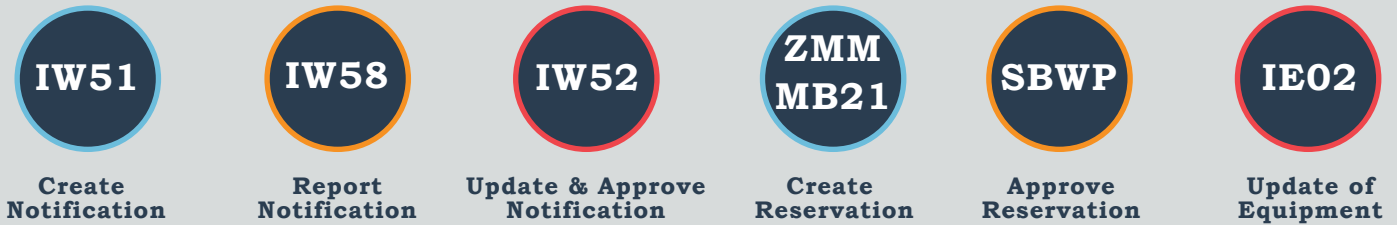# UPDATE & ASSIGN EQUIPMENT CHEAT SHEET

GALILEO >>> umoja

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 •
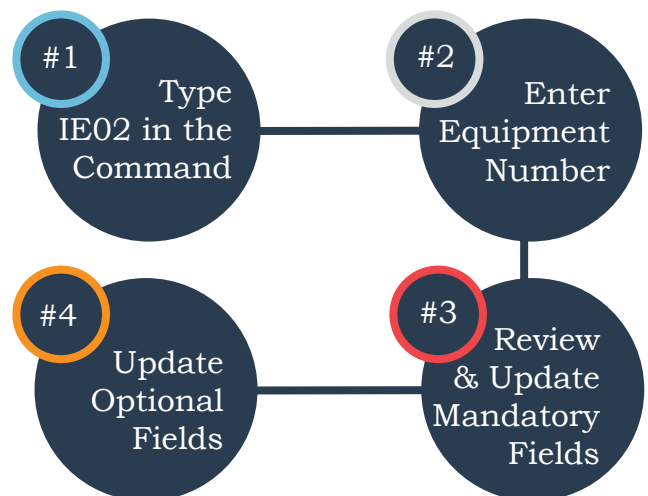
T-CODES

IW51	IW58	IW52	ZMM MB21	SBWP	IE02
Create Notification	Report Notification	Update & Approve Notification	Create Reservation	Approve Reservation	Update of Equipment

EQUIPMENT UPDATE:

1. At the time of a Goods Receipt

Steps:

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

#1 Type IE02 in the Command

#2 Enter Equipment Number

#3 Review & Update Mandatory Fields

#4 Update Optional Fields

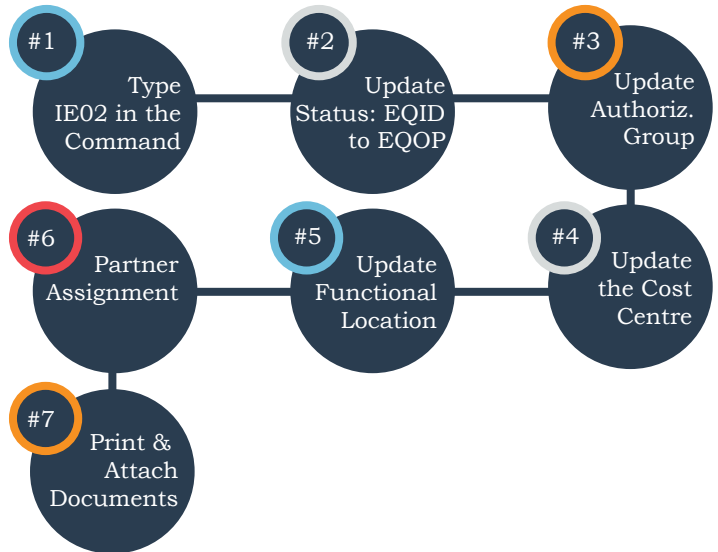**Key Fields*

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)
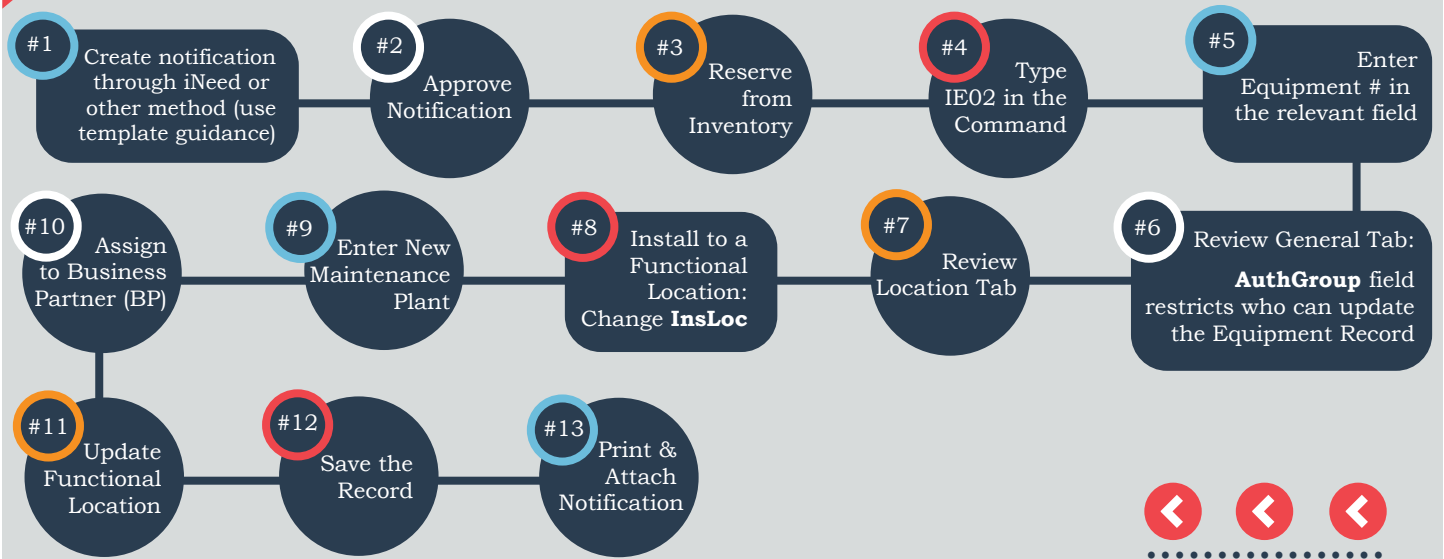- Global Insurance Category
- Condition

Key Fields

Steps:

- #1 Type IE02 in the Command
- #2 Update Status: EQID to EQOP
- #3 Update Authoriz. Group
- #4 Update the Cost Centre
- #5 Update Functional Location
- #6 Partner Assignment
- #7 Print & Attach Documents

ASSIGN EQUIPMENT

Steps:

- #1 Create notification through iNeed or other method (use template guidance)
- #2 Approve Notification
- #3 Reserve from Inventory
- #4 Type IE02 in the Command
- #5 Enter Equipment # in the relevant field
- #6 Review General Tab: **AuthGroup** field restricts who can update the Equipment Record
- #7 Review Location Tab
- #8 Install to a Functional Location: Change **InsLoc**
- #9 Enter New Maintenance Plant
- #10 Assign to Business Partner (BP)
- #11 Update Functional Location
- #12 Save the Record
- #13 Print & Attach Notification

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* willl 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