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Practical Guide to SAP® Internal Orders (CO-OM)

- ▶ Influencing Performance
- ▶ Authorizations in SAP
- ▶ Modifications and enhancements to the SAP standard
- ▶ Transport Management System

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2 Master Data

Accurate master data is critical in SAP, and it must exist before any type of posting can occur. In this chapter, we will review the methods of creating master data for internal orders and order type customizing.

2.1 Master data

The object internal order is the master data. The internal order is created from an order type, which contains all the parameters of the object. It is important to select the appropriate order type when you are creating an internal order.

2.1.1 Create an internal order


There are two methods of creating an internal order, and both are found on the SAP Easy Access menu.

To create internal orders from the Order Manager:

ACCOUNTING • CONTROLLING • INTERNAL ORDERS • MASTER DATA • ORDER
MANAGER KO04

On the Order Manager screen, select the CREATE **1** icon (see Figure 2.1).

Use the CREATE INTERNAL ORDER dialog **2** (enter or use the dropdown to select an order type, then select the ENTER icon).

The CREATE INTERNAL ORDER: MASTER DATA screen will be displayed on the right. On the left, the “find by or search” feature and the Personal Worklist will be displayed. To hide these sections, select the SHOW/HIDE WORKLIST icon  Worklist .

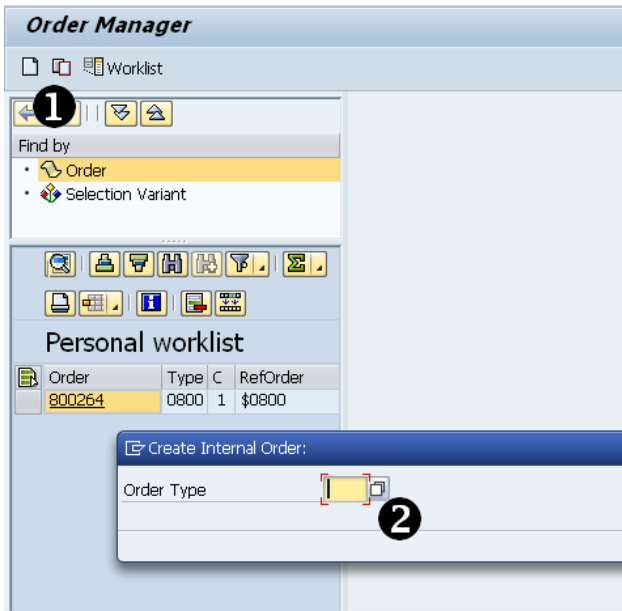


Figure 2.1: Use Order Manager KO04 to create an internal order

To create an internal order **without** Order Manager KO04:

ACCOUNTING • CONTROLLING • INTERNAL ORDERS • MASTER DATA • SPECIAL FUNCTIONS • ORDER • CREATE KO01

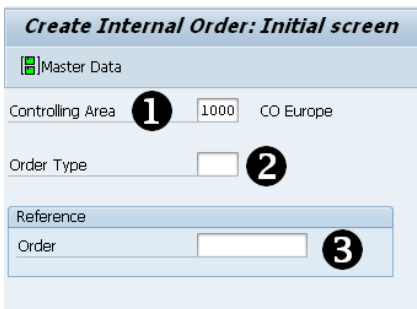



Figure 2.2: Create an internal order from KO01


On the Create Internal Order: Initial screen, enter or use the dropdown to select the controlling area **1** (see Figure 2.2).

On the Create Internal Order: Initial screen, enter or use the dropdown to select the order type **2**.

Select the MASTER DATA icon  Master Data or the ENTER icon (you can also press on your keyboard).

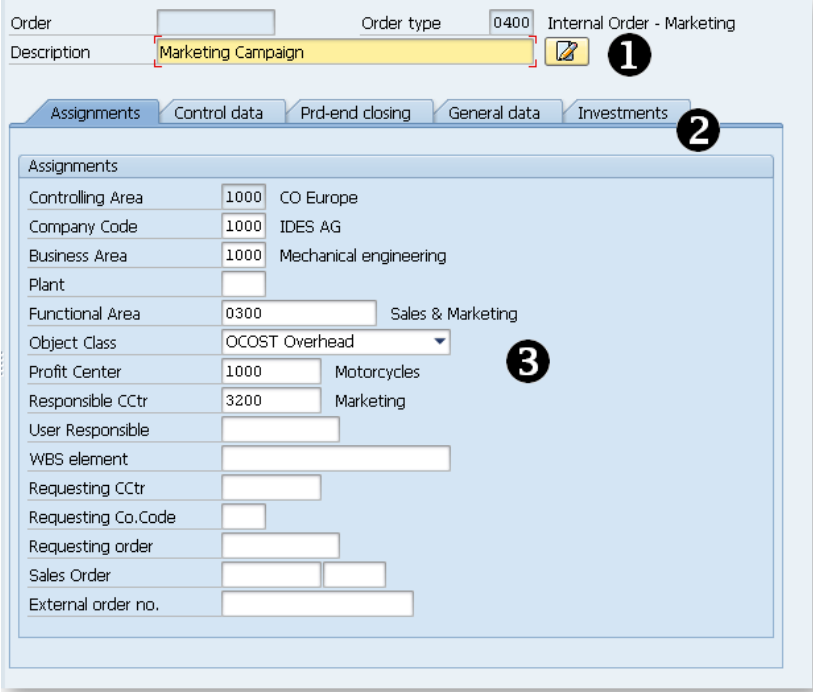
The Create Internal Order: Master Data screen will be displayed.

Order copy



If you want to copy from an existing internal order, enter that order number in the REFERENCE-ORDER field **3** (see Figure 2.2).

In Figure 2.3, we use order type 0400. This is an SAP standard delivered example of an order type. The order type determines everything about the order: whether there are default values **3**, the order number **1**, the screen layout **2**, any required fields, and so forth. Each organization can create order types with specific settings in support of its business requirements.



Order Order type 0400 Internal Order - Marketing

Description **1**

Assignments Control data Prd-end closing General data Investments **2**

Assignments

Controlling Area	1000	CO Europe
Company Code	1000	IDES AG
Business Area	1000	Mechanical engineering
Plant	<input type="text"/>	
Functional Area	0300	Sales & Marketing
Object Class	OCOST Overhead 3	
Profit Center	1000	Motorcycles
Responsible CCtr	3200	Marketing
User Responsible	<input type="text"/>	
WBS element	<input type="text"/>	
Requesting CCtr	<input type="text"/>	
Requesting Co.Code	<input type="text"/>	
Requesting order	<input type="text"/>	
Sales Order	<input type="text"/>	<input type="text"/>
External order no.	<input type="text"/>	

Figure 2.3: Initial data entry screen using order type 0400

We will explore each setting found in this example of an order.

Order header

- ▶ **Order number:** This can be entered manually or determined by a number range assigned to the order type. If the field is greyed out, the next number in the range will be determined and assigned to the internal order when it's being saved.
- ▶ **Order type:** This field is greyed out and cannot be changed from here.
- ▶ **Description:** This value is user defined, according to your business requirements.

Assignments tab

- ▶ **Controlling area:** This field is greyed out, and it cannot be changed here. It was determined by the Controlling Area you set in transaction OKKS.
- ▶ **Company code:** If it's allowed by the order type, this field may be changed. However, the company code entered must be assigned to the Controlling Area displayed above.
- ▶ **Business area:** If it's allowed by the order type, this field may be changed.
- ▶ **Plant:** If it's allowed by the order type, this field may be changed. However, the plant must be assigned to the company code entered above.

All of the fields above are important when you're posting to and from the order. Each value entered will become part of the posting and will be recorded at the document level.

The remaining fields on the Assignment tab are for informational purposes. You may use them in reporting, creating groups, creating selection variants, and to automatically assign settlement rules. These features will be discussed later.

Control Data tab

In the STATUS group we find:

- ▶ **System status:** The current status is displayed. You may see arrow up and arrow down buttons to manually change the status. These are the standard SAP status indicators for internal orders:
 - ▶ **REL released**—With this status, all business transactions can be performed.
 - ▶ **TECO technically complete**—With this status, limited business transactions can be performed.
 - ▶ **CLSD close**—With this status, just a few activities can occur. CLSD prevents any posting to or from the order.

To see the list of possible business transactions for the current status of an order, select the ALLOWED TRANSACTIONS icon. Additionally, from the System menu select GOTO • STATUS and select the BUSINESS PROCESSES tab. Here you can see the full description of possible business transactions and can sort the list.

If the order type contains a status profile, you may also see a user status in addition to the system status. This could provide more control than the three statuses listed here.

In the CONTROL DATA GROUP we find:

- ▶ **CURRENCY:** The system proposes the Company Code currency. If allowed by the order type, this field may be changed.
- ▶ **STATISTICAL ORDER:** If selected, the order will be a statistical cost object. In the Special Topics chapter (Chapter 7), we will review the requirements.
- ▶ **PLAN INTEGRATED ORDER:** If selected, the order will be integrated with Cost Center and Profit Center Planning. In Planning and Budgeting (Chapter 3), we will deep-dive on these features.
- ▶ **REVENUE POSTINGS:** If selected, the order can receive postings on revenue cost elements. In the Special Topics chapter (Chapter 7), we will review the requirements.

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