



# UPDATE & ASSIGN EQUIPMENT CHEAT SHEET

This cheat sheet addresses how to update an Equipment Record and/or Assign Equipment for individual items. Update Equipment Records when equipment is received or information needs to be changed. Use the Assign Equipment process to assign equipment to a Business Partner (BP), update the equipment status, and appoint equipment to a functional location.

## ENTERPRISE ROLES & ACTIONS



- **SD.01 • Notification User:**  
Creates Notifications
- **SD.02 • Notification Approver:**  
Approves Notifications
- **SD.10 • Services Delivery Equipment Master Data Maintainer:**  
*Creates* the Equipment Record • Changes the equipment data record • Gathers the info to validate documentation • Liaises with the Equipment Administrator if equipment disposal method is cannibalization and master data needs to be updated •
- **SD.11 • Services Delivery Equipment Master Data Maintainer Local:**  
*Updates* the Equipment Record within the authorization group • Liaises with the equipment requestor and updates the Master Data • Participates in the reconciliation of equipment during the physical verification process •

## T-CODES



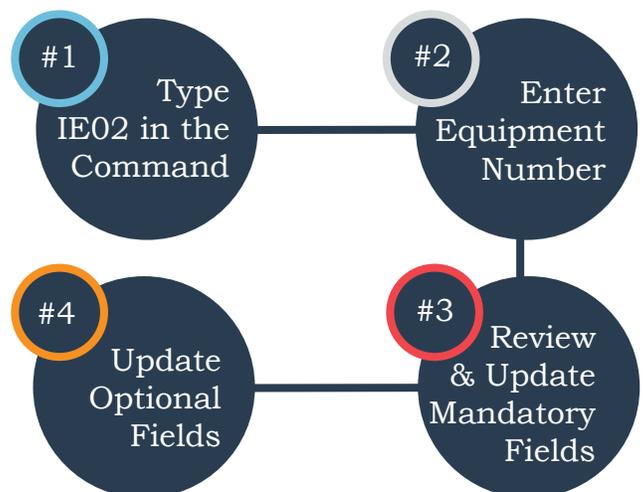
## EQUIPMENT UPDATE:

### 1. At the time of a Goods Receipt

#### Enrichment Fields:

- Authorization Group
- Functional Location
- User Status
- Manufacturer
- *Manufacturer Model #*
- *Manufacturer Serial #*
- Manufacturer Part #
- Global Insurance company
- Attachments (i.e. specification sheets)
- User Responsible
- Cost Centre
- Weight
- Size
- Warranty Data
- Condition

#### Steps:



*\*Key Fields*

## EQUIPMENT UPDATE (CONT):

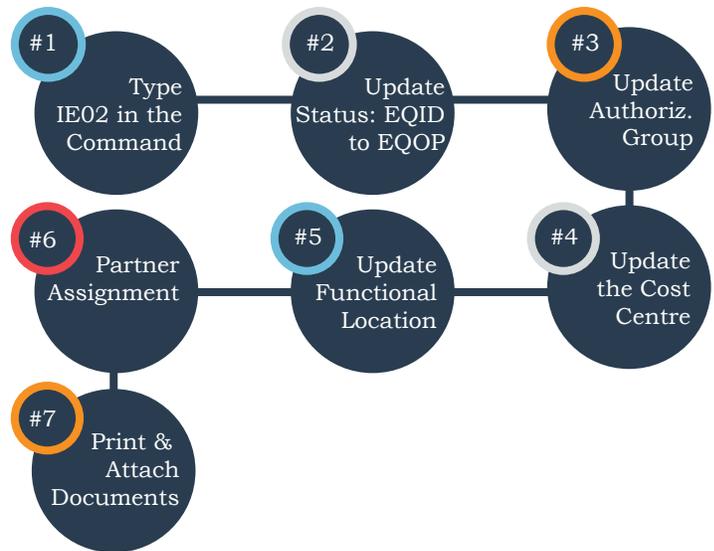
### 2. Equipment Issued from Inventory

#### Enrichment Fields:

- Manufacturer
- *Manufacturer Model Number*
- Weight
- Size
- Manufacturer Part Number
- *Manufacturer Serial Number*
- Warranty Data
- Attachments (i.e. specification sheets)
- Global Insurance Category
- Condition

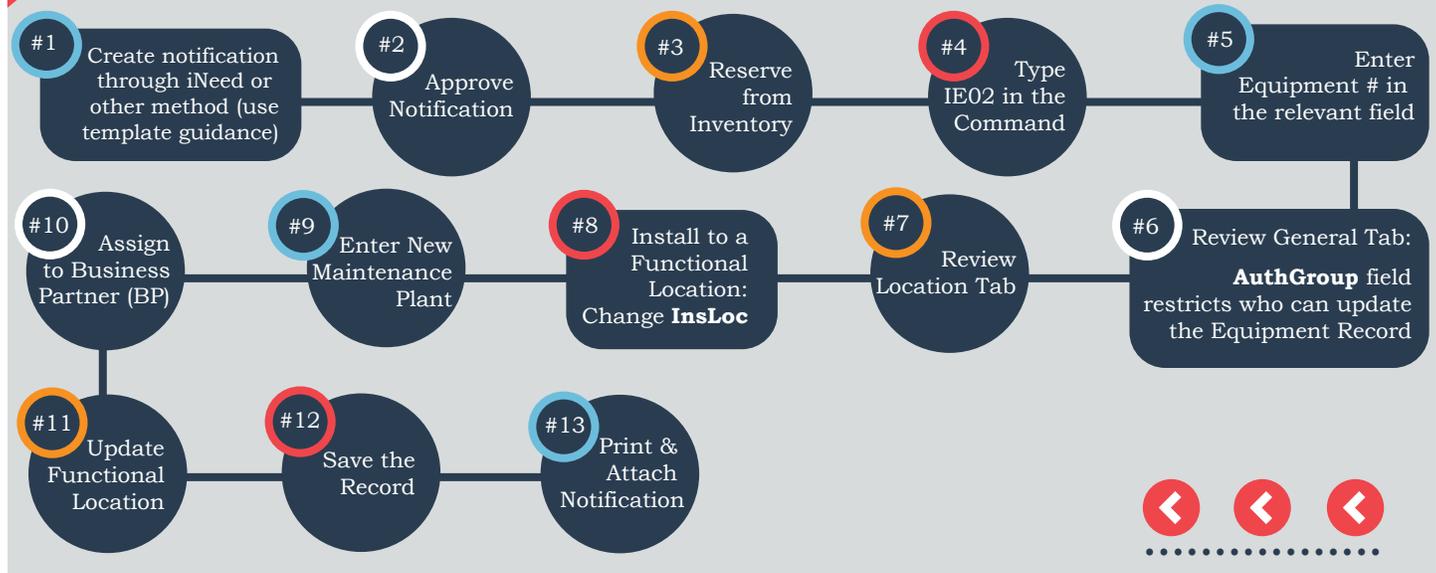
*\*Key Fields*

#### Steps:



## ASSIGN EQUIPMENT

#### Steps:



## TIPS & TRICKS

- The Goods Receipt process automatically creates the Equipment Record, assigns a serial number, and emails requisitioners. Some Equipment Record fields are automatically populated while others should be enriched.
- If the *maintenance plant* of the desired functional location is *not aligned* with the maintenance plant of the equipment, an *error message* will appear and hinder installation.
- To check the *maintenance plant* of the functional location, execute *T-Code IL03* to display the equipment.

#### Transferred Fields From PO:

- Material
- Umoja Equipment/Serial Number
- Main & Sub Asset ID
- Posting Date
- Acquisition Value
- Vendor
- Business Area
- Cost Centre, WBS Element, Internal Order
- Currency
- Material Group (from Material Master)
- Plant