

Logistics General (LO)



ADDON.IDESLO

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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
Example text	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.
Example text	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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Logistics General (LO)

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Batch Management and Active Ingredient Management

Purpose

A purchase order item is created for an active ingredient, but the goods receipt is posted as a physical quantity. The measurement results for the active ingredient contents are recorded by the quality check. The invoice verification refers to the determined active ingredient quantity of the goods receipt.

You can find more information about this process under [i](#) [Page 8].

Process Flow

You can find the data for this process under [?](#) [Page 9].

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Additional Process Information**Additional Process Information**

In this IDES scenario, you want to purchase an active ingredient. The goods receipt assumes a specific potency of the active ingredient. The actual amount of the active ingredient is measured only during the quality check. The invoice is to be paid only for the quantity of active ingredient actually received.

Data Used During This Process

Field	Data	Description
Material	Ai-1201	Mixture Orange 334
Vendor	1014	Herrmann & Riemer
Purchasing organization	1000	IDES Germany
Purchasing group	007	Lux, L
Company code	1000	IDES AG
Movement type	501	Receipt w/o purchase order into warehouse
Storage location	0001	Material stores

Entering the Goods Receipt Without the Purchase Order

Entering the Goods Receipt Without the Purchase Order

Use

In this process step, you order materials that will later from part of the material stock you require to run this process.

Procedure

1. Call up the transaction as follows:

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

2. Enter the following data:

Field	Data
Movement type	501
Plant	1100
Storage location	0001

3. Choose .

4. Enter the following data:


Field	Data
Material	AI-1201
Quantity	2000

5. Choose .

6. If a dialog box appears, choose Yes.

7. Enter a value in the *Value* field that lies within the defaulted tolerance levels. In this case, you could enter a value of 50, as the tolerances lie between 40 and 60.



To display the tolerance levels, position your cursor on the *Value* field, then choose the F4 input help. In the dialog box, you see the tolerance range. To quit the dialog box, choose .

8. Choose .

The system assigns a batch number.

9. Choose .

10. Choose .

The system confirms the transaction and assigns a document number.

Entering the Goods Receipt Without the Purchase Order

Ordering an Active Ingredient


Ordering an Active Ingredient



Procedure

1. Call up the transaction as follows:


Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Create → Vendor/Supplying Plant Known</i>
Transaction Code	ME21N, SPRO

2. Enter the following data:


Field	Data
	Standard PO
Vendor	1014 or Herrmann & Riemer
Document date	Today's date (default)

3. Choose .
4. If required, you can expand the header data area, by choosing  *Header*.
5. On the *Org.data* tab page, enter the following data:

Field	Data
Purchasing org.	1000 (IDES Germany)
Purchasing group	007 (Lux, L)
Company code	1000 (IDES AG)


6. If necessary, expand the item overview area, by choosing  *Item overview*.
7. Enter the following data:


Field	Data
Material	AI-1201 (Mixture Orange 334)
PO quantity	40
C (Category of delivery date)	D (Day format)
Delivery date	2 weeks from today
Net price	10
Currency	DEM
Plant	1100 or Berlin
Storage location	0001 or material storage

8. Choose .

Ordering an Active Ingredient



It is possible that the material already has an info record, which overwrites the amount you have just entered. If necessary, correct the net price, then choose .


- 9. If necessary, you can expand the item detail area, by choosing  *Item detail*.
- 10. On the *Invoice* tab page, select *GR-based IV* (goods-receipt-based invoice verification).
- 11. On the *Delivery* tab page, enter the following data:

Field	Data
Overdeliv.tol.	50
Underdeliv.tol.	50

- 12. Choose .



The system confirms the posting and assigns a purchase order number. Make a note of this number.



- 13. Choose .






Before you can post the goods receipt for the ordered material component, you need to reset the price control for material type *Raw material* from *V* (moving average price) to *S* (standard price) in Customizing. This ensures that the batch can be posted at the standard price. To do this, proceed as follows:

- 14. Call up the transaction as follows:

Menu Path	<i>Tools → Accelerated SAP → Customizing → Edit Project</i>
Transactioncode	SPRO; OSM2


- 15. Choose  *SAP Reference IMG*.
- 16. Choose *Logistics General → Material Master → Basic Settings → Material Types → Define Attributes of Material Types*.
- 17. In the *MTyp* column, scroll down until you see *ROH* (raw material), then select this entry.
- 18. Choose .
- 19. On the *Valuation* screen area, in the *Price control* field, choose the F4 input help to select *Standard price*.

You do not need to specify a mandatory price control. The price control appears in the material master as a default value, which you can overwrite, if required.


- 20. Choose . You have now created a transport request.
- 21. In the dialog box choose .
- 22. In the *Short description* field, enter an appropriate text.
- 23. Choose .

Ordering an Active Ingredient

In the *Request* field, you see the request number.

24. Choose .

In the status bar, the system confirms the transaction.

25. Choose .

Posting the Goods Receipt for an Active Ingredient

Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Receipt → For Purchase Order → PO Number Known.</i>
Transaction Code	MIGO

2. Enter the following data:

Field	Data
Purchase order	Your purchase order number

3. Choose .

The system copies the header data of the purchase order into the header data area of the GR document.

The purchase order items are transferred to the item overview.

The PO number you entered appears in the *Current purchase order* field, and the *PO number* field is once again ready to accept input.

If you click on individual items, the system displays an item data screen (allowing you to change the incoming quantity, for example).

4. In the header data area of the *General* tab page, enter the following data:

Field	Data
Document date	Today's date (default)
Posting date	Today's date (default)

5. Select your item, then choose the *Where* tab page at the bottom of the screen to check your organizational data.

6. If necessary, enter the following data on the *Where* tab page in the item details area:

Field	Data
Movement type	101 (Goods receipt)
Storage location	0001 or outbound warehouse

No values have been entered here. This is because the active ingredient proportion is only determined during the quality inspection, which is triggered by the goods receipt posting. To confirm that the material is in the quality inspection phase, check that *Quality inspection* has been entered in the *Stock type* field.

7. Choose the *Qty* tab page.

The system adds the base unit of measure of the active ingredient (kg) to the goods receipt unit of measure.

8. In the item overview area, select *OK* for your item.


Posting the Goods Receipt for an Active Ingredient

If the *OK* indicator in the item overview area is not active, either close the item detail area or select *Item OK* at the bottom of the item detail area.

9. Choose *Post*.



The system confirms the posting and assigns a material document number. Make a note of this number.

10. Choose .




Displaying the Purchase Order History


Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Display</i>
Transaction Code	ME23N



If your purchase order is not displayed, you can use the document overview to select purchase orders and display them on the right side of the screen. If necessary, open the document overview by choosing *Document Overview On*. In the document overview, choose *Purchase order* by clicking the  icon. In the *Vendor* field, enter the value 1014, then choose . The system now lists all of the PO document numbers found for vendor 1014. Select your PO number, then choose . The system copies your purchase order into the right side of the screen.

2. If necessary, choose  *Item details* to expand the item detail area.
3. Choose the *Purchase order history* tab page.

On the *PO history* tab page, the system displays the history of receipts of goods and invoices relating to the PO. If you double-click on a document number, you can display the material document or the accounting document.

The system displays the quantity and value of the components provided to the subcontractor.

4. Choose .

Displaying the Valuation Prices of the Material Components

Displaying the Valuation Prices of the Material Components

Use

You now display the valuation price of the material component.

Procedure

1. Call up the transaction as follows:


Menu Path	<i>Logistics → Central Functions → Batch Management → Batch-Specific Units of Measure → Standard Price → Display</i>
Transaction Code	MWB3

2. Enter the following data:

Field	Data
Material	AI-1201 (Mixture Orange 334)
Plant	1100 (Berlin)
Proportion/product UM	KI1 (Unit of measure of the active ingredient)

3. Choose .

Check the data in the *Current proportion valuation* section.

4. Choose .

Displaying the Batch Valuation Record

Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Material Master → Material → Display → Display Current</i>
Transaction Code	MM03

2. Enter the following data:

Field	Data
Material	AI-1201 (material components)

3. Choose *Select view(s)*.
4. In the *Select View(s)* dialog box, select *Accounting 1*, then choose ✓.
5. In the dialog box, enter the following data:

Field	Data
Plant	1100 (Berlin)

6. In the valuation type field, choose the F4 input help to select the movement type (batch type).



Make a note of this number.

7. To adopt the valuation type, choose ✓.
8. In the dialog box, choose ✓.
9. Choose 🗨️.

Entering the Results of the Quality Inspection

Entering the Results of the Quality Inspection

Procedure

1. Call up the transaction as follows:


Menu Path	<i>Logistics → Quality Management → Quality Inspection → Inspection Result → For Operation → Record</i>
Transaction Code	QE01, QA11

2. In the *Inspection lot* field, choose the F4 input help.


3. Enter the following data:

Field	Data
Material	AI-1201
Plant	1100

4. Choose .

On the  *Material* tab page, you see the selected inspection lot number with today's date. Make a note of this number.

5. Select your inspection lot number.

6. Choose .

7. Choose .

8. Enter a value in the *Results* field that varies from the planned value of 40, but still lies within the tolerance value (you can see the planned value in the material master under *Extras → Prop./Product UM*). In this case, for example, you could enter a value of 50, as the tolerances lie between 40 and 60%).

9. Choose .

10. Choose .

11. From the *Inspection lot* node, choose *Usage Decision → Record*.

12. Enter the number of your inspection lot.

13. Choose .



You can use the F4 input help for *Material/component* and *Plant* to display all of the inspection lots you have not yet posted.

14. In the *UD-Code* for the usage decision, enter A2.


15. Choose .

A dialog box appears, which informs you that the purchase order history for the inspection lot is still to be processed.

16. To confirm the information, choose .

Entering the Results of the Quality Inspection

In the status bar, the system confirms that the data have been saved.

17. Choose .

Checking the Batch Classification

Checking the Batch Classification



Use

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Material Master → Batch → Display</i>
Transaction Code	MSC3N

2. Enter the following data:

Field	Data
Material	Ai-1201
Batch	Your batch number
Plant	1100 (Berlin)
Storage location	0001 (material warehouse)

3. Choose .
4. Choose the *Classification* tab page.
You now see the results of the quality inspection.
5. Choose .

Displaying the Actual Value of the Batch


Use

1. Call up the transaction as follows:



Menu Path	<i>Logistics → Materials Master → Material → Display → Display Current</i>
Transaction Code	MM03

2. Enter the following data:

Field	Data
Material	Ai-1201

3. Choose *Select view(s)*.
4. In the *Select View(s)* dialog box, select *Accounting 1*, then choose .
5. In the dialog box, enter the following data:

Field	Data
Plant	1100 (Berlin)
Valuation type	Your batch number

6. Choose .
- You now see the required data in the *Accounting 1* view.
7. Choose .

Adjustment Posting for the GR Inspection Lot

Adjustment Posting for the GR Inspection Lot

Use

You now enter an adjustment posting for the goods receipt that records the difference between the planned value of the active ingredient (40) and the actual value posted. You then display the purchase order history.

Procedure

5. Call up the transaction as follows:

Menu Path	<i>Logistics → Central Functions → Batch Management → Batch-Specific Units of Measure → Subsequent Adjustment f. Goods Receipt → Enter With Ref. to Insp.Lot</i>
Transaction Code	MWBQ;

6. If required, enter the inspection lot number.

7. Choose .

The system confirms the adjustment posting.


8. Choose .


9. Choose .

10. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Display</i>
Transactioncode	ME23N



If your purchase order is not displayed, choose . In the dialog box, enter your PO number, then choose *Other purchase order*.

11. If necessary, choose  *Item detail* to expand the item detail area.

12. Choose the *Purchase order history* tab page.

You can now see your purchase order.

13. Choose .

Invoice Verification

Procedure

1. Call up the transaction as follows:


Menu Path	From the <i>Purchase Order</i> node, choose <i>Follow-On Functions</i> → <i>Logistics Invoice Verification</i>
Transaction Code	MIRO;MR3M

2. Choose *Edit* → *Switch company code*.

In the dialog box, the system displays the company code that is currently active for invoice verification. This is the company code last used by the user.

3. If necessary, enter the following data:

Field	Data
Company code	1000

4. Choose .
5. In the field directly above and to the left of the item overview, use the input help to choose *Purchase order/scheduling agreement* (if it does not already appear as the default text).

You can also use this activity to enter invoices with reference to a delivery note, for example. The system proposes the value last entered by the user in each case.

6. On the *Basic Data* tab page of the header data area, enter the following data:

Field	Data
Invoice document date	Today's date
Posting date	Today's date (default)
Tax amount, right-hand field	VN (Domestic input tax 16%)
To the right of the <i>Purchase order/scheduling agreement</i> input field	Your purchase order number

7. Choose .



In the item overview, the system displays the purchase order data, as well as the net amount in the balance field that is required to calculate the gross amount. The traffic light for the *Balance* field is red.

The value of the goods delivered plus tax (in Europe, VAT) is normally entered on the invoice sent to you by the vendor. In this process, we simulate this procedure and determine the invoice amount ourselves.

8. On the *Basic Data* tab page, enter the following:

Field	Data
<i>Calculate tax</i>	Select


Invoice Verification




When you activate *Calculate tax* the system displays the gross amount in the balance field. The corresponding tax portion appears in the *Tax amount* field.

If you have selected the tax code *No tax procedure*, or *A/PSales tax exempt*, the *Tax amount* field contains the value 0. In this case, the *Balance* field contains the net amount.

9. On the *Basic Data* tab page, enter the following:

Field	Data
Amount	Gross amount determined
 In the invoice item	Select

10. Choose .




When you confirm your entries, the traffic light to the left of the *Balance* field changes to green.

In this example, we assume that the invoiced amount equals the calculated amount.

11. Choose .

The system confirms with the message *Document no. ### created*.



The invoice is initially blocked for payment. Possible reasons include variances (settlement date too early, for example), or sporadic "control blocks". From a logistical perspective, the procurement process has been successfully completed. To display blocking reasons on the *Post Invoice Document: Initial Screen* choose *Invoice document* → *Display*. The *Invoice/ Credit Memo ###, Display Item List* screen appears, showing the invoice items. Click  twice. The blocking reasons are now listed in the line item.

Possible reasons for blocking an invoice include:

M	Quantity variance	Too little delivered
P	Price variance	Price/invoice amount too high
D	Delivery date variance	Delivery too early/too late

12. Choose .


Displaying the Purchase Order History



Procedure

14. Call up the transaction as follows:

Menu Path	From the <i>Purchase Order</i> node, choose <i>Display</i>
Transaction Code	ME23N



If your purchase order is not displayed on the *Standard PO ### Created by <User>* screen, choose . In the *Select Purchase Order* dialog box, enter your PO number, then choose *Other purchase order*.

15. If necessary, choose  *Item details* to expand the item detail area.
16. Choose the *Purchase order history* tab page.
17. Choose  until the overview tree appears.

Managing Active Ingredients, Process Orders and Order Costing

Managing Active Ingredients, Process Orders and Order Costing

Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Production-Process → Process Order → Process Order → Create → With Material</i>
Transaction Code	COR1

2. Enter the following data:

Field	Data	Description
Material number	Ai-1200	Semi-finished product Ai-1200
Production plant	1100	Berlin
Process order type	Pi01	Internal number assignment


3. Choose .


4. Enter the following data:

Field	Data
Total quantity	80 KG
Start	Today's date

5. Choose .

The order is automatically scheduled.

6. To determine the costs for this process order, choose .

The system confirms that the costs have been determined. Choose .

7. To display the detailed costs, choose *Goto → Costs → Itemization*.

8. Choose .


9. Choose  *Materials*.

The system displays the two material components that comprise semi-finished product Ai-1200.

10. Select component *AI-1201*.







11. To execute batch determination for this component, choose .

To skip any information or warning messages that may appear, choose .

12. Choose  *Adopt*.

13. Select your batch.

Managing Active Ingredients, Process Orders and Order Costing

14. To display the quantity conversion for the batch of material component Ai-1201, select the batch, then choose *Material* → *Quantities / measures* → *Quantity conversion* .
15. Choose  until the *Create Process Order: Header - General Data* screen appears.
16. To determine the costs for this process order again, choose .
To skip any warning messages, choose  .
17. To display the detailed costs, choose *Goto* → *Costs* → *Itemization*.
18. Choose .
19. To release the process order, choose .
20. Choose *Release order*.
21. Choose .
To skip any warning messages, choose Yes.



The system confirms the posting and assigns an order number. Make a note of the document number that appears in the status line for use in a subsequent process step.

22. Choose .

Material Consumption for the Process Order

Material Consumption for the Process Order

Procedure

1. Call up the transaction as follows:

Menu Path	From the <i>Materials Management</i> node, choose <i>Inventory Management</i> → <i>Goods Movement</i> → <i>Goods Issue</i> .
Transaction Code	MB1A, MB31


2. Enter the following data:

Field	Data	Description
Movement type	261	Goods issue for the order
Plant	1100	Berlin
Storage location	0001	Outbound delivery warehouse


3. Choose *Goods issue* → *Create w. reference* → *For order*.

4. In the dialog box, enter the following data:

Field	Data	Description
Order	Your order number.	You can also search for the order using the F4 input help
Material / quantity	Ai-1201	
Storage location	0001	Outbound delivery warehouse

5. Choose .

6. The system defaults both material components. Select item Ai-1201, then choose .

To skip any warning messages, choose .


7. Choose .


8. Choose .

9. To enter the goods receipt of the semi-finished product, choose *Goods Movement* → *Goods Receipt* → *For Order*.

10. Enter the following data:


Field	Data
Movement type	101
Order	Enter your document number, or search via the F4 input help

11. Choose .

12. To copy the default values to the entry screen, choose .

13. In the dialog box, choose Yes.


Material Consumption for the Process Order

To skip any warning messages, choose .





When you save this document, you need to enter a characteristic value for the batch created and stored for this GR.


14. In the *Value* field, enter a value (for example, 70) that lies within the defaulted tolerance levels. To display the tolerance range, choose the F4 input help.

15. Choose  to confirm your input.




To skip any warning messages, choose .

16. Choose  until the *Goods Receipt for Order: Overview ###* screen appears.


17. Choose .



To skip any warning messages, choose .



The system confirms the posting and assigns a document number. Make a note of the number that appears in the status bar.

18. Choose .

Creating a Production Order

Creating a Production Order

Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Production → Production Control → Order → Create → With Material</i>
Transaction Code	CO01

2. Enter the following data:

Field	Data	Description
Material	Ai-1000	Or search using the F4 input help
Production plant	1100	Berlin
Order type	PP01	Standard production order With internal number assignment
You can ignore the remaining fields		

3. Choose .


4. Enter the following data:

Field	Data	Description
Total quantity	80	Liters (L)
Start	Today's date	The start date for the production order is today
Type	Forwards	Forwards (the finish date for the production order is to be determined by the system)
You can ignore the remaining fields		

5. Choose .

The system schedules the order and determines the probable finish date.




To skip any information messages, choose .


6. Choose .

7. Select the item of the material component (AI-1200) required to make the finished product.


8. Choose .




To skip any warning messages, choose .


9. Choose  Copy.



To skip any warning messages, choose .


10. Select your batch.

11. To release your order, choose .


12. Choose .




The system confirms that the order has been saved.

To skip any warning messages, choose .

Make a note of the order number.

13. Choose .

To skip any warning messages, choose .

Goods Receipt for the Production Order

Goods Receipt for the Production Order


Procedure

1. Call up the transaction as follows:


Menu Path	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Issue → For Order.</i>
Transaction Code	MB31

2. Enter the following data:

Field	Data
Movement type	101
Order	Your order number.
Plant	1100

3. Choose .

4. Choose .


To skip any warning messages, choose .

5. In the *Value* field, enter a value (for example, 0.1) that lies within the defaulted tolerance levels.

You can use the F4 input help to see the tolerance range.

6. Choose .

7. Choose .

To skip any warning messages, choose .

In the status bar, the system confirms that document ### has been posted. Make a note of the document number.

8. Choose .

Inventory Corrections for the Finished Product

Use

At the time of the GR posting, the stock of the finished product reflects the planned value of the stock. This now needs to be adjusted.


Procedure

1. Call up the transaction as follows:

Menu Path	From the <i>Inventory Management</i> node, choose <i>Environment</i> → <i>Stock</i> → <i>Stock/Requirements list</i> .
Transaction Code	MD04


2. On the *Individual access* tab page, enter the following data:

Field	Data
Material	Ai-1000
Plant	1100




3. Choose .






You now see the current stock available.

4. Choose  to open a new session.
5. Call up the transaction as follows:

Menu Path	<i>Logistics</i> → <i>Materials Management</i> → <i>Material Master</i> → <i>Material</i> → <i>Change</i> → <i>Immediately</i>
Transactioncode	MM02

6. Enter material number AI-1000.
7. Choose *Select view(s)*.
8. In the dialog box, select *Accounting 1*.
9. Choose .
10. In the *Plant* field, enter 1100.
11. Choose .
12. Choose  *Additional data*.

You see the additional data on the *Short text* tab page.

13. Choose  the *Proportion/product UM* tab page.
14. Check that in the *Proportion unit* screen area, the *LUn* field has been selected. Choose .
15. Choose .

Inventory Corrections for the Finished Product

You now carry out the inventory correction.

16. Call up the transaction as follows:

Menu Path	<i>Logistics → Central Functions → Batch Management → Batch-Specific Units of Measure → Determine Inventory Correction Factors</i>
Transactioncode	MWBK

17. Enter the following data:


Field	Data	Description
Material	AI-1000	Or search using the F4 input help
Plant	1100	Berlin
Storage location	0001	Outbound delivery warehouse
Online processing	Select <i>Maintain</i>	If you do not select this, only display is possible
You can ignore the remaining fields		

18. Choose .

19. Choose .

The correction is saved.

20. To close the active session, choose .

21. Choose .

In the *Available* field, you now see the adjusted value/stock.

22. Choose .

Selling the Finished Product

Procedure

1. Call up the transaction as follows:

Menu Path	From the <i>Logistics</i> node, choose <i>Sales and Distribution</i> → <i>Sales</i> → <i>Order</i> → <i>Create</i>
Transaction Code	VA01

2. To create a standard order, enter the following data:

Field	Data	Description
Order type	OR	Standard order
Sales organization	1020	Berlin, Germany
Distribution channel	22	Industrial consumer
Division	00	Cross-divisional
You can ignore the remaining fields		

3. Choose .

4. Enter the following data:

Field	Data	Description
Sold-to party	1100	Customer
PO number	123	The number used by the customer to uniquely identify their purchasing document (for example, an inquiry or purchase order)
Req.deliv.date	Any	
Material	Ai-1000	Finished product
Order quantity	2	
UN (Unit of measure)	L	Liter
You can ignore the remaining fields		

5. Choose .

6. Select the item of the finished material.

7. Choose .


8. Choose .

9. Choose .



The system confirms that *Standard order ###* has been saved. Make a note of the standard order number.

Selling the Finished Product

10. Choose .

Delivery for the Standard Order

Procedure

1. Call up the transaction as follows:


Menu Path	From the <i>Sales and Distribution</i> node, choose <i>Shipping and Transportation</i> → <i>Outbound Delivery</i> → <i>Create</i> → <i>Single Document</i> → <i>With Reference to Sales Order</i>
Transaction Code	VL01N, LT03

2. On the *Create Outbound Delivery with Order Reference* screen, enter the following data:

Field	Data	Description
Shipping point	1100	Shipping point, Berlin
Selection date	4 weeks from today's date	
Order number	The number of the standard order	Use the F4 input help
You can ignore the remaining fields		

3. Choose .

When you confirm your entry, the system carries out an automatic batch determination for your finished product.

4. Select the item of the finished material.
5. To display the result of the batch determination, choose  *Batch split*.
6. To create a transfer order, choose *Subsequent functions* → *Create transfer order*.
7. To switch to the subsequent function, in the dialog box choose *Yes*.
8. On the *Create Transfer Order for Delivery Note: Initial Screen*, enter the following data:

Field	Data	Description
Warehouse number	011	Lean warehouse, Berlin
Plant	1100	Berlin
Delivery	Delivery number	Use the F4 input help
Foreground/backgrnd	Background	Background processing
Adopt picking quantity	2	Adopt quantity and post GI
You can ignore the remaining fields		

9. Choose .

The transfer order is created.

10. Choose .

Delivery for the Standard Order


Billing for the Standard Order


Procedure

1. Call up the transaction as follows:


Menu Path	From the <i>Sales and Distribution</i> node, choose <i>Billing</i> → <i>Billing Document</i> → <i>Create</i>
Transaction Code	VF01

2. Select your document.

3. Choose .

4. Choose .

The system creates the invoice document.

5. Choose .

Resetting the Customizing Settings

Resetting the Customizing Settings



Use

Once you have completed the process, you need to undo the settings you made in Customizing. The price control for material type *Raw material* must be changed from S (Standard price) to V (moving average price).




Procedure

1. Call up the transaction as follows:

Menu Path	<i>Tools → AcceleratedSAP → Customizing → Edit Project</i>
Transactioncode	SPRO

2. Choose  *SAP Reference IMG*.
3. Choose *Logistics General → Material Master → Basic Settings → Material Types → Define Attributes of Material Types*.
4. In the *MTyp* column, scroll down until you see *ROH* (raw material), then select this entry.
5. Choose .
6. On the *Valuation* screen area, in the *Price control* field, choose the F4 input help to select *Moving average price/periodic unit price*.

You do not need to specify a mandatory price control. The price control appears in the material master as a default value, which you can overwrite, if required.

7. Choose . You have now created a transport request.
8. In the dialog box choose .
9. In the *Short description* field, enter an appropriate text.
10. Choose .

In the *Request* field, you see the request number.

11. Choose .

In the status bar, the system confirms the transaction.

12. Choose .

Valuation For A Single Batch

Purpose

If a material is subject to split valuation, the material is managed in different sub-stocks, where each sub-stock is valued separately.

Every transaction that is relevant for the valuation – goods receipt, goods issue, invoice receipt or physical inventory – is performed at sub-stock level.

When you process one of these transactions, you must always enter the sub-stock that should be used. In this way, the value change is limited to the sub-stock you choose. All other sub-stocks remain unchanged.

The total stock and the sub-stocks are both updated. The value of the total stock is calculated as the sum of the stock values and stock quantities of all sub-stocks. Valuation for a single batch is a special form of valuation. In valuation for a single batch, one valuation record exists for each batch.

In the following exercises you will create two purchase orders with different prices for the same material. You then post the goods receipt to different batches. You then check the prices at plant level and batch level.

You can find more information about this process under [i \[Page 44\]](#).

Process Flow

You can find the data for this process under [? \[Page 45\]](#).

1. [Creating a Purchase Order for the Material \[Page 46\]](#)
2. [Creating the Second Purchase Order with a Different Price \[Page 48\]](#)
3. [Posting the Goods Receipt for the Purchase Order \[Page 50\]](#)
4. [Displaying the Accounting Data for Plant Level or Batch Level \[Page 52\]](#)
5. [Valuation Record of the Material: Overview \[Page 53\]](#)

Additional Process Information

Additional Process Information

Information about split valuation

For certain materials, it is necessary to value the different stocks separately in a special valuation area. There can be several reasons for this:

- The material comes from different sources.
- The material has different quality levels.
- The material has different statuses.
- Differentiation between materials produced in-house, and materials produced externally.
- Differentiation between different deliveries.



Note that you must make the following prerequisite settings in the system:

- *Material Master* → *Accounting View*
- The *Valuation Category* indicator is set to X (autom. Batch).
- The *Price Control* indicator is set to V (Moving average price).
- The accounting view is displayed in the *Display Accounting Data For Plant Level Or Batch Level* process step.

Data Used During This Process

Field	Data	Description
Currency	EUR	
Material number	CH_1103	Printex
Movement type	101	Goods receipt for purchase order
Order type	NB	Standard purchase order
Plant	1100	Berlin
Purchasing group	025	Bering, H.
Purchasing organization	1000	IDES Deutschland
Company Code	1000	IDES AG
Storage location	0001	Storage location
Vendor account (1.)	1060	Chemische Werke Halle
Vendor account (2.)	1032	Wesson Ltd.

Creating A Purchase Order For The Material

Creating A Purchase Order For The Material


1. Call up the transaction as follows:



Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Create → Vendor/Supplying Plant Known</i>
Transaction Code	ME21N

You now have the option of setting default entries for the PO document. To do this, choose [Default Settings for Order Document Fields \[Ext.\]](#).


If you do modify your personal settings, this could mean that the entries you see on your screens might differ from those described in the IDES processes. To avoid this situation, when you have completed this process we strongly advise you to reset any changes you make to your personal settings.

2. Enter the following data:

Field	Data
	Standard PO
Vendor	1060
Document date	Today's date

3. Choose .
4. If required, you can expand the header detail area by choosing  *Header*.
5. On the *Org. Data* tab of the header data area, use the F4 input help to enter the following data:


Field	Data
Purchasing org.	IDES Germany
Purchasing group	Bering, H.
Company code	IDES AG

6. If required, you can expand the item overview area, by choosing  *Item overview*.
7. Enter the following data:

Field	Data
Material	CH_1103
PO quantity	1000
C (Category of delivery date)	D
Delivery date	One month from today's date
Net price	20
Currency	EUR
Plant	1100

Creating A Purchase Order For The Material



Storage location	0001
------------------	------

8. Choose .




It is possible that the material CH_1103 already has an info record that overwrites the amount you have just entered. If necessary, correct the net price, then choose



9. If required, you can expand the item detail area by choosing  *Item detail*.
10. On the *Invoice* tab page, select *GR-based IV* (Goods receipt based invoice verification).
11. Choose .



The system confirms the transaction and displays the purchase order number. Make a note of this number.

12. Choose  until the overview tree appears.


Creating The Second Purchase Order With A Different Price


Creating The Second Purchase Order With A Different Price


13. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Create → Vendor/Supplying Plant Known</i>
Transaction Code	ME21N

14. Enter the following data:

Field	Data
	Standard PO
Vendor	1032
Document date	Today's date

15. Choose .

16. If required, you can expand the header detail area by choosing  *Header*.


17. On the *Org. Data* tab of the header data area, use the F4 input help to enter the following data:

Field	Data
Purchasing org.	IDES Germany
Purchasing group	Bering, H.
Company code	IDES AG

18. If required, you can expand the item overview area by choosing  *Item overview*.

19. Enter the following data:

Field	Data
Material	CH_1103
PO quantity	1000
C (Category of delivery date)	D
Delivery date	One month from today's date
Net price	25
Currency	EUR
Plant	1100
Storage location	0001



20. Choose .



Creating The Second Purchase Order With A Different Price


It is possible that the material CH_1103 already has an info record that overwrites the amount you have just entered. If necessary, correct the net price, then choose



21. If required, you can expand the item detail area by choosing  *Item detail*.
22. On the *Invoice* tab page, select *GR-based IV* (Goods receipt based invoice verification).
23. Choose .



The system confirms the transaction and displays the purchase order number. Make a note of this number.

24. Choose  until the overview tree appears.

Posting The Goods Receipt For The Purchase Order

Posting The Goods Receipt For The Purchase Order

1. Call up the transaction as follows:

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

2. Enter the following data:

Field	Data
Purchase order	Number of your first purchase order

3. Choose .

The system copies the header data of the purchase order into the header data area of the GR document.

The purchase order items are transferred to the item overview.

The PO number you entered appears in the *Current purchase order* field, and the *PO number* field is once again ready to accept input.

If you click on individual items, the system displays an item data screen (allowing you to change the incoming quantity, for example).

4. In the header data area of the *General* tab page, enter the following data:

Field	Data
Document date	Today's date
Posting date	Today's date

5. Select your item, then choose the *Wk* tab page at the bottom of the screen to check your organizational data.

6. Enter the following data:


Field	Data
Movement type	101
Plant	1100
Storage location	0001

7. Choose the *Batch* tab page.

8. Choose *Classification*.

9. For the characteristic *Color Pigment*, select the value *White* using the F4 input help.

10. Choose .


11. To confirm your entries, choose .



Posting The Goods Receipt For The Purchase Order

If stocks of the material are low, or the material is missing, then the system displays a message informing you that the shortfall quantity control has been notified. Acknowledge this message.


If you receive a message concerning a price change, confirm the message to accept it.

12. Choose .

The system has allocated a batch number to the item.

13. Set the *Item OK* indicator for your item in the item overview area.


If the *OK* indicator in the item overview area is not active, either close the item detail area or select *Item OK* at the bottom of the item detail area.

14. Choose .



The system confirms the posting and assigns a material document number. Make a note of this number.

15. Repeat the process steps 2 – 14 for your second purchase order.

16. Choose  until the overview tree appears.

Displaying The Accounting Data For Plant Level Or Batch Level



Displaying The Accounting Data For Plant Level Or Batch Level

1. Call up the transaction as follows:


Menu Path	From the <i>Materials Management</i> node, choose <i>Material Master</i> → <i>Material</i> → <i>Display</i> → <i>Display Current</i>
Transaction Code	MM03

2. Enter the following data:

Field	Data
Material	CH_1103




3. Choose .
4. In the *Select View(s)* dialog box, select *Accounting 1*, then choose .
5. In the *Organizational Levels* dialog box, enter the following data:

Field	Data
Plant	1100

6. Choose .



Note the *Moving Average Price* on the *Display Material CH_1103 (Raw material)* screen.

7. Choose  Organizational Levels.
8. In the *Organizational Levels* dialog box, in the *Valuation type* field, choose the input help.
9. Select a batch and choose .
10. In the *Organizational Levels* dialog box, choose .




Note that the *Moving Average Price* has changed.

11. Repeat steps 7 – 10 for the other batches.



Note the moving prices and the total value. These are different for each batch because the material has been purchased with different prices.

Check the valuations of all batches present for this plant. You can see that the moving price at plant level is the average value of all moving prices at batch level.

12. Choose  until the overview tree appears.


Valuation Record Of The Material: Overview

1. Call up the transaction as follows:


Menu Path	From the <i>Material Master</i> node, choose <i>Others</i> → <i>Materials List</i> .
Transaction Code	MM60

2. Enter the following data:

Field	Data
Material	CH_1103
Plant	1100

3. Choose .

The system displays the valuation records for each batch.

4. Choose  until the overview tree appears.

Quality Management of Batches

Purpose

These processes show you how to inspect, classify, and monitor materials that are managed in batches.

Prerequisites

The data required for this process is already available in the system.

The processes in this process flow can be performed independently of each other. However, we recommend that you perform the processes in the given order.

Process Flow

1. Quality Inspection

This process shows you how to classify materials managed in batches ([Classifying Materials \[Page 55\]](#)).

The specifications from the material classification are used as standard values for the quality inspection ([Material Specification \[Page 60\]](#)).

The inspection results are used in the [classifying batches \[Page 64\]](#) process.

2. [Source Inspection \[Page 68\]](#)

You periodically inspect the stored batch. When the batch reaches its shelf life expiration date, you can post the warehouse stock to blocked stock.

3. [Recurring Inspection \[Page 80\]](#)

You periodically inspect the stored batch.

4. [Quality Certificate \[Page 89\]](#)

You print a certificate with the batch values.

Material Classification

Purpose

You learn how to classify materials that are handled in batches. The basis for this process is the definition of a batch class with class characteristics. A batch can be classified using characteristic values.

Process Flow

You can find the data for this process under [?](#) [Page 56].

1. [Displaying a Batch Class and Class Characteristics \[Page 57\]](#)

You display a batch class. When you display a batch class, you can also see the class characteristics and their value ranges.

2. [Displaying a Material Classification \[Page 58\]](#)

You display the classification data for a material that is managed in batches. You can see that the value ranges of the class characteristics can be individually defined for each material.

3. [Displaying a Batch Classification \[Page 59\]](#)

You display the classification data, that is, the valuation of a specific batch.

Result

You now understand how a material that is managed in batches is classified.

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

Field	Data	Description
Class	QS001	
Class type	023	Batch
Material	QS8X30	Hexagonal head screw M8X30

Displaying a Batch Class and Class Characteristics


Procedure

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Basic Data → Class Characteristic → Class Management</i>
Transaction Code	CL02

2. Enter the following data:

Field	Data
Class	QS001
Class type	023

3. Choose .

The basic data for the class *hexagonal head screws* appears.

4. Choose the *Keywords* tab page.

You can see a list of the keywords according to which you can search for the class.

5. Choose the *Characteristics* tab page.

You can now see a list of the characteristics associated with this class.

6. Select the line with the quantitative *Threaded length* characteristic and choose *Disp. vals.*

The system displays the value range determined when defining the class characteristic for threaded length

7. Choose .


8. Select the line with the qualitative *Electroplating* characteristic and choose *Disp. vals.*

When defining the class characteristic, a selected set from the characteristic attribute catalog was determined as the value set.

9. For the *Selected set* field, choose .

The system displays the value set contained in the selected set.

10. Choose .

11. Choose  until the overview tree appears.

Displaying a Material Classification


Displaying a Material Classification

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Logistics Master Data → Material → Display</i>
Transaction Code	MM03

2. Enter the following data:

Field	Data
Material	QS8X30


3. Choose .

The system asks you to select a view.

4. Select the *General Plant Data / Storage 1* view and choose .

5. In the dialog box, choose .


The storage view appears, and you can see that the *Batch management* indicator is set.

6. To scroll to the left in the view tab pages, choose .

7. Choose the *Classification* tab page.

In the *Assignments* screen area, you can see that the material is part of batch class QS001 (hexagonal head screws).

In the *Values* screen area, you can see that the threaded length for the hexagonal head screw M8X30 is restricted to a value range of 29.0 to 31.0 mm, while a value range of 9.0 to 99.0 mm was determined for the whole class of the class characteristic.

8. Choose  until the overview tree appears.


Displaying a Batch Classification

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Logistics Master Data → Batch → Display</i>
Transaction Code	MSC3N

2. Enter the following data:

Field	Data
Material	QS8X30
Batch	1

3. Choose .


The basic data screen for the batch appears.

4. Choose the *Classification* tab page.

The class characteristics of the batch have specific values or value ranges which reflect the quality of the batch.

5. Choose the *Material data* tab page.

You can see the specifications from the material master record.

6. Choose  until the overview tree appears.

Material Specification

Material Specification

Purpose

You use characteristic values from the material classification as specifications for a quality inspection. The basis for this is the material specification in which the class characteristics have links to the inspection characteristics.

Process Flow

1. [Creating an Inspection Lot for a Batch Specification \[Page 61\]](#)

You create an inspection lot and a new batch.

2. [Displaying an Inspection Specification \[Page 62\]](#)

You display the material specification assigned to the inspection lot. The inspection characteristics in the material specification contain links to class characteristics from the material classification.

Creating an Inspection Lot for a Batch Specification

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Inspection → Inspection Lot → Processing → Create</i>
Transaction Code	QA01


2. Enter the following data:

Field	Data
Material	QS8X30
Plant	1000
Inspection lot origin	05

3. Choose .

4. Enter the following data:

Field	Data
Batch	2
Insp.lot qty	1000


5. Choose .



If this is the first time you are performing this process, the batch that you have entered has not yet been created. In this case the system asks you if you want the batch to be created. In the dialog box, choose Yes.

You can also define the batch later, for example, when you are making the usage decision.

The system now prepares the quality inspection by selecting the inspection specifications and performing the sample calculation.

6. Choose .

Displaying Inspection Specifications



Displaying Inspection Specifications

1. Call the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Inspection → Inspection Lot → Processing → Display</i>
Transaction Code	QA03







2. Enter the following data:

Field	Data
Inspection lot number	The system proposes the number of the inspection lot you last created


3. Choose .
4. In the *Material* line, choose  (*Display material*).
The quality management view of the material master record appears.
5. Choose *Insp. setup*.
In the inspection type overview, you can see detailed information about inspection type 01.
6. Double-click on inspection type 05.
You can see that an inspection with a material specification is selected for this inspection type.



For more information, use the *F1* help.

7. To return to the display of the inspection lot, choose  and then choose .
8. Choose the *Insp. specifications* tab page and then choose  (*Display material specification*).
The characteristic assignment screen of the material specification appears. You can see that two inspection characteristics (each linked to a class characteristic with the same name) have been entered.
9. In the line with the quantitative inspection characteristic *Threaded length*, choose  (*Detail*).
On the details screen, you can see the tolerance range of 29.0 mm to 31.0 mm from the material specification.
10. In the line with the inspection characteristic *Threaded length*, choose  (*Display inspection characteristic*).
The *General data* screen for the inspection characteristic appears.
11. Choose *Quant. Data*.
You can see the tolerance range of 29.5 mm to 30.5 mm for the inspection characteristic. The values from the material classification take precedence over these specifications, because the material specification contains a link to the class characteristic.
12. Choose .

Displaying Inspection Specifications

13. Choose  until the overview tree appears.

Batch Classification

Batch Classification

Purpose

You learn how to enter inspection characteristic values for a batch. The batch is then classified according to these inspection results.

Prerequisites

This process uses data from the material specification process.

Process Flow

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

1. [Entering Inspection Results \[Page 65\]](#)

You enter the data for one quantitative and one qualitative characteristic and make the usage decision.

2. [Displaying a Batch Classification \[Page 67\]](#)

You display the batch that was inspected using the inspection lot. The values of the class characteristics stem from the quality inspection.

Result

The batch is classified.

Entering Inspection Results

7. Call up the transaction as follows:

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

8. Enter the following data:

Field	Data
Plant	1000
Insp. lot origin	05
Material	QS8X30

9. Choose .

The worklist for results recording appears in the left screen area. The inspection lot you created earlier is included in this worklist. You may have to further expand the inspection operation and the inspection characteristics for this lot. A table containing the inspection characteristic overview with entry fields appears in the right screen area.

10. Enter the *Result* 30.1 mm for the *Threaded length* quantitative inspection characteristic.

11. For the *Electroplating* qualitative inspection characteristic, choose the *Result* 'Code C Dull finish, yellowish brown' using the possible entries help.

12. Choose .

The inspection results are saved in the database. However, the batch is not yet classified.

13. In the worklist, double-click the line with the inspection lot number.

The screen on which you enter the usage decision appears.



You can now determine the batch, since you can now enter data in the *Batch* field and know the inspection results.

14. Using the possible entries help, enter the following data:

Field	Data
UD Code	Code A
Shelf life expiration date	Today's date +2 months


15. Choose *Batch condition*.


The system proposes the *Released* batch condition.

16. To adopt the proposal, choose .

The system saves the usage decision and copies the inspection characteristic values into batch classification.

Entering Inspection Results

17. Choose .

18. Choose  until the overview tree appears.


Displaying a Batch Classification

19. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Logistics Master Data → Batch → Display</i>
Transaction Code	MSC3N

20. Enter the following data:

Field	Data
Material	QS8X30
Batch	2
Plant	1000

21. Choose .

The tab page with basic data about the batch appears. You can see that the value in the *Shelf life expiration date* field is the same as the value you entered when you made the usage decision.


You can also see that the batch has been posted to *Unrestricted stock*.

22. Choose the *Material data* tab page.

This tab page contains the specifications from the material classification.

23. Choose the *Classification* tab page.

You can see that the batch is classified according to the results of the quality inspection.

24. Choose  until the overview tree appears.

Source Inspection

Source Inspection

Purpose

In this process you perform a source inspection on goods you have ordered. You classify the prepared batch before goods receipt.

Process Flow

You can find the data for this process under [?](#) [Page 69].

1. [Creating a Purchase Order \[Page 70\]](#)
You order the goods and specify a delivery date.
2. [Creating the Source Inspection Lot \[Page 72\]](#)
You monitor the planned delivery dates and you create an inspection lot data record before the inbound delivery arrives.
3. [Creating a Batch \[Page 74\]](#)
The vendor prepares the goods. It is a new batch. You create a batch data record.
4. [Performing the Source Inspection \[Page 75\]](#)
You enter the inspection results and make the usage decision.
5. [Displaying the Batch Classification \[Page 77\]](#)
6. [Posting a Goods Receipt \[Page 78\]](#)
You post goods receipts for the delivered batch.
7. [Displaying Stock \[Page 79\]](#)

Result

A new batch has been classified according to the results of the source inspection. This new batch is stored in various storage locations.

Data Used During This Process

Field	Data	Description
Vendor	1234	K.F.W. Berlin (German version)
	1235	K.F.W. London (English version)
Purchasing organization	1000	IDES Deutschland
Purchasing group	001	Dietl, B.
Company code	1000	IDES AG
Material	QS8X35	Hexagonal head screws M8X35
Plant	1000	Hamburg
Storage location	0001	Material storage
	0002	Finished goods warehouse

Creating a Purchase Order

Creating a Purchase Order


1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Purchasing → Purchase Order → Create → Vendor/Supplying Plant Known</i>
Transaction Code	ME21N


Documentation explaining the function appears on the left side of the screen.

2. To hide this documentation, choose  *Close*.


The system now stores this setting for your user ID.

To activate the documentation at any time, choose  *Help*.

3. Enter the following data:

Field	Data	Description
 field	Standard PO	
Vendor	1234	K.F.W. Berlin (German version)
	1235	K.F.W. London (English version)
Invoice date	Today's date (defaulted)	

4. Choose .

5. If required, you can expand the area for the item header data, by choosing  *Header*.

6. On the *Org. Data* tab page, enter the following data:

Field	Data	Description
Purchasing org.	1000	IDES Deutschland
Purch. group	001	Dietl, B.
Company code	1000	IDES AG


7. Choose .

8. If required, you can expand the item overview area, by choosing  *Item overview*.


9. Enter the following data:


Field	Data
Material	QS8X35
PO quantity	1000
C (Category of delivery date)	D (Day format)
Delivery date	Today's date +7 days (possible entries help)
Net price	0.10
Plant	1000

Creating a Purchase Order


10. Choose .



It is possible that the material already has an info record, which overwrites the amount you have entered. If required, correct the net price and choose .


11. If required, you can expand the item detail area, by choosing  *Item details*.

12. On the *Invoice* tab page, in the *Tax code* field, enter *V1 (Input tax Domestic 15%)*.

13. Choose .



The system confirms the posting and assigns a purchase order number. Make a note of this number.

14. Choose  until the overview tree appears.

Creating a Source Inspection Lot


Creating a Source Inspection Lot

1. Call up the transaction as follows:



Menu Path	<i>Logistics → Quality Management → Quality Inspection → Worklist → Inspection Lot Creation → Source Inspection → Trigger Manually.</i>
Transaction Code	QI07

2. Enter the following data:


Field	Data
Vendor	1234 (German) 1235 (English)
Material	QS8X35
Plant	1000
Opening period (D)	30 (default)

3. Choose .

The system displays a worklist for the source inspections that have yet to be processed.

4. Select your purchasing document, then choose  *Insp. lot*.
5. Choose .

The source inspection lot has been created, so the purchasing document disappears from the list.

6. Choose  twice.



Printing the Inspection Instruction

1. To display your inspection lot, call up the following transaction:

Menu Path	<i>From the Quality Inspection node, choose Inspection Lot → Processing → Display</i>
Transaction Code	QA03

2. To confirm the defaulted inspection lot number, choose .

You can identify the displayed inspection lot using the purchasing document number.

3. Make a note of the number of the inspection lot.
4. Choose  *Inspection instruction*.
5. To quit the transaction, choose .

6. Choose *System → Own spool requests*.

The system opens a second session and an overview of your spool requests is displayed.

7. Select script *LV01* and choose .

The system displays the inspection instruction.

8. Close the session.

Creating a Batch


Creating a Batch

7. Call up the transaction as follows:

Menu Path	From the <i>Quality Management</i> node, choose <i>Quality Planning</i> → <i>Logistics Master Data</i> → <i>Batch</i> → <i>Create</i>
Transaction Code	MSC1N


8. Enter the following data:

Field	Data
Material	QS8X35
Batch	3
Plant	1000


9. Choose .

10. Enter the following data:

Field	Data
Date of production	Current date (possible entries help)
Shelf life expiration date	Today's date + 1 year
Next inspection	Today's date + 1 month

11. Choose .

The batch data record has been created. The batch has not been classified and there is no stock for this batch.

12. Choose .


Performing the Source Inspection

1. Call up the transaction as follows:

Menu Path	From the <i>Quality Inspection</i> node, choose <i>Worklist</i> → <i>Results Recording</i>
Transaction Code	QE51N

2. On the *Material* tab page, enter the following data:

Field	Data
Plant	1000
Inspection lot origin	01
Material	QS8X35
Char. filter	1
Inspector	Your name
Start	Current date and time (possible entries help)

3. Choose .

The source inspection lot appears in the worklist. The system immediately makes the inspection characteristics available for processing in the right screen area.

Entering Results

1. In the *Threaded length* line, enter the following data:

Field	Data
Result	35.1

2. In the *Electroplating* line, enter the following data using the possible entries help:

Field	Data
Result	L Polished, yellowish brown

3. Choose .

The system accepts the inspection characteristic results and results entry is complete.


4. Choose .

You are still in the worklist for results recording.

Making the Usage Decision

1. Double-click on the line with your inspection lot in the worklist.

The *Record Usage Decision* screen appears.


2. In the *Batch* field, enter the value 3 and choose .

3. In the *UD-Code* field, enter code A.

4. Choose .

Performing the Source Inspection

The system classifies the batch according to the inspection results and saves the usage decision.

5. Choose  until the overview tree appears.
6. In the dialog box, choose Yes.

Displaying the Batch Classification

1. Call up the transaction as follows:

Menu Path	From the <i>Quality Management</i> node, choose <i>Quality Planning</i> → <i>Logistics Master Data</i> → <i>Batch</i> → <i>Display</i>
Transaction Code	MSC3N

2. Enter the following data:

Field	Data
Material	QS8X35
Batch	3
Plant	1000


3. Choose .
4. Choose the *Classification* tab page.

You can see that the batch was classified according to the inspection results.

Apart from the inspection characteristics, the following class characteristics and values also appear:

Field	Data
Quality score	100
Usage Decision	A (acceptance)

These are general class characteristics. Values can be assigned to them independent of a material specification.

5. Choose  until the overview tree appears.

Posting the Goods Receipt

Posting the Goods Receipt

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Materials Management → Inventory Management → Goods Movement → Goods Movement</i>
Transaction Code	MIGO



2. Enter the following data:

Field	Data
Purchase order	Your purchase order number


3. Choose .

The system copies the header data of the purchase order into the header data area of the goods receipt document.

The purchase order item is copied into the item overview.


4. To distribute the items amongst several storage locations, select the item and choose  (*Distribute quantity*).
5. If the *Tip* dialog box appears, choose .
6. In the dialog box, enter the following data:

Field	Data
Quantity in unit of entry (item line 1)	600
Storage location	0001
Batch	3
Quantity in unit of entry (item line 2)	400
Storage location	0002
Batch	3

7. Choose  *Adopt*.
8. Select the indicator OK for your items in the item overview.



If the OK indicator is not active in the item overview, close the item detail area or set the *Item OK* indicator in the lower part of the item detail area.

9. Choose *Post*.
10. Choose  until the overview tree appears.


Displaying Stock

1. Call up the transaction as follows:


Menu Path	From the <i>Inventory Management</i> node, choose <i>Environment</i> → <i>Stock</i> → <i>Stock Overview</i> .
Transaction Code	MMBE

2. Enter the following data:

Field	Data
Material	QS8X35
Plant	1000
Storage location	Empty
Batch	Empty
Display version	1

3. Choose .

You now see the stocks, subdivided by company code, plant, storage location, and batch.

4. Choose  until the overview tree appears.

Recurring Inspection

Recurring Inspection

Purpose

A batch in storage is periodically inspected.

Prerequisites

You use the batch that you created in the *Source Inspection* process.

Process Flow

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

1. [Control of the Recurring Inspection \[Page 82\]](#)

You define the period of time for the recurring inspection of a material and the precise time for the recurring inspection of a batch.

2. [Triggering a Recurring Inspection \[Page 84\]](#)

You monitor batch deadlines and create inspection lot data records for the recurring inspection for each batch and storage location. Until the inspection is completed, the batch is posted to *Restricted-use* stock.

3. [Inspection Lot Processing \[Page 85\]](#)

You enter the inspection results and make a usage decision for partial stock. Batch deadlines and classification are updated.

4. [Long-Term Inspection \[Page 87\]](#)

For another unit of partial stock, you enter the inspection results for the characteristics that are not subject to a long-term inspection and make the usage decision. The batch is classified according to the inspected characteristics. You then add the results for the characteristics that are subject to a long-term inspection and complete the inspection. The system reclassifies the batch, taking into account the results of the long-term inspection.

Result

The partial stocks of the batch were monitored and reclassified using a periodically recurring inspection.

Data Used During This Process

Field	Data	Description
Material	QS8X35	Hexagonal head screws M8X35
Plant	1000	Hamburg

Control of the Recurring Inspection

Control of the Recurring Inspection

Controlling in the Material Master Record

1. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Logistics Master Data → Material → Display</i>
Transaction Code	MM03

2. Enter the following data:

Field	Data
Material	QS8X35

3. Choose .

The system asks you to select a view.

4. Select the *Quality Management* view and choose .


The system requires you to enter an organizational level.

5. Enter the following data:

Field	Data
Plant	1000

6. Choose .

The *Quality Management* view appears and you can see that the inspection interval is set to 90 days. For more information use the F1 help.

7. Choose  until the overview tree appears.


Controlling in the Batch Data Record

1. Call up the transaction as follows:

Menu Path	From the <i>Logistics Master Data</i> node, choose <i>Batch → Change</i>
Transaction Code	MSC2N

2. Enter the following data:

Field	Data
Material	QS8X35
Batch	3
Plant	1000


3. Choose .

The *Basic data 1* tab page for the batch appears.


4. Check the following entries and add any that are missing:

Control of the Recurring Inspection

Field	Data
Date of production	Today's date -1 month (possible entries help)
Shelf life expiration date	Today's date + 1 year
Next inspection	Today's date + 1 month

5. Choose .

The batch data record has been modified.

6. Choose  until the overview tree appears.

Triggering a Recurring Inspection

Triggering a Recurring Inspection

12. Call up the transaction as follows:

Menu Path	From the <i>Quality Management</i> node, choose <i>Quality Inspection</i> → <i>Worklist</i> → <i>Inspection Lot Creation</i> → <i>Deadline Monitoring</i> → <i>Trigger Manually</i>
Transaction Code	QA07

13. Enter the following data:

Field	Data
Material	QS8X35
Plant	1000
Batch	3

14. In the *Additional goods movement at time of recurring inspection* screen area, enter the following data:

Field	Data
Initial run in days	99
Block batch at lot creation	Set

15. Choose  and then choose  *Execute*.

The system now displays the log of the steps that were performed in the background during the process.


16. Expand the log.

You can see that two inspection lots (one per storage location) were created and that the batch was posted to *Restricted-use* stock.



Instead of blocking the batch at lot creation, you could also have marked the partial stocks as being *In quality inspection*.

Instead of performing stock changes at inspection lot creation, you could also have made stock changes depend on the fact that the deadline for the recurring inspection has already been exceeded.

17. Choose  until the overview tree appears.

Inspection Lot Processing

25. Call up the transaction as follows:

Menu Path	From the <i>Quality Inspection</i> node, choose <i>Worklist</i> → <i>Variants for Results Recording</i> → <i>For All Inspection Lots</i>
Transaction Code	QE72

26. Enter the following data:

Field	Data
Plant	1000
Inspection lot origin	09
Material	QS8X35

27. Choose .

The worklist for results recording appears containing both of your previously created inspection lots.

28. Choose  and then choose .



An overview of the inspection lots and inspection characteristics appears in matrix form, with the inspection lots on the horizontal axis and the inspection characteristics on the vertical axis.



The inspection characteristic *Electroplating* is a long-term characteristic which means that its values are determined using a long-term inspection. You therefore only enter the results for the inspection characteristic *threaded length* and make usage decisions for the inspection lots in advance. You only enter results for the long-term characteristic after the long-term inspection has been completed and then you post the inspection completion.


29. Enter the following data for the inspection characteristic *threaded length*:

Field	Data
Result (first inspection lot)	34.9
Result (second inspection lot)	35.1

30. Choose  Save and then choose .


The system uses icons to show that the values you entered have been accepted.

31. Choose  until the inspection lot overview appears.

32. Select the first inspection lot and choose  *Usage decision (UD)*.

The system warns you that the long-term characteristic *Electroplating* is still open.


33. Choose *Batch status*.

34. Change the batch status from *restricted-use* stock to *unrestricted-use* stock and choose .

Inspection Lot Processing


35. Enter the following data:

Field	Data
UD Code	A2 (possible entries help)


36. Choose .

The usage decision is saved to the database. The batch is classified.

37. Choose  until the inspection lot overview appears.

38. Select the second inspection lot and choose  *Usage decision*.

39. Repeat steps 9 to 12 for the second inspection lot.

40. Choose  until the overview tree appears.

Long-Term Inspection

Entering Results

41. Call up the transaction as follows:

Menu Path	From the <i>Variants for Results Recording</i> node, choose <i>For All Inspection lots</i>
Transaction Code	QE72

42. Enter the following data:

Field	Data
Plant	1000
Insp. lot origin	09
Material	QS8X35
With long-term inspections	set

43. Choose .

The worklist for results recording appears containing both of your previously processed inspection lots.



44. Choose  and then choose .

45. In the dialog box, choose Yes.

An overview of the inspection lots and the long-term characteristic *Electroplating* appears in matrix form, with the inspection lots on the horizontal axis and the long-term characteristic *Electroplating* on the vertical axis.


46. Enter the following data for the *Electroplating* characteristic:

Field	Data
Result (first inspection characteristic)	G bright, yellowish brown (possible entries help)
Result (second inspection characteristic)	L Polished, yellowish brown (possible entries help)

47. Choose  Save and then choose .

The system uses icons to show that the values you have entered have been accepted.

48. Choose  until the inspection lot overview appears.

49. Select the first inspection lot and choose  *Usage decision (UD)*.

You can change the usage decision data on the basis of the results for the long-term inspection.




50. Change the quality score of the inspection lot from 100 to 95.

51. Choose *Complete inspection*.


52. Choose .

The usage decision is saved to the database. The batch is reclassified.

Display Batch Values

53. Choose  until the inspection lot overview appears.
54. Select the second inspection lot and choose  *Usage decision (UD)*.
55. Change the quality score of the inspection lot from 100 to 90.
56. Choose *Complete inspection*.
57. Choose .

The usage decision is saved to the database and the batch is reclassified.

58. Choose  until the overview tree appears.


Display Batch Values

18. Call up the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Planning → Logistics Master Data → Batch → Display</i>
Transaction Code	MSC3N

19. Enter the following data:


Field	Data
Material	QS8X35
Batch	3

20. Choose .

The *Basic data 1* tab page for the batch appears.

21. Choose the *Classification* tab page.

The class characteristics of the batch have the values determined for the last inspection lot.

22. Choose  until the overview tree appears.

Quality Certificates

Purpose

You create a quality certificate to certify the batch values.

Prerequisites

The data required for steps 1 and 2 of the process has already been created. Step 3 of the process uses data from the source inspection or recurring inspection processes.

Process Flow

1. [Creating a Certificate \[Page 90\]](#)

You print a certificate, which certifies the values used to classify a batch.

2. [Creating a Certificate Profile \[Page 91\]](#)

You create your own certificate profile and assign it to the material.

3. [Creating a Certificate According to own Profile \[Page 94\]](#)

You print a certificate according to your own profile.

Creating a Certificate

Creating a Certificate


59. Call the transaction as follows:


Menu Path	<i>Logistics → Quality Management → Quality Certificates → Outgoing → Certificate Creation → For Batch</i>
Transaction Code	QC22


60. Enter the following data:

Field	Data
Material	QS8X30
Batch	1
Sending plant	1000

61. Choose *Choose recipient*.

62. In the dialog box, choose *User-definable address* and choose .

63. Enter your own address and choose .


64. Choose .

65. In the dialog box, enter the following data:

Field	Data
Output device	LP01

66. Choose  *Print preview*.

The system calls up the quality certificate in the print preview. The certificate has a letter header, information about the material and the batch, and the batch characteristics *Threaded length* and *Electroplating* with values from batch classification.

67. Choose  until the overview tree appears.

Cert. Profile

Use

In this step of the process, you copy the certificate profile used in the previous process and change the data.

Procedure

Creation of a Certificate Profile

68. Call the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Certificates → Outgoing → Certificate Profile → Create</i>
Transaction Code	QC01

69. Enter the following data:

Field	Data
Cert. Profile	QS02
CertificateType	E31B (possible entries help)

70. In the *Copy model* screen area, enter the following data:

Field	Data
Cert. profile	QS01
CertificateType	E31B (possible entries help)
Version	1 (possible entries help)

71. Choose .

The system copies the data from the copy model.



If the certificate profile QS02 has already been created, choose a variance key, for example, QS03...

In the *Assigned layout set* screen area, you can see that the form QM_QCERT_01 is used for this certificate profile. This form determines the layout of the quality certificate.

72. To define the content of the certificate, choose  *Characteristics*.


73. Select item 10 *Threaded length* and choose .

74. In the *Insp. spec. origin* field, use the possible entries help to select *Batch specification*.

The tolerance range for threaded length is output on the certificate.

For the electroplating characteristic, you do not want to include the value from batch classification. You want the result of the last quality inspection to appear on the certificate.


Cert. Profile

75. Choose .

76. Select item 20 *Electroplating* and choose  (*Delete line*).


77. Enter the following data instead of the deleted item:

Field	Data
No.	20
Category	Master inspection characteristic (possible entries help)
Plant	1000
Master insp. charac.	Q-0020

78. Choose .


The system proposes suitable values for the remaining fields on the basis of the information you entered.



You can view these proposals individually by choosing . Return to the characteristic data screen.


79. In the next line enter the following data:

Field	Data
No.	30
Category	Class characteristic
Characteristic name	LOBM_UDCODE

80. Choose .

The system proposes suitable values for the remaining fields on the basis of the information you entered.

The usage decision in the batch classification from the last quality inspection will now appear in the certificate.


81. Select item 30 and choose .

82. In the *Short text origin* field, use the possible entries help to select *Certif. profile char.*

83. In the texts screen area, choose *Further texts*.


84. Enter the following data:

Field	Data
Language	EN
Short text	Usage decision

85. Choose  until the *Characteristic Data* screen appears.

86. Choose  (*Release profile*).


87. Choose .

88. Choose  until the overview tree appears.

Assignment of the Certificate Profile


1. Call the transaction as follows:

Menu Path	<i>Logistics → Quality Management → Quality Certificates → Outgoing → Certificate Profile → Assignment → Create</i>
Transaction Code	QC15

2. Choose *Material*, and then choose .

3. Enter the following data:

Field	Data
Material	QS8X35
Profile	QS02

4. Choose .

The system saves the assignment. The certificate profile can now be used for the material.

Creating a Certificate According to Own Profile

Creating a Certificate According to Own Profile


89. Call the transaction as follows:


Menu Path	<i>Logistics → Quality Management → Quality Certificates → Outgoing → Certificate Creation → For Batch</i>
Transaction Code	QC22

90. Enter the following data:

Field	Data
Material	QS8X35
Batch	3
Sending plant	1000

91. Choose *Choose recipient*.

92. In the dialog box, choose *User-definable address* and choose .

93. Enter your own address and choose .

94. Choose .

95. In the dialog box, enter the following data:


Field	Data
Output device	LP01

96. Choose  *Print preview*.

The system calls up the quality certificate in the print preview. The certificate contains the letter header, information about the material and the batch, and the batch characteristics *Threaded length*, *Electroplating*, and *Usage decision*.

The texts of the characteristics originate in the class characteristic, the master inspection characteristic, and the certificate profile.

The values of the characteristics come from batch classification and inspection results.

97. Choose  until the overview tree appears.