



Summary

Purpose:

Create a tooling/equipment material master. (This does not cover creating a tool BOM for complex tooling/equipment.)

Time Commitment:

10-15 minutes

Before using MM01 to create tool MMs

Introduction to Material Masters

Introduction to Tools and Equipment

Review the current version of SOP-20153 and associated QSDs.

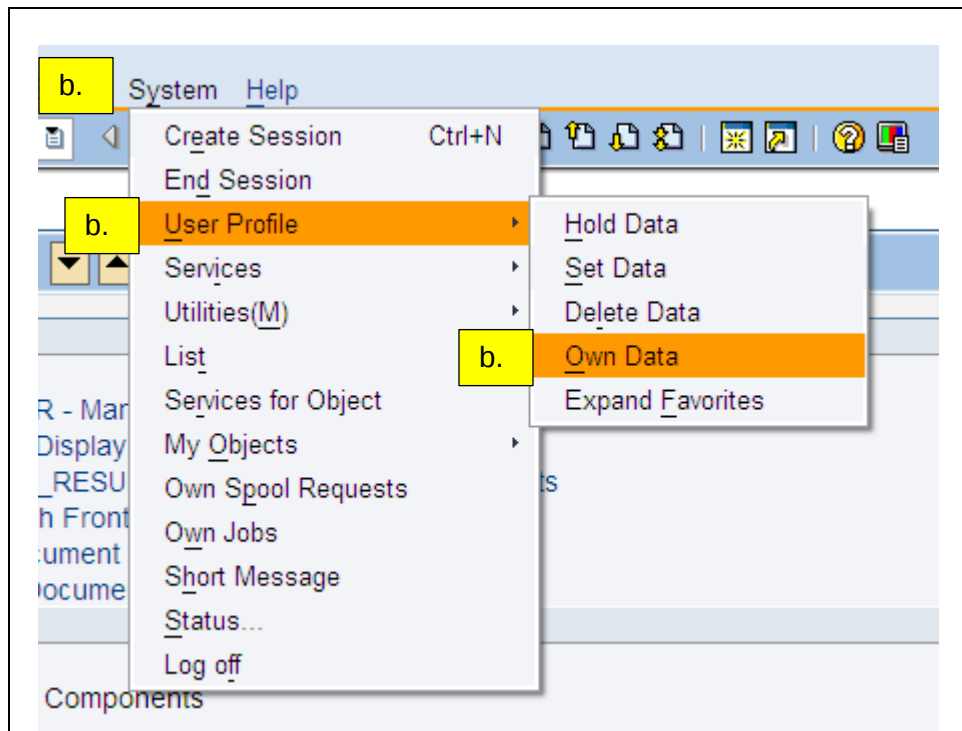
NOTE: All tool MMs should be added to tool set BOMs before production use. Individual tools should not be directly assigned as PRTs to production routings.

Table of Contents

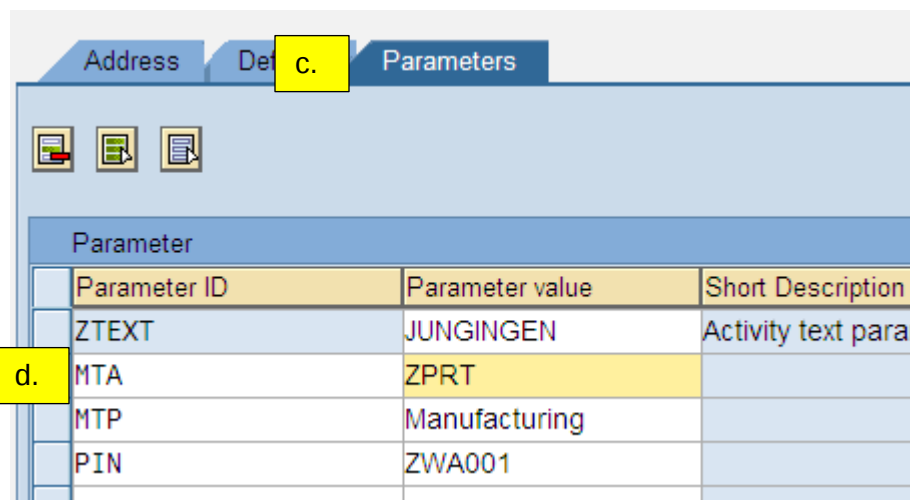
1. OPTIONAL: Set user defaults	2
2. Create tooling MM.....	3
3. Enter MM data – Basic data 1 tab	5
4. Enter MM data – Basic data 2 tab	7
5. Enter MM data – Prod.resources/ tools	8
6. Enter MM data – Plant data / stor. 1.....	9
7. Enter MM data – Plant data / stor. 2.....	10
8. Attach the mechanical spec (spec must be created first)	11
9. Promote MM to QU if spec is RL.....	13

1. OPTIONAL: Set user defaults

- a. Log on to reach the SAP Easy Access screen
- b. On the main menu bar, choose System > User Profile > Own Data

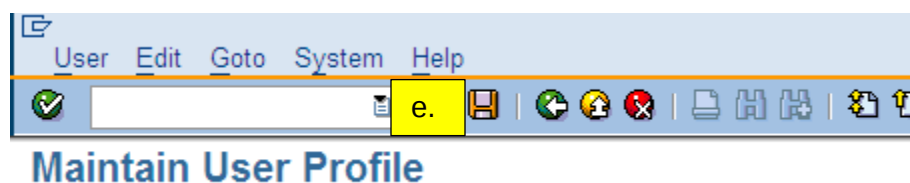


- c. Select the Parameters tab



- d. Scroll down until you see blank rows, and add MTA, MTP, and PIN parameters as shown at right

- e. Save your user profile



Notes: Setting defaults will automate steps 2b and 2c below.

2. Create tooling MM

- a. Enter transaction MM01 (not shown)
- b. Choose industry sector Manufacturing
- c. Choose material type ZPRT
- d. Click Select Views

Create Material (Initial Screen)

d. Select View(s) Org. Levels Data

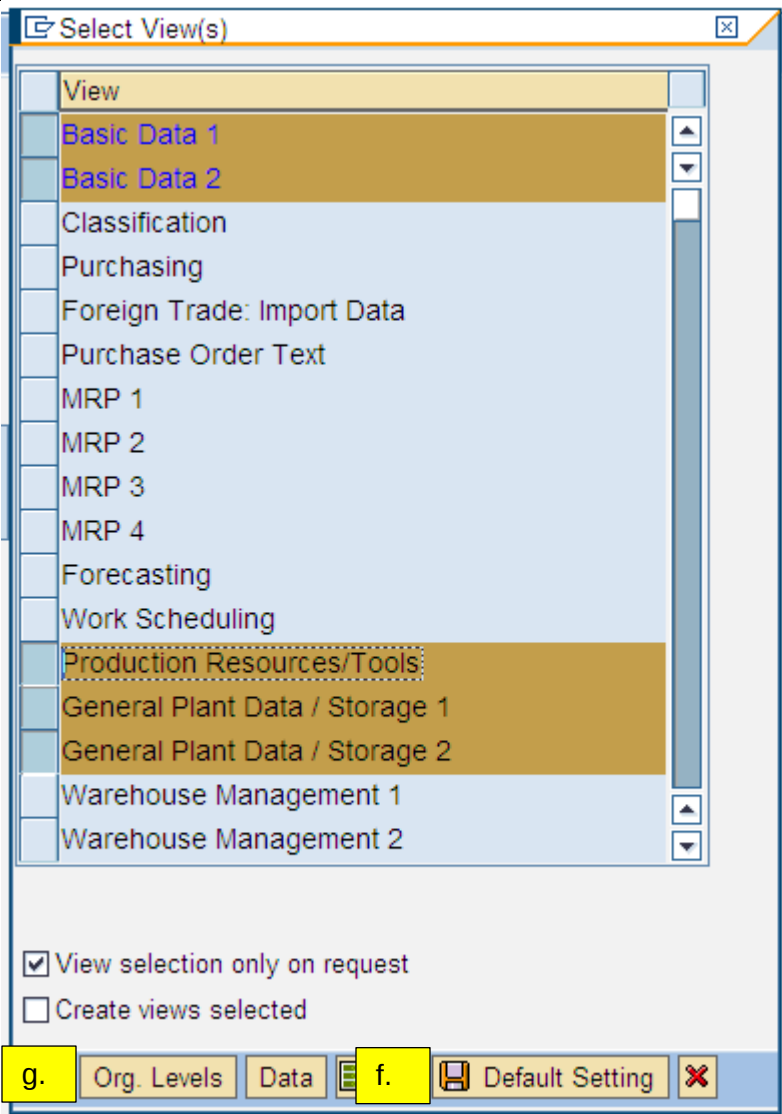
Material

Industry sector **b.** M Manufacturing

Material Type **c.** ZPRT PRT/Tools/Equi

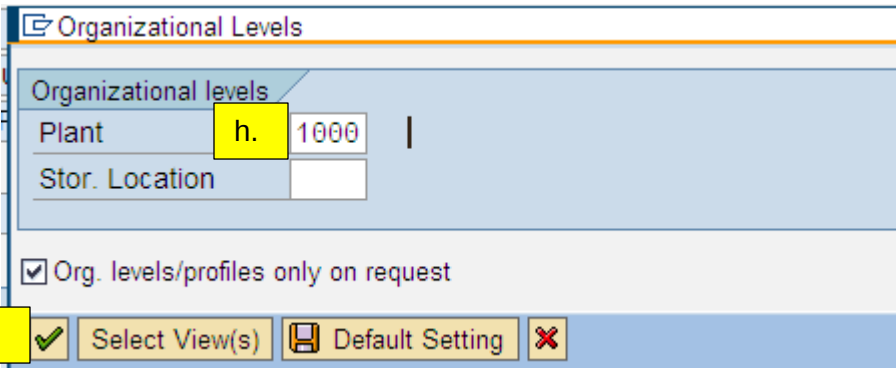
Change Number

- e. Select the views highlighted at right
- f. **Optional:** To save these views as your default, hit  Default Setting. Then you can skip the select views step on future tool MM creates.



- g. Click Org. Levels

- h. Choose the plant the tool will be used in
- i. Hit the green check  to proceed



Notes: If you don't set default views, re-select them each time.

**3. Enter MM data –
Basic data 1 tab**

- a. Enter a material description – all CAPS
- b. Set the base unit of measure to EA

Material 20019110 a. DESCRIPTION HERE

General data

Base Unit of Measure	b. EA	Material Group
Old material number		Ext. Matl Group
Division		Lab/Office
Product allocation		Prod.hierarchy
X-plant matl status	NQ	Valid from
☐ Assign effect. vals		GenItemCatGrou

- c. In the Ext. Matl Group field, type or select "TOOLS"
- d. Hit enter to advance to the Basic data 2 tab

The screenshot shows the SAP Material Master creation interface for Tools/Equipment. The title bar includes 'Item' and 'Help'. The main header is 'PART/Tools/Equipment'. Below this is a 'Check Screen Data' button. The 'Classification' tab is selected, showing 'Purchasing' and 'Foreign trade import' sub-tabs. A 'DESCRIPTION HERE' field is visible. The 'Basic data 2' tab is highlighted, showing the following fields:

Material Group	
c. Ext. Matl Group	
Lab/Office	
Prod.hierarchy	
Valid from	
GenItemCatGroup	

Notes: The tool designer may also end up changing the X-plant matl status field later in this process. Where applicable, reference WI-17206624 for material description.

**4. Enter MM data –
Basic data 2 tab**

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

The screenshot shows the SAP 'Create Material' dialog box for material '20019129'. The 'Basic data 2' tab is active. The 'Material' field contains '20019129' and the 'DESCRIPTION HERE' field is highlighted in yellow. Below the 'Material' field are two small icons. The 'Other Data' section contains the following fields:

Other Data	
Prod./insp. memo	Ind. Std Desc.
Page format	☐ CAD Indicator
Basic material	

Notes: Though the designer doesn't enter data, the Basic data 2 view is still required.

**5. Enter MM data –
Prod.resources/
tools**

- a. Hit enter to
proceed to
next tab

The screenshot shows the SAP 'Create Material' transaction for Tools/Equipment. The title bar reads 'Create Material 20019129 (PRT/Tools/Equipment)'. The menu bar includes 'Material', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. The toolbar contains various icons for navigation and actions. Below the title bar, there are three tabs: 'Work scheduling', 'Prod.resources/tools' (which is active), and 'Plant data / st'. The 'Prod.resources/tools' tab is selected, and the 'Material' field is populated with '20019129'. The 'Plant' field is populated with '1000'. The 'DESCRIPTION HERE' field contains 'Welch Allyn Inc (Skaneateles)'. Below the 'General data' section, the 'Base Unit of Measure' is 'EA' (each), and the 'Unit of issue' is 'Valid from'. The 'Task list usage' field is highlighted in yellow and contains 'a.' followed by '009' and a magnifying glass icon. The 'Grouping key 1' and 'Grouping key 2' fields are empty.

Notes: Though the designer doesn't enter data, the prod.resources/tools view is still required.

**6. Enter MM data –
Plant data / stor. 1**

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

The screenshot shows the SAP 'Create Material' transaction for Tools/Equipment. The title bar reads 'Create Material 20019129 (PRT/Tools/Equipment)'. The menu bar includes 'Material', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. The toolbar contains various icons for navigation and actions. Below the title bar, there are three tabs: 'Prod.resources/tools', 'Plant data / stor. 1', and 'Plant data'. The 'Plant data / stor. 1' tab is active. The main form area displays the following data:

Material	20019129	DESCRIPTION HERE
Plant	1000	Welch Allyn Inc (Skaneateles)

Below this, there is a section for 'General data' with the following fields:

Base Unit of Measure	EA	each	Unit of issue
Temp. conditions			Storage condition
Container reqmts			Haz. material num
CC phys. inv. ind.		☐ CC fixed	Number of GR sli
Label type		Lab.form ☐	☐ Appr.batch rec.
☐ Batch management			

Notes: Though the designer doesn't enter data, the plant data/storage views are still required.

**7. Enter MM data –
Plant data / stor. 2**

- b. No data is required in this view. Do NOT hit enter

The screenshot shows the SAP 'Create Material' dialog box for Plant data / stor. 2. The dialog box has a menu bar with 'Material', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main title is 'Create Material 20019129 (PRT/Tools/Equipment)'. Below the title are three buttons: 'Additional Data', 'Org. Levels', and 'Check Screen Data'. The 'Plant data / stor. 1' tab is selected. The 'Material' field contains '20019129' and the 'DESCRIPTION HERE' field is highlighted. The 'Plant' field contains '1000' and the 'Welch Allyn Inc (Skaneateles)' text is visible. Below these fields are sections for 'Weight/volume' and 'General plant parameters'. The 'Weight/volume' section has fields for 'Gross Weight', 'Net Weight', 'Volume', and 'Size/dimensions', each with a corresponding 'Weight unit' or 'Volume unit' field. The 'General plant parameters' section has a checkbox for 'Neg. stocks in plant' and a label 'Loc. handling arc'.

Notes: Though the designer doesn't enter data, the plant data/storage views are still required.

8. Attach the mechanical spec (spec must be created first)

a. Click Additional Data

b. Go to the Document Data tab

c. Select the All Versions radio button

d. With the cursor in the Document field, use the matchcode to find and attach the correct document

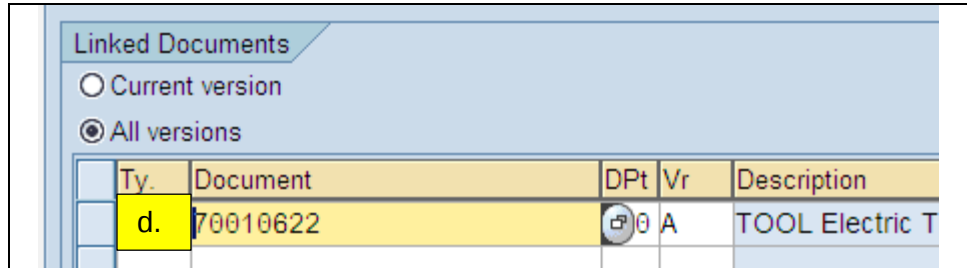
The first screenshot shows the 'Create Material 20019110 (PRT/Tools/Equipment)' screen. The 'Additional Data' button is highlighted with a yellow box and labeled 'a.'. The 'Basic data 1' tab is selected. The 'Material' field contains '20019110' and the 'DESCRIPTION HERE' field is empty.

The second screenshot shows the 'Material 20019110 (PRT/Tools/Equipment)' screen. The 'Document data' tab is highlighted with a yellow box and labeled 'b.'. The 'Material' field contains '20019110' and the 'Document' field is empty.

The third screenshot shows the 'Create Material 20019110 (PRT/Tools/Equipment)' screen. The 'Main Data' button is highlighted with a yellow box and labeled 'c.'. The 'Document data' tab is selected. The 'Material' field contains '20019110' and the 'Document' field is empty. The 'All versions' radio button is selected. The 'Document' field is highlighted with a yellow box and labeled 'd.'. The 'Document' field contains the matchcode '1'.

Ty.	Document	DPt	Vr	Description
	1			

- e. Double click
on the
document
number to
display spec

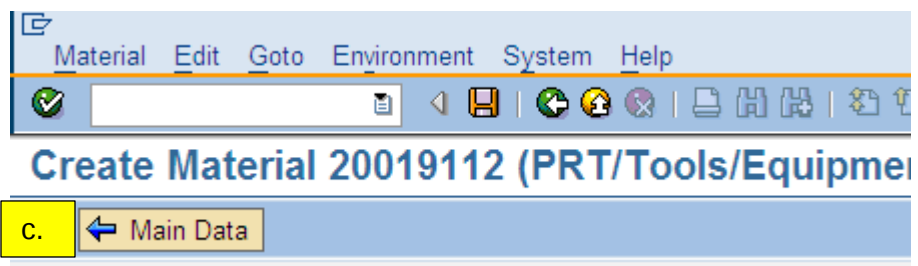
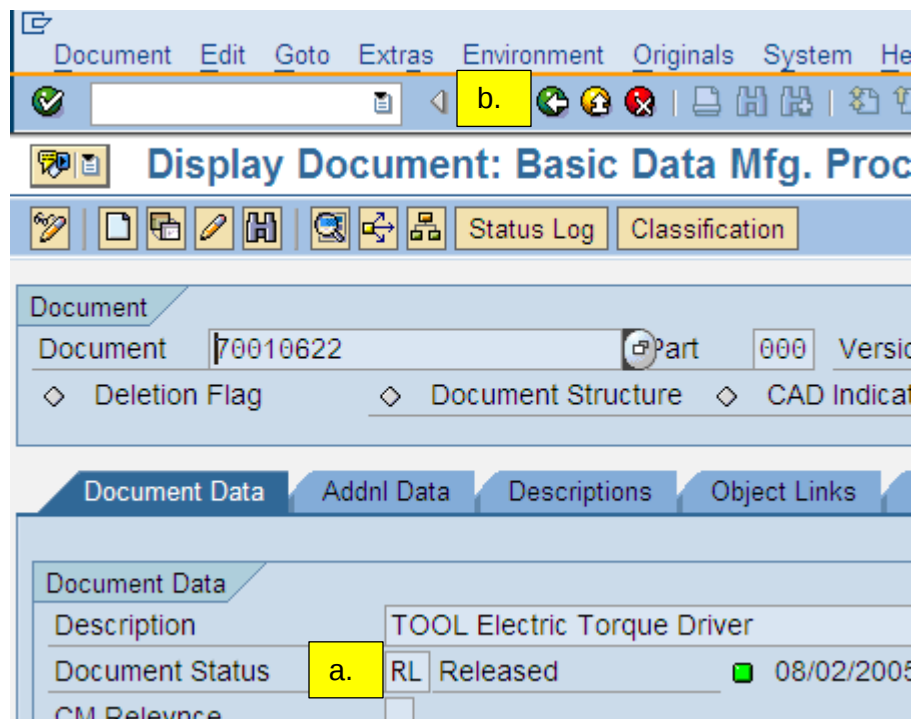


Ty.	Document	DPt	Vr	Description
d.	70010622		A	TOOL Electric T

Notes: Instead of navigating Additional Data > Document Data, you can press F8 from the Create Material screen (also works in other MM transactions).

**9. Promote MM to QU
if spec is RL**

- a. If the tool spec is released (RL status), continue to step 5b. If not, see notes for this step first
- b. Green arrow back to the material master
- c. Click on Main Data



- d. **Skip if tool specification is not RL:**
Promote the material status from NQ > QU
- e. Save the material master to complete

Material 20019112 DESCRIPTION HERE

Display revision level

General data

Base Unit of Measure	EA	each	Material Group
Old material number			Ext. Matl Group
Division			Lab/Office
Product allocation			Prod.hierarchy
X-plant matl status	d.	NQ	Valid from
☐ Assign effect. vals			GenItemCatGrou

Notes: If the spec is NOT yet released (RL status), an ECR must be processed first to release it. ONLY THEN can the material master status can be promoted from NQ > QU. The ECR constructor can promote the MM status in that scenario.