

Claim Management



HELP.PSCLM

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Claim Management

Purpose

Things like delivery difficulties, price variations, and unforeseen capacity bottlenecks can cause your project to vary from what you planned. In such cases, the contracting parties need to establish who is responsible for the variance. You can use Claim Management to do this. Claim Management ensures that subsequent claims, resulting from variances, against the contract partner can be prepared and submitted at the appropriate moment, or claims by the contract can be headed off.

The Project System supports Claim Management using a notification type called "claim". You use these notifications to document variances from your project plan, name the person responsible, and initiate follow-up activities. The following are among the points you enter in the claim:

- Cause of the variance
- Person or group responsible
- Costs arising from the variance
- Actions and tasks to be initiated because of the variance

The integration of unit costing with the claim and the link to workflow functions in the R/3 System ensure efficient Claim Management execution.

Features

Creating and Displaying Claims

When you detect a variance from your project plan, you create a claim in the R/3 System or using an Internet application. This means you can document variances either at your R/3 work station, or at any computer that has Internet access. This makes claim entry easy and convenient. You can enter claims at a construction site, when traveling, and so on. The flexible user interface makes things even easier.

See [Creating Claims \[Page 7\]](#) and [Entering Notifications in the Internet \[Ext.\]](#)

You can enter details of the claim using long texts. In addition to the notification header long text, four other long text categories are available. You can use them to structure the information on the claims. For example, you can enter reasons for the variance from the project plan and the action to be taken as a result in different long text types. You can give the long text types any names you like. The facility for accessing information per long text type enables you to target information selection.

See [Entering Notification Long Texts \[Page 15\]](#).

You can add additional, detailed information to the claim in the form of business documents or DMS documents.

You can access all the information you define for a claim at any time, using the R/3 System. You can also access the most important information using the Internet. This ensures that everyone involved in the project can obtain information about claims relating to it.

Claim Management

Processing Claims

As claims usually cause additional costs, you can enter the costs you expect to arise either when you create the claim, or later, when more precise information is available. The following options are available:

- Enter the estimated costs manually.
- Create a unit costing from the claim or link it to an existing unit costing.

You can also enter the costs demanded and accepted manually.

Status management and workflow are two more high-performance tools you can use to process claims in the R/3 System. The link between claim management and status management means that you can make processing of a claim dependent on its status. You might, for example, stipulate that a claim cannot be closed until all the measures relating to it are complete.

See [Status Management for Notifications \[Page 39\]](#) and [Status Management for Measures \[Page 25\]](#)

Using workflow enables you to have information distributed automatically within your business. If, for example, you create a claim that requires approval, a work item automatically appears in the inbox of the person who must give that approval.

See [Approval Requirement for Notifications \[Ext.\]](#), [Using Workflow to Process Notifications \[Ext.\]](#) and [Using Workflow to Process Tasks \[Ext.\]](#)

The system documents all changes to the claim in the action log.

See [Action Log \[Page 17\]](#)

Once you have processed and closed your claim, you can archive it. A deletion program deletes the database records for claims successfully archived.

See [Archiving Claims \[Page 45\]](#)

Evaluating Claims

The worklists for notifications and tasks include an overview of the claims to be processed and the tasks associated with them.

For detailed evaluations of claims, go to the information system and access the overview reports for the claims.

As you can assign the claim to a project or WBS element either when you create the claim or later, you can display all the claims created for a project/WBS element in the information system.

See [Evaluating Claims \[Page 44\]](#)

You can use an evaluation program to display the data for claims already archived.

See [Archiving Claims \[Page 45\]](#)

Creating and Processing Claims

Prerequisites

You can apply the preconfigured settings we supply to Claim Management, so that there is no need for any customizing. However, if the preconfigured settings do not meet your requirements, maintain the following settings before you use Claim Management:

You want to:	What You Should Know	Menu Path
<p>... Define a new notification type [Ext.]</p>	<p>The standard system we deliver contains two types of notification.</p> <p>The claim on customer or vendor is a claim made by your business against another business involved in the project. The claim by customer or vendor is a claim made against your business by another business involved in the project.</p> <p>You can create additional notification types if required.</p>	<p><i>Project System → Claim → Notification → Create Notification Type → Define Notification Types</i></p>
<p>... Define a number range for the notification type</p>	<p>A number range has been assigned to one or more notification types.</p> <p>When you assign a number range to the claim, the procedure depends on whether a number range has already been assigned to a notification type.</p> <p>Number range is already maintained for a notification type Execute transaction SM29. This takes you to the screen <i>Tables - Model Transfer</i>. In the <i>Command File</i> field, enter the file <i>p46c_clm_mel</i>. The system copies the customizing settings, but not the number ranges, from client zero to your client. Go to customizing and maintain the number range for the claim type.</p> <p>No number range has been maintained. Execute transaction QCCN. This takes you to the screen <i>Tables - Model Transfer</i>. The <i>Command File</i> field is already filled. Confirm the prompt. The system copies the number range object from client zero to your client. Now carry out transaction SM29, proceeding as described above.</p>	<p><i>Project System → Claim → Notification → Create Notification Type → Define Number Ranges</i></p>


Creating and Processing Claims

... Configure screen templates for your notification types	<p>The information groups in the notification are assigned to particular registers and screen areas.</p> <p>Configure the screen templates to suit your requirements.</p>	<i>Project System → Claim → Notification → Create Notification → Notification Type → Define Screen Templates</i>
... Maintain catalogs for claim entry	<p>When creating a claim, you need to fill a number of input fields.</p> <p>The system offers a number of input options for these fields. The number and type of input options is determined by catalogs, which you create yourself.</p> <p>For example, you create a catalog that lists situations that can lead to variances from the project plan (such as human error or force majeure) or possible error locations (such as construction sites).</p>	<i>Project System → Claim → Notification → Create Notification → Notification Type → Maintain Catalogs</i>
... Define a report structure	<p>As your catalogs can be used for all notification types in the R/3 System, the code groups permitted in each catalog are assigned to a particular notification type by means of a report structure.</p> <p>For more information, see Report Structures [Ext.] and Changing Report Structures [Ext.].</p>	<i>Project System → Claim → Notification → Create Notification → Notification Content → Define Report Profiles</i>
... Define a partner structure for a notification type	<p>You use the partner structure to determine which partner roles (such as ordering party or person responsible) are permitted or required for claim processing.</p>	<i>Project System → Claim → Notification → Create Notification → Partner → Define Partner Structures</i>
... Stipulate priority types for notification types	<p>The system uses the priorities assigned to a relative start and finish date to determine the desired start and finish dates for a claim, taking the entry date as its starting point.</p>	<i>Project System → Claim → Notification → Notification Processing → Response Control → Define Priorities</i>
... Define codes for long texts	<p>You can assign four different long texts to a claim, each with a different description.</p> <p>You assign a catalog, code group, and code to each long text.</p>	<i>Project System → Claim → Claim-Specific Settings → Codes for Detailed Long Texts</i>

Procedure

1. Choose *Logistics* or *Accounting* → *Project System* → *Notifications* → *Create Claim*.
This brings you to the *Create Claim: Initial Screen*.
2. Enter the *Notification Type* and, if required, the *Partner Type*.

Creating and Processing Claims


You do not have to determine the partner type now. If you decide to do it later, do so in claim processing by choosing  *Change Partner Type*. Among other things, the partner type determines which reference documents the system offers in claim processing. If you do not specify a partner type, the system displays all available reference documents.

For more information, read [Partners in Claims \[Page 20\]](#).


Do not enter a notification number, unless you have specified in customizing that the number range interval you have assigned to the notification type permits external number assignment.



If you want to enter the notification using the Internet, choose a number range interval that does **not** permit external number assignment.

3. Choose .

This brings you to the *Create Claim: <Notification Type>* screen.

4. Enter the necessary data.
5. To enter detailed information on the claim, use  *Edit Text* to select a long text type. In the standard system, this button is on the *Facts* tab page.



We recommend that you enter either a long text for the notification header or the four long text type whose descriptions you have maintained in customizing.

For more information, read [Entering Notification Long Texts \[Page 15\]](#).

6. Specify a priority for the claim. This indicates how important and urgent the claim is. In the standard system, this field is on the *Facts* tab page.
For more information, read [Specifying Priorities \[Ext.\]](#).
7. Assign a reference object to the claim, either now or later. In the standard system, this field is on the *Assignment* tab page.



Assigning a claim to a reference object allows targeted claim selection in the information system. Note that you can only view this assignment in Claim Management reporting. The assignment is not integrated with other reports, such as the structure overview in the Project System.

8. Enter the costs for the claim. In the standard system, the fields for this are on the *Costs* tab page.

You can estimate the costs or, if you have detailed information about the claim, have them calculated using [unit costing \[Ext.\]](#).


9. To execute an activity, either enter the appropriate tasks and actions in the relevant tab pages or choose them from the activity string. The system documents the chosen activity in the relevant tab pages.

For more information, see [Tasks \[Ext.\]](#), [Actions \[Ext.\]](#), and [Activity String \[Page 31\]](#).

Creating and Processing Claims

10. To assign DMS (Document Management System) documents to the claim, enter the documents in the DMS tab page.

For more information, see [Incorporating Documents from the DMS \[Page 38\]](#).

11. Save the claim by choosing .

This returns you to the *Create Claim: Initial Screen*.

Result

The system saves the claim and assigns a notification number.

Creating Claims Using the Internet

Use

Use the application form to create a claim using the Internet/intranet.

We supply a predefined form for claims. It is divided into different areas:

The diagram illustrates the layout of the claim creation form. It is a rectangular box with a light blue border. Inside, there are four main sections: 'Initiator' and 'Entry Clerk' are side-by-side at the top; 'Claim Data' is a wide horizontal box below them; 'Remarks' is a larger vertical box below 'Claim Data'; and at the bottom, there are two buttons labeled 'Check' and 'Send'.

Prerequisites

You have defined the form layout using [SAP@Web Studios \[Ext.\]](#).

If you access the form using *Create Internal Service Request* from the launchpad in the Employee Workplace, you must first choose the appropriate form.

Procedure

1. Enter the required data for the *Initiator*, *Entry Clerk*, and *Claim*.
The system enters your data in the *Entry Clerk* and *Initiator* fields. You can overwrite the initiator data.
2. If you know who will be processing the claim, enter his or her name in the *Processed by* field.
3. If required, enter an explanatory text in the *Remarks* field.
This is optional.
4. *Check* your specifications.
5. *Send* the application.

Creating Claims Using the Internet

Result

The claim is transferred to the SAP System and assigned to the appropriate person there for processing.

Notification Header

Definition

Information in the notification that applies to the overall notification.

Use

You use the notification header information to identify and process a notification.

Structure

The structure of a notification can be customized to meet user-specific needs. For this reason, the notification header may contain different types of information. The following table shows a selection of header and partner data for notification types delivered with the standard system.

General data	<ul style="list-style-type: none"> • Notification number • Notification type • Notification status
Problem information	<ul style="list-style-type: none"> • Problem description (for example, subject matter with coding and short text)
Reference objects/reference documents	<ul style="list-style-type: none"> • Reference objects (for example, material, serial number, functional location, equipment) • Reference documents (for example, sales order or production order)
Organizational information	<ul style="list-style-type: none"> • Organizational data • Work center • Malfunction data • System availability • Quantities • Basic dates
Execution data (internal)	<ul style="list-style-type: none"> • Organization (for example, coordinator or department responsible) • Address data • Priority • Notification start and end dates
Contact person	<ul style="list-style-type: none"> • Partners (for example, customer, vendor, or manufacturer)
Tasks / Activities	<ul style="list-style-type: none"> • Immediate tasks and activities for notification header

Notification Header


Entering Notification Long Texts

Prerequisites

Maintain codes in Project System customizing by choosing *Claim* → *Claim-Specific Settings* → *Codes for Detailed Long Texts*.

You are authorized to maintain long texts.

Procedure

1. Call up the claim in creation or change modes.
2. Enter a claim short text , such as a short description of the problem, in the *Description* field.
In the standard system, this field is on the *Facts* tab page.
3. If the line provided is not enough for your description and you want to enter detailed information about the claim, choose  *Edit Text* and select one of the long text types listed.

There are five long text types to choose from. These are the long text for the notification header and the four you have defined and named in customizing.



For more information, see Project System customizing under *Claim* → *Claim-Specific Settings* → *Codes for Detailed Long Texts*.



We recommend you use the four long text types you can maintain in customizing if you want to structure your information.


If you choose the notification header long text, the system displays the *Change Notification Long Text* screen.

If you are processing one of the long texts you have defined yourself, a text input screen is displayed.

4. Enter your long text.
Go to Project System customizing and choose *Claim* → *Notification* → *Create Notification* → *Notification Type* → *Define Screen Templates* → *Format Notification Long Text* to determine, among other things, the following:
 - Existing long text may be added to, but not changed.
 - The system logs each change to the long text, including who made it and when.
5. To save the long text and return to claim processing, choose  in the *Change Notification Long Text* screen and  in the text input window.

Result

The system displays the texts in the text field.

If you only want to display one text type, choose  *Filters*. In the list field, you can stipulate that the system should display all long text types or just one particular type.

Displaying Administrative Information

Displaying Administrative Information

Use

The system records administrative information for the notification header and for individual items, tasks and activities. This information specifies who created the notification, item, task, or activity, and who last changed these objects.

Procedure

Display Administrative Information for Notification

1. Call up a notification in the change or display mode.
2. Position the cursor anywhere on the notification screen except on an item, task, or activity, and then choose *Goto* → *Administrative data*.

The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the notification.
3. Choose *Continue* to close the dialog box.

Display Administrative Data for an Item, Task, or Activity

1. Call up a notification in the change or display mode.
2. Choose the tab page for items, tasks, or activities.
3. Select an item, task, or activity, and then choose *Goto* → *Administrative data*.

The dialog box for the administrative data appears. The dialog box displays who created the notification and who made the latest changes to the item, task, or activity.
4. Choose *Continue* to close the dialog box.

Action Log

Use

Changes to notifications are documented in the action log. You can use the action log to track:

- Which data or statuses were changed for selected fields
- Who made the changes
- When the changes were made

The action log also records the changes that were made to tasks, items, activities, and partners during notification processing.

Activities

1. Call up a notification in the change or display mode.
2. Choose *Extras* → *Notification documents* → *Changes*.

The action log for the notification appears.

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

Partners in Notification Processing

Definition

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

A business partner can have several **functions** at one time. Functions are characterized by function categories. A function category, for example, may be a sold-to party, interested person, payer, or payee.

A business partner can have relationships with other business partners. Relationships are characterized by **relationship types**. For example, relationship types can include the following: "is a subsidiary of," "is the contact person for," or "is identical to." A business partner can have several addresses. Addresses are defined by address types. An address type, for example, can consist of a delivery address or correspondence address.

A business partner can be assigned other business partners using the function determination. These business partners can then act on behalf of the original partner in their respective roles. For example, a business partner can be defined as a payee for another business partner.

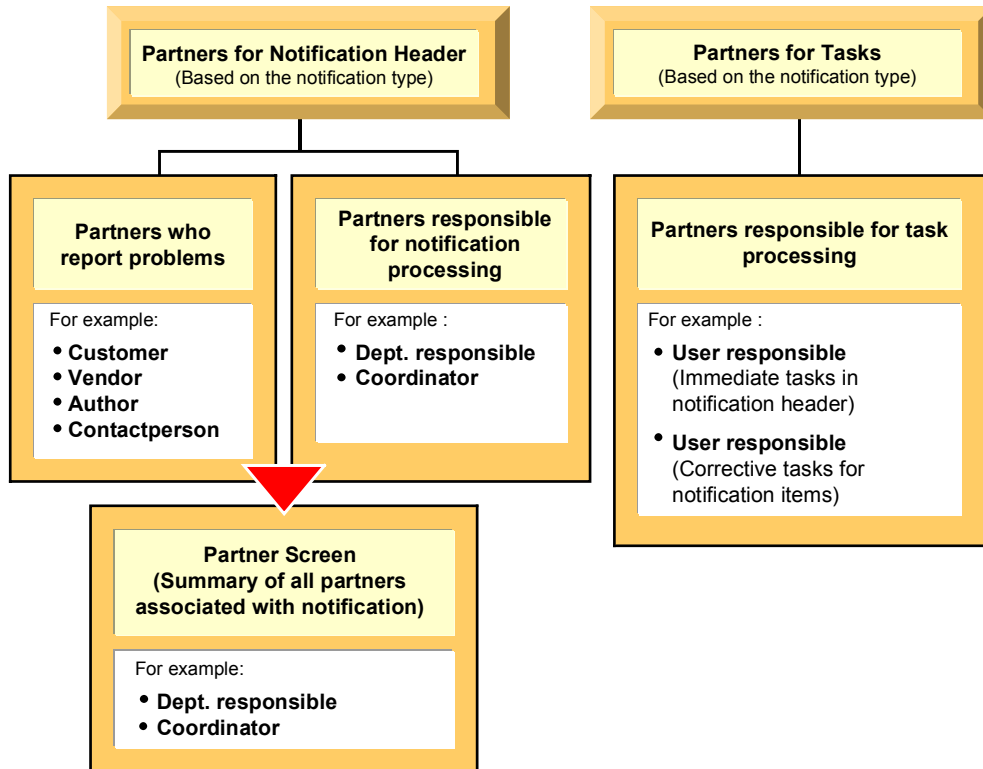
For more information about business partners, refer to the documentation *Basic Functions and Master Data in Sales and Distribution*.

Use

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

The following graphic shows how partners are used for notification processing.

Partners in Notification Processing



Structure

Partner type

Partners can be:

- Internal partners (for example, internal employees or partners in the *Human Resources* component)
- External partners (for example, customers, vendors, or manufacturers)

Partner function

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

Partner determination procedure

The partner determination procedure specifies whether partners can be assigned to a notification and which partner functions can be used to process various business transactions. Your system administrator defines the partner determination procedure in Customizing.

Partners in Claims

Definition

When you create a claim, or each time you access the claim to change it, you assign it to a partner type. Claim Management offers the following partner types:

- Vendor
- Customer
- Internal

Depending on the partner type, the system determines the following in claim processing:

- A suitable partner
 - If you have chosen the types "Customer" or "Vendor", the system does not offer the general partner overview for partner entry purposes, but:
 - For customers:
 - Customer Address*, where you can enter a customer who already exists in the system
 - Contact Person Address*, for the contact person at the customer
 - Notification Address*: for example, the customer's lawyer
 - For vendors:
 - Vendor Address*, where you can enter a vendor who already exists in the system
 - Manufacturer Address*
 - Notification Address*: for example, sales and distribution at the vendor

You can enter a contact person in the notification address.

If you change the partner type, for example, from customer to vendor, the system adopts all the partners and displays them in the partner overview.

In the standard claim configuration, the contact person is always the customer contact person.

- Allowed reference documents
 - For vendors, the purchasing document
 - For customers, the sales order, delivery, and purchase order number
 - For "internal", the sales order, delivery, purchase order number, and purchasing document

Processing the Partner Information

Prerequisites

You can only display the partner data screen if a partner determination procedure has been defined in Customizing for *Cross-Application Components* under *Notification → Notification Creation → Partner*.

Procedure

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

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

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

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

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

Configuring User Default Values

Configuring User Default Values

Use

It is a good idea to define user default values if you enter a lot of claims, but rarely use particular notification data.



The system automatically copies these values to the appropriate fields when you create a claim. You can overwrite them at any time.

Features

You can define the following default values and settings:

- General data
 - Notification type
 - WBS element
 - Partner type
 - Whether the system shows a status line/pushbutton when you enter or display long texts
- Appearance of the action box:: The system represents the action box as a table or an overview tree.
 - If you choose the table, the system displays only the follow-up activities that can be carried out.
 - If you choose the overview tree, the system displays all the available follow-up activities.

Activities

1. Choose *Extras* → *Settings* → *Default Values*.
The *User Default Values* dialog box appears.
 2. Enter the necessary data in the *General* and *Action Box* tab pages.
 3. Choose  to save the data, then choose .
- When you access claimprocessing again or create a new claim, the system uses your user default values.

Claim Tasks

Definition

A planned or completed activity that describes the planning and organizational measure in a claim. A task is defined by a code from the task catalog and if necessary accompanied by a text.

For more information, see the Implementation Guide *Project System* → *Claim* → *Notification* → *Create Notification* → *Notification Type* → *Maintain Catalogs*.

Use

A task allows you to plan the cooperation of various persons during the claim process and assures that the activities connected to the task are completed within a given timeframe. The task receives a status depending on its degree of completion.

You can enter data for a task on two different screens with varying degrees of detail.

- Overview screen
- Detail screen

The following entries are possible for each task:

- A table key for the tasks to be executed and a brief instruction describing what is to be done
- The task's planned start and end
- The task's status
- Responsible partner for carrying out the task

For more information, read [Entering Tasks \[Page 24\]](#)



The documentation for processing tasks contains a note explaining how to create a task for a notification item. This is **not** possible in claim management because a claim does not recognize items. In claim management a task refers to the entire claim.

Integration

The system can automatically execute activities connected to a task as follow-up actions and trigger a workflow (for example, printing or calling up a particular SAP transaction). You can define the follow-up activities according to your own needs.

For more information, see the Implementation Guide *Project System* → *Claim* → *Claim-Specific Settings* *Activate Workflows and Assign Personnel* as well as [Follow-Up Actions for Tasks \[Ext.\]](#).

Entering Tasks

Entering Tasks

Procedure

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

Function	Tab page / Pushbutton / Menu path	What you should know
Record immediate tasks for the notification header	Choose the <i>Tasks</i> tab page.	Enter the data on the task overview.
Record immediate tasks on task detail screen	Select a task on the task overview and choose <i>Detail view</i> .	Enter the data on the task detail screen.
Record corrective tasks for a notification item	Choose the <i>Items</i> tab, select an item, and then choose the <i>Item tasks</i> tab page.	Enter the task data for the item.
Record corrective tasks on the task detail screen	Choose the <i>Items</i> tab page and then select an item. Choose the <i>Item tasks</i> tab page, select a task and then choose <i>Detail view</i> .	Enter the planned start and end dates for the task on this screen. The dates you enter may be changed based on the status you assign to the task (see Status Management for Tasks [Page 25]).

See also:

[Automatic Determination of Tasks \[Page 27\]](#)

Status Management for Tasks

Use

A task status provides information about a task's current processing stage. The system manages the following statuses for tasks:

Status	Meaning
Task outstanding	The task was created in the notification.
Task released	The task can be executed.
Task completed	The task was executed.
Task successful	The result of the task was successful (for example, the problem was solved or damage was repaired).

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



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

Integration

The various notification and task statuses, for the most part, are independent of one another. This means, for example, that you can put a notification in process even though it contains outstanding, unreleased tasks. As long as a notification still contains outstanding tasks, however, you cannot complete the notification.

For more information about the general status management function, see [Status Management \[Ext.\]](#).

Features

You can use the status management function as follows:

- **Assign a status to a task**

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

Once you have assigned a status to a task, the corresponding status is displayed in the task overview screen and task detail screen. If you want to display the text for the status abbreviations, choose *Status detail*.
- **Date changes as a result of status assignments**

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

Status Management for Tasks

Status	The system fills the following fields:
Released	<i>Planned start</i> with the current date/time <i>Planned end</i> with either the current date/time or desired notification end date/time. You can overwrite both fields.
Completed	<i>Date completed</i> <date> by <user name> with the current date/time and current user name. You cannot overwrite these fields.
Successful	None



The planned dates for a task must fall within the desired start and end dates of the notification. If you specify other dates for the task, the system displays a message to inform you of this.

Automatic Determination of Tasks

Use

You can have the system determine the tasks for a notification automatically on the basis the settings defined in Customizing for response monitoring. The **response profile** and **service profile** in Customizing together determine how and when a person responsible for processing a notification should respond.

- In the response profile, you specify one or more standard tasks that the system will propose on the basis of the notification priority. The system proposes these tasks automatically and they must be completed within a specified time interval. The system automatically assigns the determined tasks to the notification header.
- In the service profile, you define the time periods for individual workdays (service windows) during which a notification can be processed.



You create a notification at 10:00 a.m. The response profile defines a time interval of two hours for the task code “Call back customer” and a time interval of 4 hours for the task code “Check whether technician is on site”. The times defined in the service window are 8:00 a.m. to 12:00 noon and from 2:00 p.m. to 6:00 p.m.

In this case, you must call back the customer by 12:00 noon to discuss or clarify the problem. If you need to send a technician to the customer site, the technician must arrive by 4:00 p.m.

Prerequisites

A response profile and service profile must be assigned to the notification type in Customizing for *Cross-Application Components* under *Notification* → *Notification Processing* → *Define Response Monitoring*.

Activities

Choose *Edit* → *Tasks* → *Determine* to automatically determine the tasks.

You can also choose *Edit* → *Tasks* → *Simulation(Det.)* to simulate the determination of tasks (without actually assigning the tasks to the notification).

Follow-Up Actions for Tasks

Follow-Up Actions for Tasks

Use

You can define a follow-up action for a task that will automatically be triggered and executed by the system. A follow-up action can call one or more function modules that execute specific functions (for example, printing a shop paper or calling up a transaction).

Prerequisites

In Customizing for *Cross-Application Components* under:

- *Notification* → *Notification Creation* → *Notification Content* → *Maintain Catalogs*, the indicator for follow-up actions is set in the task catalog (catalog type 2)
- *Notification* → *Notification Processing* → *Additional Notification Functions* → *Define Follow-Up Actions for Tasks*, you have defined a follow-up action key and assigned one or more function modules to be called to this key

A follow-up function is only executed if the business transaction that is assigned to the follow-up action allows it.

Features

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

1. Entered a task code (for the notification header or for a notification item) that has a follow-up action assigned to it.
2. Saved the notification

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

Claim Activity

Definition

Completed action or recorded information documented during the processing of a claim.



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

Use

The following entries are possible for each activity:

- A key for the activity performed and a short text that can be changed
- Start and end of the activity
- Quantity factor (for example, if an activity consisted of sending three units of a material to a laboratory for testing, you can enter the value "3" for the quantity factor)

You can enter data for an activity on two different screens with varying degrees of detail.

- Overview screen
- Detail screen

For more information, read [Entering Activities \[Page 30\]](#).



The documentation for processing activities contains a note explaining how to create an activity for a notification item. This is not possible in claim management because a claim does not recognize items. In claim management an activity refers to the entire claim.

Entering Activities

Entering Activities

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

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

Action Box

Use

When you process notifications, you can use the **action box** to execute **follow-up functions**. A follow-up function is a function that:

- Can either be executed as part of an overall business process or independently of such a process
- You can select and execute in the action box by means of a mouse click while you are processing a notification or task

Prerequisites

The follow-up functions in the action box are defined in Customizing for *Cross-Application Components* under *Notification* → *Notification processing* → *Additional Notification Functions*. The follow-up functions that:

- Have been predefined in the standard system can be used without any further preparations
- Are displayed in the action box, but which you do not need, can be deleted in Customizing
- You have programmed yourself and are to be included in the action box must also be defined in Customizing

Features

The following table contains the most important information you need to know about setting up and using the action box.

Function	What you should know
Appearance of the action box	<p>In the standard system, the action box is displayed as an overview tree. In this display mode, the follow-up functions are displayed in a list in different colors. The colors have the following meaning:</p> <ul style="list-style-type: none"> • Blue: The follow-up function is active and can be executed. • Black: The follow-up function is inactive and cannot be executed (yet). • Gray: The follow-up function has been executed and cannot be executed again. <p>If you set the <i>Action box: Table</i> indicator in the user default values, the system displays the action box as a table. In this mode, the system only displays the follow-up functions that can be executed (without the color coding).</p>

Action Box

Follow-up functions and dependent follow-up functions	<p>Depending on your settings in Customizing, the action box can include follow-up functions that you:</p> <ul style="list-style-type: none"> • Can execute more than once and independently of other follow-up functions in the action box • Can execute only once and/or after certain other follow-up functions have been executed (for example, follow-up functions within a process)
Control parameters for a follow-up function	<p>In Customizing, you can specify:</p> <ul style="list-style-type: none"> • In which processing view a follow-up function will be displayed for use (for example, in the simplified or extended notification processing modes) • In which transactions a follow-up function will be displayed for use (for example, in the create or change mode) • Whether a follow-up function will be displayed for use in the transactions for notification processing and/or task processing • Whether a follow-up function will be documented as a task or activity in the notification, or whether it will not be documented at all That all follow-up functions documented as tasks or activities will be available for use in the action box when you create or change a notification The follow-up functions that are not documented will also be available for use in the action box when you display a notification
Assigning follow-up functions to scenarios	<p>In addition to assigning follow-up functions to a notification type, you can also assign them to a scenario. For example, if you are processing a notification that has a scenario assigned to it, the action box will contain follow-up functions that are assigned to the notification type, as well as those that are assigned to the scenario.</p>
Standard follow-up functions	<p>The action box contains several follow-up functions that have been predefined in Customizing. For more information about these functions, see Standard Follow-Up Functions [Page 34].</p>
Business transactions	<p>In Customizing, you can assign a business transaction to a follow-up function. A business transaction determines whether a follow-up function can be executed, based on the current status of a notification.</p>

<p>Authorization check</p>	<p>Each follow-up function that is documented as a task or activity is assigned a code group in Customizing. When you process a notification, the system automatically checks whether you are authorized to access the code groups assigned to the various follow-up functions. If you do not have authorization for a particular code group, the corresponding follow-up function will not appear in the action box. This means that you can only use the follow-up functions for which you have authorization.</p>
<p>Workflow link</p>	<p>You can link follow-up functions that are documented as tasks to the functions of the <i>SAP Business Workflow</i> component. The system can then trigger workflow tasks once a follow-up function (task) has been executed and the notification has been saved.</p>
<p>Difference between follow-up functions and follow-up actions</p>	<p>Follow-up functions in the action box are different from task-related follow-up actions [Page 28]. Both follow-up functions and follow-up actions call function modules. With a follow-up action, however, the system executes the corresponding function module when you save a notification. With a follow-up function, the system executes the function module as soon as you execute the follow-up function in the action box. Also, when you process follow-up functions, you enter information interactively in a dialog box. This is not possible with follow-up actions.</p>

Activities

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



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

The system then executes the selected function. Depending on the settings in Customizing, the follow-up function is:

- Documented as an activity in the notification
- Documented as a task for the notification header
- Not documented

Standard Follow-Up Functions

Standard Follow-Up Functions

Use

The action box in the standard system contains several follow-up functions that can be used by all applications to make it easier to process notifications. When you execute one of these follow-up functions, the system documents the execution of this function as an activity or task for the notification header.

Features

Follow-up function	What you should know
Telephone contact using <i>SAPphone</i>	<p>You can use this function to make a telephone call using <i>SAPphone</i>. The system records the details of your phone call as a notification activity.</p> <p>To use this function, the telephone and computer in your office must be interconnected and the <i>SAPphone</i> component must be active.</p>
Telephone contact without <i>SAPphone</i>	You can use this function to record a telephone call that you initiated while processing a notification. The system records the details of your phone call as a notification activity.
Internal memo	You can use this function to record an internal message or remark that relates to the subject matter of the notification. The system records the memo as a long text for an activity.
Solution database [Ext.]	<p>You can use this function to search the solution database for symptoms and solutions that are similar to the problem you are currently processing.</p> <p>If you find a symptom or solution in the database that applies to the problem in your current notification, you can:</p> <ul style="list-style-type: none"> • Document your database search as an activity for the notification • Copy the tasks associated with the solution into your notification

Standard Follow-Up Functions

<p>Send notices</p>	<p>Using this function, you can postpone the processing of a notification. The system can then print this data or send it as a fax or e-mail to an internal or external address (Internet).</p> <p>The system copies the long text associated with the corresponding code in the task catalog as a text proposal. You can change this text as necessary without changing the original long text. If the notification contains several partners, you can select a partner before you process the text.</p> <p>You can view the document in a print preview before you save the notification. When you save the notification, the system sends the notice by executing a follow-up action.</p>
<p>Send e-mail</p>	<p>You can use this follow-up function to send an e-mail (with or without an attachment) to a partner in the notification.</p> <p>The system copies the long text associated with the corresponding code in the task catalog as a text proposal.</p>

Function Modules for Claim-Specific Activities

Function Modules for Claim-Specific Activities

Definition

In addition to the [standard activities \[Page 34\]](#), Claim Management offers a number of claim-specific activities in the action box. When you carry out one of these activities, the system documents the fact as either an [action \[Ext.\]](#) or a [task \[Ext.\]](#) in the appropriate tab page.

Use

The following activities are available:

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

Outbound Telephone Calls

Use

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

You can initiate an outbound telephone call in a notification from the:

- Partner overview screen
- Worklist screen for notification processing
- Action box as a follow-up function (provided the follow-up function for outbound telephone calls was activated in Customizing for the action box)

Prerequisites

The *SAPphone* component in Customizing for *Basis Components (Basis Services → Communication Interfaces)* is active. For more information, see [SAPphone \[Ext.\]](#).

Activities

You choose the function for outbound telephone calls in the partner overview screen, in a notification list, or in the action box.

Linking Documents from the DMS

Linking Documents from the DMS

Use

In the standard system, the notifications are linked to the SAP System's *Document Management System* (DMS). This allows you to link documents that are stored in the DMS to a notification. You can display or print a linked document at any time while you are processing a notification.

Prerequisites

In Customizing for the notification type, a tab page has been activated for the DMS (see Customizing for *Cross-Application Components* under *Notification* → *Notification Creation* → *Notification Type* → *Define Screen Templates*).

Activities

To link a document contained in the DMS to a notification, you call up the notification in the create or change mode and then choose the *DMS* tab page. A table is displayed in which you can retrieve, link, and display documents from the DMS.

Status Management for Notifications

Use

Notifications are supported by the SAP System's status management function. Whenever you create and process a notification, you execute certain business transactions for the notification. These business transactions are documented in the SAP System by a status. The current status of a notification tells you which processing stage the notification has reached and which steps have yet to be completed.

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

Features

A notification can have the following types of statuses:

- **System statuses**

System statuses are set when you execute certain functions for a notification. For example, when you print a notification, the system sets the status "printed" (*NOPT*). The system status tells you that a business transaction was carried out for the notification.

The system statuses for notifications are predefined in the SAP System and cannot be changed.

- **User statuses**

User statuses allow you to further restrict the functions that are allowed by a system status.

Your system administrator defines user statuses in a status profile (see Customizing for *Cross-Application Components* under *Notification Processing* → *Status Management* → *Define Status Profile*). You can assign and delete user statuses if you have the necessary authorization.

See also:

[Assigning and Changing User Statuses \[Page 43\]](#)

Displaying Status Information

Displaying Status Information

Procedure

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

Function	Tab page / Pushbutton / Menu path	What you should know
Display status information in the notification header		<p>The current system statuses are displayed in the <i>Status</i> field of the notification header. If user statuses also exist for the notification, they are also displayed.</p> <p>The <i>Status</i> field also displays the task status. If at least one notification task is still outstanding or released, the status "task outstanding" (TSOS) is displayed. As long as this status is set, you cannot complete the notification.</p>
Display status information for individual tasks	<i>Tasks</i> tab page	The task overview contains the status of all recorded tasks.
Display system and user statuses with short texts	<i>Status detail</i> pushbutton	All active system and user statuses for the notification are displayed on the <i>Status</i> tab page.
Display general status overview	Choose <i>Status detail</i> pushbutton and then <i>Extras</i> → <i>Overview</i>	<p>You can see which processing steps have already been performed.</p> <p>All active and inactive system and user statuses for the notification are displayed.</p>
Display statuses that can still be assigned	Choose <i>Status detail</i> and then the <i>Business processes</i> tab page	<p>You can see which processing steps are currently allowed or not allowed.</p> <p>If you choose <i>Transaction analysis</i>, you can see which business transactions can still be executed for the notification (green traffic light) and which ones can no longer be assigned (red traffic light).</p>

Assignment of System Statuses

Assignment of System Statuses

Use

Whenever you execute a function in a notification that is influenced by the SAP System's status management function, the system automatically assigns a corresponding system status to the notification. On the basis of the current system status, you can determine what other functions can be executed for the notification.

Features

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

- Create a notification
- Postpone a notification
- Put a notification in process
- Assign an order to a notification
- Complete a notification
- Print a notification
- Create a task
- Release a task
- Complete a task
- Complete a task successfully
- Complete all tasks
- Activate an approval requirement for a notification
- Give an approval to a notification
- Refuse an approval for a notification
- Create a costing for a claim

Assigning and Changing User Statuses

Prerequisites

To be able to assign user statuses to a notification, the following conditions must be fulfilled in Customizing for *Cross-Application Components* under *Notification Processing* → *Status Management* → *Define Status Profile*:

- User statuses are defined in a status profile
- A status profile is assigned to the notification type to be processed.

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

- The status order numbers defined for individual user statuses in the status profile determine the sequence in which the user statuses can be activated.
- If a user status does not have an order number assigned to it, the user status can always be set.
- It is not possible for several statuses with status order numbers to be active at the same time.
- You cannot delete the initial user status that has been set for a notification.

Procedure

1. Call up a notification in the change mode.
2. In the notification header, choose *Status detail*.
The status information is displayed.
3. In the column for user statuses (right column), activate the desired user status and then choose *Back*.
The notification header with the chosen user status is displayed.
4. Save the notification.

Evaluating Claims

Evaluating Claims

Features

The project information system includes the following reports for analyzing claims:

- Claim Overview


The system displays all the data entered for the claim selected, except for tasks and actions. If this is all the data you need, we recommend you use this report, for performance reasons.
- Claim Hierarchy

The system displays all the data entered for the claim selected, including tasks and actions.


Activities

1. Choose *Logistics* or *Accounting* → *Project System* → *Information System* → *Claim* → *Overview* or *Hierarchy*.

The *Claim Overview* or *Claim Hierarchy* screen appears.

2. Enter the selection criteria you require and choose .

The relevant report appears.

Determine the layout of the lists yourself, using .

Archiving Claims

Prerequisites

The claim is closed.

Procedure

The archiving object CM_QMEL is available for claims. Claim archiving using transaction SARA involves the following steps:

1. **Preparation (RQARCCMV):**

The preparation program assigns status MARC to the claims selected, thereby flagging them as ready for archiving and deletion. This also blocks the claims so flagged against further online changes.

2. **Archiving Run (RQARCCMA):**

The archiving program writes the database tables for the claim to the archive. If the process was successful, the program deletes the data from the system immediately after it has been archived.

3. **Delete (RQARCCMD):**

A deletion program deletes the database records for claims successfully archived. If the deletion program is not accessed automatically when the archiving action has been completed successfully, you must wait until archiving is complete altogether.

4. **Evaluation (RQARCCMS):**

You can use the evaluation program to display the data for claims already archived.