



Job Aid

Equipment Assignment

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A. INTRODUCTION

This Job Aid details the steps required to Assign Equipment (including Fixed Assets) to a Business Partner (BP) and to install the equipment at a functional location. In order to provide equipment and material accountability, the equipment record must be updated to reflect the correct status, BP reference number and Functional Location.

B. TRIGGER

Perform this procedure when you need to assign one or more items of equipment to a BP.

C. ENTERPRISE ROLES & RESPONSIBILITIES

The roles involved in this procedure are listed below:

Enterprise Roles	System Activities	Non-system Activities
SD11: Equipment Master Data Maintainer - Local	<p>Create and complete Notification for the Equipment Assignment Request</p> <p>Update the Equipment record within the authorization group.</p>	<p>Liaise with the equipment requestor, update the Master Data Maintainer. Participate in the reconciliation of equipment within the physical verification process</p> <p>Print Notification for the Assignee to sign acknowledgment of Equipment assignment.</p>
SD02-Notification Approver	Approves the Notification	

D. TRANSACTION T-CODES

Transaction	T-code
Assignment of Equipment Record	IE02
Creation of Notification	IW51
Update of Notification	IW52

E. HIGH LEVEL EQUIPMENT ASSIGNMENT END TO END PROCESS FLOW

- 1) Creation of Notification (using template).
- 2) Approve and Release of the Notification.
- 3) Create & Approve Reservation (if applicable), and update Notification.

For the steps involved in the Reservation Creation, please refer to job aid - "How to Create, Certify and Approve Reservations for Inventory".

- 4) Perform Goods Issue to Reservation with approval

For the steps involved in the performing Goods Issue, please refer to User Guide - "Local Inventory Goods Movement".

- 5) Update Notification status and complete tasks
- 6) Enrich Equipment Record:
 - a. Update Equipment User Status,
 - b. Business Partner (BP) and
 - c. Install to Functional Location
- 7) Update Asset Record (if applicable)
- 8) Print and Attach Assignment of Equipment
- 9) Complete and Close Notification

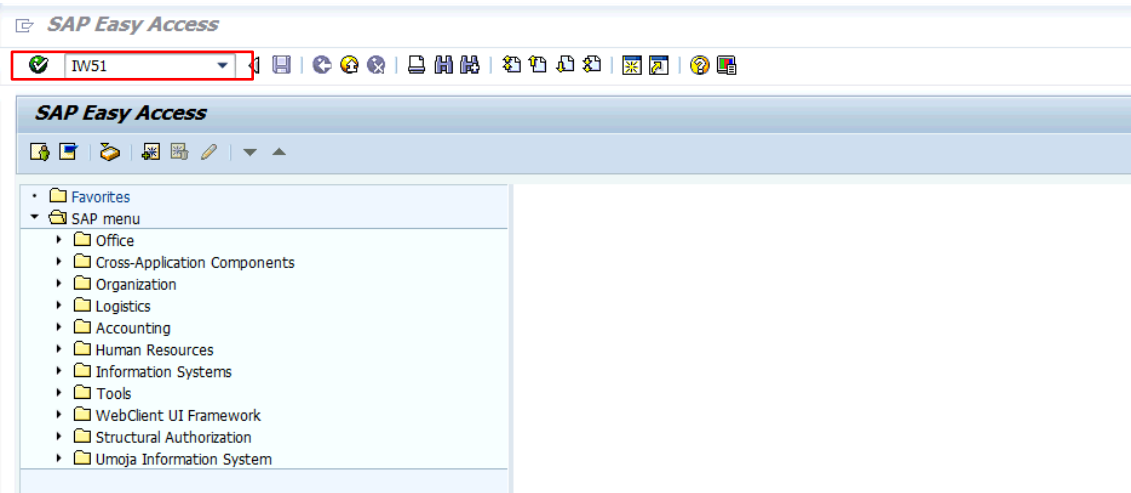
F. EQUIPMENT ASSIGNMENT STEP-BY-STEP INSTRUCTIONS

I. Creation of Notification (using template)

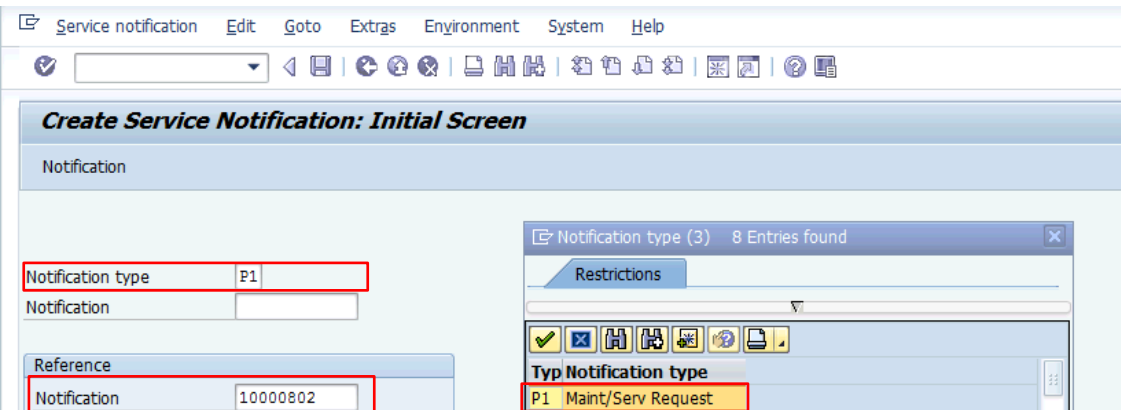
In order to facilitate the creation of the Notification for the assignment of equipment, you must use a reference template which includes all the possible tasks/assignments that need to be completed. The Template Notification provides the framework for the assignment of equipment. **Tasks that are NOT required can be deleted and additional Tasks can be added**; this activity is the responsibility of the Equipment Master Data Maintainer.

*** If multiple equipment records are being assigned within the same case (to the same BP), a single notification can be created with an attachment detailing all the Equipment/Inventory records within the notification case. Each Equipment record should be updated with reference to the notification number so as to establish and maintain the link between related equipment and notification.

1. Type IW51 in the Command field and click Enter and Select Notification type “P1”.



2. Populate the following fields and click the Enter icon:
 - Notification type “P1”.
 - Reference Notification created for the entity in question. These are given in Appendix A.



3. The “Create Service Notification” screen will be displayed. The Description, Coding, Planner Group and Plant will be automatically populated from the Reference Template. **These fields must be updated to reflect your details.**

Create Service Notification: Maint/Serv Request

Notification: 10000000001 | **US00 Equipment Assignment Template******

Notific. Status: OSNO OST5 | RQCR

Reference object:

- Functional loc.:
- Equipment:
- Assembly:

Subject:

- Coding:
- Description: **US00 Equipment Assignment Template******

Item:

- Object part:
- Damage:
- Text:
- Cause code:
- Cause text:

Execution:

- Priority:
- Req. start: 24.05.2016 20:33:19 | Required End: 00:00:00
- Malfunc. start: 24.05.2016 20:33:20 | Malfunc. end: 00:00:00
- Main WorkCtr:
- Planner group: **F00 / US00 Facilities Managem**
- Department resp.:
- Person respons.:
- Sales area: / / | Sales Office: | Sales Group:

4. In the first tab, “Notification”, Update the following fields:

- i. **Description:** A short description/title to reference request
- ii. **Equipment Number:** Once the equipment serial number to be assigned is known it should be referenced within the Notification. If multiple equipment records are being assigned within the same case (to the same BP), attach the list of equipment to the notification.
- iii. **Coding:** The notification is defaulted to “UN00: Assignment” as per the template. If the Notification is not created for an assignment, the coding needs to be updated.
- iv. **Long Text:** In the “Description” field enter the details of request. Who/What is required. If multiple equipment records are included in the notification, indicate that this request is for multiple items and ensure this is attached to the notification.
- v. **Planner group:** The template defaults to planner group “010” (generic) and plant US00. Update the Plant and Planner group. Additionally, the Person Responsible can be updated with the name of the Property Custodian who is responsible for progressing/completing the equipment assignment and notification.

Create Service Notification: Maint/Serv Request

Notification: 800000000001 P1 Assignment of Equipment Stock **i**

Notific. Status: OSNO OST5 RQCR

Serv.order Sales ord.

Notification Location data Items Tasks Activities Sales

Reference object

Functional loc. **ii**

Equipment

Assembly

Subject **iii**

Coding: UNASSN UN00 Assignment

Description: Assignment of Equipment Stock

09.07.2017 20:40:05 TSEGA KELETA (IKELETA)
Request for the Issuance and Assignment of laptop from stock.
User: Paul Holden
Material Number: 1500005105 **iv**

Item

Object part

Damage

Text

Cause code

Cause text

Entry 1 frm 0

Execution

Priority Effect Breakdown H

Req. start 24.05.2016 20:33:19 Required End 00:00:00

Malfunct. start 24.05.2016 20:33:20 Malfunct.end 00:00:00

Main WorkCtr

Planner group F00 / US00 Facilities Managem **v**

Department resp

Person respons. 123456 Tsega Ayanna KELETA

Sales area Sales Office Sales Group

5. In the “Location Data” Tab, Update the following fields:

- Account Assignment:
 - If an equipment record has been updated in the notification tab, then the account assignment will be populated from the equipment.
 - If they are not then the information for Business Area and Cost Centre data, needs to be populated.

Create Service Notification: Maint/Serv Request

Notification: \$0000000001 P1 Assignment of Equipment Stock

Notific. Status: OSNO OSTS RQCR

Serv.order Sales ord.

Notification Location data Items Tasks Activities Sales

Location data

MaintPlant
Location
Room
Plant section
Work center
ABC indicator
Sort field

Sales and distribution

Sales Org.
Distr. Channel
Division

Account assignment

Company Code 1000 United Nations New York
Asset
Business Area S100 United Nations Headquarters
Cost Center 10099 PKHQ OICT CO Area 1000
WBS Element
SettlementOrder

6. The Task Tab will have a list of prepopulated tasks that are relevant to all Equipment Assignment cases. The Equipment Master Data Maintainer should delete the tasks that are not relevant.
 - Task Status: Indicates the status of each task and can be used to monitor progress with the request
 - Responsibility: This field can be updated to reflect the person that needs to be involved for the step. Once the task is completed, the Equipment Maintainer (person responsible) will mark the task as complete.

The Notification tasks can be tailored to specific requirements by removal of task(s) not required. To delete a redundant process task, select the row clicking at the left, and then click in the delete icon

Note: It is important that if the Equipment that is being assigned or Transferred is an Asset, the Asset Accountant is notified so the appropriate steps which are specific to Fixed Asset can be completed.

Create Service Notification: Maint/Serv Request

Notification: %0000000001 P1 Assignment of Equipment Stock

Notific. Status: OSNO OST5 RQCR

Serv.order: Sales ord.

No.	Code gr...	Ta...	Task code t...	Task text	T...	Status	User Status	Task processor	Responsible	List name	Planned st...	Plan
1	UNGENRC	001	Generic Task	Request creation/Forward to Approver	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
2	UNGENRC	001	Generic Task	Notify Approver	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
3	UNGENRC	001	Generic Task	Create Reservation/Log	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
4	UNGENRC	001	Generic Task	Receive/Check Material is available	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
5	UNGENRC	001	Generic Task	Update Notification w/reservation number	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
6	UNGENRC	001	Generic Task	Print and have User sign to accept	TSOS			Person respons.	789100	Paul Wilson HOLDEN	00:01	
7	UNGENRC	001	Generic Task	User acknowledgement	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
8	UNGENRC	001	Generic Task	Attached scanned copy to staff member	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
9	UNGENRC	001	Generic Task	Update Equipment Record	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	
10	UNGENRC	001	Generic Task	Notify FA Accountant	TSOS			Person respons.	123456	Tsega Ayanna KELETA	00:01	

7. Click the Save icon. Note the Notification Number for future reference.

Create Service Notification: Initial Screen

Notification type: P1

Reference Notification:

Notification 10001094 saved

Message no. IM405

Notification 10001094 saved

I. Approval and Release of the Notification:

1. To search for the list of Notifications that are awaiting approval, type IW58 in the Command field and click Enter. Tailor the search of outstanding notifications based on Plant, Planner Group, Date, etc. Execute Report.

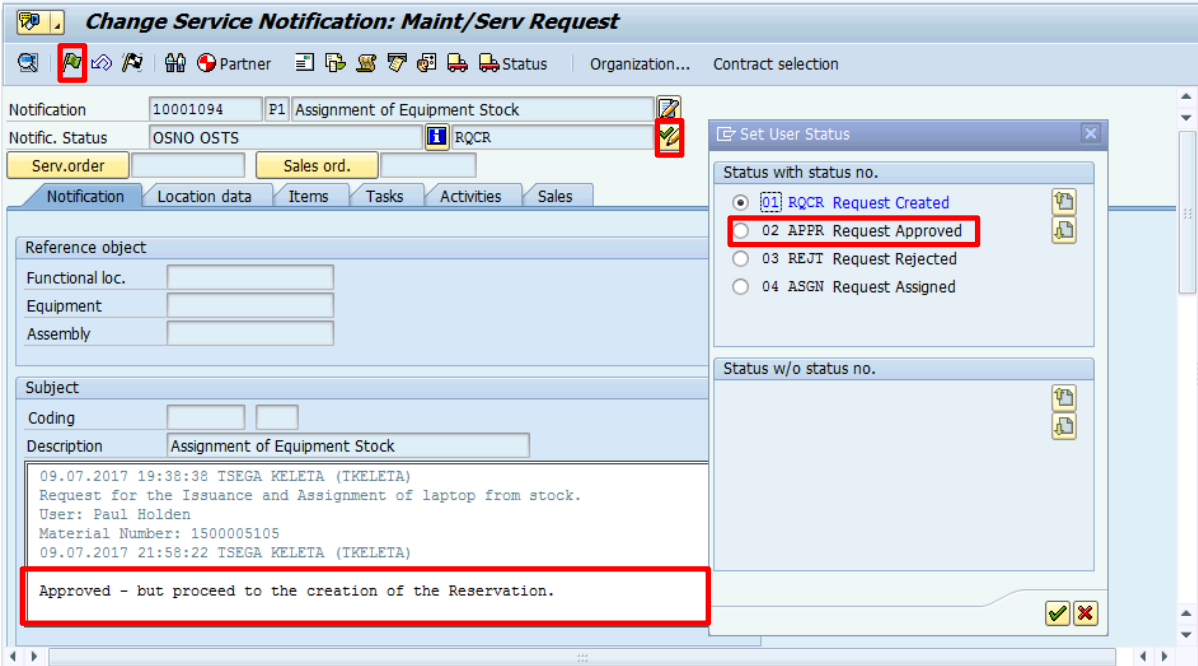
Note: Although the Notification Approver can run the above notification report to find the list of outstanding notifications for Approval, it is recommended that an email is sent to the approver from within the notification. (Please refer to Section G in this Job Aid for instruction on how to send emails)

- The list of Service Notifications will be displayed based on the search criterion that was entered. Select the relevant Notification and double click on the Notification number.

Notification	Description	Typ	PInt	PG	PPI	Created by	Created on	Changed by	Changed on	D	Dv	Customer	Equipment	Description of technical object	Material	Material Description
10001050	INTTRK-11704_Test 1	ZZ	010	KE00	TKELETA		02.05.2017									
10001051	INTTRK-11704_Test 2	ZZ	010	US00	TKELETA		02.05.2017									
10001052	Test	ZZ	US00	010	US00	TKELETA	02.05.2017						10008664	ACCESS POINT TSUNAMI MP 8		
10001053	Test	ZZ	US00	010	US00	TKELETA	02.05.2017						10008664	ACCESS POINT TSUNAMI MP 8		
10001054	INTTRK 11074 External Test	ZZ	US00	010	US00	TKELETA	03.05.2017						10008664	ACCESS POINT TSUNAMI MP 8...		
10001067	INTTRK-9461 Test 1	ZZ	F00	CH00	TKELETA		19.05.2017									
10001070	INTTRK-9461 Test 5	ZZ	F00	CH00	TKELETA		19.05.2017									
10001071	INTTRK 9461	ZZ	CH30	010	CH30	TKELETA	19.05.2017	TKELETA	19.05.2017				10001490	Laptop DELL LATITUDE E7240		
10001072	INTTRK-9461 Test 4	ZZ	F00	KE00	TKELETA		19.05.2017									
10001073	INTTRK-9461 Test 7	ZZ	F00	CH00	TKELETA		19.05.2017									
10001077	Test Sales Order	ZZ	010	SY20	TKELETA		01.06.2017									
10001078	test	ZZ	F00	KE00	TKELETA		06.06.2017	TKELETA	06.06.2017							
10001085	test	ZZ	US00	CH00	TKELETA		21.06.2017						10097191	Recorders magnetic tape		
10001086	INTTRK-12839	ZZ	US00	010	CH00	TKELETA	21.06.2017						10097192	Computer network communica...		
10001087	INTTRK-12839	ZZ	US00	010	CH00	TKELETA	21.06.2017						10097192	Computer network communica...		

- The “Change Service Notification” screen will be displayed. The Approver should review the request before Approving. If further action is required, a reason should be given in the long text of the Notification. When Approver is satisfied that everything is in order, click on the Change Status icon to select the radio button 02 APPR Request Approved and save.

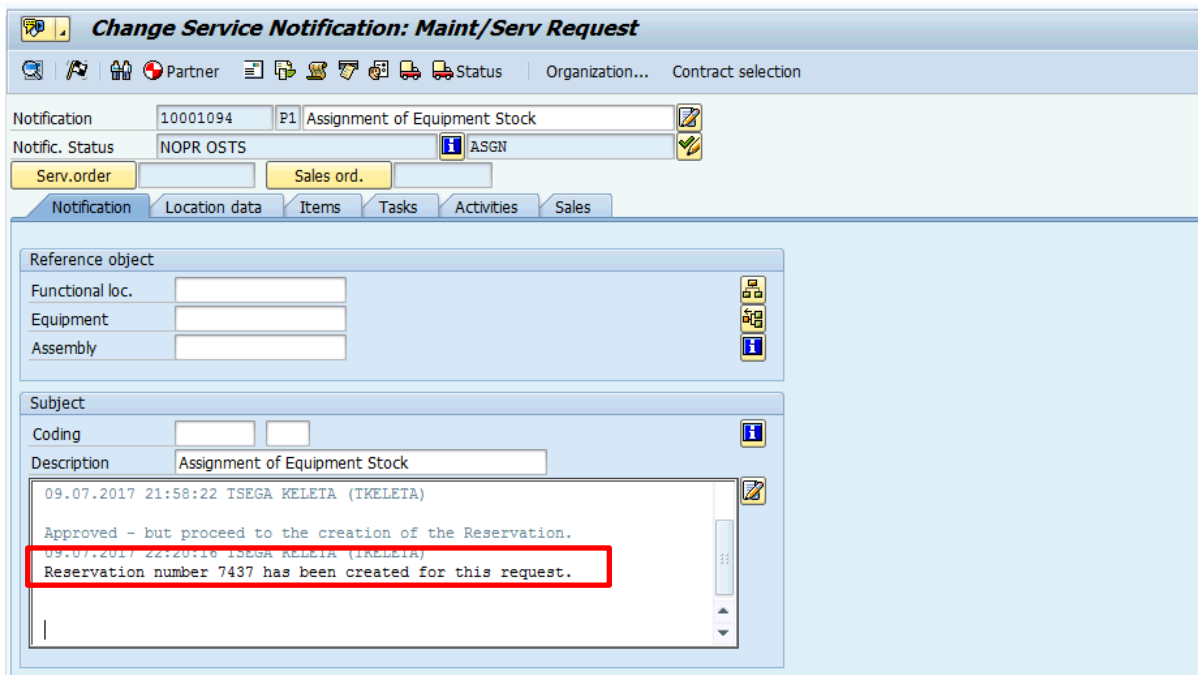
Go back to the “Change Service Notification” screen and click on the green flag to release the Notification.



II. Create & Approve Reservation, and update Notification Description:

For the steps on how to create and approve a reservation, please refer to following Job Aid <<How to Create, Certify and Approve Reservations for Inventory>>.

Once the Reservation is Created, the number should then be referenced within the notification and the relevant task should be marked as Completed.



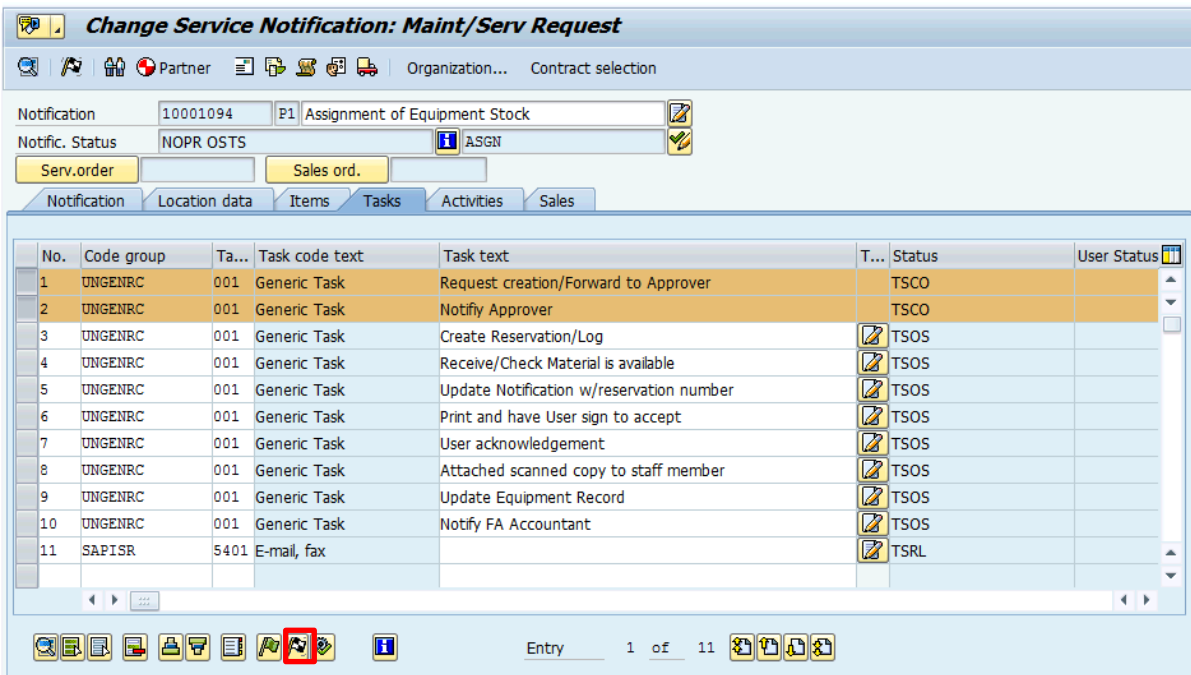
III. Perform Goods Issue(s):

Once the Reservation has been approved, the Logistics user will proceed to perform the Goods Issue. For the steps on how to create Goods issue, please refer to following User Guide <<Local Inventory Goods Movement>>.

IV. Update Notification status and complete tasks:

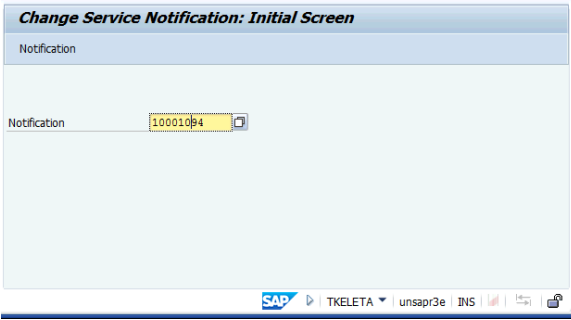
Throughout the Equipment Assignment process, the SD Equipment Maintainer must ensure that the relevant tasks are being completed. As such, the “Task” tab of the Notification will be continually updated to indicate the activities that have been completed.

To complete a task, select the task and then click on the chequered flag icon. Save the Notification. By the time the request is fulfilled, all tasks listed must be completed.

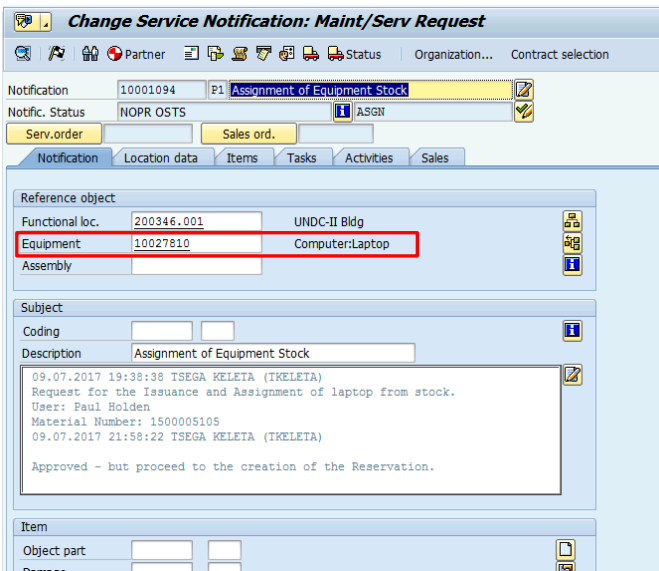


Update Notification with the Equipment Number from Goods issue. At the time of the Goods Issue, the specific Equipment record/Serial Number to be assigned will be identified. The Equipment maintainer, should update the Notification with the equipment number.

1. Type IW52 in the Command field and click Enter. Enter Notification ID and execute



2. Update the Equipment number in the Notification



V. Update Equipment records (update status and include notification ID)

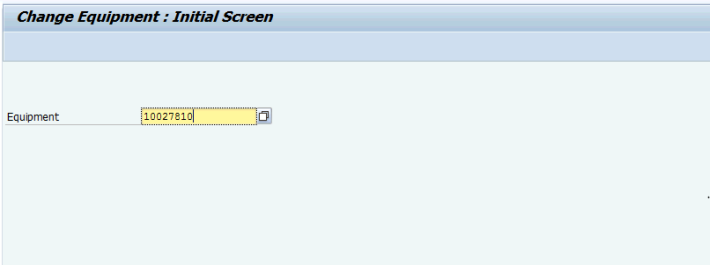
Once the Goods Issue has been processed; the following information must be updated in the equipment master:

- **Equipment Status:** The status needs to be changed to reflect that the equipment has been assigned to a user.
- **Business Partner:** The Person Accountable for the Equipment will be updated to reflect that the equipment has been assigned to a user(BP).
- **Functional Location:** The Functional Location is a Real-Estate object that will denote the place where the equipment is located. It represents a building, floor or room.
- **Inventory Field:** Notification Number must be referenced in the equipment record(s), for ease of identification and reporting.

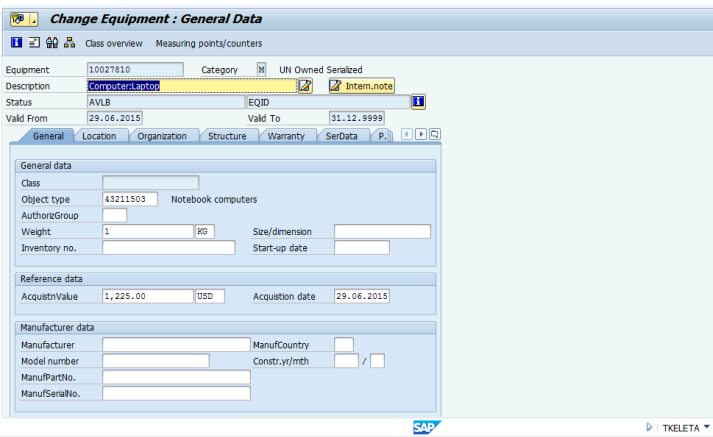
Note: If there are multiple equipment records associated with the notification, the “Mass Equipment Update” Job Aid should be referenced.

The following section describes how a single piece of equipment is changed to reflect the initial status required at notification outset.

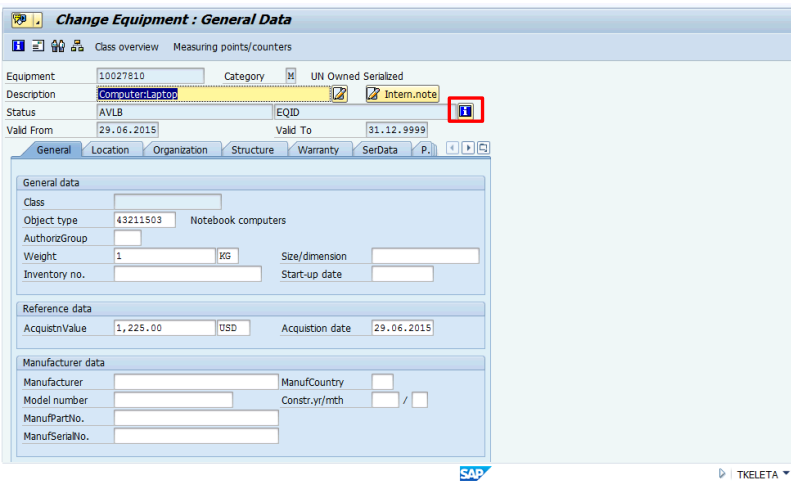
1. Type IE02 in the Command field and click enter. Enter the relevant Equipment ID and hit enter.



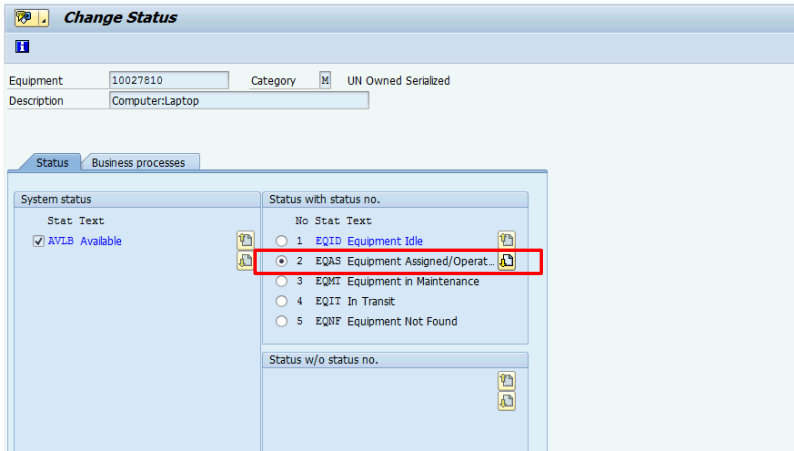
2. The "Change Equipment: General data" screen will be displayed.



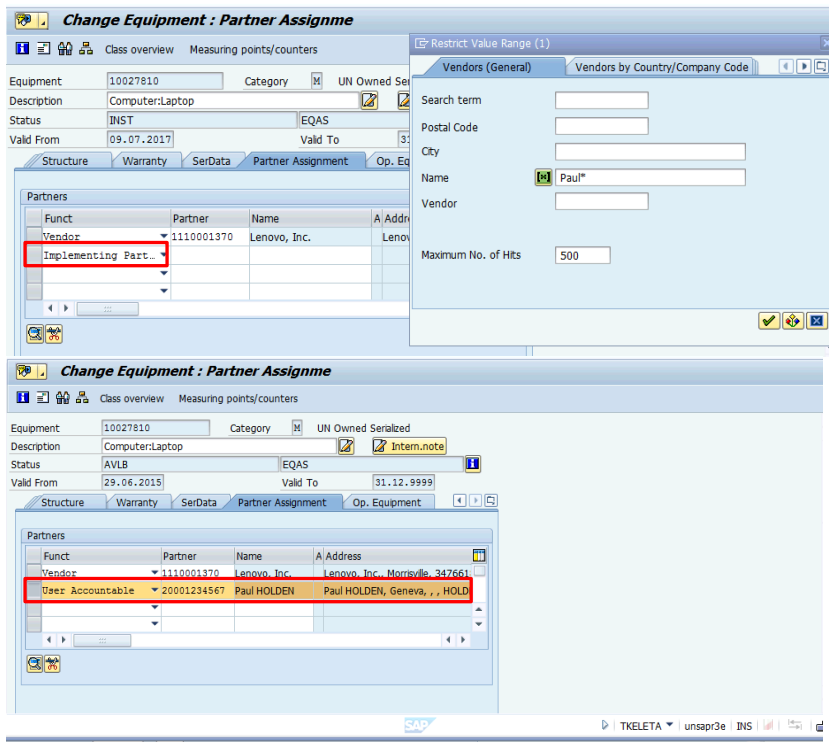
3. To update the User Status: Click on the Change Status icon.



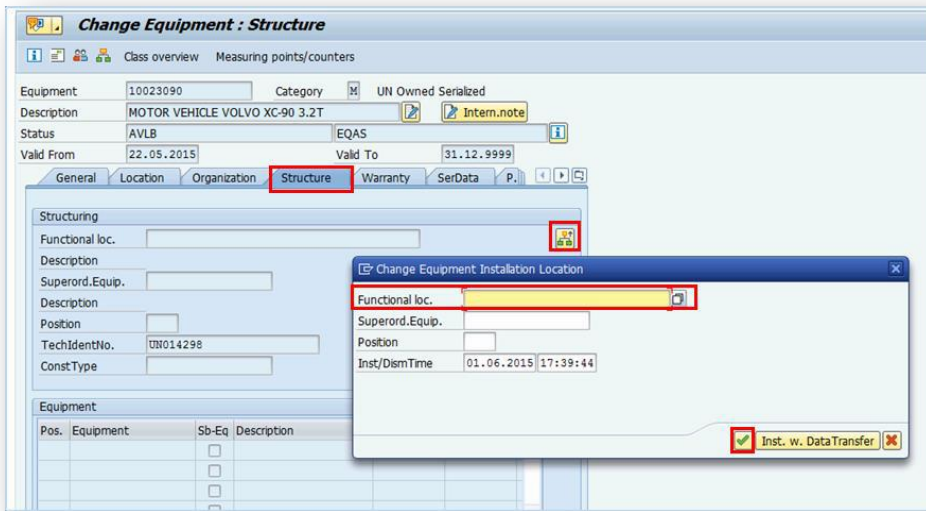
- Select the status “EQAS Equipment Assigned/Operation”



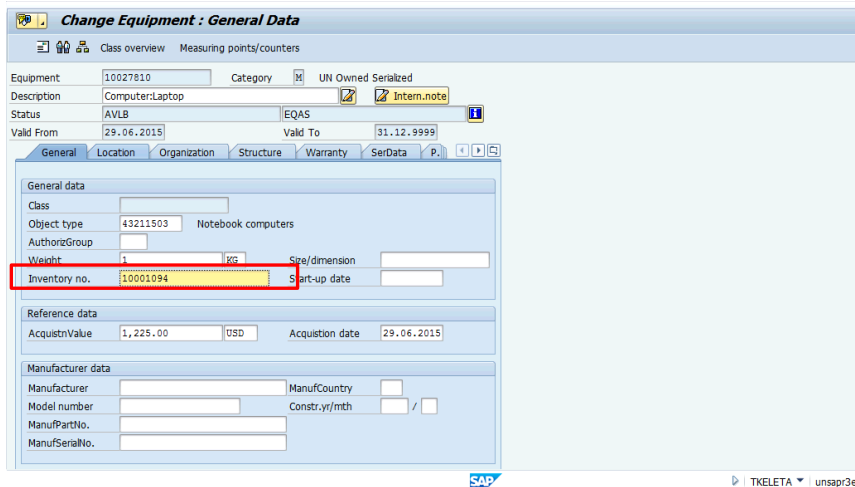
- To update the Business Partner: Go to the “Partner Assignment” tab. Select the Function “User Accountable” and search for Name of the User that the equipment is being assigned to. Select the appropriate person and click on the green check mark.



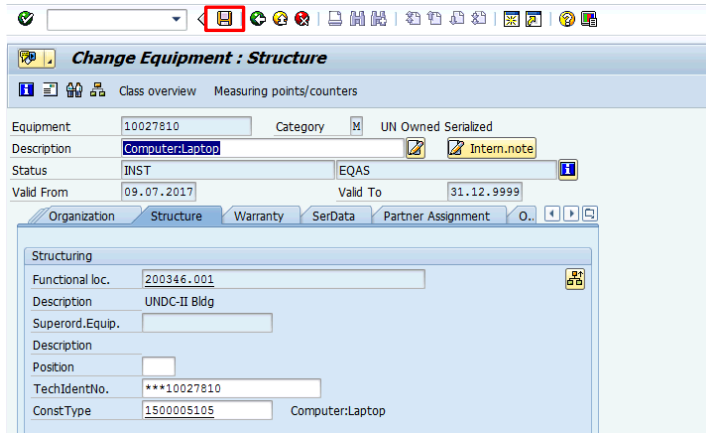
- To update the Functional Location: Click the **Structure** tab
 - Click the **Change InsLoc** icon to install equipment to a functional location
 - In the **Change Equipment Installation Location** pop-up window, enter the required functional location and click the **Continue** icon



- To update the Notification Number: In the General Tab, enter the Notification number in the "Inventory no." field.



- Click on the Save



VI. Update Asset Record (if applicable)

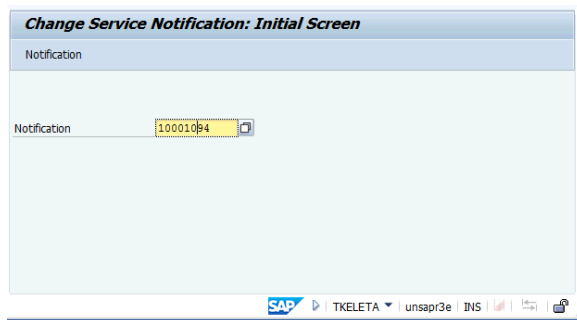
If the assignment/transfer is for Asset Records, please refer to job aid - FA “Transfers (Internal Sales and Donations)”

VII. Print and Attach Document for Assignment of Equipment

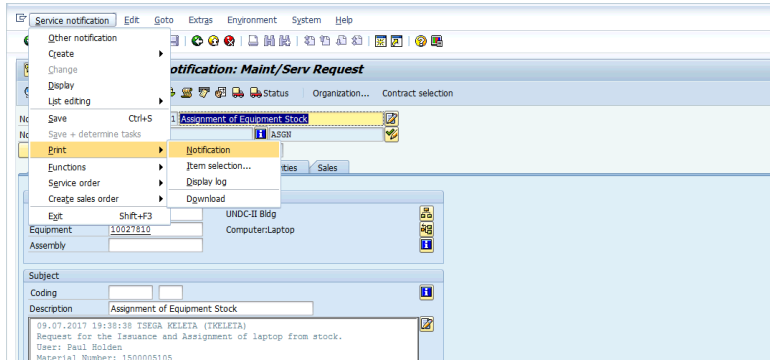
Equipment Data Maintainer, must print the Notification or the Goods Issue Document for the Assignee to accept receipt (by signature) of the equipment and then attach it to the Notification. For the steps on how to print the Goods issue Document, please refer to following User Guide <<Local Inventory Goods Movement>>.

The below steps describe how to print the Notification:


1. Type IW52 in the Command field and click Enter. Enter Notification ID and execute



2. Print the Notification by following menu path Service Notification -> Print -> Notification



3. The Notification can then be signed, scanned and attached (uploaded) to the notification.



United Nations Nations Unies

SERVICE NOTIFICATION

Type : P1 Notification : 10001094		Start Date : 24.05.2016	End Date :
Notification Date : 24.05.2016		Start Time : 20:33:19	End Time : 00:00:00
Reported By :		Reporter Contact	
		Telephone :	Ext :
		E-mail :	
Description: Assignment of Equipment Stock			
Function Location : 200345.001		Order :	
Equipment : 10027810		Planning Plant : US00	Planner : F00
Warranty End Date :		Telephone : 1234	

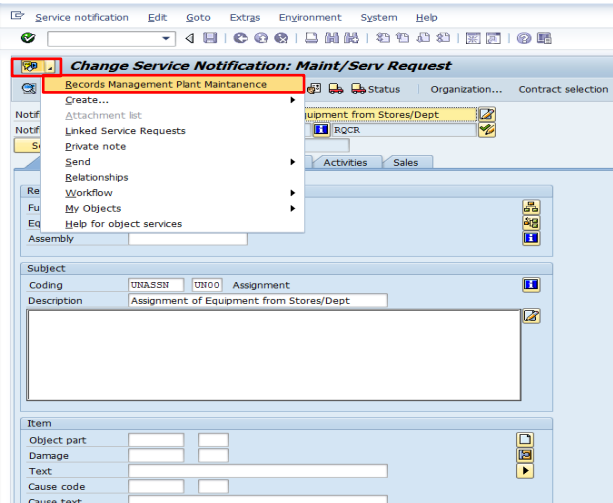
Detailed Description(Long Text)

09.07.2017 19:38:38 TSEGA KELETA (TKELETA)
Request for the Issuance and Assignment of laptop from stock.
User: Paul Holden
Material Number: 1500005105
09.07.2017 21:58:22 TSEGA KELETA (TKELETA)
Approved - but proceed to the creation of the Reservation.

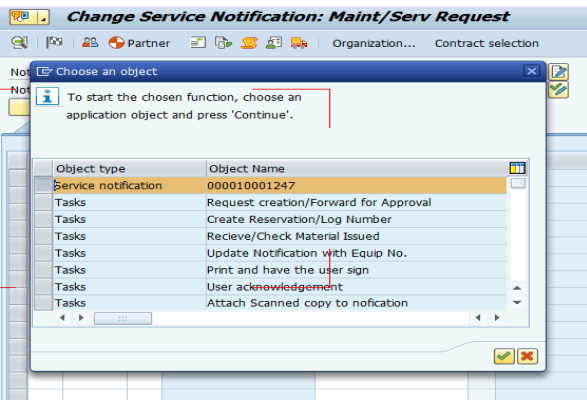
Task Details


Code	Group	Task Code	Task Text
UNGENRC		001 Generic Task	Request creation/Forward to Approver
UNGENRC		001 Generic Task	Notify Approver
UNGENRC		001 Generic Task	Create Reservation/Log
UNGENRC		001 Generic Task	Receive/Check Material is available
UNGENRC		001 Generic Task	Update Notification w/reservation number
UNGENRC		001 Generic Task	Print and have User sign to accept
UNGENRC		001 Generic Task	User acknowledgement
UNGENRC		001 Generic Task	Attached scanned copy to staff member

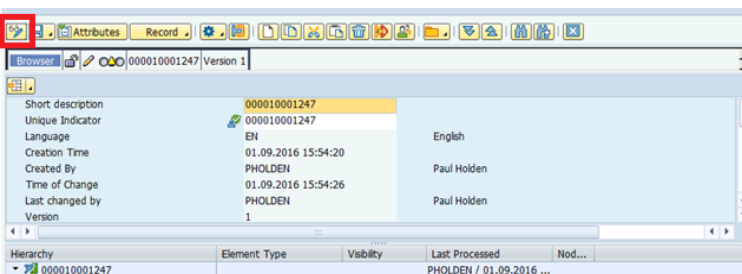
4. Under the Services for Object icon and the Click the Record Management icon.



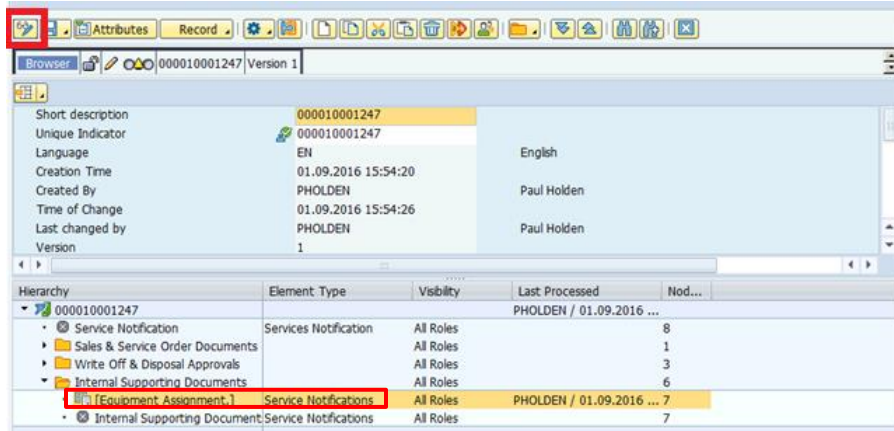
5. Highlight the entire Service notification row and click on the green check mark.



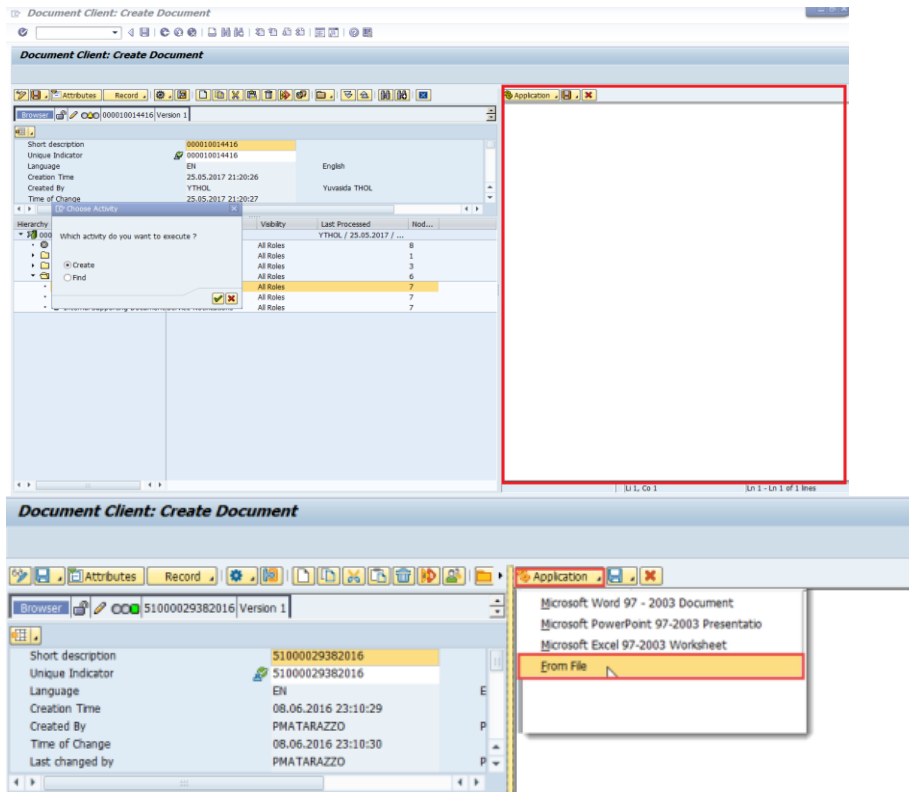
6. Click on **Display/Change** icon,  on the upper left screen



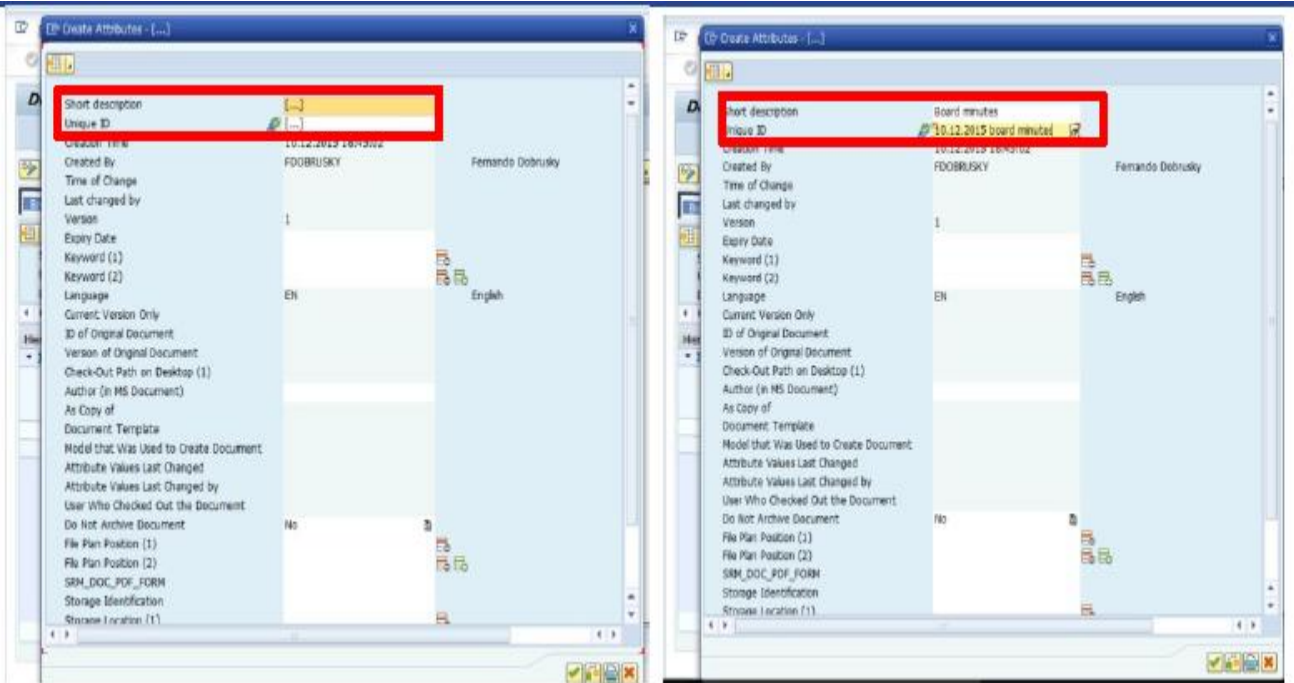
Select the relevant folder that pertains to Equipment Assignment (i.e. **Internal Supporting Documents**)



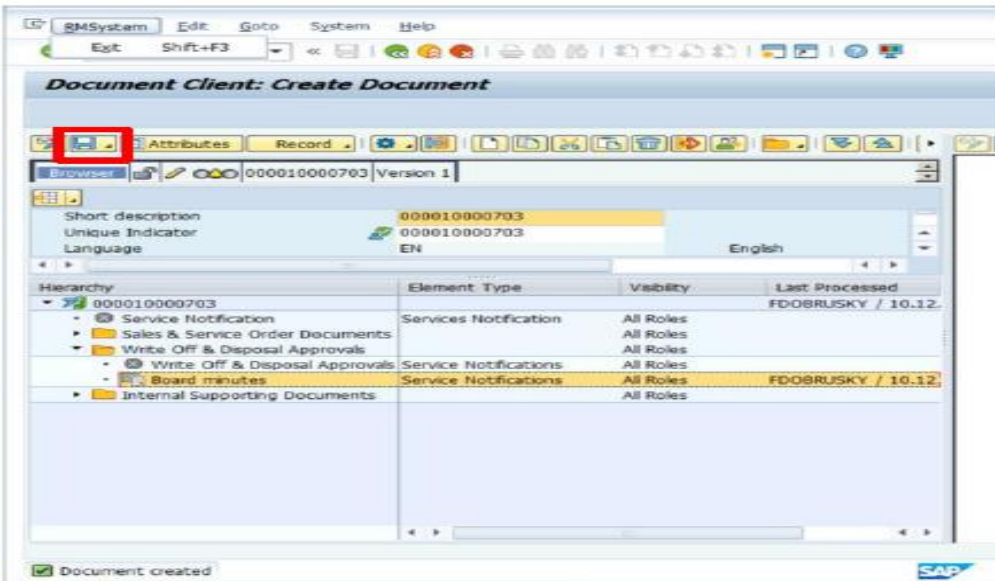
- To upload the document, attach the original document by clicking the Application > From File menu item Select From File menu item



- Complete the "short description" and "Unique ID" on the attributes screen:



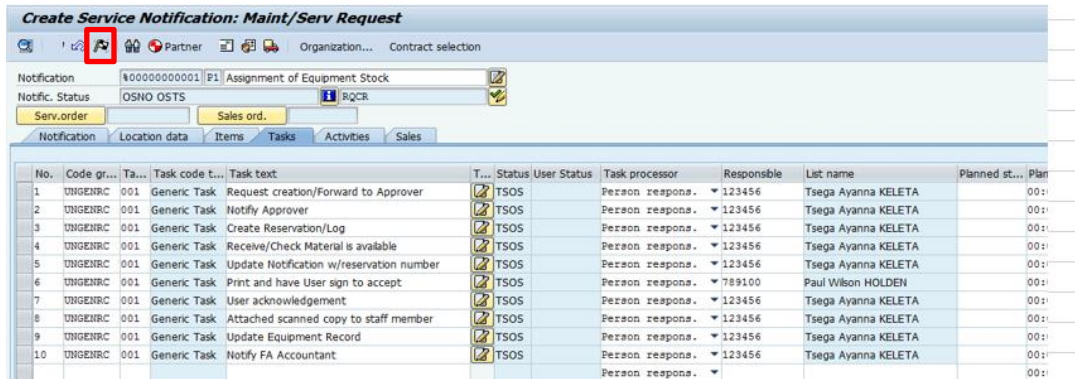
9. The file will be uploaded and it will be displayed for your revision. Click on “Save”



10. Click on “Back” at the top until you are back in the notification screen, save the notification and exit.

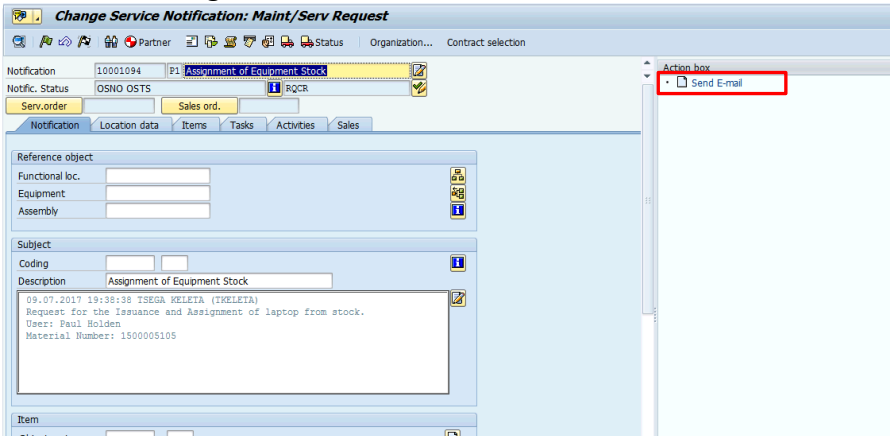
VIII. Complete and Close Notification:

- 1) Go to IW52 Transaction and open the Notification. The “Change Service Notification” screen will be displayed.
- 2) To complete the notification, click on the chequered, black and white, flag.

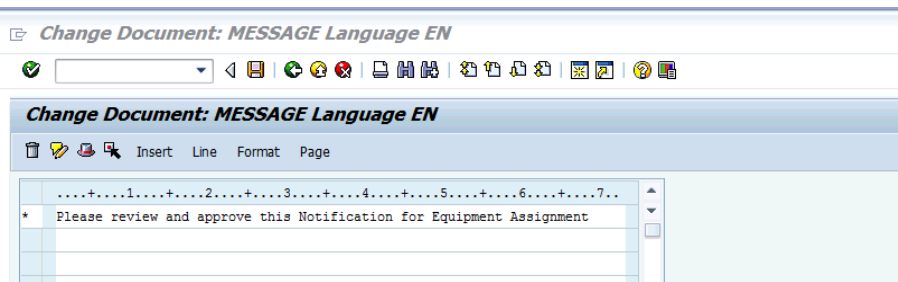



G. APPENDIX A: HOW TO SEND EMAIL NOTIFICATION

From the “Change Service Notification” screen, Click on “Send Email”



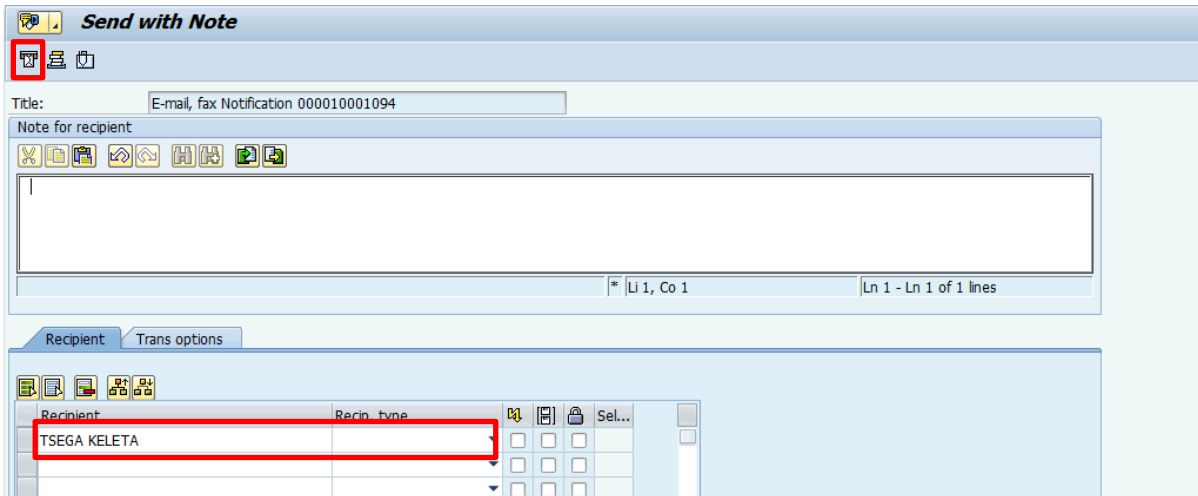
Type in a message for the approver.



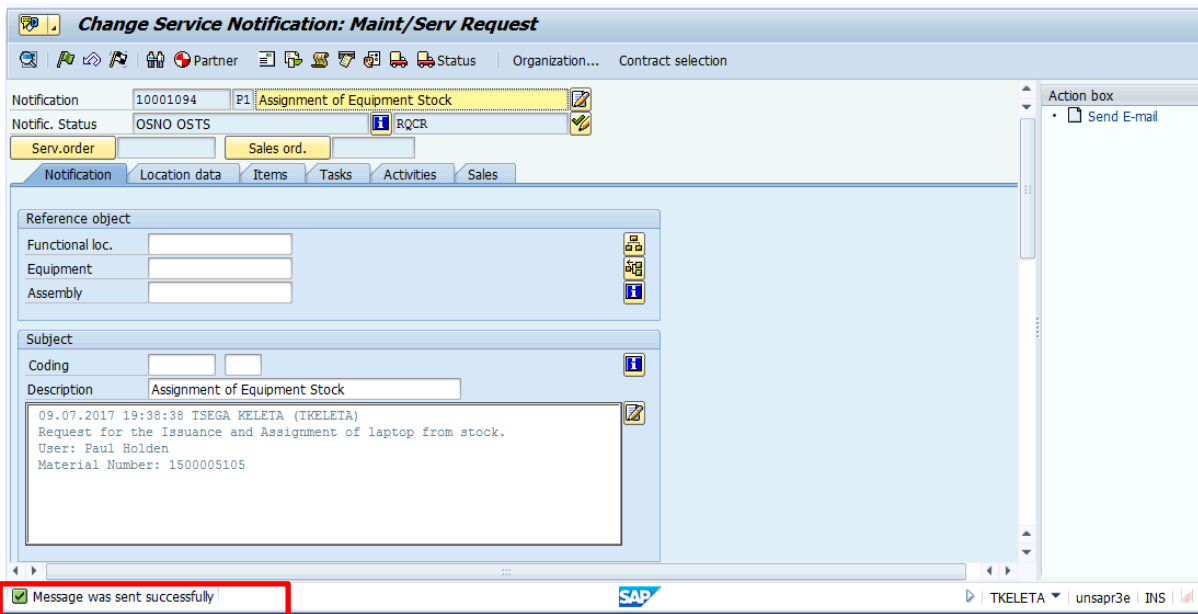
After message completion select  icon to indicate the email address (note: you will be prompted to save the message). The notification number defaults into the title of the mail.

Enter the email addresses of the approver and select send.

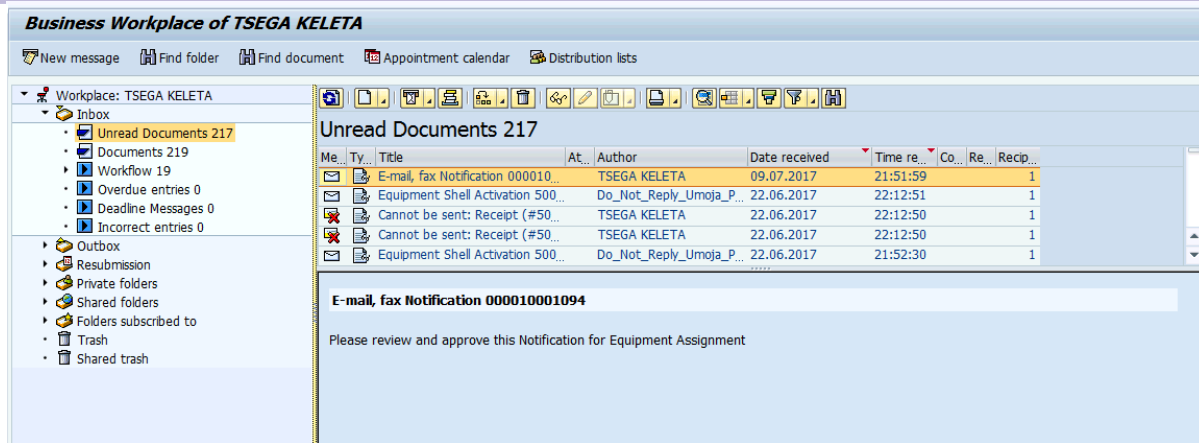
Note: Although there is a “note to Recipient” section on this screen. The note received by the approver will be based on the message entered upon the selection of the email request, NOT this one.



Once email is sent, it will appear within the inbox of the approver.



The Email will be available in the Approvers - SAP mailbox



H. Appendix B – Notification Templates and Status Sequence

Table 1: Equipment Assignment – Standard Template Task List

Task no.	Task Description
1	Record Request in Notification
2	Check if material is available
3	Create Reservation
4	Check eqpmt. holdings of user
5	Update Notification with Reservation No.
6	Have Reservation Approved
7	Attach signed doc (Goods Movement Document)
8	Send signed copy to user
9	Update Equipment Record
10	Notify FA Accountant (if Applicable)

Table 2: Equipment Assignment Template for PK/SPM

Number	Type	Template Description	Catalogue
10025833	P1	PK/SPM Equipment Assignment Template ***	UNASSN: Assignment