|  |  |
| --- | --- |
|  | Test Script  SAP S/4HANA - 05-09-24 |
|  | Reactive Maintenance (4HH\_CA)  **SAP Logo** |
|  | PUBLIC |

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# Purpose

Overview

This comprehensive nine-step process supports an end-to-end maintenance process. First, a maintenance request is created (Initiation). Next, the maintenance request is screened and accepted (Screening). The maintenance request is converted into a maintenance order. During this phase, the required resources for processing the order are also planned (Planning). The maintenance order is then approved for execution (Approval). Next, the maintenance order is prepared for execution. Various requirements such as stock, non-stock material, purchase requisition, and capacity are reviewed (Preparation). After this, the maintenance order is scheduled for execution (Scheduling). The maintenance order is then executed to repair malfunction (Execution). Then, activities like failure data recording and other post-work activities are performed (Post Execution). Finally, the maintenance order is reviewed and is technically completed (Completion).

As an exception to above nine-step process where all steps needs to be executed, a minor work or an emergency work does not need to go through all the nine steps. When you select the notification processing context in the Create Maintenance Request app, you also decide the variation of the reactive maintenance process (minor or emergency).

This document provides a detailed procedure for testing this scope item after solution activation, reflecting the predefined scope of the solution. Each process step, report, or item is covered in its own section, providing the system interactions (test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly. Project-specific steps must be added.

|  |
| --- |
| Note Values in this test script (decimal notation, date formats, and so on) are presented in U.S. standard notation. If your test system is set up to use a different notation, enter values as appropriate. |

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

|  |
| --- |
| Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.  For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/docs/SAP_S4HANA_ON-PREMISE/4cef93946a0b48ec89533b3c34443b85/17d958a88d244ee293aed687f9bfe37f.html?version=2023). |

|  |  |  |  |
| --- | --- | --- | --- |
| Name (Role) | ID (Role) | Name (Space) | ID (Space) |
| Maintenance Planner | SAP\_BR\_MAINTENANCE\_PLANNER | Maintenance Planning | SAP\_EAM\_SP\_MAINT\_PLANNER |
| Maintenance Supervisor | SAP\_BR\_MAINT\_SUPERVISOR | / Maintenance Supervisor / Maintenance Supervision | / SAP\_BR\_MAINTENANCE\_SUPERVISOR / SAP\_EAM\_SP\_MAINT\_SUPERVISOR |
| Maintenance Technician | SAP\_BR\_MAINTENANCE\_TECHNICIAN | Maintenance Execution | SAP\_EAM\_SP\_MAINT\_TECHNICIAN |
| Warehouse Clerk | SAP\_BR\_WAREHOUSE\_CLERK | Inventory Processing | SAP\_MMIM\_SP\_INVENTORY\_PROCESS |
| Purchaser | SAP\_BR\_PURCHASER | Purchasing / Sourcing and Contracting | SAP\_PRC\_SP\_PURCHASING / SAP\_PRC\_SP\_SOURCING |
| Accounts Payable Accountant - Procurement | SAP\_BR\_AP\_ACCOUNTANT\_PROCUREMT | Accounts Payable - Procurement | SAP\_PRC\_SP\_ACCOUNTS\_PAYABLE |
| Employee | SAP\_BR\_EMPLOYEE | Employee Self-Services | SAP\_HCM\_SP\_EMPLOYEE |
| Inventory Manager | SAP\_BR\_INVENTORY\_MANAGER | Inventory Management | SAP\_MMIM\_SP\_INVENTORY\_MANAGE |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT | Business Process Configuration | SAP\_BASIS\_SP\_BPC |
| Cost Accountant - Overhead | SAP\_BR\_OVERHEAD\_ACCOUNTANT |  |  |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company is created in your system during implementation. The organizational structure reflects the structure of your company. The master data represents materials, vendors, for example, depending on the operational focus of your company.

Use your own master data to go through the test procedure. You can also use the following sample data:

|  |  |  |  |
| --- | --- | --- | --- |
| Data | Sample Value | Details | Comments |
| Equipment | 229100091 | Cooling Water Circulation Pump |  |
| Equipment | 229100093 | Cooling Water Circulation Pump |  |
| Spare Parts | SP001 | Bearing | Spare parts |
| Spare Parts | SP002 | Coupling | Spare parts |
| Spare Parts | SP003 | Shaft | Spare parts |
| Spare Parts | SP004 | Gaskets 1mm | Spare parts |
| Spare Parts | SP005 | Mechanical Seal | Spare parts |
| Spare Parts | SP006 | Spur gear IS651 | Spare parts |
| Non-stock Material | NL001 | Screw |  |
| Service Material | SM0001 | Service Material 01 |  |
| Plant | 2910 | Plant 1 CA |  |
| Storage Location | 291B | Std. storage 2 |  |
| Supplier | 29300001 | Domestic CA Supplier 1 |  |

For more information on creating master data objects, see the following Master Data Scripts (MDS):

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| 5LM | Create Functional Location |
| 5MF | Create Equipment |
| 5MH | Create Maintenance Work Center |
| 5MI | Measuring Point |
| 2J7 | Spare Parts |

Bill of Material Structure

This overview shows the bill of material structure and the usage of each component if you have activated all optional enhancements.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Material | Level | Material Type | Unit | Characteristics | Optional Enhancements |
| 229100091 | 0 | Equipment | PC | Cooling Water Circulation Pump |  |
| SP001 | 1 | ERSA | PC | Bearing |  |
| SP002 | 1 | ERSA | PC | Coupling |  |
| SP003 | 1 | ERSA | PC | Shaft |  |
| SP004 | 1 | ERSA | PC | Gaskets 1mm |  |
| SP005 | 1 | ERSA | PC | Mechanical Seal |  |
| SP006 | 1 | ERSA | PC | Spur Gear IS651 |  |

## Business Conditions

Before this scope item can be tested, the following business conditions must be met.

|  |  |
| --- | --- |
| Scope Item | Business Condition |
| BNZ - Create New Open MM Posting Period | You have completed the step described in the Create New Open MM Posting Period (BNZ) master data script. The posting period is up to date.  To run through this scope item, the materials must be available in stock. |

# Preliminary Steps

## Initializing Material Stock

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In a real business case, the materials are usually purchased from external suppliers. In this case, the process is covered by the standard purchasing or subcontracting processes. This process step shows you how to post initial stock directly to the storage locations.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 2:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Inventory Manager. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Stock (F1062). | The Manage Stock screen displays. |  |
| 3 | Input Material | Make the following entries and choose Enter:   * Material: < material number>. Select one of the Spare Parts Material mentioned in the previous section Master Data, Organizational Data, and Other Data. * Plant: 2910 |  |  |
| 4 | Select Stock | Select the icon beside the stock that you want to add initial stock, for example:   * Storage Location: 291B * Unrestricted-Use Stock | A dialog box opens. The storage location, stock type and the current quantity are displayed according to your entries in the previous steps. |  |
| 5 | Add Initial Entry | Make the following entries and choose Post:   * Document Date: <today> * Posting Date: <today> * Stock Change: initial entry * Quantity: <quantity number> | The material document is created and the stock has been added. |  |

## Configure Flexible Workflow for Maintenance Orders

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this procedure, you can configure and activate flexible workflow for maintenance orders.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 3:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log onto Fiori Launchpad | Log on to the SAP Fiori launchpad as Configuration Expert - Business Process Configuration | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Workflows for Maintenance Orders - Asset Management (F4989) app. | The Manage Workflows screen is displayed. |  |
| 3 | Check Automatic Approval of Maintenance Order | In Workflows list, choose Automatic Approval of Maintenance Order, Make sure workflow Automatic Approval of Maintenance Order is in active status. If not, select it and choose Activate. | The workflow item is activated. |  |
| 4 | Manage Workflow | You can also create custom workflow. When a workflow is triggered, it determines the agents who can approve the maintenance order.  Below is a custom workflow created for reference  Choose Create and make following entries:  Workflow Name: <Enter Text>  Go to the START CONDITIONS area and choose Maintenance Order Type is <Enter Order Type> |  |  |
| 5 | Create Step Sequence | Go to the STEPS area, and choose Create, then make the following entries on the next screen:  Go to the RECIPIENTS area:   * Assignment By: User * User: <Enter User ID> * Step to be completed by: One of the recipients. * Step Conditions:   Go to the Step Conditions area and choose Main Work Center of the maintenance order is <Enter Main Work Center>.  Choose Create. |  |  |
| 6 | Save Workflow | Choose Save. | Workflow is created. |  |
| 7 | Activate Workflow | Go back to the workflow list.  Select the required workflow and choose Activate. | The workflow is activated. |  |

## Create Planning Bucket

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

With this app, you can create maintenance planning buckets that aid you in effectively managing your maintenance backlog. By defining maintenance planning buckets, you can divide the maintenance effort into manageable groups based on their scope. The scope of a planning bucket includes time, but also other important attributes of the maintenance jobs such as the planner group.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 4:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Maintenance Planning Buckets (F3888) | The app opens. |  |
| 3 | Create New Planning Bucket | Choose the Create button. Enter the following information:  Header:   * Label: <PUMP\_2910> * Description: <Planning Bucket for PUMP Unit>   General Data:   * Type: Operational Maintenance * Planning Plant: 2910   Time Period:   * Start Date and Time: Todays date/Time * Duration: 7 Days * Recurrence: Weekly * Recurs Every: 1 WK * Number of Buckets in Advance: 5   Scope:   * Planner Group: <Entry of your Choice > * Plant Section: <Entry of your Choice > * Maintenance Plant: 2910 * Main Work Center: <Entry of your Choice > * Technical Object: 229100091   Choose Create. | Planning bucket is saved. |  |

## Maintain Cost Rates

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this activity, you can maintain, check, and update the actual cost rates.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 5:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Cost Accountant - Overhead. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Cost Rates - Plan (F3162)   |  | | --- | | Note If Universal Parallel Accounting (UPA) is not active, use the Edit Prices for Activity Types - Cost Centers (KP26) app instead of the Manage Cost Rates - Plan (F3162) app to maintain cost rates. | | The app opens. |  |
| 3 | Check Actual Cost Rates | Set the following filters and choose Go.   * Valid On: Today * Cost Center: 29101701 * Activity Type: 11 * Currency: For example, CAD   Check if there is a valid cost rate for given cost center, activity type, and period. | The actual cost rates for given cost center, activity type and period are checked for valid values.   |  | | --- | | Note You can skip the next step if there is a valid cost rate for given cost center, activity type, and period. | |  |
| 4 | Maintain Actual Cost Rates | Choose Add and enter the following   * Cost Center: 29101701 * Activity Type: 11 * From Fiscal Year: Current Year * From Period: Current Period * Fixed Rate: 100 * Currency: For example, CAD * Per:1 * Activity Unit: H * Choose Save. | Cost rates are created. |  |

## Create Purchasing Information Record

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The purpose of this activity is to create the information records for materials, for example, NL001 and choose a valid supplier (for example, 29300001).

This step becomes obsolete if the necessary information records are already present.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 6:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Purchaser. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Manage Purchasing Info Records (F1982) app. | The Manage Purchasing Info Records screen is displayed. |  |
| 3 | Open New Purchasing Info Record | Choose Create. | The Purchasing Info Record screen displays. |  |
| 4 | Enter Header Data | Go to header area and enter the following:   * Purchasing Info Record Category:: Standard * Purchasing Organization: 2910 * Supplier: 29300001 * Material: NL001 * Plant: 2910 * Purchasing Group : 001 | Header data is added. |  |
| 5 | Enter General Information | Enter the following:   * Available From: Today * Available To: 12/31/9999 | General information is added. |  |
| 6 | Enter Purchasing Data | Enter the following:   * Incoterm: EXW * Incoterm Location 1: Vendor | Purchasing data is added. |  |
| 7 | Enter Delivery and Quantity Data | Enter the following details:   * Delivery Time in Days: <XX Days>, for example, 1 * Under Delivery Tolerance in %: 10.0 * Over Delivery Tolerance in %: 10.0 * Tax Code: <Tax Code>, for example, I0. For Brazil, it is 00. * Order Unit: PC * Standard Order Quantity <Standard Order Quantity>, for example, 10 | Delivery and quantity data is added. |  |
| 8 | Enter Condition Data | Go to the Conditions area. Choose the Create icon. Enter the following:   * Valid From: <Valid from Date> * Amount: <Amount>, for example, 1 * Currency: <Currency>, for example, CAD * Pricing Unit: <Pricing Unit>, for example, 1 * Valid To: <Valid to Date>   Choose Apply. | Condition data is added. |  |
| 9 | Enter Reference Data (Optional) | You can enter reference data. | Reference data is added. |  |
| 10 | Create Purchasing Information Record | Choose Create. | A purchasing information record is created. |  |

# Overview Table

This scope item consists of several process steps provided in the table below.

Table 7: Reactive Maintenance

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| Create Maintenance Request | Employee | Create Maintenance Request (F1511A) | Maintenance request is created. |
| Review Maintenance Requests | Employee | My Maintenance Requests (F4513) | Maintenance request is reviewed. |
| Screen Maintenance Requests | Maintenance Supervisor | Screen Maintenance Requests (F4072) | Maintenance request is approved. |
| Create and Plan Maintenance Order | Maintenance Planner | Manage Maintenance Notifications and Orders (F4604) | Maintenance order is created and resources are planned. |
| Submit Maintenance Order for Approval | Maintenance Planner | Manage Maintenance Notifications and Orders (F4604) | Maintenance order is submitted for approval. |
| Approve Maintenance Order (Optional) | As per agent determined in the workflow. | My Inbox (F0862) | Maintenance order is approved |
| Review and Release Maintenance Order | Maintenance Planner | Manage Maintenance Notifications and Orders (F4604) | Maintenance order is released. |
| Convert Purchase Requisitions to Purchase Orders | Purchaser | Process Purchase Requisitions (V2) (F1048A) | Purchase requisitions are converted to purchase orders. |
| Goods Receipt for Purchase Orders | Warehouse Clerk | Post Goods Movement (MIGO) | Goods receipt is posted. |
| Post Goods Issue | Warehouse Clerk | Post Goods Movement (MIGO) | Goods Issue is posted. |
| Maintenance Backlog Overview | Maintenance Planner | Maintenance Backlog Overview (F5105) | Maintenance backlog is reviewed. |
| Submit Order for Scheduling | Maintenance Planner | Find Maintenance Order (F2175) | Maintenance orders are ready to be scheduled. |
| Schedule Maintenance Order and Submit for Execution | Maintenance Planner | Find Maintenance Order (F2175) | Maintenance orders are scheduled. |
| Execute Maintenance Order | Maintenance Technician | Perform Maintenance Jobs (F5104A) | Time confirmation is posted for pre and main maintenance order operations. |
| Manage Output | Maintenance Supervisor | Find Maintenance Orders - Completion (F2175)  Manage Work Packs (F6065) | The documents are printed. |
| Complete Main Work | Maintenance Supervisor | Find Maintenance Order (F2175) | Pre and main work are completed. |
| Maintain Service Entry Sheet | Purchaser | Manage Service Entry Sheets - Lean Services (F2027) | The service entry sheet is created. |
| Execute Post Work Operations | Maintenance Technician | Perform Maintenance Jobs (F5104A) | Post work operations are completed. |
| Review Failure Data | Maintenance Supervisor | Find Maintenance Orders and Operations (F2173) | Failure data is reviewed. |
| Review Maintenance Cost | Maintenance Planner | Maintenance Order Costs (F4603) | Maintenance cost is reviewed. |
| Technically Complete Maintenance Order | Maintenance Planner | Find Maintenance Order (F2175) | Maintenance order is technically completed. |
| Create Supplier Invoice with PO/GR Relation | Accounts Payable Accountant - Procurement | Create Supplier Invoice - Advanced (MIRO) | Supplier invoice is posted. |

Table 8: Emergency Work

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| Create Maintenance Request | Maintenance Planner | Create Maintenance Request (F1511A) | Maintenance request is created. |

Table 9: Minor Work

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| Create Maintenance Request | Maintenance Planner | Create Maintenance Request (F1511A) | Maintenance request is created. |
| Record Malfunction Details | Maintenance Technician | My Maintenance Requests (F4513) | Malfunction details are recorded. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Reactive Maintenance

### Create Maintenance Request

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This is the Initiation phase of the maintenance process where an employee can create a maintenance request.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 10:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Employee. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Create Maintenance Request (F1511A). | The Create Maintenance Request screen is displayed. |  |
| 3 | Enter Details | Enter the following details:   * Technical Object: 229100091   You can search for an object in the search help by entering some keywords such as 'water pump' and choose Go.  From the results, select the equipment with number 229100091 and description Cooling Water Circulation Pump.   * Current Location: Platform * Failure Effect: PM General * Failure Mode: Vibration * Detection Method: Inspection * Effect: Production restricted. Effect can be selected from the list available. * Malfunction Start Date Time:Enter the date and the time * Long Text: Answer the predefined questions. * Description: Detailed information regarding the maintenance request can be updated here. | The details are entered. |  |
| 4 | Assess Priority | Assess Priority: Select relevant consequence and likelihood for each consequence category and choose Assess button. Review the details and choose Apply.  Ensure that the following prerequisites are met:   * Ensure that the technical object is populated. * Technical object master data has the maintenance plant populated in the Location Data tab. | Priority is automatically calculated and populated on the screen. |  |
| 5 | Add Attachment/URL (Optional) | In the Attachments area, choose Upload. Select the files you want to upload. You can also choose Add a Link to provide link to relevant information for the maintenance request. | The files and the links are added to the maintenance request. |  |
| 6 | Save | Choose Submit. | The maintenance request is submitted and is available in My Maintenance Requests (F4513) app. |  |

### Review Maintenance Requests

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

Employee can check their existing maintenance requests in this application with various filter options as explained below.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 11:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Employee. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open My Maintenance Requests (F4513) | The app opens. |  |
| 3 | Search for Maintenance Request Based on the Status | You can switch between the list of maintenance requests based on the statuses displayed on the screen such as: Draft , Submitted, Action Required (returned due to insufficient information), Accepted , Rejected, and Completed.  To create new maintenance requests, choose Create button. | System retrieves a list of maintenance requests based on the selected status. |  |
| 4 | Review Maintenance Request | Choose the maintenance request created in the previous step to view details and review progress. | The maintenance request is reviewed. |  |

### Screen Maintenance Requests

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This is the Screening phase of the maintenance process where the supervisor reviews all the open maintenance requests. Change responsibility of the requests (if required) and take appropriate decision to proceed with the request or reject the request.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 12:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction |  | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Supervisor. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Screen Maintenance Requests (F4072) | The app opens. |  |
| 3 | Get List of Maintenance Requests | By default, the app displays a list of maintenance requests that are open.  Enter the following:   * Notification Type: Reactive Work * Choose Go   You can switch between the list of maintenance requests in Action Required, Accepted, Rejected, and Completed status. | List of maintenance requests is displayed based on the filter criteria. |  |
| 4 | Change Responsibility (Optional) | Select one or more open maintenance requests by selecting the checkbox. Choose Change Responsibility button.  On the Change Responsibility screen, the main work center, planner group, planning plant, and person responsible can be changed. | Responsibility details for the maintenance requests are changed. |  |
| 5 | Review and Modify the Maintenance Request | Choose a maintenance request which needs to be reviewed. Maintenance Request is opened and details can be seen.  Choose Edit to update the information related to malfunction, responsibility, and other details. Further while reviewing the request, the supervisor can also reassess the risk and redetermine the priority of the maintenance request and if required, can manually change the final due date.  Choose Save. | Maintenance request is reviewed and updated. |  |
| 6 | Accept Maintenance Request | From the top right side, you can choose Accept, Reject, or Action Required.  Accept the maintenance request if all the details are correct in the request.   |  | | --- | | Note If you choose Action Required, the maintenance request is sent back and will be available in Action Required tab of My Maintenance Requests app where the initiator can provide required information and resend it for screening. If you reject a maintenance request, the request will not be processed further and can be seen in the Rejected tab of My Maintenance Requests app. The reason code needs to be selected if maintenance request is rejected or sent back seeking additional information. | | The maintenance request is accepted. |  |

### Create and Plan Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

After the maintenance request is accepted, we are in the Planning phase of the maintenance process. The accepted maintenance request is called as maintenance notification. This process step shows how to convert a maintenance notification into a maintenance order and provides details to plan the resources for the order.

Order processing helps you to plan maintenance tasks in greater detail. You decide the tasks to be performed and what components (materials) are needed, and so on.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 13:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Manage Maintenance Notifications and Orders (F4604) app. | The app opens with details. |  |
| 3 | Get List of Maintenance Notifications | Enter the following:   * Execution Object Type: Maintenance Notification * Notification Type: Reactive Work (Y1) * Choose Go | Based on the filter criteria, a list of accepted notifications is displayed. |  |
| 4 | Create or Assign Maintenance Order | To create or assign an order, follow these steps:   1. Select one or more maintenance notifications for which maintenance order needs to be created. 2. Choose Create Order button on the top of the screen. 3. Select the Maintenance Order Type: Reactive Maintenance (YA01) 4. Choose Create.   Alternatively, it is possible to assign existing maintenance order to a maintenance notification using the Assign Order button. | The maintenance order is created and is assigned to the maintenance notification.  The order number is shown in Associated with under Execution Object Type section of the list view. |  |
| 5 | Plan Maintenance Order | In the Execution Object Type column, choose the maintenance order number to access the quick view and navigate to the Change Maintenance Order app.  To plan maintenance order, add details such as material, services, and labor in Change Maintenance Order app as described in steps below. | Change Maintenance order screen is opened. |  |
| 6 | Define the Operations | Go to the Operation Data tab. This selection brings you to the operation overview. Make the following entries in the Operations table.   * Operation : (example, 0010) * Description: <Entry of your choice> * Work: <Entry of your choice> * Number of Capacities: <2> * Stage: <Select Stage as required>   The system calculates the duration of the operation based on the time you entered in the Work field and on number of resources maintained in the Number of Capacities field.  Add required number of operations based on Pre, Main and Post stage. | Operations are added with Pre, Main and Post stages along with other details. |  |
| 7 | Add Stock and Non Stock Material | Select the checkbox for operation (example, 0010) and choose Materials tab at the bottom of the screen. Select the variant as Standard.  For a stock material, follow these steps:   1. Choose Select from Structure List. 2. On the Select Material Component screen, select the stock item of item category L (for example, SP001). 3. Choose OK.   For a non-stock material, enter the following:   * Material: NL001 * Item Category: Non-stock Item N * Quantity: <1> * Plant: 2910 * Purchasing Org: 2910 * Price: Entry of your choice * Supplier: 29300001 * G/L Account: 61002000  |  | | --- | | Note To duplicate a material line in the list with all item data, choose Copy Material. You can then change specific fields in the copied line. | | Stock and non-stock material are added to the maintenance order. |  |
| 8 | Add Services | Select the checkbox for operation (example, 0010) and choose Services tab at the bottom of the screen.  For a service without service material, enter the following:   * Description: <Description of service> * Quantity: <1> * Unit:<H> * Plant: 2910 * Price: Entry of your choice * Purchasing Org: 2910 * Purchasing Group: 001 * Supplier: 29300001 * G/L Account: 65008000 * Material Group: YBMM01  |  | | --- | | Note You can choose Settings button to add or remove fields in the screen. |   For service with service material, enter the following:   * Product: SM0001 * Quantity: <1> * Supplier: 29300001   Press Enter. The system will fill up other fields from Service Product Master. | Services are added to maintenance order. |  |
| 9 | Add Enhanced Limit Services  The procurement mode for the combination of plant and order type must be set to enhanced procurement mode in the configuration activity Activate Enhanced Procurement Mode. | Select the checkbox for operation (example, 0010) and choose Services tab at the bottom of the screen.  For a service without service material, enter the following:   * Description: <Description of service> * Item Categoy: E- Enhanced limit * Expected Value: <Entry of your choice> * Overall Limit: <Entry of your choice>  |  | | --- | | Note The expected value must not be larger than the overall limit. |  * Plant: 2910 * Purchasing Org: 2910 * Purchasing Group: 001 * Supplier: 29300001 * G/L Account: 65008000 * Material Group: YBMM01   You can choose Settings button to add or remove fields in the screen.   |  | | --- | | Note You can select a service material for a service, if required. | | The quantity is set to 1. The unit is set to AU (Activity Unit) or to the unit of the material master record.  The value from the Expected Value field should be copied to the Price field. |  |
| 10 | Cost Review | Go to the Costs tab.  On the top of the screen, select Additional Functions > Determine Costs  The planned cost is displayed as per the cost category.  The estimated costs can be updated against each cost category. | Planned and estimated costs are reviewed and updated. |  |
| 11 | Check Entries | Choose Check Entries in the upper left corner of the screen. | Entries have been checked. |  |
| 12 | Save Order | Choose Save | The maintenance order is saved and is in Planning phase.  The selected stock material is reserved automatically.   |  | | --- | | Note To verify this, log on to the SAP Fiori launchpad as a Inventory Manager.  Open Display Stock Overview (MMBE)  Enter the stock material, plant, and storage location and choose Execute.  Select storage location line under Stock Overview and choose Reservations (Menu -> Environment -> Reservations) | |  |

### Submit Maintenance Order for Approval

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This is the Approval phase of the maintenance process, where the maintenance planner submits the order for approval.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 14:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Manage Maintenance Notifications and Orders (F4604) app. | The app opens. |  |
| 3 | Get list of Maintenance Orders | Enter the following:   * Execution Object Type: Maintenance Order * Order Type: Reactive Maintenance * Choose Go. | A list of maintenance orders is displayed based on the filter criteria. |  |
| 4 | Submit Order for Approval | Select one or more maintenance orders which are ready for approval.  On the top right side of the screen, choose Submit for Approval button. | The maintenance order is submitted for approval.  The order goes for approval as per the workflow that you have maintained.   |  | | --- | | Note If custom workflows have not been maintained, the order gets approved automatically. |   Maintenance order is in Approval phase. |  |

### Approve Maintenance Order (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to approve maintenance orders from My Inbox (F0862) app.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 15:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Supervisor. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open My Inbox (F0862) app. | A list of orders that are ready for approval is displayed. |  |
| 3 | Approve | On the My Inbox screen, select the workflow request for maintenance order. You can review information page which gives details of maintenance order like general data, responsibilities, account assignment, cost, dates and so on.  Update comment in Comments section.  Approve the maintenance order and add decision note if required.   |  | | --- | | Note If a maintenance order is rejected, it can be processed further and sent for approval again. | | The maintenance order is approved and the order will be removed from the list in My Inbox. |  |

### Review and Release Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this process step, a maintenance planner reviews and releases the maintenance order.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 16:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Maintenance Notifications and Orders (F4604) app. | The app opens. |  |
| 3 | Review Maintenance Order | Enter the following:   * Execution Object: Maintenance Order Number which was approved in the previous step   Choose Go. | Maintenance order is displayed in the list view and is reviewed. |  |
| 4 | Release Maintenance Order | Select the order by selecting the checkbox. Choose Change Order Status and select Release.  Plan costs at the time of releasing the order will be taken as baseline cost and will be displayed in detailed cost analysis section of cost tab. Even if there is a change in plan cost later the ,baseline cost will remain the same and this will help to understand the deviation from plan costs. | Maintenance order is released for preparation. |  |
| 5 | Review Purchase Requisitions | When the maintenance order is released, purchase requisition is created for the non-stock material and services.  Select the maintenance order. On the Maintenance Order screen that appears, go to the Operations tab.  Select the row for operation (example, 0010).  On the Maintenance Order Operation screen, go to the Material tab.  Note the purchase requisition number for the non-stock material and services from the Purchase Requisition column. | The purchase requisitions are reviewed. |  |

### Maintenance Backlog Overview

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The maintenance order is in Preparation phase. Maintenance Planner can use the Maintenance Backlog Overview (F5105) app to analyze the maintenance orders in various phases.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 17:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Maintenance Backlog Overview (F5105) app. | The app opens. |  |
| 3 | Open Maintenance Order via Maintenance Backlog Card | Use the filter on the top to get the list of orders based on planning bucket template   * Reference Planning Bucket: PUMP\_2910 * Past Buckets: 1 * Future Buckets: 5 | The Maintenance Backlog card, External Procurement card, Rework Orders and Quick Link card are displayed. |  |
| 4 | Manage Maintenance Backlog Card | Select the criteria from the dropdown list for the maintenance backlog card.   * By Phase * By Maintenance Activity Type * By Order and Notification Type * By Priority | Based on the selected criteria, the maintenance backlog card displays the summary of orders that are associated with a specific maintenance planning bucket. |  |
| 5 | Review Maintenance Orders and Maintenance Notifications | Select any colour segment on the bar chart to review the details of a maintenance notification or a maintenance order. | Based on the selected colour segment, the respective application opens with details of the maintenance notification or the maintenance order. You can review the details. |  |
| 6 | Manage Maintenance Backlog Card (By Phase) | Select By Phase in the maintenance backlog card and choose the bar that indicates preparation. | The Manage Maintenance Backlog screen displays a list of maintenance orders in the Orders in Preparation tab. You can view the status of the maintenance orders for schedule compliance, availability, and readiness. |  |
| 6.1 | Manage Maintenance Backlog Card (By Phase) | Select Stock Components, Non-Stock Components Services and Resources tabs to review the corresponding details. | The maintenance order details have been reviewed. |  |
| 6.2 | Manage Maintenance Backlog Card (By Phase) - Keep Committed Quantities- Activate (Optional) | To keep the committed quantity and to fulfill the shortage quantity, follow these steps:   1. Go to the Stock Components tab. 2. Go to the Orders In Preparation tab. 3. Select the stock components by selecting the checkbox. 4. Choose Keep Committed Quantities > Activate .  |  | | --- | | Note You can schedule the job through the Schedule Material Availability Check Report to perform an ATP check for stock components. | | The system assigns the available stock material to the maintenance order if there is a shortage. |  |
| 6.3 | Manage Maintenance Backlog Card (By Phase) – Schedule Order (Optional) | To change the scheduling of the maintenance orders, follow these steps:   1. Go to the Orders tab. 2. Go to the Orders In Preparation tab. 3. Select an order by selecting the checkbox. 4. Choose Change Scheduling and select any one of the options:    * You can assign the order to the next or the previous bucket    * You can change the basic start date or the end date    * You can assign or unassign the order to a maintenance event.   To submit the order for scheduling, choose Submit for Scheduling.   |  | | --- | | Note Order can also be submitted for scheduling through Find Maintenance Order (F2175) app and is detailed out in the process step [Submit Order for Scheduling](#unique_24) [page ] 38. | | The result may be one of the following depending on the selected option:   * The basic start date or the end date is changed * The order is moved to the next or the previous bucket * The order is assigned or unassigned to the maintenance event.   The maintenance order moves into the scheduling phase. |  |
| 7 | Manage External Procurement Card | Click on the bar chart to review the purchase requisition or the purchase order for the corresponding milestone. | The purchase requisition or the purchase order is displayed. |  |
| 8 | Monitoring Procurement Activities | As a maintenance planner, you can monitor the availability status of non-stock components and services (external operations and lean services) in the Manage Maintenance Backlog (F4073) app.  For this purpose, the system tracks several milestones in the procurement process. They mark the completion of the following important procurement activities:   |  |  | | --- | --- | | Procurement Activity | Procurement Milestone | | Create Purchase Requisition | Purchase Requisition Created | | Release Purchase Requisition | Purchase Requisition Released | | Send Purchase Order to Vendor | Purchase Order Sent to Vendor | | Receive Purchase Order Confirmation | Order Confirmed by Vendor | | Receive Shipment Confirmation | Order Shipped | | Receive Shipment | Order Received in Full |  |  | | --- | | Note For non-stock components, all the six milestones are applicable. For lean services or external operations, only the first four milestones are applicable. | | * A green symbol indicates that the milestones are complete. * A yellow symbol indicates that the milestone is pending completion and the warning period has started. * A red symbol indicates that the milestone is pending completion and its due date has been reached or passed. * A grey symbol indicates that the milestone is not yet pending completion. |  |
| 9 | Procurement Milestone: Purchase Requisition Created | When a maintenance order with non-stock material or service is released and saved, a purchase requisition gets created and released. For more information, see [Review and Release Maintenance Order](#unique_22) [page ] 28. | The procurement milestone Purchase Requisition Created is green in color. |  |
| 10 | Procurement Milestone: Purchase Requisition Released | When a maintenance order with non-stock material or service is released and saved, a purchase requisition gets created and released. For more information, see [Review and Release Maintenance Order](#unique_22) [page ] 28. | Procurement Milestone: Purchase Requisition Released is green in color. |  |
| 11 | Procurement Milestone: Purchase Order Sent to Vendor | If output management is enabled and print or email is taken, then milestone will turn green. | Procurement Milestone: Purchase Order Sent toVendor is green in color. |  |
| 12 | Procurement Milestone: Order Confirmed by Vendor | The order confirmed by the vendor milestone turns green when one or more order acknowledgments for the entire requirement quantity have been entered in the purchase order. Follow these steps:   1. Open the Change Purchase Order (ME22N) application after logging in as Purchaser 2. Choose Other Purchase Order button and enter the PO number. 3. Choose Item Detail option and go to the Confirmations tab. 4. Choose Confirmation Control. 5. Select the Acknowl. Reqd checkbox. 6. Press Enter 7. Enter the following:    * Confirmation control: AB (Order Acknowledgement)    * Delivery Date:    * Quantity: <Enter the PO quantity>    * Press Enter 8. Choose Save | Procurement Milestone: Order Confirmed by Vendor is green in color. |  |
| 13 | Procurement Milestone: Order Shipped | The order shipped milestone turns green when:   * Option 1: The Delivery Completed checkbox is selected in the purchase order. * Option 2: One or more shipping notifications for the entire requirement quantity have been entered in the purchase order.   Follow these steps:   1. Open the Change Purchase Order (ME22N) application after logging in as Purchaser 2. Choose Other Purchase Order button and enter the PO number. 3. Choose Item Detail option and go to the Confirmations tab. 4. Choose Confirmation Control. 5. Select the Acknowl. Reqd checkbox. 6. Press Enter 7. Enter the following:    * Confirmation control: LA (Inbound Delivery)    * Delivery Date:    * Quantity: <Enter the PO quantity> .    * Press Enter 8. Choose Save | Procurement Milestone: Order Shipped is green in color. |  |
| 14 | Procurement Milestone: Order Received in Full | Order received in full milestone turns green when the goods receipts have been posted for the entire requirement quantity.  You can find the detailed steps in the following sections:   * For non-stock components, see [Goods Receipt for Purchase Order](#unique_25) [page ] 35. * For services, see [Maintain Service Entry Sheet](#unique_26) [page ] 46. | Procurement Milestone: Order Received in Full is green in color. |  |

### Convert Purchase Requisitions to Purchase Orders

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to assign purchase requisitions to a source of supply and to convert assigned source purchase requisitions to purchase orders.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 18:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Purchaser. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Process Purchase Requisitions (V2) (F1048A) app. | The Process Purchase Requisitions (V2) screen is displayed |  |
| 3 | Search for Purchase Requisition | Enter the following:   * Plant: 2910 * Purchasing Group: 001 * Purchasing Organization: 2910 * Choose Go | A list of purchase requisitions is displayed. |  |
| 4 | Create the Purchase Orders | Follow these steps:   1. Select the purchase requisition. 2. Choose Create Purchase Order. 3. On New Purchase Order screen that opens, choose Purchase Order Type as the standard purchase order (NB). 4. Choose Order.   The purchase order is created and displayed. | The purchase order is created. |  |

### Goods Receipt for Purchase Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to post the goods receipt for the purchase order.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 19:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Warehouse Clerk. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Post Goods Movement (MIGO) app. | The Post Goods Movement screen is displayed. |  |
| 3 | Post Goods Receipt | Enter the following:   * First top-left frame: Goods Receipt * Second top-left frame: Purchase Order * Order: <Enter the Purchase order number from the previous step> * GR goods receipt: 101   Choose Execute.  Following details are available:   * Document Date: default date * Posting Date: Default   Follow these steps:   1. Go to Quantity tab and enter the quantity. For example :1 2. Select the checkbox for Item OK 3. Choose Post. | The material document is posted. |  |

### Post Goods Issue

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to post the goods issue from storage location.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 20:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Warehouse Clerk. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Post Goods Movement (MIGO) app. | The Post Goods Movement screen is displayed. |  |
| 3 | Post Goods Issue | Enter the following:   * First top-left frame: Goods Issue * Second top-left frame: Order * Order: <Enter the maintenance order number> * GI for order: 261   Choose Execute.  Following details are available:   * Document Date: default date * Posting Date: Default   Follow these steps:   1. Go to Quantity tab and enter the quantity. For example, 1 2. Select the checkbox for Item OK 3. Choose Post. | The material document is posted. |  |

### Submit Order for Scheduling

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

Once Preparation is done and backlog is reviewed, the order can be set for Ready to Schedule to start Scheduling phase.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 21:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner . | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Find Maintenance Orders - Completion (F2175) app. | A list of orders is displayed. |  |
| 3 | Get List of Maintenance Orders | Enter the following:   * Technical object: 229100091 * Choose Go | A list of maintenance orders is displayed based on the filter criteria. |  |
| 4 | Set Order to Ready to Schedule | Select the order by selecting the checkbox.  Choose Change Status > Ready to Schedule | The maintenance order is in Scheduling phase. |  |

### Schedule Maintenance Order and Submit for Execution

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this step, the Maintenance Planner can dispatch the maintenance orders for execution.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 22:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Find Maintenance Orders - Completion (F2175) app. | The app opens. |  |
| 3 | Review List of Maintenance Order | Enter the following:   * Technical object: 229100091 * Choose Go | A list of maintenance orders is displayed based on the filter criteria.  You can review and check if the order is in Scheduling phase. |  |
| 4 | Set Orders to Ready for Execution | Select the order by selecting the checkbox.  Choose the Dispatch Operations button.   |  | | --- | | Note If the scope item 43R (Resource Scheduling) is activated, the corresponding applications can be used for dispatching the operations. | | The order operations are dispatched and the maintenance order is in Execution phase. |  |

### Manage Output

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The maintenance planner can search and apply filters to identify maintenance orders or order operations and create work pack. A work pack consists of a list of job packs. The job packs consists of the corresponding maintenance order operations (jobs). You can create one output request for multiple job packs.

With the Manage Work Packs (F6065) app, you can find existing work packs, select work packs, job packs, and include items in them. You can send them for output immediately or schedule them to be eligible for the mass output.

Work packs allow you to include multiple output types and leverage support for print and email channels for the output.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 23:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Find Maintenance Orders - Completion (F2175) app. | The app opens. |  |
| 3 | Review List of Maintenance Orders | Enter the following:   * Technical Object: 229100091 * Choose Go. | A list of maintenance orders is displayed based on the filter criteria. |  |
| 4 | Create Work Pack | Select the Order checkbox and choose Create Work Pack.  A popup window appears. Enter the following:   * Work Pack Name: <Entry of your Choice> * Work Pack Type: <Entry of your Choice> * Group By <Entry of your Choice>   Include operations used in other work packs: Select this checkbox.   |  | | --- | | Note If this checkbox is not selected, then it will skip the order operation for which the work pack already exists |   Choose Save.   |  | | --- | | Note A work pack can also be created using multiple operations from different orders using the Find Maintenance Orders and Operations (F2173) app. | | A message informs you that the work pack creation has been scheduled and you can check the application log to track the status. |  |
| 5 | Check Application Logs | Follow these steps:   1. Choose the Application Logs button. 2. Choose Go. 3. Select the work pack created in previous step to view the log details. | The work pack is created, and the log details are shown with a message and the work pack ID. |  |
| 6 | Access the App | Open the Manage Work Packs (F6065) app. | The app opens. |  |
| 7 | Search Work Pack | Enter the following:   * Work Pack: Enter the work pack ID created in the previous step. * Choose Go. * Choose the work pack. | The work pack is displayed based on the filter criteria and work pack details are displayed. |  |
| 8 | Add/Delete Jobs  (Optional) | Follow these steps:   1. Go to the Job Packs tab and select the job pack. 2. Go to the Jobs tab and choose the Add icon to add a job. 3. Select the required jobs and choose Add on the popup window.   Or  Select the job and choose Delete icon to delete the job. Choose Delete on the popup window. | Job is added or deleted. |  |
| 9 | Send Output | Follow these steps:   1. Go to the Output Items tab. 2. Select one or more items and choose the Send Output button. 3. Choose the Show More per Row icon. 4. To preview the shop paper, choose the icon to display the document. | The item ID is sent for output. |  |
| 10 | Add Attachments to Output | Follow these steps:   1. Go to the Output Items tab. 2. Choose the Show More per Row icon. 3. Select the item ID. 4. Choose the Edit button. 5. Choose the number specified on the Attachments field.   A pop window will appear.  The attachment will be displayed under Available Attachments.  To get output of the attachments, use below options:   * Merge with Form Template: Drag the document from Available Attachments to Merge with form template section. * Additional Attachments for Output: Drag the document from Available Attachments to Additional Attachments for Output section.   To preview the final output document, choose the icon to display the document. | With the first option, the attachment will be merged with the work pack document output.  With the second option, the attachment will be printed as additional document along with work pack form. |  |

### Execute Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this step, the Maintenance Technician executes the pre and main operations.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 24:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Technician. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Perform Maintenance Jobs (F5104A) app. | The app opens. |  |
| 3 | Get List of Maintenance Order Operations | Enter the following:   * Execution Object: The maintenance order number which was dispatched for execution in the previous step * Choose Go. | A list of dispatched operations for the selected order is displayed. |  |
| 4 | Assign Operations | Select the operations and choose Assign to Me   |  | | --- | | Note The Assign to Me button is enabled only if the order operation is not assigned to anyone | | The operations are assigned to you. |  |
| 5 | Select the Operation for Processing | Choose the operation and navigate to the Perform Maintenance Job screen. | Perform Maintenance Job screen is displayed with the details of the operation. |  |
| 6 | Start the Operation | Choose Start. | The subphase is changed to Work in Execution. |  |
| 7 | Review Components | Go to Components tab and review the planned component details. | The component details are reviewed. |  |
| 8 | Goods Issue or Return (Optional) | 1. Go to Planned Components in the Components tab 2. Choose Post for the component that the maintenance technician wants to issue.   The Post Goods Issue screen is displayed. Enter the required quantity and the movement description.   1. Choose Post. 2. Choose Return for the component that the maintenance technician wants to return.   The Return Goods screen is displayed. Enter the required quantity and choose Return.  A new line item for the respective component is added.   1. Choose Post.   The Post Goods Return screen is displayed. Enter the required quantity and the movement description.   1. Choose Post. | The components are issued or returned. |  |
| 9 | Review Attachments | Go to the Attachments tab to review the attachments. If required, you can also upload new files and add a link. | The attachments are reviewed.  The files and links are added. |  |
| 10 | Pause and Resume Work | Choose Pause button to pause the work.  After you pause the work, you can restart the work by choosing Resume. | For an operation that has been paused, the subphase will be Work Paused.  When you resume the work, the subphase changes to Work in Execution. |  |
| 11 | Time Confirmation | Choose Record Time on the top left corner of the Perform Maintenance Job screen. The Record Time screen is displayed. Enter the following:   * Actual work. For example, 4 hours * Remaining work, if any. For example, 2 hours. * Enter the confirmation text as required.   Select the checkbox Final Confirmation and choose Record to do the final confirmation for the operation.  Repeat this for all the operations in the PRE and MAIN execution stages. | The final confirmations are posted and can be reviewed in the Confirmation tab  The work progress is shown as 100 %.  The subphase is changed to Work Finished. |  |
| 12 | Add Measurement (Optional) | Follow these steps:   1. Go to Measurements tab 2. Select All Measuring Points from the Technical Object Association dropdown list. 3. Go to Latest Reading tab 4. Choose Add Meaurements. 5. Enter the current reading for the measuring point and press Enter. 6. Select the date and the time using the Calender button. 7. Choose Save. | The measurement reading is updated and can be seen in the Previous Reading column of the corresponding measuring point. |  |

### Complete Main Work

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

After the Maintenance Technician has executed the Pre and Main operations and finally confirmed them, the Maintenance Supervisor can change the status of the maintenance order to Main Work Completed.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 25:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Supervisor. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Find Maintenance Orders - Completion (F2175) app. | A list of maintenance orders is displayed. |  |
| 3 | Get List of Maintenance Orders | Enter the following:   * Technical object: 229100091 * Choose Go. | A list of maintenance orders is displayed based on the filter criteria. |  |
| 4 | Set Order Status to Order Main Work Completed | Select the order by selecting the checkbox.  Choose Change Status > Main Work Completed . | The Main Work Completed screen is displayed. |  |
| 5 | Enter Reference Data | Enter the following:   * Main Work Completion Date and Time: The default values are displayed. Use the calendar icon to change the values. * Set Main Work Completion Date and Time as Reference Date and Time: Select this checkbox. * Choose OK | The order status is set to Order Main Work Completed. |  |

### Maintain Service Entry Sheet

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this activity, you report the performed services in the service entry sheet.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 26:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Purchaser. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Manage Service Entry Sheets - Lean Services (F2027) app. | The app opens. |  |
| 3 | Enter Field Values  Case 1: Purchase service without material number  Case 2: Purchase service with material number | Choose Create.  On the Service Entry Sheet screen, enter the following:   * Name of Service Entry Sheet: <SES Name>, for example, Vincent Sun * Reference Purchase Order: <Purchase order you created> * The Add Purchase Order Items dialog box is displayed, choose the checkboxes next to the required purchase order items. * Increase or decrease the service entry sheet items using the "+" / "-" buttons * Choose the Add button. * Enter the posting date for goods receipt: <Today’s date>   In the Items area, choose Purchase Order Item and enter the following for each item:   * Performance Period: <Enter the date range> * Stated Quantity: < Stated Quantity >. For example,10 * Unit of measure: <Unit>.For example, H   Choose Apply. |  |  |
| 4 | Add Attachments in Service Entry Sheet (Optional) | You can upload files using the Upload button or add a link to the service entry sheet and view the existing attachments by following one of these:  On the header level, go to tab Attachments  On the item level, go to tab Items, open the details and go to tab Attachments.  If the attachments are not required any longer, you can delete them.  You can view the attachments and save them on your device regardless of the status of the service entry sheet.  You can add or delete attachments only while editing the service entry sheet. This means that the status of the service entry sheet must be In Process. |  |  |
| 5 | Create Service Entry Sheet | Choose Create | The service entry sheet is created. |  |
| 6 | Send for Approval | Choose Send for Approval. | The service entry sheet is sent for approval. |  |
| 7 | Check the Status of the Service Entry Sheet. | On the Manage Service Entry Sheets screen, follow these steps:   1. Search for the service entry sheet that you had created above 2. Check the status of the service entry sheet. 3. Send service entry sheet for approval if approval is required.   If the status is Approved, do not send the service entry sheet for approval with flexible workflow. |  |  |

### Execute Post Work Operations

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this process step the technician will execute post operations activities (if any) and also update the malfunction details and failure data.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 27:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Technician. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Perform Maintenance Jobs (F5104A) app. | The app opens. |  |
| 3 | Get List of Maintenance Order Operations | Enter the following   * Order: The maintenance order number which was dispatched for execution in the previous step * Choose Go | A list of dispatched operations for the selected order is displayed. |  |
| 4 | Select the Operation for Processing | Choose the operation in POST stage to navigate to the Perform Maintenance Job screen. | Perform Maintenance Job screen is displayed with the details of the operation. |  |
| 5 | Start the Operation | Choose Start. | The subphase is changed to Work in Execution. |  |
| 6 | Edit Malfunction Data | Follow these steps:   1. Go to the Malfunction Data section. 2. Choose the Edit button.   The Edit Malfunction Data screen is displayed.   * Select an effect from dropdown list. * Select a failure mode from dropdown list. * Select a detection method from dropdown list. * Enter Malfunction Start Date and Time as today's date and time in the following format: 09:00:00 am * Enter Malfunction End Date and Time as today's date and time in the following format: 11:00:00 am. * Select the checkbox if there is a breakdown. The breakdown duration is calculated. * Enter the malfunction long text.   Click on Save button. | The malfunction data is saved. |  |
| 7 | Record Malfunction Details | Follow these steps:   1. Go to the Malfunction Data → Malfunction Details. 2. Choose the Add button.   The Add Malfunction Data screen is displayed.  Enter the following details in the Damage Details tab:   * Select the object part from dropdown list. * Select the damage code from dropdown list. * Enter a description for the damage.   Enter the following details on the Cause tab:   * Select the cause code from dropdown list. * Enter a description for the cause. * Select the Root Cause radio button.   Enter the following details on the Activity tab:   * Select the activity code from dropdown list * Enter a description for the activity.   Click Record button.  You can add additional causes and activities using the New Cause and New Activity buttons respectively. | The malfunction details are recorded. |  |
| 8 | Time confirmation | Choose Record Time on the top right corner of the Perform Maintenance Job screen.  The Record Time screen is displayed. Enter the following details:   * Enter the actual work. For example, 4 hours * Enter the remaining work if any. For example , 2 hours. * Enter a description for the confirmation as required.   Select the Final Confirmation checkbox and choose Record to do the final confirmation on the operation.  Repeat this for all the operations in the POST execution stage. | The final confirmations are posted and can be reviewed under the Confirmation tab.  The work progress is shown as 100 %.  The subphase is changed to Work Finished. |  |

### Review Failure Data

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this step, the supervisor can review the failure data updated by the technician.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 28:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Supervisor. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Find Maintenance Orders and Operations (F2173) app. | The app opens. |  |
| 3 | Get List of Maintenance Order Operations | Enter the following:   * Order: The maintenance order number from the previous step * Choose Go | A list of operations for the selected order is displayed. |  |
| 4 | Review and Verify the Details | Choose the maintenance notification number.   |  | | --- | | Note If the notification is not displayed, follow the below steps:   * Choose Settings from the top right context menu. * Choose Notification. * Choose OK. * Click the notification to navigate to required application. |   In the displayed dialog box, choose Performance Maintenance Job.  Select the required operation.  Go to the Malfunction Data tab and verify the details. | The malfunction details are reviewed. |  |

### Review Maintenance Cost

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

Maintenance planner can review the cost of maintenance orders.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 29:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Maintenance Order Costs - Plan / Actual (F4603) app. | The app opens. |  |
| 3 | Get Details | Enter the following details as filters:   * Relative Date Function: Previous 30 days * G/L Account Hierarchy: YPS2 * Ledger: 0L * Company Code: 2910 * Equipment: 229100091   Choose Go.   |  | | --- | | Note If data is not displayed, it can be due to the Relative Date Function field is set to a past date. | | Based on the filter values, different types of maintenance costs are analyzed and reviewed. |  |

### Technically Complete Maintenance Order

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The maintenance notification is completed and the maintenance order is technically completed after the required maintenance work has been performed.

The technical completion clears all the purchase requisitions, open reservations, and capacities still outstanding for the maintenance order.

Nevertheless, the order can continue to receive costs, for example, through invoice receipts for delivered and used materials. However it is blocked for all changes in the processing.

The order settlement transfers the costs incurred that were temporarily collected for the maintenance order, to the recipient, for example, to the cost center for the maintained object. This process step shows you how to technically complete a maintenance order.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 30:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open the Find Maintenance Orders - Completion (F2175) app. | The app opens. |  |
| 3 | Get List of Maintenance Orders | Enter the following:   * Order Type: Reactive Maintenance   Choose GO. | A list of maintenance orders is displayed based on the search criteria. |  |
| 5 | Set order status to Technically Completed | Select the order by selecting the check box.  Choose Change Status > Complete Technically. | The Complete Technically screen is displayed. |  |
| 6 | Enter Reference Data | Enter the following:   * Completion Date/Time: The default values are displayed. Use the calendar icon to change the values. * Keep Default Values: Select this checkbox * Complete Assigned Notifications: Select this checkbox if you want to complete the assigned notifications.   Choose Complete Technically | The order is technically completed. |  |

### Create Supplier Invoice with PO/GR Relation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to create the invoice with reference to the purchase order.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 31:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Accounts Payable Accountant - Procurement. | The SAP Fiori launchpad is displayed. |  |
| 2 | Open the App | Open Create Supplier Invoice - Advanced (MIRO). | The app opens. |  |
| 3 | Navigation | If the system prompts you, enter the following and choose Continue:   * Company Code: 2910 | The Enter Incoming Invoice screen is displayed. |  |
| 4 | Enter Basic Data | Enter the following:   * Transaction: Invoice * Invoice Date: Today's date * Posting Date: Today's date * Reference: <Reference invoice number from invoicing party> * Amount: <Amount according to the invoice value>. * Currency: CAD * Select Calculate Tax * Tax Code: Enter the tax code.   If there is no tax, specify the tax code I0 (for Brazil, it is 00).  If G/L account is subjected to tax, ensure that you enter an appropriate tax code. | Basic data is entered. |  |
| 5 | Enter Purchase Order References | On the Purchase Order References screen, make the following entries:  Reference Document Category: Purchase Order/ Scheduling Agreement  Purchase Order: Enter the purchase order you posted in the previous step. | The Purchase Order References screen is displayed. |  |
| 6 | Check the Purchase Order Items Data | Check the amount, the quantity and the tax code. | The amount and the quantity correspond to the values of the goods receipts. |  |
| 7 | Check Tax Code | In the Tax area, check the tax code information and the tax amount. |  |  |
| 8 | Simulate Supplier Invoice and Check Messages | Choose Simulate.  If there are no differences (or if the value is within the defined tolerance), the Simulation screen displays. You can check the results in the Simulation Overview and Simulation Details areas.  Review the Gross Invoice Amount against the items plus tax amount (if tax code is 10, (for Brazil, it is 00), you do not have any tax amount) |  |  |
|  | Post Invoice | Choose Post. | The invoice document is posted. |  |

## Emergency Work

### Create Maintenance Request

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This is the Initiation phase of the maintenance process where a planner can create a maintenance request for an emergency work.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 32:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Create Maintenance Request (F1511A). | The Create Maintenance Request screen is displayed. |  |
| 3 | Enter Details | Enter the following details:   * Technical Object: 229100091   You can search for an object in the search help by entering some keywords such as water pump and choose Go.  From the results, select the equipment with number 229100091 and description Cooling Water Circulation Pump.   * Current Location: Platform * Failure Effect: PM General * Failure Mode: Vibration * Detection Method: Inspection * Effect: Production restricted. Effect can be selected from the list available. * Malfunction Start Date Time: Enter the date and the time * Notification Processing Context: Emergency Work * Long Text: Answer the predefined questions. * Description: Detailed information regarding the maintenance request can be updated here. | The details are entered. |  |
| 4 | Assess Priority | Assess Priority: Select relevant consequence and likelihood for each consequence category and choose Assess button on the right bottom. Review the details and choose Apply.  Ensure that the following prerequisites are met:   * Ensure that the technical object is populated. * Technical object master data has the maintenance plant populated in the Location Data tab. | Priority is automatically calculated and populated on the screen. |  |
| 5 | Add Attachment/URL (Optional) | In the Attachments area, choose Upload. Select the files you want to upload. You can also choose Add a Link to provide link to relevant information for the maintenance request. | The files and the links are added to the maintenance request. |  |
| 6 | Save | Choose Submit. | The maintenance request is created and is available in the Accepted tab in My Maintenance Requests (F4513) app.  Based on this accepted notification, the system creates a maintenance order, releases it and subsequently dispatches the order operation. This means that the maintenance order of the Reactive Maintenance order type is passed directly to the Execution phase without running through any intermediate planning, approval, preparation, and scheduling steps. |  |

|  |
| --- |
| Note Execution of the emergency maintenance order can be done in the same way as explained in reactive maintenance process.  Maintenance planner can add additional operations to involve additional maintenance technicians in the repair work order and dispatch the newly entered operations manually. |

## Minor Work

### Create Maintenance Request

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This is the Initiation phase of the maintenance process where a planner can create a maintenance request for a minor work.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 33:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Maintenance Planner. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Create Maintenance Request (F1511A). | The Create Maintenance Request screen is displayed. |  |
| 3 | Enter Details | Enter the following details:   * Technical Object: 229100091   You can search for an object in the search help by entering some keywords such as water pump and choose Go.  From the results, select the equipment with number 229100091 and description Cooling Water Circulation Pump.   * Current Location: Platform * Failure Effect: PM General * Failure Mode: Vibration * Detection Method: Inspection * Effect: Production restricted. Effect can be selected from the list available. * Malfunction Start Date Time: Enter the date and the time * Notification Processing Context: Minor Work * Long Text: Answer the predefined questions. * Description: Detailed information regarding the maintenance request can be updated here. | The details are entered. |  |
| 4 | Assess Priority | Assess Priority: Select relevant consequence and likelihood for each consequence category and choose Assess button. Review the details and choose Apply.  Ensure that the following prerequisites are met:   * Ensure that the technical object is populated. * Technical object master data has the maintenance plant populated in the Location Data tab. | Priority is automatically calculated and populated on the screen. |  |
| 5 | Add Attachment/URL (Optional) | In the Attachments area, choose Upload. Select the files you want to upload. You can also choose Add a Link to provide link to relevant information for the maintenance request. | The files and the links are added to the maintenance request. |  |
| 6 | Save | Choose Submit. | The maintenance request is created and is available in the Accepted tab in My Maintenance Requests (F4513) app. |  |

### Record Malfunction Details

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The Maintenance Technician can check the accepted maintenance requests in this application with various filter options and record the malfunction data.

Procedure

This section describes test procedures for each process step that belongs to this scope item.

Table 34:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass/Fail/Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as Maintenance Technician. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open My Maintenance Requests (F4513) | The app opens. |  |
| 3 | Record Malfunction Details | Go to Accepted tab  Select the maintenance notification created in the previous step.  Choose the Malfunction Details button. The Add Malfunction Details screen is displayed.  Enter the following details in the Damage Details tab:   * Select the object part from dropdown list. * Select the damage code from dropdown list. * Enter a description for the damage.   Enter the following details on the Cause tab:   * Select the cause code from dropdown list. * Enter a description for the cause. * Select the Root Cause radio button.   Enter the following details on the Activity tab:   * Select the activity code from dropdown list * Enter a description for the activity.   You can add additional causes and activities using the New Cause and New Activity buttons respectively.  Enter the following details on the Malfunction Data tab:   * Enter the malfunction start date and time as today's date and time in the following format: 09:00:00 am * Enter the malfunction end date and time as today's date and time in the following format: 11:00:00 am. * Select the checkbox if there is a breakdown. The breakdown duration is calculated. * Choose the Submit button. | Malfunction details are captured. |  |
| 4 | Complete Notification | Follow these steps:   1. Select the notification. 2. Choose Complete Notification on the top right screen. The Complete Notification screen is displayed. 3. Enter Reference Date Time: The default values are displayed. Use the calendar icon to change the values. 4. Choose Complete Notification button. | Notification is completed. |  |

# Appendix

## Process Integration

### Preceeding Processes

You must first complete the following processes before you start with the test steps:

Table 35:

|  |  |
| --- | --- |
| Process | Business Condition |
| Create New Open MM Posting Period (BNZ) | A new MM period must exist. |
| Period-End Closing - Maintenance Orders (BF7) | Activity types rates to be maintained |

### Succeeding Processes

After completing the activities in this test script, you can continue testing the following business processes:

Table 36:

|  |  |
| --- | --- |
| Process | Business Condition |
| Accounts Payable (J60) | Use the master data from this test script and execute the following steps:   * Invoice payment preparation * Payment run * Single outgoing payment * Manual payment online |
| Period-End Closing - Maintenance Orders (BF7) | A maintenance order is technically completed as part of this script. |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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