



Summary

Purpose:
Create a tooling equipment master.

Time Commitment:
10 minutes

Before using IE01

Introduction to Tools and Equipment

Equipment masters should only be created in SAP for durable equipment.

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1. Run create equipment transaction

- a. Enter transaction IE01 (not shown)
- b. Choose equipment category (see notes)
- c. Enter material master number for tool

The screenshot shows the 'Create Equipment : Initial Screen' in SAP. The menu bar includes 'Equipment', 'Edit', 'Goto', 'Extras', 'Structure', 'Environment', 'System', and 'H'. Below the menu is a toolbar with various icons. The main form has the following fields:

Equipment	
Valid On	10/02/2012
Equipment category	b. ☒

Below this is a 'Reference' section with a blue header:

Equipment	
Material	c.

Notes: Equipment categories are T – default, M machinery (CNC), Q – complex test equipment (ATE), V – vendor tooling.

2. Search for current serialized equipment

- a. Search for existing serialized equipment

Create Equipment : Initial Screen

Equipment a. 

Valid On

Equipment category Tooling

Reference

Equipment

Material

Equipment Number (1)

b.

Material Serial Numbers

Equipment by short text

Material c. 

Serial Number

Equipment

Equipment descript.

Language Key

- b. Go to the Material Serial Numbers tab
- c. Enter the material master number and run the search

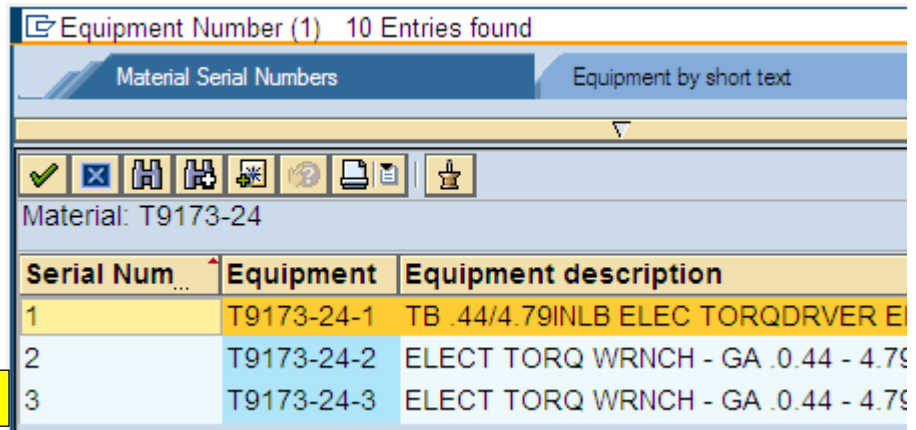


Notes: Leave other search fields blank to find all serialized tooling.

3. Define serialized EM number

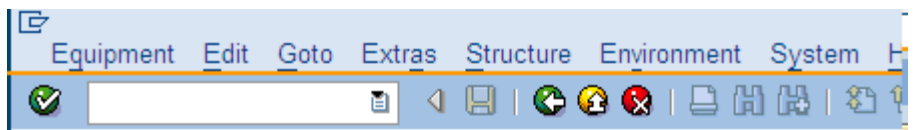
- a. Look at the serial numbers that already exist and identify the NEXT number in the sequence

a.



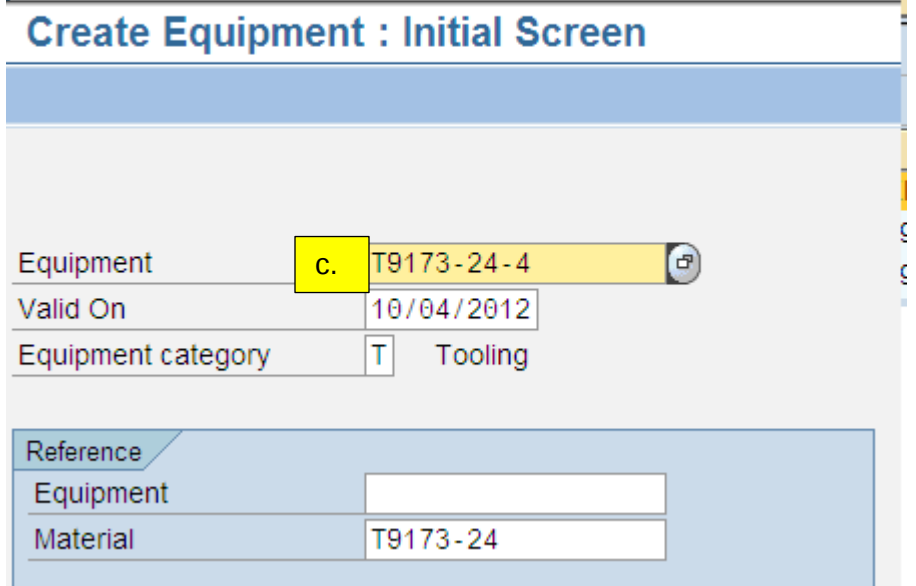
Serial Num...	Equipment	Equipment description
1	T9173-24-1	TB .44/4.79INLB ELEC TORQDRIVER E
2	T9173-24-2	ELECT TORQ WRNCH - GA .0.44 - 4.79
3	T9173-24-3	ELECT TORQ WRNCH - GA .0.44 - 4.79

- b. Close the search box



- c. Enter NEXT serialized number in Equipment field and run transaction

c.



Equipment T9173-24-4

Valid On 10/04/2012

Equipment category T Tooling

Reference

Equipment

Material T9173-24

- d. Uncheck Document assignments

Copy Equipment

Reference

Material T9173-24

Description TB .44/4.79INLB ELEC TORQDRIVER E

Sub-objects to be copied

Texts

☒ All languages

☒ Internal note

☒ Classification

☐ Document assignments

Notes: If Document assignments is not unchecked, DIR attachments will be imported from the tool material master, and will have to be deleted manually.

**4. Enter EM data –
General tab**

- a. Description
will copy from
the reference
material
master
- b. Select the
appropriate
object type
- c. Hit enter to
proceed to
next tab

Create Equipment : General Data

Class overview Measuring points/counters

Equipment T9173-24-4 Category T Tool

Description **a.** TB .44/4.79INLB ELEC TORQDRIVER EL0410B

Status AVLB NQ

Valid From 11/06/2012 Valid To

General Location Organization Structure Document

General data

Class

Object type **b.** ☒

AuthorizGroup

Weight Size/dime

Inventory no. Start-up c

Reference data

Notes: Object type identifies whether PM, V&V, or calibration is required for this equipment.

**5. Enter EM data –
Location tab**

- a. Enter the plant that will maintain the equipment in MaintPlant
- b. Enter the location of the equipment (subcategory of plant)
- c. Hit enter to proceed to next tab

The screenshot shows the 'Create Equipment : Location' dialog box in SAP. The 'Location' tab is selected. The 'MaintPlant' field is highlighted with a yellow box and labeled 'a.' The 'Location' field is highlighted with a yellow box and labeled 'b.' The 'Room' field is empty. The 'Plant section' field is empty. The 'Work center' field is empty. The 'ABC indic.' field is empty. The 'Sort field' field is empty.

Notes: The Location field is different/more general than the Functional location field on the Structure tab, which defines the work center for the equipment.

6. Enter EM data –
Organization tab

- a. Enter a
planner group
- b. Hit enter to
proceed to
next tab

Equipment: T-9173-24-4 Category: T Tool: T

Description: TB .44/4.79INLB ELEC TORQDRIVER EL0410B

Status: AVLB NQ

Valid From: 11/08/2012 Valid To:

General Location **Organization** Structure Documents

Account assignment

Company Code: 100 Welch Allyn Inc Skaneateles

Business Area:

Asset: /

Cost Center: / WA01

WBS Element:

StandgOrder:

SettlementOrder:

Responsibilities

Planning plant: 1000 Welch Allyn Inc (Skaneateles)

Planner group: **a.** ☒

Main WorkCtr: /

Notes: Planner group identifies the department responsible for the equipment, or buyer responsible for vendor equipment.

7. Enter EM data – Structure tab

- a. Click the Change InstallLoc button

Create Equipment : Structure

Equipment: TM0000000001IE Category: T Tool

Description: T9TB .44/4.79INLB ELEC TORQDRVER EL0410B

Status: AVLB NQ

Valid From: 12/11/2012 Valid To:

General Location Organization **Structure** Document

Structuring

Functional loc. a.

Description

Superord.Equip.

Description

Position

TechIdentNo.

ConstType: T9173-24 TB .44/4.79INLB EL

- b. Use the match code search to select the appropriate functional location for the equipment
- c. Hit enter to proceed to next tab

Change Equipment Installation Location

Functional loc. b.

Superord.Equip.

Position

Inst/DismTime: 11/19/2012 00:00:00

☒ Inst. w. DataTransfer ☐

Notes: You CANNOT change the functional location directly from the Functional loc. field on the Structure tab.

8. Enter EM data – Documents tab

- Select the All versions radio button
- With the cursor in the Document field, use the match code to attach appropriate documentation (consider object type)
- Hit enter to proceed to next tab

Create Equipment : Documents

Class overview Measuring points/counters

Equipment T9173-24-4 Category T Tool

Description TB .44/4.79INLB ELEC TORQDRVER EL0410B

Status AVLB NQ

Valid From 11/15/2012 Valid To

General Location Organization Structure Documents

Linked Documents

☐ Current version

☒ All versions

Ty.	Document	DPt	Vr	Description

Notes: Refer to equipment work instructions for details on documentation to be attached. Version of SAP document that applies to a specific piece of equipment is the version that is linked. **This may or may not be the current version.** Use the radio button to select all versions button. Highest version of any specific document listed is the one that defines current state of equipment. When changing equipment, engineer/designer **MUST** link new version of the DIR to applicable equipment master (s). This may or may not be all equipment masters for that particular piece of equipment.

**9. Enter EM data –
PRT data tab**

- a. No data is required in this view
- b. Hit enter to proceed to next tab

The screenshot shows the SAP 'Data' view for the object 'ELEC TORQDRIVER EL0410B'. The 'PRT data' tab is selected. The 'Category' is 'T' and 'Tooling' is 'Intern.note'. The 'Valid To' date is '12/31/9999'. The 'Load records' checkbox is unchecked. A message at the bottom right states 'Cannot be changed'.

Structure Environment System Help

Data

ints/counters

Category T Tooling

ELEC TORQDRIVER EL0410B Intern.note

NQ

Valid To 12/31/9999

ation Structure Documents PRT data SerData

☐ Load records

Cannot be changed

Notes: Equipment designer doesn't enter any data on the PRT data tab.

**10. Enter EM data –
Serial data tab**

- a. Enter the
Serial Number
of the
equipment (as
identified in
step 3c)
- b. Save the
equipment
master to
complete

Create Equipment : SerNo.Detail

Equipment: T9173-24-4 Category: T Tool: T

Description: TB .44/4.79INLB ELEC TORQDRIVER EL0410B

Status: AVLB NQ

Valid From: 11/15/2012 Valid To:

General Location Organization Structure Document

General

Material: T9173-24 TB .44/4.79INLB E

Serial Number: a. ☒

Last SerialNo: 31

Stock information

Stock type: ☐

Plant: ☐

Notes: The serial number entered on this tab should be the same as the number after the last dash in the equipment number.