 9502, *Density*.

9. Enter the following data:

Field	Data
Results / mean value	Valid measured value that lies within the upper and lower tolerances


10. Choose .

11. Choose .

You can now enter the results for the characteristic 9503, *Solids content*.


12. Enter the following data:

Field	Data
Measurement reading / offset	Valid measured value that lies within the upper and lower tolerances

13. Choose  and repeat this entry three times to process the required number of samples. The system calculates and displays the mean value.


14. Choose .


### Recording Results by Lot

15. Choose . You can now enter the results for the characteristic 9504, *Gloss*.


16. Enter the following data:


Field	Data
Results / mean value	Valid measured value that lies within the upper and lower tolerances


17. Choose .

18. Choose . You can now enter the results for the characteristic 9505, *Paint color*.


19. Enter the following data:


Field	Data
Results / code	<i>Value help (F4)</i> Select 80, <i>Black</i> , then choose  .

20. Choose .

21. Choose .

22. Write down the inspection lot number that is displayed to the left of material CH\_4100 in the left screen section (above the *Inspection by material specification* line).

23. Choose .

24. Choose  until the overview tree appears.

In the dialog box, choose Yes.


## Inspection Lot Completion

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Quality Inspection</i> node, choose <i>Inspection Lot</i> → <i>Usage Decision</i> → <i>Record</i>
<b>Transaction Code</b>	QA11

2. Enter the following data:

Field	Data
Inspection lot	The inspection lot number you wrote down in the <i>Results Recording by Lot</i> process (starts with 04...) or use the value help to search by material CH_4100

3. Choose .
4. On the *Record Usage Decision: Characteristic Overview* screen, position your cursor on the *UD Code* field.
5. Choose the value help.


A dialog box appears. Choose *A2 (Acceptance: Stock window background)*.

6. Choose .




The system informs you that the *Usage decision for lot ### has been saved*. In the background, the system posts the quantity from the inspection stock to the unrestricted-use stock.


When you save the usage decision, the system transfers the inspection results to the batch.

7. Choose  until the overview tree appears.
8. Call up the transaction as follows:


<b>Menu Path</b>	From the <i>Quality Inspection</i> node, choose <i>Inspection Lot</i> → <i>Usage Decision</i> → <i>Display</i>
<b>Transaction Code</b>	QA13

9. Enter the number of your inspection lot.
10. Choose .
11. On the *Display Usage Decision: Characteristic Overview* screen, choose the *Inspection lot stock* tab.

You now see that there is no quantity to be posted to the unrestricted-use stock.

12. Choose *Extras* → *Batches* → *Batch values*. You now see the batch specification and the previous inspection results. The inspection results were automatically assigned to the batch when you made the usage decision.
13. Choose .

## Inspection Lot Completion

14. Choose  until the overview tree appears.


15. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Quality Inspection</i> node, choose <i>Inspection Lot</i> → <i>Usage Decision</i> → <i>Record</i>
<b>Transaction Code</b>	QA11

Perform inspection lot completion for the second inspection lot.

16. Enter the following data:


Field	Data
Inspection lot	Inspection lot number (starts with 03...) or use the value help to search by material CH_4100

17. Choose .

18. On the *Record Usage Decision: Characteristic Overview* screen, position your cursor on the *UD Code* field.


19. Choose the value help.

A dialog box appears. Choose *A (Acceptance: no further action)*.

20. Choose .



The system informs you that the *Usage decision for lot ### has been saved*.

21. Choose  until the overview tree appears.

## Displaying the Process Data Documentation

You can find more information about this process under [i \[Page 80\]](#).

### Process Flow

You can find the data for this process under [? \[Page 81\]](#).

1. [Archiving the Process Log \[Page 82\]](#)

---

**Additional Process Information****Additional Process Information**

You can archive the documentation for the production process of a batch (batch record). Before archiving, you can display the batch record as a list.



## Data Used During This Process

Field	Data
Material number	CH_4100
Plant	1100

## Archiving the Process Log


## Archiving the Process Log







1. Call up the transaction as follows:


<b>Menu Path</b>	<i>Logistics → Production - Process → Process Order → Tools → Process Data Document → Order Record → Simulate</i>
<b>Transaction Code</b>	COAA

2. Enter the following data:

Field	Data
Process order	Your process order number or Search using the value help ( <i>Process orders for material and master recipe tab</i> ) Enter Material CH_4100, recipe group CH_P100
Plant	1100

3. Choose .

Select the line for your process order number. You now see the various formatting options. Try out the following list options:  *Process order*,  *Material*,  *PI sheet*,  *Process message*,  *User-def.*,  *Inspection lot*. Scroll through the lists.

4. Choose  until the overview tree appears.

## Stock Adjustment for Filling (Optional)

### Purpose

If you run the complete PP-PI scenario, you first perform material requirements planning, which triggers procurement or in-house production. You then produce the bulk product (paint) as a semi-finished product. If you would like to shorten the complete scenario, you must check the stocks and post any missing material components. You thereby limit the production process to the filling of the paint and the production of the finished product.

In this process, you enter the stock without reference to a document. To enter the stock, choose [Required Quantities \[Page 86\]](#).

### Prerequisites

To run the process *Separate Filling of Bulk Materials*, you need a certain stock of raw materials and semi-finished products. The level of the stock depends on the required production quantity. In this process, we assume a production quantity of 10,000 kg CH\_5102 (primer coat black). The quantities change proportionately to changes in the production quantity.

You should only run this process if you have only run the *Manual Planning and Consumption of Requirements* process before but none of the other processes.

You can find more information about this process under [i \[Page 84\]](#).

### Process Flow

You can find the data for this process under [? \[Page 85\]](#).

1. [Goods Receipt for Batch Stocks \[Page 87\]](#)
2. [Goods Receipt for Warehouse Stocks \[Page 89\]](#)

---

**Additional Process Information****Additional Process Information**

You post the semi-finished product "Primer coat, black" and the packaging material "500 L Canister" to the warehouse without reference to the purchase order or to the process order.

## Data Used During This Process

Field	Data
Material	CH_3102
Material	CH_4100

## Required Quantities

## Required Quantities



If you want to produce a quantity other than that specified in this process, you need to convert the quantities in proportion to the requirements. The quantities given here relate to a production of 10,000 kg CH\_5102.

Material	Batch mgmt requirement	Quantity	Storage location	Plant
CH_3102		20	0002	1100
CH_4100	Select	10000	0003	1100



You can display the current stock situation.

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Environment → Stock → Stock Overview</i>
<b>Transaction Code</b>	MMBE

2. Enter the following data:

Field	Data
Material	Material number to be checked
Plant	1100

3. Choose .

On the *Stock Overview: Company Code/Plant/Storage Location/Batch* screen, you see the number of pieces currently held in the material warehouse. If this quantity is less than that specified in the basic settings and you wish to run the shortened version of this scenario, you need to post stock manually.

4. Choose .


## Goods Receipt for Batch Stocks

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Receipt → Other</i>
<b>Transaction Code</b>	MB1C

2. Enter the following data:

Field	Data
Movement type	521
Plant	1100
Storage location	0003

3. Choose .

4. Enter the following data:

Field	Data
Material	CH_4100

5. Position your cursor on the material number.

6. Choose *Environment → Plant stock avail..*

Compare the unrestricted-use stock with the required quantity (see the *Required Quantities* process step).

To produce 10,000 kg of CH\_5102 (Primer coat), you need 10,000 kg of CH\_4100 (Black primer).

7. Choose .

8. Since automatic batch number assignment is active, the system asks whether you wish to assign the batch number internally. Choose **Yes**.


9. For materials that are subject to batch management, you need to assign characteristic values the first time you post the batch. In this process step, you make these entries manually. If the *Other Goods Receipts: Classification* screen appears, enter the following data:

Field	Data
Solids content	63
Paint color tone	80, Black (CH01 80)


10. Choose .


11. As the quantity, enter the difference between the unrestricted-use stock and the required quantity.


12. Choose .


To skip any warning messages, choose .

**Goods Receipt for Batch Stocks**


13. Choose .

To skip any warning messages, choose .

14. Choose .

15. Choose  until the overview tree appears.



If you want to enter or change values for the batch following the stock posting, choose *Logistics* → *Materials Management* → *Material Master* → *Batch* → *Change*. Enter the material number and the batch number, or use the value help to search for the batch. Choose , then choose the *Classification* tab. You can now modify the characteristic values.



## Goods Receipt for Warehouse Stocks

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Receipt → Other</i>
<b>Transaction Code</b>	MB1C

2. Enter the following data:

Field	Data
Movement type	501
Plant	1100
Storage location	0002

3. Choose .

4. Enter the following data:


Field	Data
Material	CH_3102


5. Position your cursor on the material number.


6. Choose *Environment → Plant stock avail..*

Compare the unrestricted-use stock with the required quantity (see the *Required Quantities* process step).

To produce 10,000 kg of CH\_5102 (Primer coat), you need 10,000 kg of CH\_3102 (Canister).

7. Choose .

8. As the quantity, enter the difference between the unrestricted-use stock and the required quantity. Choose .

To skip any warning messages, choose .

9. Choose .

10. Choose .

---

**Separate Filling of Bulk Materials**

## Separate Filling of Bulk Materials

You can find more information about this process under [i \[Page 91\]](#).

### Process Flow

You can find the data for this process under [? \[Page 92\]](#).

1. [Evaluating MRP and Creating the Process Order \[Page 93\]](#)
2. [Processing and Releasing the Process Order \[Page 94\]](#)
3. [Creating a Control Recipe \[Page 95\]](#)
4. [Sending the PI Sheet \[Page 96\]](#)
5. [Maintaining the PI Sheet \[Page 97\]](#)
6. [Sending the Process Message and Checking the Automatic Posting \[Page 99\]](#)

## Additional Process Information

The semi-finished product *Paint* is filled into canisters. The planned order is thus converted by the system into a process order for the finished product. This process describes an easy and compact run through process manufacturing, repeating many of the individual steps from the paint production. You can also run this process separately if you make the necessary preparations.

---

**Data Used During This Process****Data Used During This Process**

Field	Data
Material	CH_5102
Material	CH_4100
Material	CH_3102
Plant	1100







## Evaluating MRP and Creating the Process Order

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Production – Process → MRP → Evaluations → Stock/Requirements List</i>
<b>Transaction Code</b>	MD04

2. Enter the following data:

Field	Data
Material	CH_5102
Plant	1100

3. Choose .
4. Choose  for your planned order.
5. In the dialog box, choose --> *Proc. order*.  
To skip any information messages, choose .
6. The system generates a process order. The *Create Process Order: Header – General Data* screen appears.
7. Choose .
8. On the *Stock/Requirements List as of ## Hrs* screen, choose .  
You see that the planned order has now been converted into a process order. Make a note of this process order number.
9. Choose  until the overview tree appears.

## Processing and Releasing the Process Order


## Processing and Releasing the Process Order

1. Call up the transaction as follows:



<b>Menu Path</b>	From the <i>Production - Process</i> node, choose <i>Process Order → Process Order → Change</i>
<b>Transaction Code</b>	COR2

2. Enter the following data:

Field	Data
Process order	Your number (for material CH_5102)


3. Choose .
4. To create a batch, choose the *Goods receipt* tab.
5. Enter the following data:

Field	Data
Batch	Any batch number, for example, CH_C901

6. Choose .
7. If this batch number does not yet exist, the *Batch Handling* dialog box appears. Choose *Yes*.
8. To release the order, choose .


The system automatically triggers batch determination for the bulk material.





To see the results of the batch determination, choose  *Materials*. The *Batch* field is now filled.

The system now checks the material availability.



If the material is available, the system displays a confirmation message. If the material is not available, a dialog box appears. Choose *Missing parts list*. Choose . To continue processing, choose *Release order*. Adjust the stocks. To do this, choose [Stock Adjustment for Filling \(Optional\) \[Page 83\]](#)

9. Choose .
10. Choose .





## Creating a Control Recipe

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Production - Process → Process Order → Process Order → Change</i>
<b>Transaction Code</b>	COR2

2. Enter the following data:

Field	Data
Process order	Your number (for material CH_5102) or use the value help to search by material CH_5102

3. Choose .
4. Choose .
5. Choose .
6. Choose .

## Sending the PI Sheet




## Sending the PI Sheet


1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Production - Process</i> node, choose <i>Process Management</i> → <i>Control Recipe</i> → <i>Control Recipe Monitor</i>
<b>Transaction Code</b>	CO53

2. Enter the following data:

Field	Data
Plant	1100
Process order	Your number (for material CH_5102)
Status	Select all
Mode	Select <i>No test</i>

3. Choose  *Display*.
4. Select the control recipe, then choose  *Send*.
5. Note the control recipe number.
6. To check the status, choose .
 

The control recipe now has the status *Sent*.
7. Choose  until the overview tree appears.




## Maintaining the PI Sheet

1. Call up the transaction as follows:

<b>Menu Path</b>	From the <i>Process Management</i> node, choose <i>PI Sheet</i> → <i>Find</i>
<b>Transaction Code</b>	CO60

2. Enter the following data:

Field	Data
Control recipe	Control recipe number for destination F1
Alternatively, search by Plant	1100
Ctrl rec.destination	F1 (CHARGING)
Material number	CH_5102
All other entry fields	Delete default values

3. Choose .
4. Double-click your process order number to select the PI sheet.
5. Choose *PI sheet* → *Display* -> *Maintain*.
6. Report the start of phase 110. To do this, enter the following data:



Field	Data
Signature phase status 110	Your user ID

7. Choose .



Once you have entered and confirmed the signature, no more changes can be made.

8. To report the material withdrawal in phase 110 / process instruction 0000, enter the following data:

Field	Data
Material CH_4100 batch/storage location	Choose the value help, then choose  <i>Copy</i> .
Material CH_3102 storage location	Choose the value help, then choose  <i>Copy</i> .



The system only enters a proposal in the *Batch* field if the material is subject to batch management. Otherwise, the field remains empty. If a batch split has occurred for the component, you must enter data for all batches of the material.

9. To confirm the actual quantity that has been filled, enter the following data for phase 110 / process instruction 0010:

Field	Data


### Maintaining the PI Sheet

Filled quantity	10000 (Order quantity from the first process instruction in the PI sheet)
-----------------	--

10. To calculate the number of containers, choose .

11. Now report the end of the phase. Enter the following data for phase 110 / process instruction 0040:


Field	Data
Signature phase end 110	Your user ID

12. Choose .

13. Choose *PI sheet* → *Set to complete*.



Based on the confirmed quantity, the system generates a goods receipt for the process order for the filling and a goods issue for the filled batch and the packaging material as soon as the process messages are sent.

14. Choose  until the overview tree appears.


## Sending the Process Message and Checking the Automatic Posting


1. Call up the transaction as follows:


<b>Menu Path</b>	From the <i>Process Management</i> node, choose <i>Message → Message Monitor</i>
<b>Transaction Code</b>	CO54

2. Enter the following data:


Field	Data
Plant	1100
Process order	Your number, or use the value help to search for your order by material CH_5102
Status	Select all
Mode	Select <i>No test</i>

3. Choose .

4. Choose .

5. Choose  *Send*.

6. Choose .


7. Choose  until the overview tree appears.

8. Now check the goods receipt from production. Call up the transaction as follows:


<b>Menu Path</b>	<i>Logistics → Materials Management → Inventory Management → Environment → Stock → Stock Overview</i>
<b>Transaction Code</b>	MMBE

9. Enter the following data:

Field	Data
Material	CH_5102
Plant	1100
Storage location	Delete entry
Batch	Delete entry

10. Choose .

The finished product has now been packed in canisters and you can see to which batch and in which storage location it has been posted.

11. Choose  until the overview tree appears.

---

**Sending the Process Message and Checking the Automatic Posting**

## Direct Sales to Industrial Consumers

### Purpose

The stored finished product is now sold. When the delivery is due, the system searches the warehouse stock for suitable batches. Batch determination is started automatically.

### Process Flow

You can find the data for this process under [?](#) [Page 102].

1. [Processing the Sales Order \[Page 103\]](#)

---

**Data Used During This Process****Data Used During This Process**

<b>Field</b>	<b>Data</b>
Material number	CH_5102
Customer number	1100
Sales organization	1020
Distribution channel	22
Shipping point	1100

## Processing the Sales Order

1. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Sales and Distribution → Sales → Order → Create</i>
<b>Transaction Code</b>	VA01


2. Enter the following data:

Field	Data
Order type	OR
Sales organization	1020
Distribution channel	22
Division	00


3. Choose .

4. Enter the following data:

Field	Data
Sold-to party	1100
Purch.order no.	Any number
Req.deliv.date	Confirm the default value
Material	CH_5102
Order quantity	1000 (fill quantity is 500 l )

5. Choose .

6. Write down the order number.

7. Choose  until the overview tree appears.

To close the dialog box, choose *No*.

8. From the *Order* node, choose *Subsequent functions → Outbound Delivery*.

The *Create Outbound Delivery with Order Reference* screen appears.

9. Check the default values, then extend the selection period. Enter the following data:

Field	Data
Shipping point	Defaulted (1100)
Selection date	Today's date +2 months
Order	Confirm the default value or search via the PO number

10. Choose .

11. Choose *Subsequent functions → Create transfer order*.

In the dialog box, choose *Yes*.

## Processing the Sales Order

The *Create Transfer Order for Delivery Note: Initial Screen* appears.


12. Enter the following data:

Field	Data
Warehouse number	011
Plant	1100
Delivery	Defaulted by the system
Process Flow	Background
Adopt picking quantity	2

13. Write down the delivery number displayed in the *Delivery* field.

14. Choose .

The system generates a transfer order for the picking of the delivery quantities. Option 2 (Adopt picking quantity) ensures that the goods issue posting is made at the same time as the delivery.

15. Choose  until the overview tree appears.

16. Call up the transaction as follows:

<b>Menu Path</b>	<i>Logistics → Sales and Distribution → Shipping and Transportation → Outbound Delivery → Change → Single Document</i>
<b>Transaction Code</b>	VL02N

17. Enter the following data:



Field	Data
Outbound delivery	Your delivery number


18. Choose .

The *Change Delivery ###: Overview* screen appears.

19. Select the item, then choose  *Batch split*. You see the batch that the system selected.

20. Select the batch split item, then choose  *Batch determination*.

Find out why the system determined these batches. Position your cursor on a batch number, then choose  *Classification*. Choose . You now see the selection criteria and the batch characteristics in the dialog box. (If you want to analyze this further, select a line, then double-click it to display details.)

21. Choose  to close the dialog box.

22. Choose *Strategy info...*

In the dialog box, you can see into how many batches the requirement quantity may be split, and how the batches are sorted. The proposed quantity rule determines how the requirement quantity is distributed to the selected batches.



## Processing the Sales Order



In this case, we have used the proposed quantity rule 2. This ensures that the order is delivered from a single batch. The system selects the batch with the smallest remaining quantity.

If you still intend to use the batch split, you can change the batch determination and manually overwrite the default. You can also make changes to all of the other entries from the strategy information, as well as to the selection criteria.

23. Choose

24. Choose twice.

The *Change Delivery ###: Overview* screen appears.

25. To call up all of the batch items, select the item, then choose .



When a material is subject to batch management, the system splits the main item of the delivery into multiple subitems. You only need to enter the pick quantity for the subitems. The system calculates the quantity of the main item.

26. Choose until the overview tree appears.

In the dialog box, choose *No*.

27. From the *Sales* node, choose *Order* → *Display*.

28. Enter the following data:

Field	Data
Order	Your sales order number (defaulted)

29. Choose .

The *Display Standard Order: Overview* screen appears.

30. Choose the *Item overview* tab.

31. Select the item, then choose .

32. Position your cursor on the document number of the delivery, then choose *Display document*.

33. Select the item, then choose .

34. You now see the document details. You can check the batch, the quantity, and the storage location.

35. Choose until the overview tree appears.