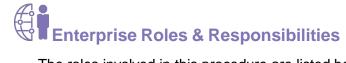


Job Aid

Equipment Mass Change



This job aid describes how to use the Equipment Mass Change utility. This utility will reduce the effort involved to make sure the necessary changes are reflected in the equipment records by applying the changes in mass rather than on a one-by-one case. Mass change of equipment occurs during Write-off, Transfer, Assignment, Mass Maintenance, Physical Verification in which cases this utility can be leveraged.



The roles involved in this procedure are listed below:

Enterprise Roles	System Activities	Non-system Activities
SD10: Equipment Master Data Maintainer	Use SAP t-codes to:	 Gathers information to validate documentation. Liaise with Equipment Administrator in the cannibalization of equipment process and Master Data
SD11: Equipment Master Data Maintainer – Local	Use SAP t-codes to: Update the equipment record within the authorization group.	 Liaise with the equipment requestor, update the Master Data Maintainer. Participate in the reconciliation of equipment within the physical verification
SD17: PADP Approver	Use SAP t codes to: Update the equipment record for PADP Approval	Liaise with the Equipment Master Data maintainer for PADP Planning & Approval



This Equipment mass change tool serves the following business needs:

✓ Equipment Master Data Updates

Equipment master data must be accurately maintained, the need to reflect changes to the Equipment Master may arise from a number of business processes through its lifecycle;

- Equipment receipt into inventory (eg update of warranty data, attachment of specification sheets)
- Equipment issued from inventory; update of functional location, authorisation Group, user assignment, cost centre.
- Physical Verification; equipment found/located within a department
- Equipment Transfer; between users in a department or interdepartmental/inter business area.
- Disposal; equipment to be updated and "retired" as part of the disposal process.
- PADP & Surplus; this information mandated by Financial Regulations and DFS Liquidation Manual to be updated in the equipment record.
- Global Insurance Category for Insurance Reporting purpose.
- Performance tracking characteristics: Updating the performance characteristics (km and hrs.) for an equipment in the form of measuring points (counter).

✓ Measurement Document Upload

Mass upload of Equipment usage data in the form of measurement documents. These readings in turn trigger maintenance activities on the equipment.

Use this procedure to update the equipment records, applying the changes in mass rather than on a one-by-one case.

Trigger

This procedure is applied in the following scenarios

When there is a need to facilitate the maintenance of Equipment Master Data needed as a result of changes caused by any and/or all of the following:

- I. Enrichment or removal of equipment parameters
- II. Equipment installation/dismantling at a functional location
- III. Enrichment or removal of equipment parameters as a result of sale, write-off or disposal
- IV. Equipment assignment to an equipment owner (Business Partner)
- V. Changes in equipment user status
- VI. Enrichment of equipment master to add performance tracking characteristics in the form of measuring points.
- ✓ Or When the Equipment Usage readings (km or hrs.) are to be uploaded in the form of measurement documents.



Equipment Master Data that require the changes must **EXIST** in the Umoja system prior to processing.

The ability to utilize the mass change transaction is role dependent. Only users assigned to **SD10**, **SD11** and **SD17** will be able to effect changes as mentioned below.

Role	<u>Changes Possible</u>
SD10 & SD11	(I) Equipment Mass Updates (except PADP approval)(II) Measuring point creation / updates(III) Measurement Document upload
SD17	(I) Equipment Mass Updates related to PADP data only

User will be required to **manually** prepare the input file(s) for both the functionalities:

- (I) Equipment master data change and/or Measuring Point creation/change
- (II) Measurement Document Data

Instructions on the input file preparation are specified below

I. Equipment Master Data Change and/or Measuring Point Creation/Change



The input file preparation can be supported via Umoja standard report (i.e. IE05) for SD10 and SD11 roles while <u>SD17 role</u> can leverage the report IH08. Both the reports provide all required fields for the load file, except the partner information ("Partner Function", "Partner") and the measuring point information ("Unit of Measure - UoM", "Annual Estimate")



Menu Path

Use the following menu path to create the load template by downloading data from the transaction:

Logistics > Plant Maintenance > Maintenance of Technical Objects > Equipment > List Editing > Change

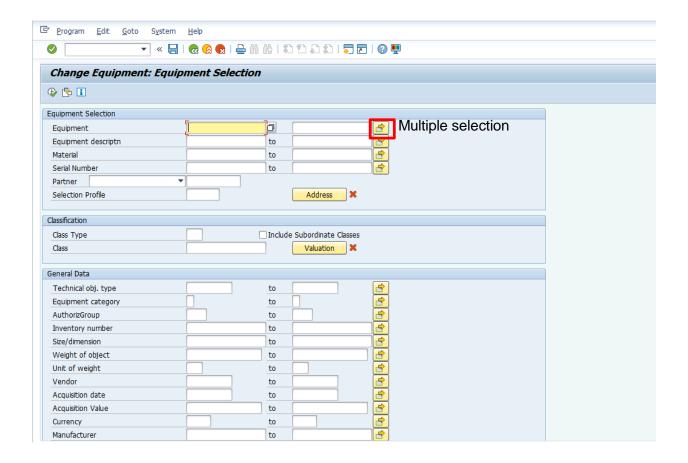
Transaction Code: IE05/IH08

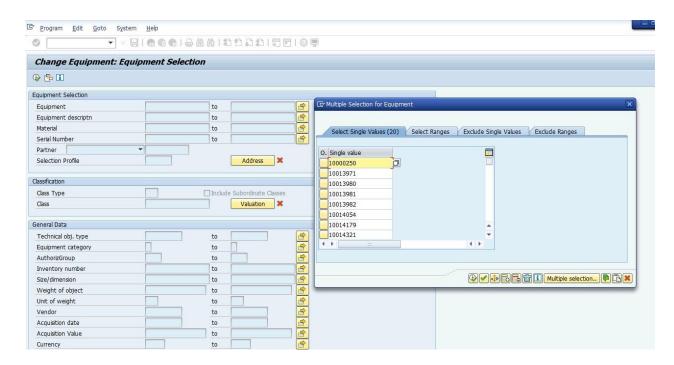


1. Enter **IE05/IH08** in the **Command** field and click the **Enter** icon

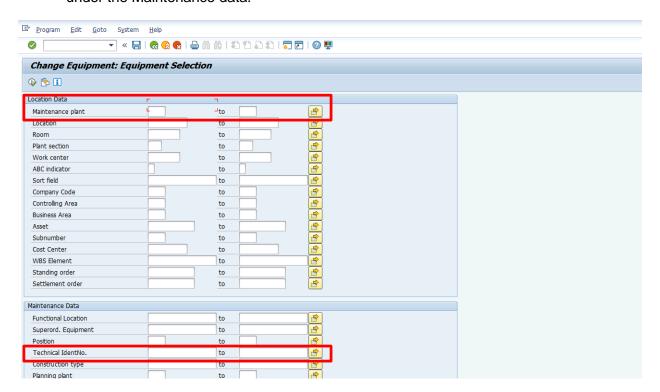
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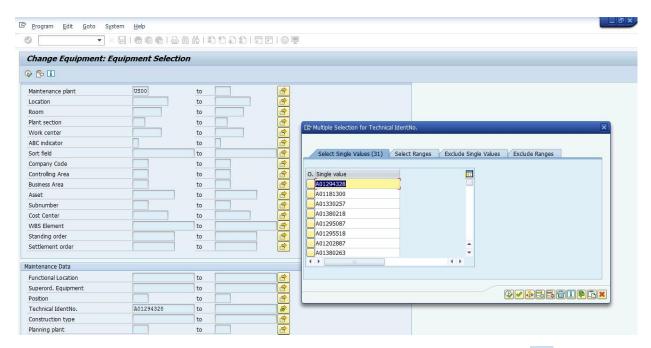
- 2. Enter the list of equipment records to be updated. This can either be via manual selection or by cut/paste from excel.
- 3. The equipment number **must** exist in the system.



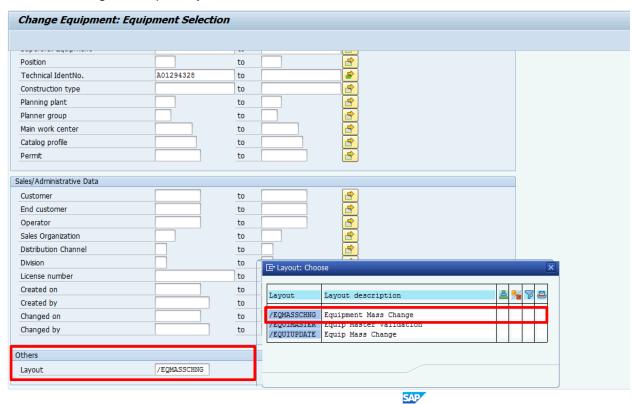


 Alternatively, if other parameters of the Equipment Master are known, enter the field Maintenance plant in the equipment master under Location Data and TechldentNo. under the Maintenance data.

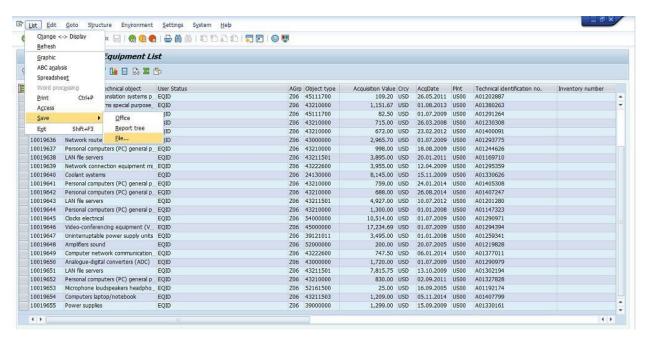




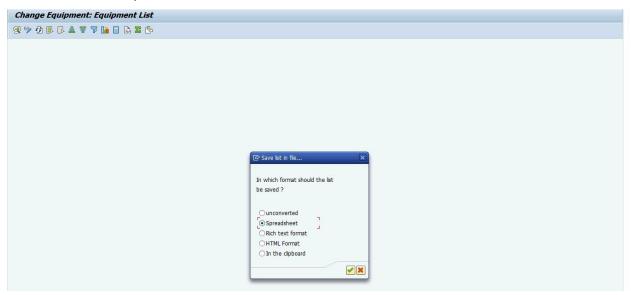
5. Leverage the report layout /EQMASSCHNG and click the Execute icon



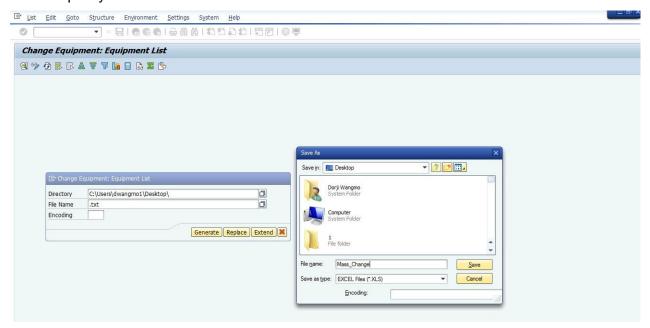
Create input load file by downloading data from IE05 transaction by going to List > Save > File



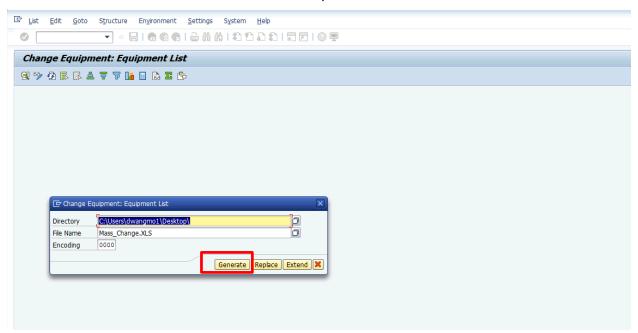
7. Select the Spreadsheet format



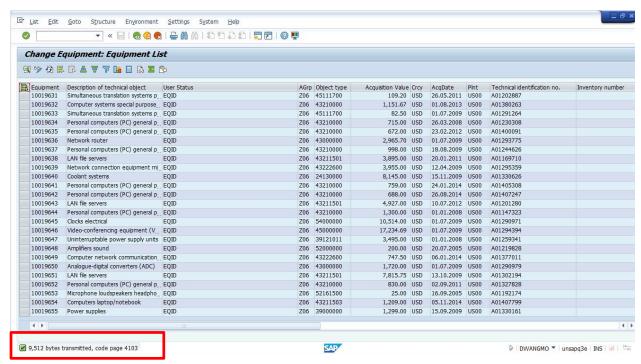
8. Specify the location where the file can be saved on the local device



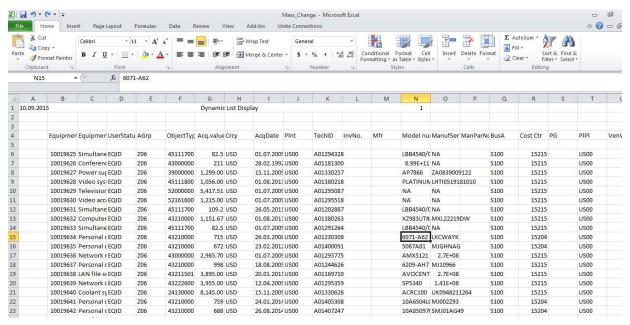
9. Click the Generate button to create the report



10. A message is displayed in the status bar indicating that the data has been transmitted and downloaded to the User's local device

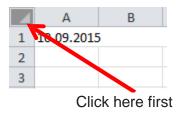


11. Open the downloaded file to extract the equipment master data. The file will look like this:

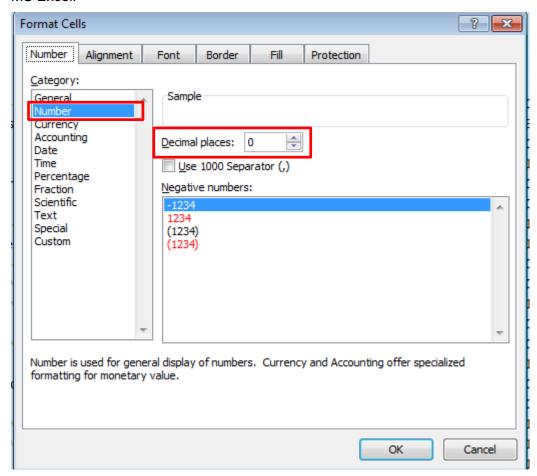




Click where the row and column headers meet, this will select the entire sheet

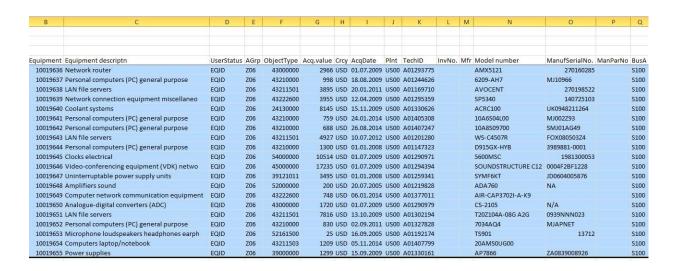


Then right-click and select format the cells. Under the category select Number and enter '0' in the decimal places. This is done so all the values for the extracted data do not get truncated by MS Excel.

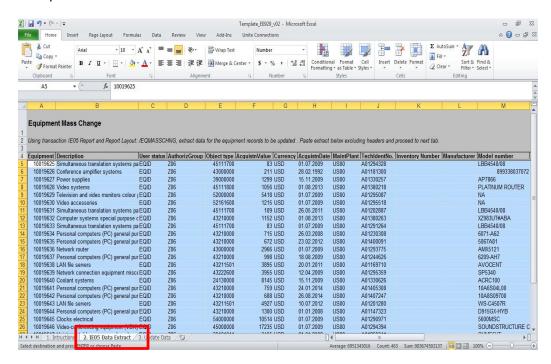


12. Copy all the data from the Equipment column (Column B) to the Functional Location column (Column Z)





- 13. Paste Data Extract into the template (file name: Template_E0929_v02.xlsm). The template can be downloaded from the Job Aids page on iSeek or Unite Connections: Equipment Mass Change Data Template
- 14. Paste Data from Report Extract, excluding headers, to "2. IE05 Data Extract" tab in the spreadsheet mentioned above:



15. Review data pasted in "2. IE05 Data Extract" validate that the format of data corresponds to the extract.

Making changes to data to support Equipment Mass Change Utility (Part II)

Use the following instructions to review, change and perform the Equipment Mass Change



- a. Go to the "3. Update Data" tab in the template file, if more than 1000 records have to be updated drag formulas down additional rows until all equipment numbers from the "IE05 Data Extract" tab are shown.
- b. Columns are **grayed** out where original data from the extract is shown to assist with modifications. DO NOT CHANGE VALUES IN THESE COLUMNS.
- c. Columns that are not grayed out or highlighted as either mandatory or optional fields. If field is mandatory it's value can NEVER be left blank/deleted, only updated with new value.
- d. Mandatory fields are key data to identify and provide information of the equipment, the mandatory fields are
 - Equipment Description
 - User status
 - Authorization Group
 - Technical Object type
 - Acquisition Value in USD
 - Currency
 - Acquisition Date
 - Maintenance Plant
 - Tech ID Number
- e. Optional fields only require input if the current value is to be changed or removed.
- f. PADP fields are relevant only for the PK and SPM's.

Mission (SD10 & SD11) updates following fields in the Equipment Master

- Mission Group
- Estimated Release Date
- Follow On Mission
- Disposal Remark

PADP Approver (SD17) can update the Mission related fields above and the following (#2) approval fields

- Approved Destination Mission
- Approval Status



All the fields indicated as **mandatory** should be populated in the load file. The values for Fields, which are indicated as mandatory should never be **removed and/or deleted**, even if any field

contains special indicator value '/' by mistake. Values should be overwritten if users change content.

If a field in the spreadsheet contains blank value (no information provided in the field) the upload tool will interpret the blank value as 'no update' needed for that field in the Equipment record.

If the value of a field is to be removed in the Equipment Record, and this field is not a mandatory field, the user must indicate so in the spreadsheet field with a special indicator '/'; the program will interpret '/' value as deletion of value in the Equipment record field.

If the "Vendor: Date on which the warranty begins" or the "Vendor: Date on which the warranty ends" or the "Acquisition Date" contains any value, it should be in **DDMMYYYY format.**

For the update of Partner in the Equipment record, the same approach as above is to be followed: Via the upload tool any type of partner function can be maintained. For this, both the partner type and business partner fields have to be populated properly.

Only '1' Partner Function / Partner will be provided in the excel file. Example a partner type (i.e. "ZV") is already available in the equipment master and the input file also contains information related to the same partner type, the program will overwrite the existing entry and won't create or add it as a new partner/line. If more than one partner does exist in the Equipment Master, for the same "partner function", the program will update only the first partner function available.

If a deletion is required, the partner type information should be in the load file and the business partner field should contain special indicator '/' this will delete the 1st partner type from the system that match with the load file. As long as one field between partner type and partner is left blank, program will interpret as no update required to the partner in the equipment record. In order to change the value user must indicate as specified above.

Installation / Uninstallation: If functional location provided is different than the one in the Equipment Master then:

- Functional Location field in spreadsheet contains blank" value, no update is needed to this field in the Equipment Record.
- Functional Location field in spreadsheet contains special indicator 'l', then uninstall equipment from functional location.
- Functional Location field in spreadsheet contains different Functional Location value then dismantle equipment from current functional location and install to the one provided in the spreadsheet.

Installation or Dismantle of Equipment in Functional Location will be allowed upon master data. For example, dismantle will be allowed if Equipment has been already installed in Functional Location. Therefore, Equipment master data needs to be verified first and indicate to user if installation or dismantle will be allowed.

If the Functional Location is provided in spreadsheet it should be interpreted as "Installation". Therefore, verify if system will allow performing this activity based on existing values in the equipment master data. If Equipment has not been installed in Functional Location, then this activity will succeed, otherwise a warning message will be presented user. Also, if equipment has already been installed for the same Functional Location entered in the spreadsheet, then the system will indicate to user that installation will not be pursued as it was already done (warning error).

If the functional Location in the spreadsheet is left "blank" no update is required for the value in the Equipment Master Record.

If the functional Location field in the spreadsheet contains special character 'I' it will be interpreted as "**Dismantle**". If Equipment has been already installed, then this activity will succeed, otherwise a warning message will be presented to the user.

If a measuring point UoM is provided in the spreadsheet and an active measuring point with the same or different UoM already exists in Umoja then the system will give an error message as the program allows only one active measuring point per equipment.

Annual Estimate is relevant only for a measuring point. Hence if the Annual Estimate field is populated in the spreadsheet without a measuring point UoM, then no updates will be made.

The program does not support deletion of a measuring point. Also, it is not possible to change the UoM of an existing measuring point.

PADP Mission related fields (Mission Group, Follow on mission, Estimated Release Date, Disposal Remark) can be updated by the roles SD10, SD11 and SD17.

PADP Approval fields (Approved Destination Mission, Approval Status) can be updated only by SD17 role. If user with any other role attempts to update these fields an error will be generated.

If Estimated Release Date contains any value it should be in **DDMMYYYY** format

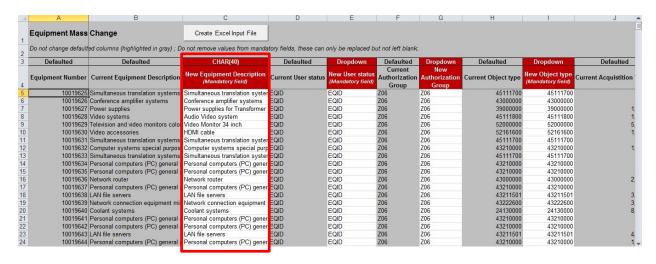
SD17 role (PADP Approver) does not have the authorization to update any information on the equipment record other than the PADP fields. Hence if the load file contains any information other than the mandatory and the PADP fields (listed in the "Important Tips" section above) then error message will be presented to the user.



1. Changing Equipment Description

Description of an equipment master is in the form of a short text. This is the description of the equipment or asset. This is a mandatory field and cannot be removed. In cases where the Equipment record was incorrectly/erroneously recorded, change the equipment description in the template file. The description of equipment cannot be longer than 40 characters to conform to Umoja standards.

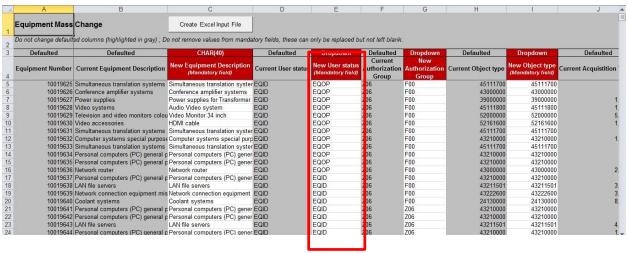
Make the necessary changes/updates to the template:



2. Changing the User Status

This field represents the status of the equipment (i.e. whether the equipment is usable, to be repaired). If any status requires to be updated, select one of the statuses in the drop-down list.

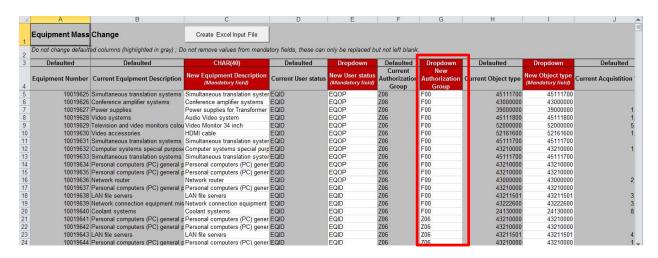
Make the necessary changes to the Status of the equipment in the template:



3. Authorization Groups

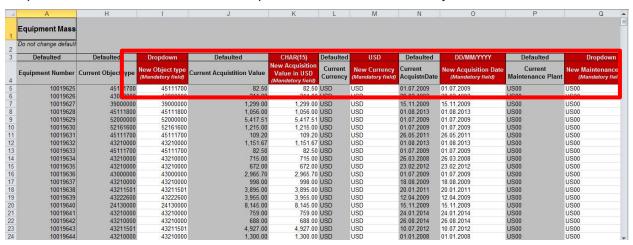
The user will have access to change equipment of its own authorization group only.

Whereas, the User' in offices designated to ensure proper utilization and safe custody of all UN property (e.g. Property Management Section) access to multiple authorization groups is possible. This is a mandatory field and cannot be removed or left blank. User' with access to multiple authorization groups can change the authorization group by selecting the authorization groups in the drop-down list.



4. Other Mandatory fields

The other mandatory fields like Object type, Acquisition Value, Current Currency, and Acquisition Date can be enriched and updated as deemed necessary.

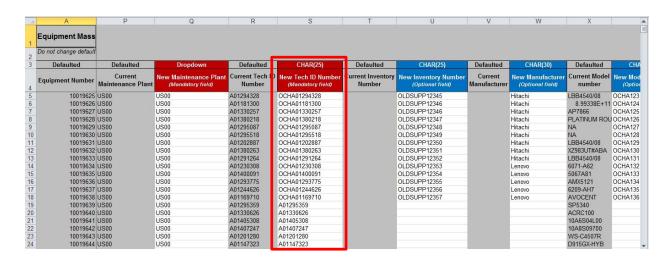


5. Maintenance Plant

This is a mandatory field and should not be removed. This field should be changed ONLY if the equipment is transferred to different Plant in a different Functional Location. In order to change the maintenance plant the equipment should first be uninstalled from its current functional location.

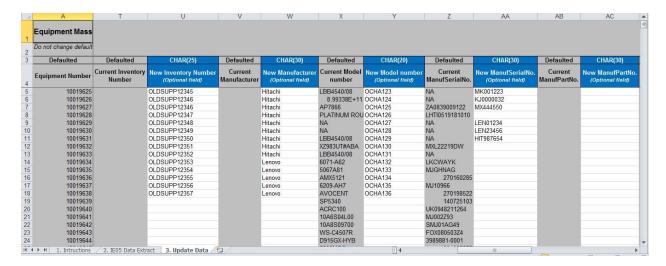
6. Tech ID Number

This is a mandatory field and cannot be removed/deleted. The Tech ID Number shows the Umoja-generated serial number (with 3 *'s in front). The Equipment Master's Tech ID number automatically adopts the serial number preceded by 3 stars (***) in order to indicate that this record was automatically generated in Umoja following the Goods Receipt process. The user can overwrite this number by removing the 3 stars (***) to indicate that the equipment record was validated after being created. Make the necessary changes/updates to the Tech ID number in the template



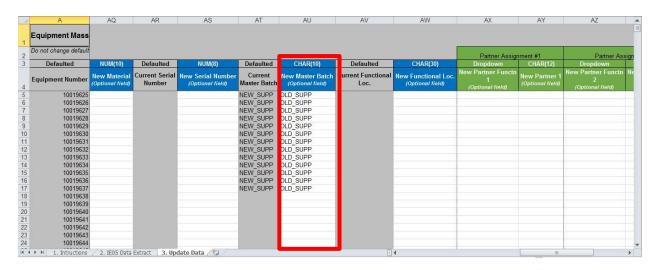
7. Other Optional Fields

Equipment Mass Change utility allows the users' to enrich or remove the optional fields. Optional fields only require input if the current value is to be changed or removed.



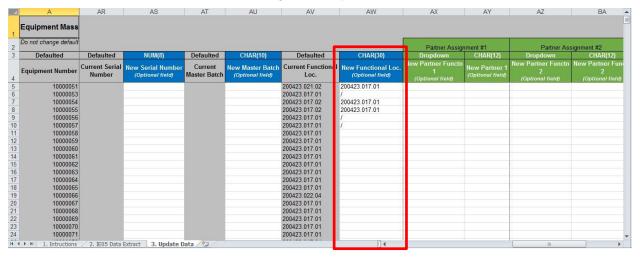
8. Master Batch

Equipment Mass Change utility allows the users to change the master batch field. Change of a master batch field is controlled by Umoja/SAP standard. Any new equipment created in Umoja (acquired through the Umoja SRM process) will have a "new" valuation type automatically populated. For certain Material Types (for example, ZERS – Spare Parts, and ZSAA – Supplies & Equipment), if they are issued and subsequently returned to inventory, they will be given a "used" valuation of "0". Master batch data in the load file can be changed from NEW_SPARES/SUPP to OLD_SPARES/SUPP, thus, updating the equipment master batch data after the mass update for plants that manage inventory.



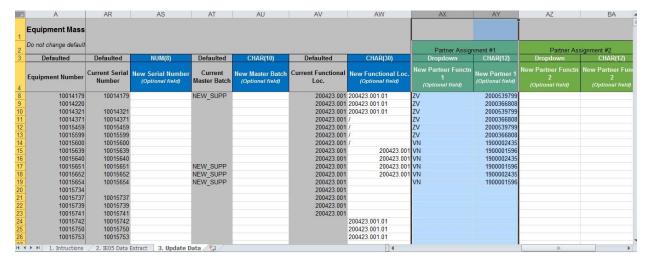
9. Functional Locations

The equipment can be **assigned** to a new functional location or can be **dismantled** from the current functional location using this utility.



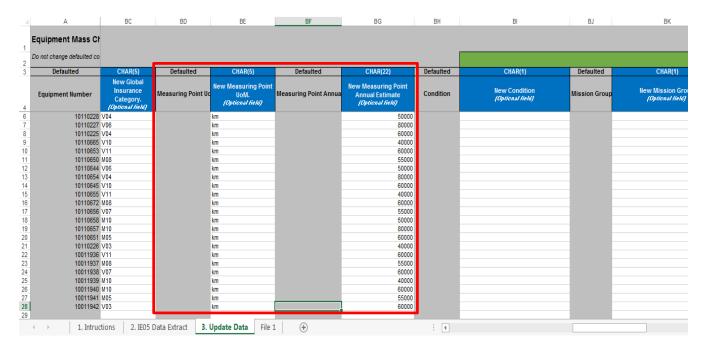
10. Business Partner

Equipment master can be assigned with new business partner of same or different function and override the first business partner of the same function (when assigned to multiple BP). If Partner profile is entered validate values against BP Master.



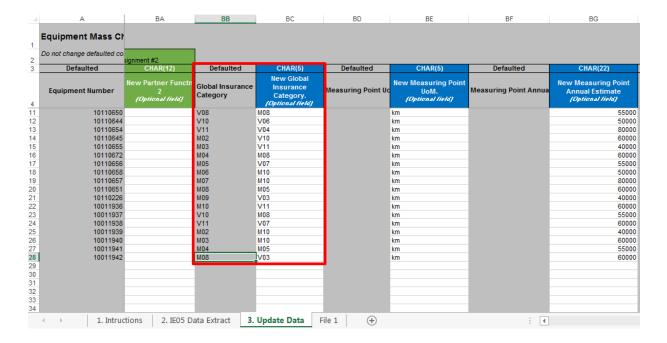
11. Measuring Point

A measuring point of type counter can be created for an equipment by populating UoM in the load file. Annual Estimate field in the load file is a characteristic of the measuring point which supports Performance based maintenance.



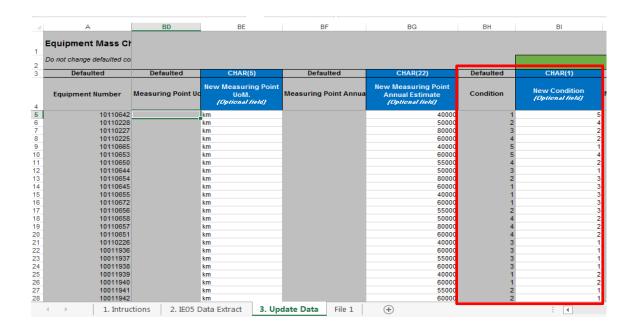
12. Global Insurance Category

Global Insurance Category can be updated for insurance reporting purposes.



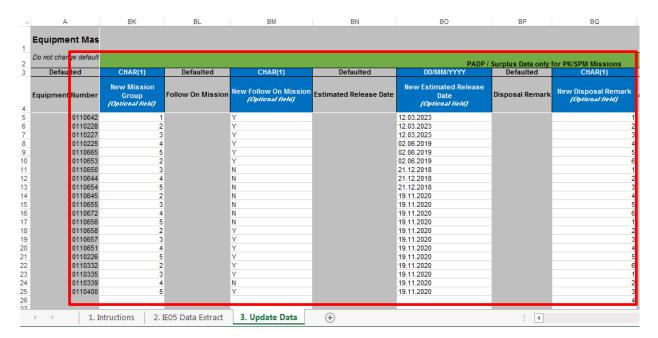
13. Equipment Condition

Equipment condition can be updated in the template as shown below



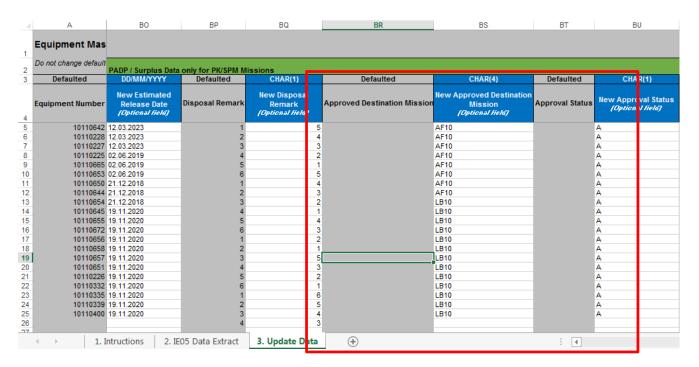
14. PADP Mission fields

The PADP mission planning fields are used for the PADP planning process which is relevant for the PK/SPM missions. These fields can be updated in the template as shown below.



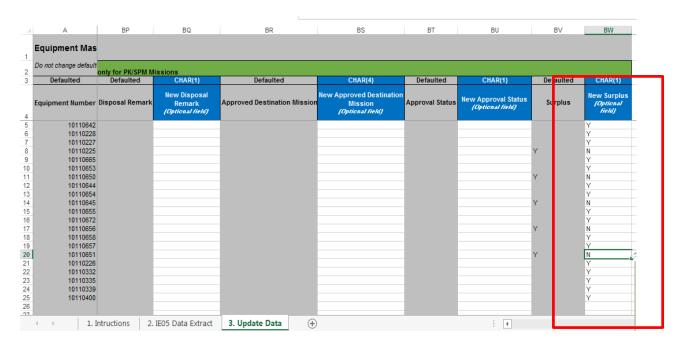
15. PADP Approval fields

Mass approval of PADP planning data can be performed only by the PADP approver. If needed the PADP approver can also overwrite the mission planning data.



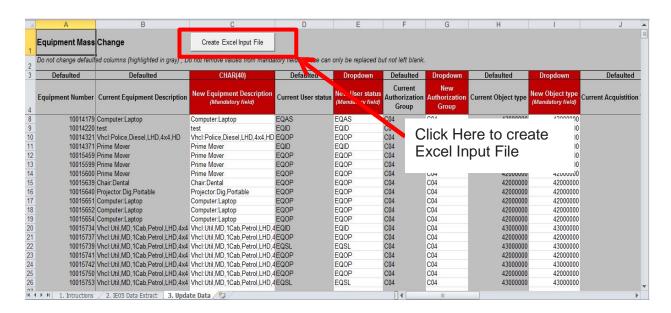
16. Surplus

Surplus field can be updated in mass as shown below.

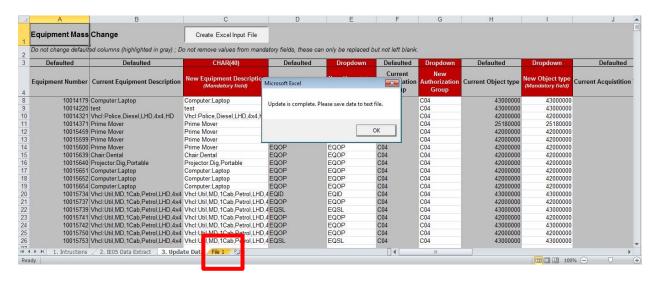


Create the Excel Input File

 Review the template file again for all the changes. When all changes have been made to the data in the "3. Update Data" tab click on the button on top of the tab that reads "Create Excel Input File", message will appear when file is ready for review.



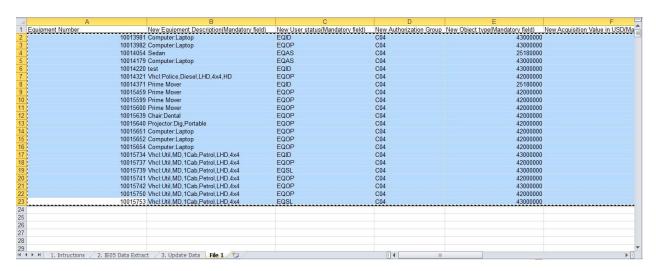
2. Review the additional "File 1" and/or "File 2" tabs created

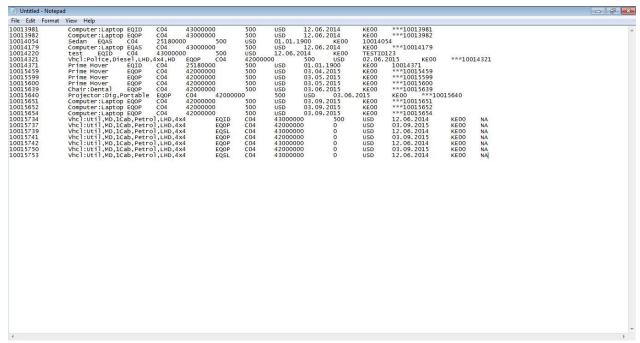




1. Copy the data from the "File 1 and/or 2" tab to a text file, make sure to not copy the headers.

2. If "File 2 tab" is created, copy the data from the "File 2" tab to a different text file, make sure to not copy the headers.



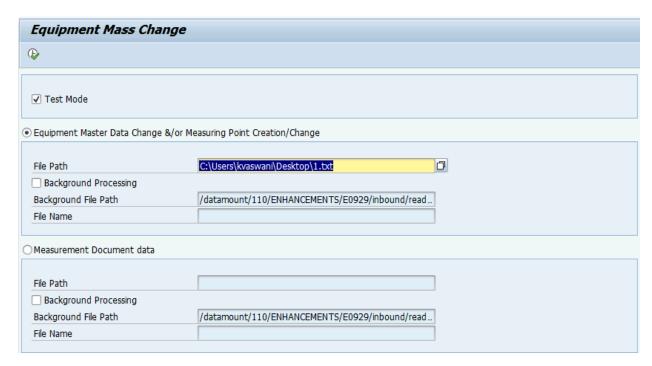




On copying the data from the "File 1" tab to a text file, **backspace** on the text file so the cursor is pointed to the last character in the text file. Save the text file on the local device.

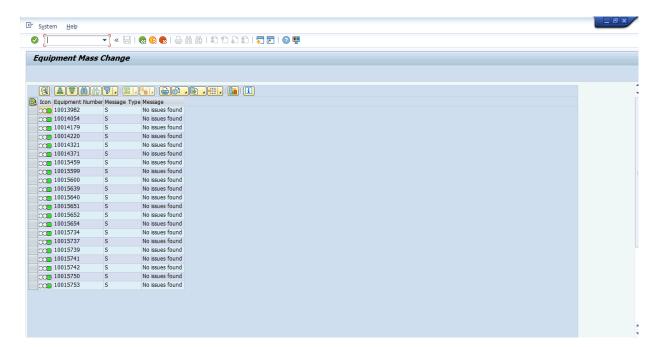
Step-by-Step Instructions to Run Equipment Mass Change Utility (Part III)

1. Enter ZPMEQUICHANGE transaction in the Command field and click the Enter icon

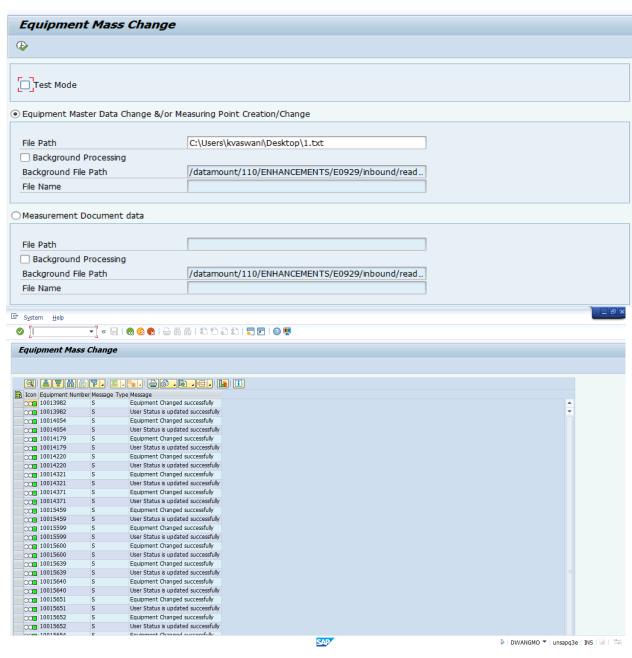


Process this input text file via custom transaction code (**ZPMEQUICHANGE**).

Select the option "Equipment Master Data Change and/or Measuring Point Creation/Change and the checkbox for "Test Mode". In simulation mode program will give appropriate message based on authorization or missing mandatory fields. All fields will be validated and if any error then it will be displayed in output.



2. Again, process this input text file via custom transaction code (ZPMEQUICHANGE). This time **Uncheck** the checkbox for "Test Mode"





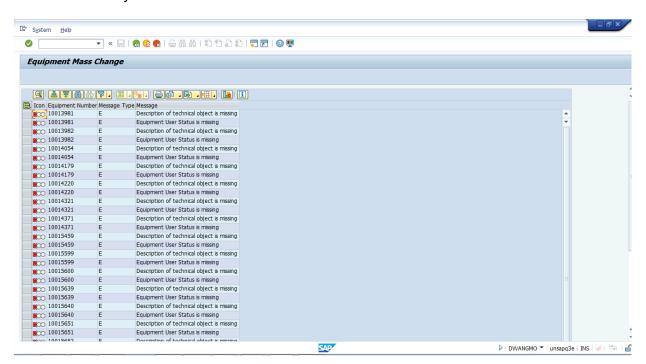
Program will do basic validation and will update equipment records as per information available in source file.

Note: Equipment Mass Change can also be executed by uploading file from **Umoja application server** and is described in a separate Job Aid.

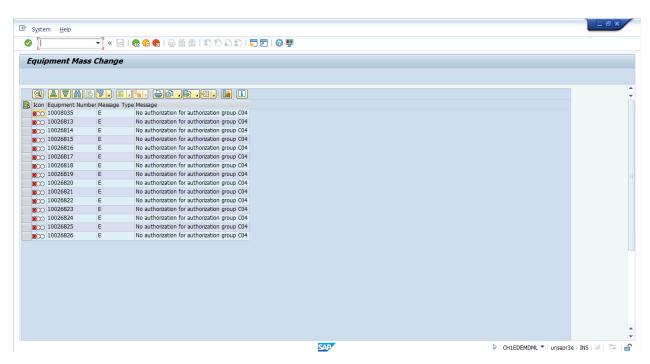


Find below detail of screen's behavior while updating certain fields using the Equipment Mass Update transaction ZPMEQUICHANGE

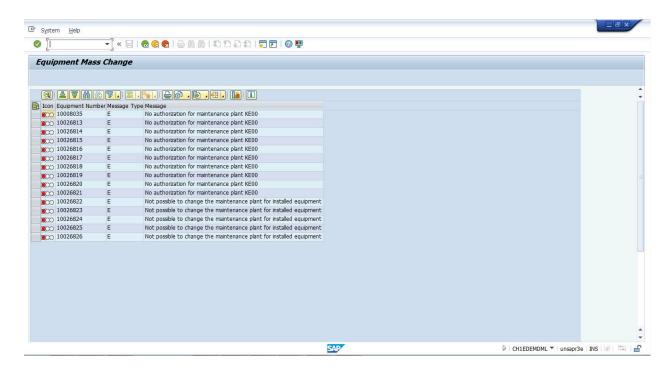
1. Mandatory Field Deletion



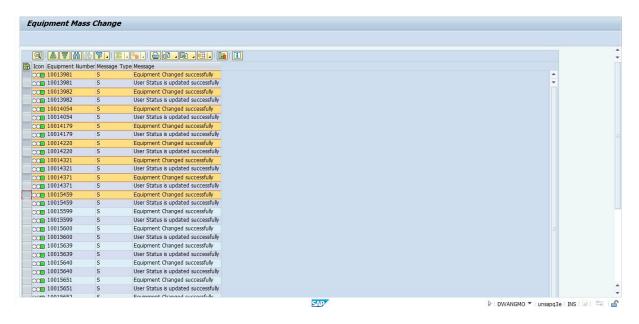
When Authorization Group is not within user's permissions, authorization group in the same plant to another value for which the user has no access to

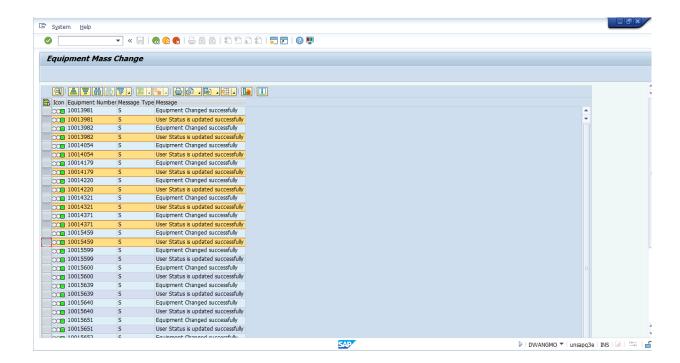


3. When there is a change to the Maintenance Plant to one where user has no authorization

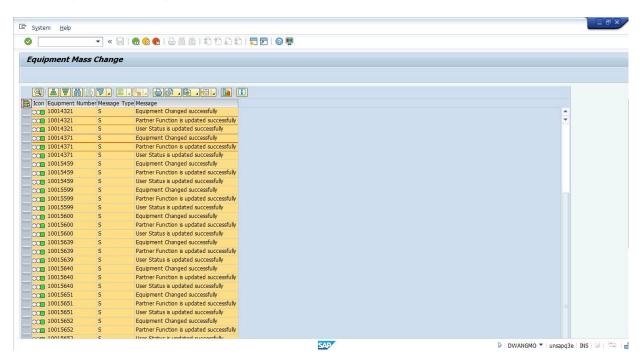


4. Other Mandatory Field Update

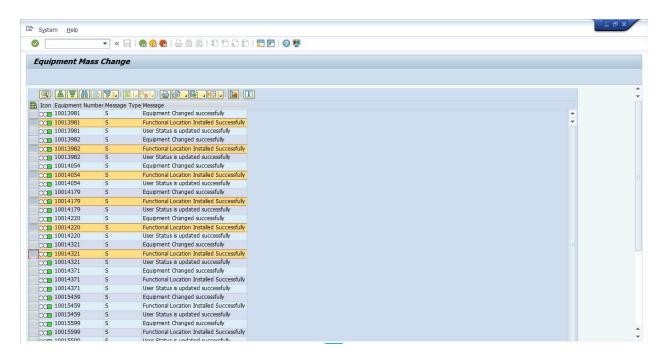




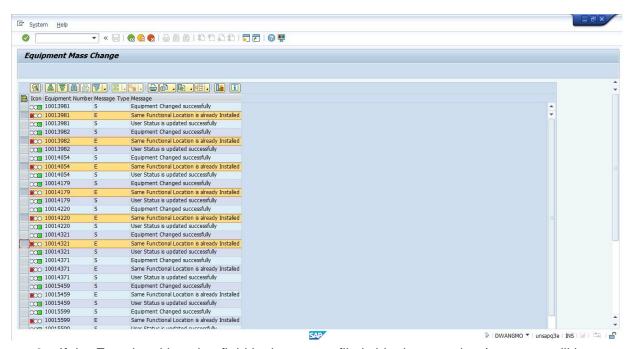
Optional Field Update



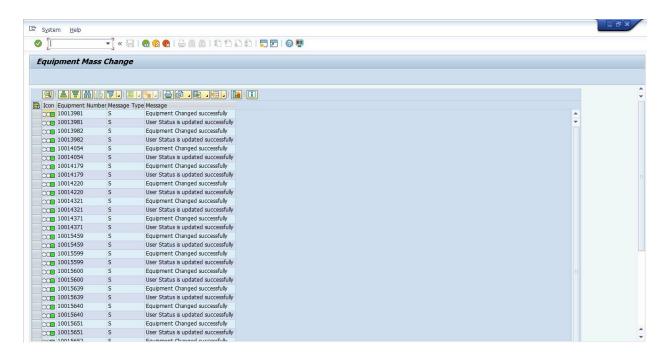
6. If the Functional location field on the equipment master record is blank and functional location field in the source file has value, the program will treat this scenario as "Functional location Installation" and message confirming" installation can be performed successful" will display.



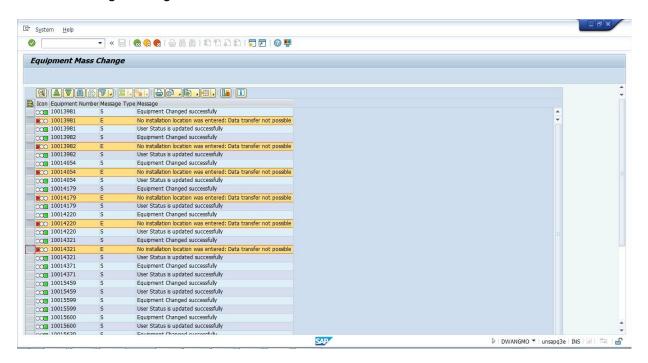
7. If the Functional location field on the equipment master record is same as functional location field in the source file, the program will treat this scenario as "Functional location Installation warning message will be displayed"; installation will not be pursued as equipment was already installed at same functional location



8. If the Functional location field in the source file is blank, no update/message will be performed on the equipment master

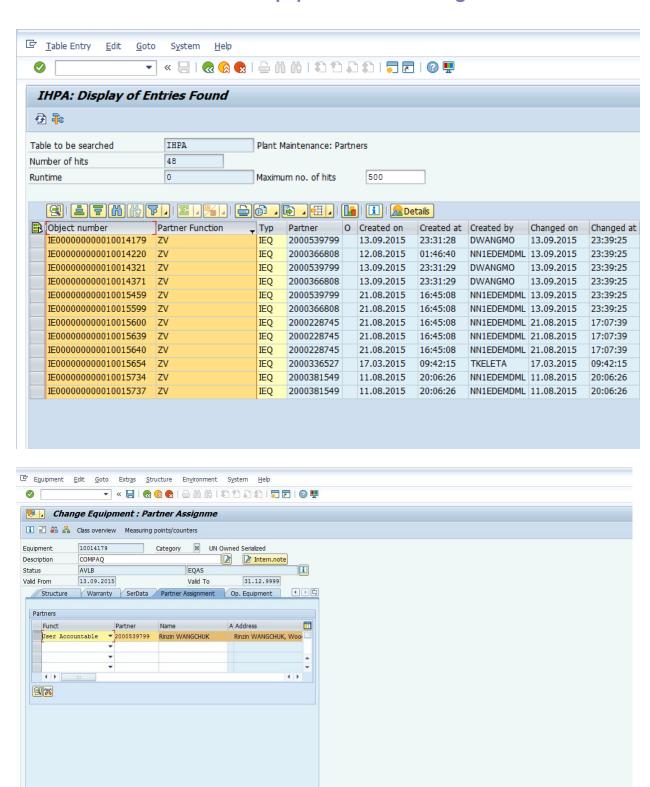


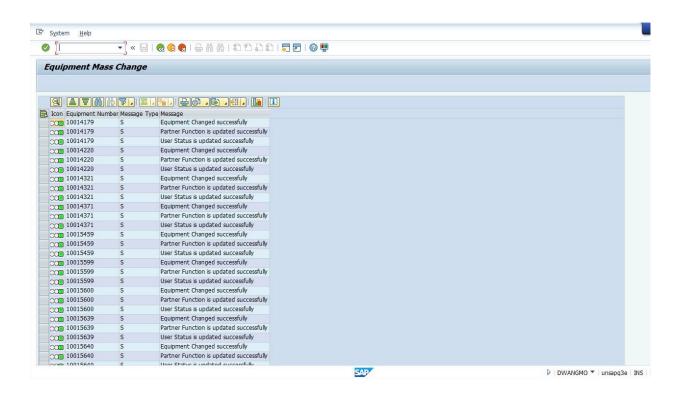
9. If the Functional location field in the source file is populated with special character "/" and equipment record is not installed on any functional location, the program will give warning message as functional location field has no value to be removed.



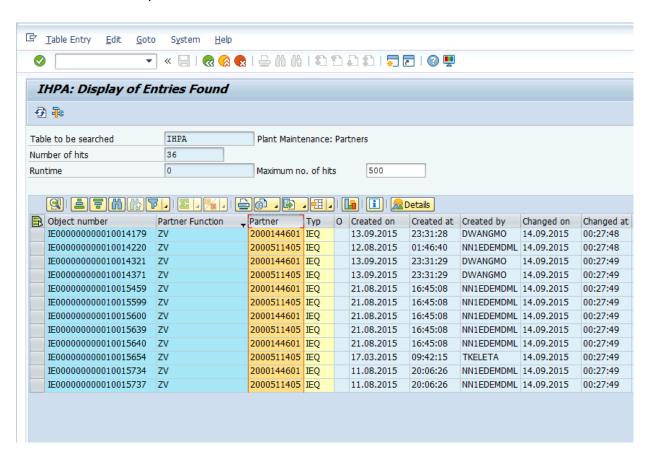
10. For equipment records that are already assigned to a BP partner type example ZV, this program allows to update the ZV partner with new value.

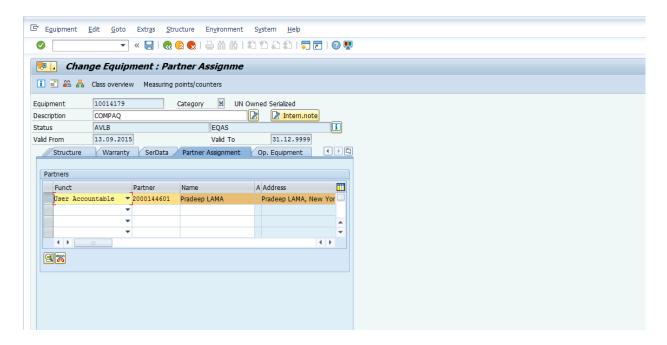
Before Mass Update:



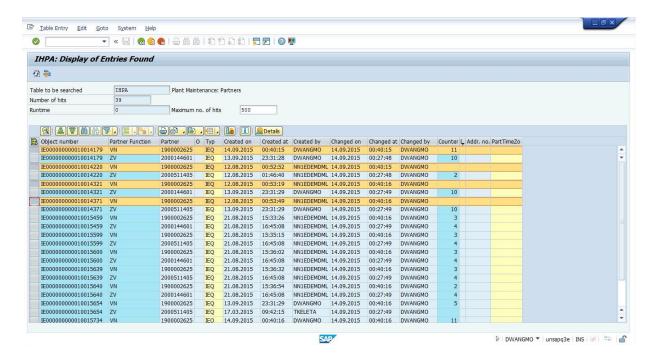


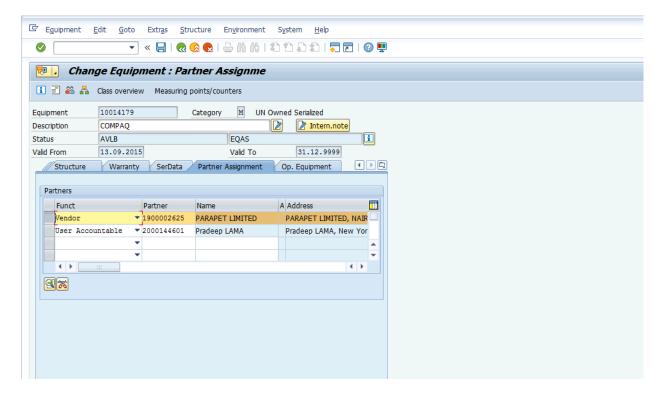
After Mass Update:



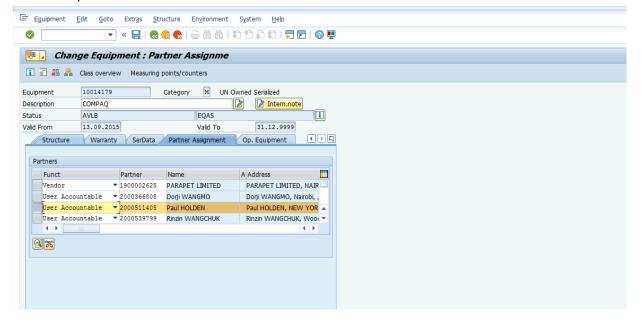


11. Equipment records are updated each with all partner types from input file, Equipment records are updated with additional business partner type VN

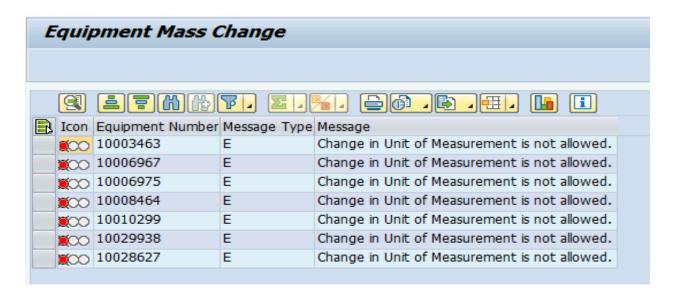




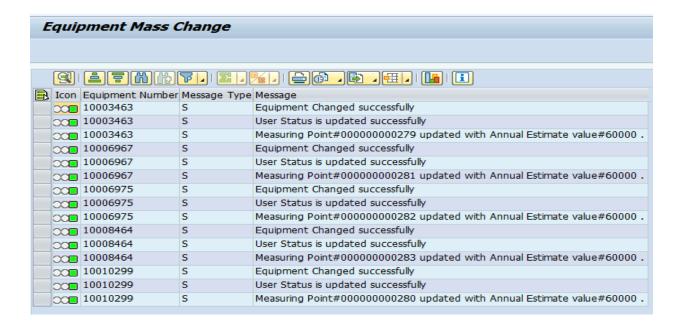
12. When the equipment has multiple business partners for the same function (example ZV), in the input file, a new business partner with same business function as the ones maintained manually (e.g. ZV) and process file. Program finds that equipment record is assigned to multiple business partners of the same function (e.g. ZV); program will override the first business partner of the same function with value from input file i.e. program will search 1st partner and replace it with the BP from the source value. Every time Partner changed/added then system automatically sorts list of partner assigned to same partner function.



13. If the user attempts to change unit of measurement of an existing active measuring point the program will generate error.



14. If annual estimate value is populated for a measuring point UoM (of an existing active measuring point), the program will update the value as in the screenshot below.

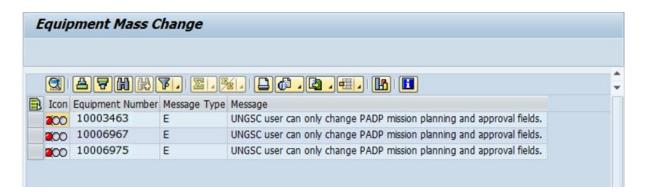


15. If a user with Equipment master data maintainer role (SD10 & SD11) attempts to update PADP approval fields, the program will generate error.



16. If a user with PADP approver role (SD17) attempts to change any information other than the PADP fields, the program will generate error.

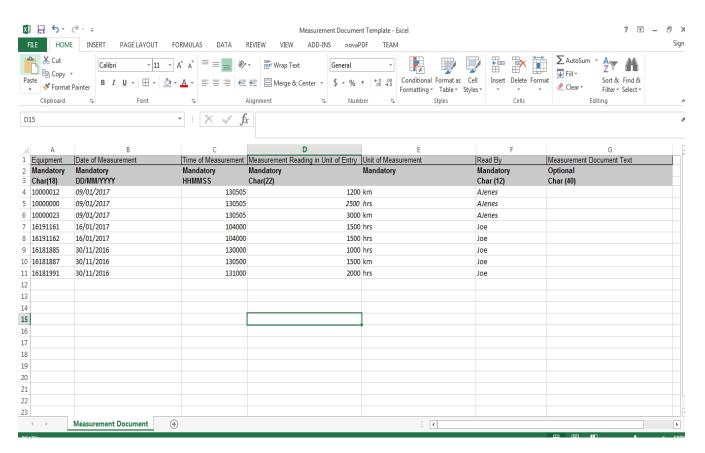
(Note: However, it is still required to populate the mandatory fields (with no changes) for the program to execute successfully as mentioned in the "Important Tips" above)



II. Measurement Document Data

Manual Creation of the Input File (Part I)

The load file for measurement document upload can be prepared manually or downloaded from an external system such as CarLog in a fixed format. A snapshot of the format for this file is as shown below:





Measuring point with the given UoM for the given equipment(s) must exist in the system.

This template can also be downloaded from the Job Aids page on iSeek or Unite Connections.



Copy data from the Excel file to a text file, make sure not to copy the headers.

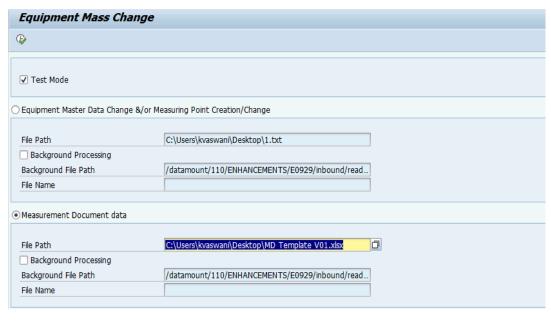


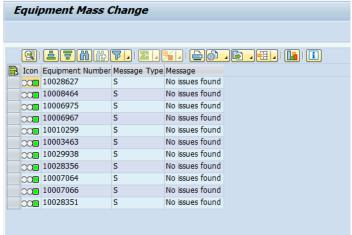
On copying data from the Template to a text file, **backspace** on the text file so the cursor is pointed to the last character in the text file. Save the text file on the local device.



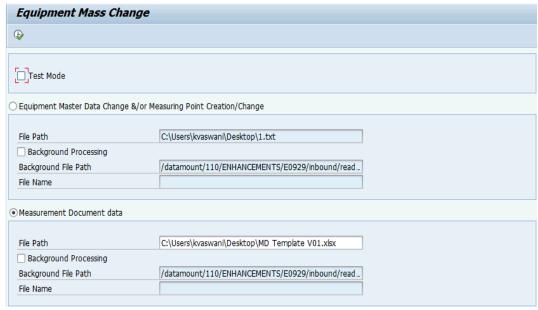
Step-by-Step Instructions to Run Equipment Mass Change Utility (Part II)

- 1. Enter ZPMEQUICHANGE transaction in the Command field and click the Enter icon
- 2. Process this input text file via custom transaction code (**ZPMEQUICHANGE**). Select the option "Measurement Document Data" and the checkbox for "Test Mode". In simulation mode program will give appropriate message based on authorization or missing mandatory fields. All fields will be validated and if any error then it will be displayed in output.





Again, process this input text file via custom transaction code (ZPMEQUICHANGE). This time Uncheck the checkbox for "Test Mode".

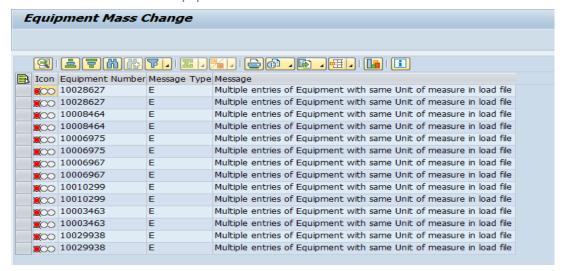




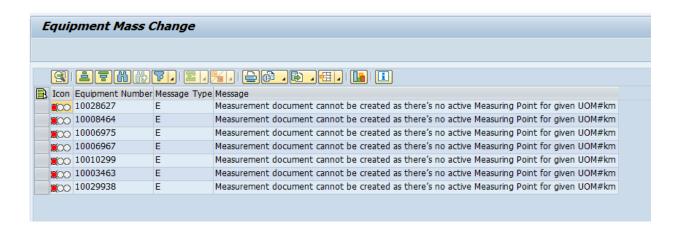
Program will do basic validation and create measurement documents as per information available in source file.



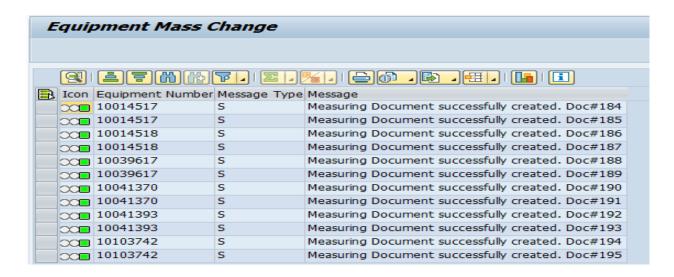
1. The program does not allow creation of more than one measurement document for a unique combination of equipment and UoM per load file. It will generate error when multiple entries for the same equipment and UoM are found in the load file.



2. If measuring point does not exist for the given combination of equipment and UoM in the load file, error message will be generated.



When the equipment has two active measuring points and the load file contains one entry for each of the UoM, the program will create two measurement documents (one for each measuring point / UoM).



4. Decimal point readings are not allowed for measurement documents. Users will be prompted with an error message if the load file contains decimal value.

