

# USER GUIDE

*Procure to Pay with SAP Operational Process Intelligence  
powered by SAP HANA*

*Take complete control on requests with real time visibility into Procure  
to Pay process in Procurement Department of any Company*

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# 1 OVERVIEW

## 1.1 SCENARIO DESCRIPTION

Global Procurement Office of a company uses SAP's Procure-to-Pay process to manage their purchase requests, accelerate and automate their procurement processes, proactively ensure compliance, and find new ways to cut costs. Global Procurement handles purchasing for the company world-wide. Procurement is run in shared-service-centres in various locations across the globe. Procurement supports purchasing 3rd-party services facility equipment, HR related services, IT/ telecommunication, marketing, office supplies and logistics

## 1.2 BUSINESS PAIN POINTS

This following scenario addresses three major challenges of a Procurement Operations Manager, Bogdan Bruma, at global procurement department of a company:

- a. Getting end-to-end transparency on real-time status across all parties & departments involved
- b. Finding where to initiate action today to prevent missing SLAs tomorrow
- c. Getting control to manage KPIs like cycle-time not only for parts of the process

## 1.3 KEY MESSAGES AND VALUE PROPOSITION

SAP Operational Process Intelligence (OPInt) powered by SAP HANA enables line-of-business users to gain process visibility across their end-to-end business processes with a clear focus, improving the operational decision making to achieve better business outcomes.

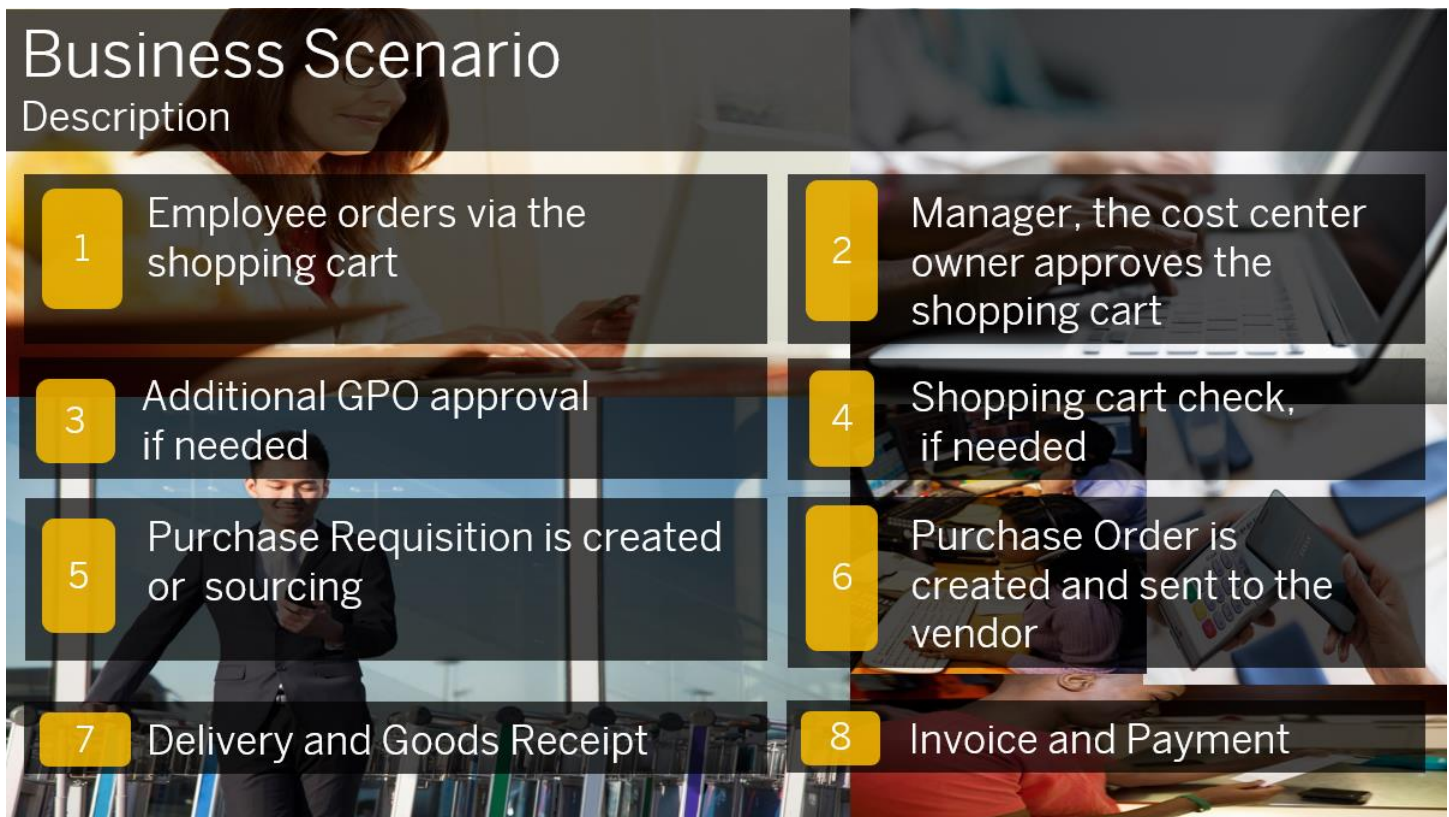
SAP OPInt allows Global Procurement department of any companies to track the progress and milestones of key performance indicators that are crucial for their business. These KPIs are defined in OPInt using measures and indicators. KPIs for the ProcureToPay scenario include:

- Auto Approved SC
- Cycle Time for GPO Approval
- Cycle Time for Quality Check
- Number of Requests Rejected in Quality Check
- Number of Requests Rejected in GPO
- Quality Reject Percentage
- Quality Accept Percentage

SAP OPInt provides Space.me, which will be used by the Procurement Operations Manager, Bogdan, to analyse process instances that are overdue or at risk and take appropriate corrective actions. He can take an action by creating tasks for requests which are not completed on time and improves the process on hands in a "proactive mode".

## 1.4 STORY FLOW

In this scenario, employees of a company places a shopping cart request for the commodities that is required in their day-to-day job (like laptops, mobile phones, secure ID, etc.) in the SAP SRM system. The shopping cart goes through various levels of approvals and finally is released. Once the shopping cart is released in the SAP SRM system, a corresponding Purchase Requisition is created in the connected SAP ERP system. When this purchase requisition is approved and released, a purchase request is created and sent to the supplier based on category of commodity requested. The vendor then delivers the good and creates good receipt. Process ends when invoice is generated and payment is done.

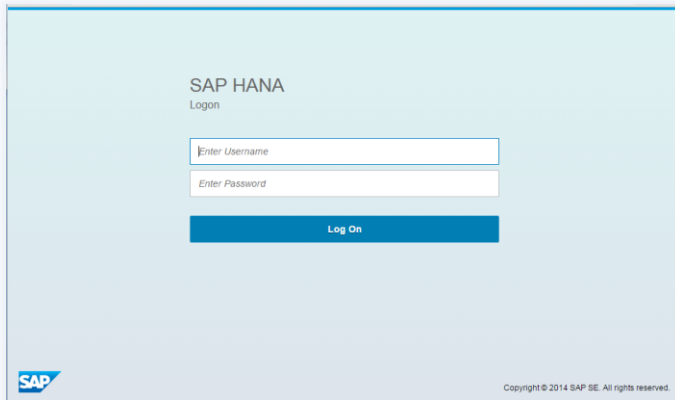


## 2. STEP-BY-STEP GUIDE

### Step 1 – Access OPInt home page

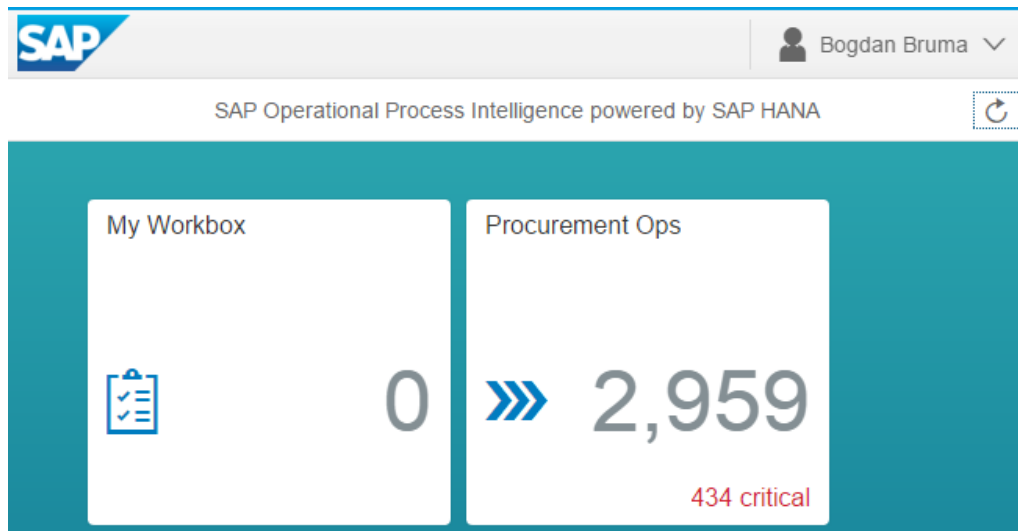
1. Login to space.me with user: **Bogdan** and password: **Abcd1234**

<https://smartprocessapps636d78be.hana.ondemand.com/sap/opi/pv/workspace>



2. You can see the open requests which are currently under process in procurement department of a Company, out of which status of 434 requests are critical i.e. these requests have already surpassed their delivery date.

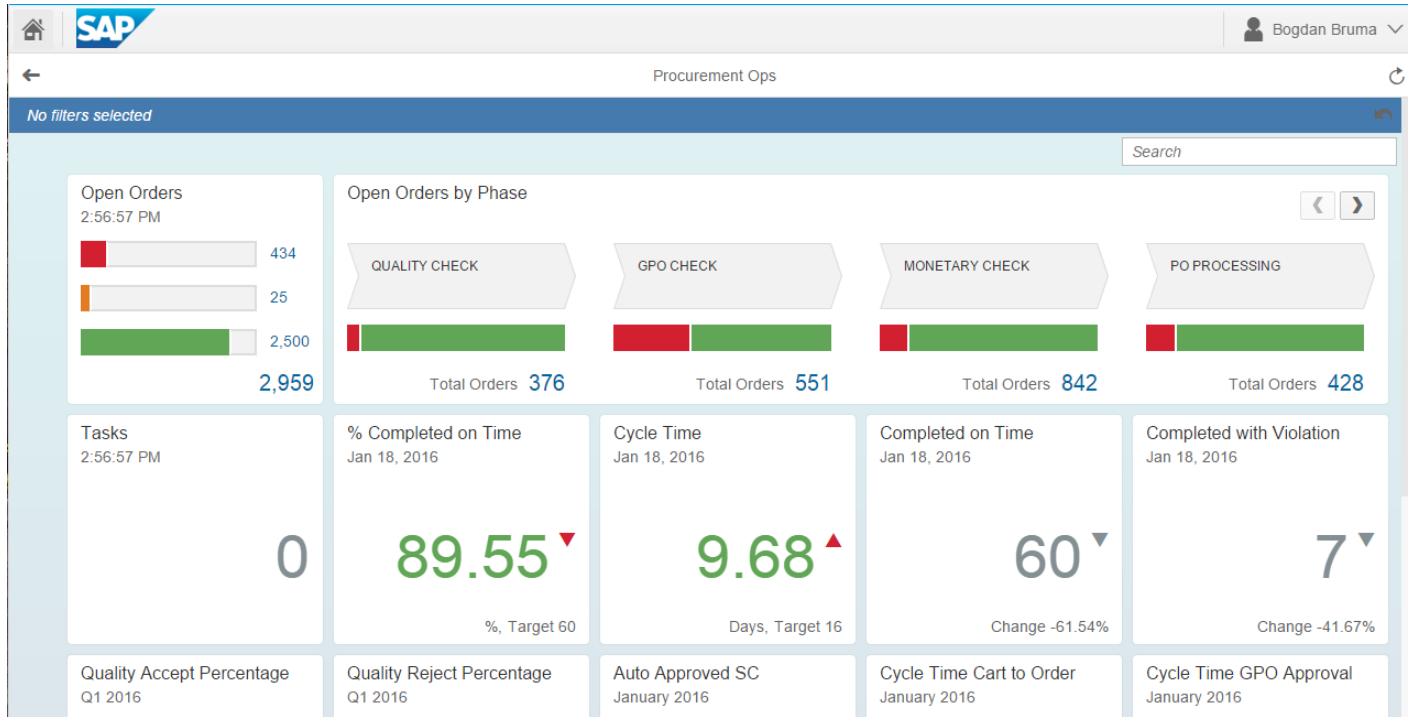
Click on the **Procurement Ops** tile and you will be navigating the details of these requests.



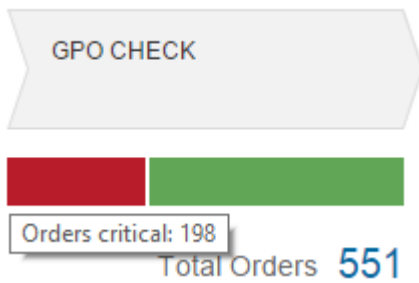
- 3.

- Explore **Open Orders** and **Open Orders by Phase** tiles to analyze requests that are overdue or at risk. You will see that there are lots of pending requests in **GPO CHECK** phase.

Now drills down into **GPO CHECK** phase to get complete details of all the pending requests.



- Select on the critical requests (RED traffic light region) in **GPO CHECK** phase



## Step 2 – Analyzing the Problem Cluster

Here you would see how to cluster the reasons for the delay in delivery of the requests and how to take actions to keep these requests are fulfilled on-time.

1. You will see complete list of requests that are critical in GPO CHECK phase in **Open Orders** page

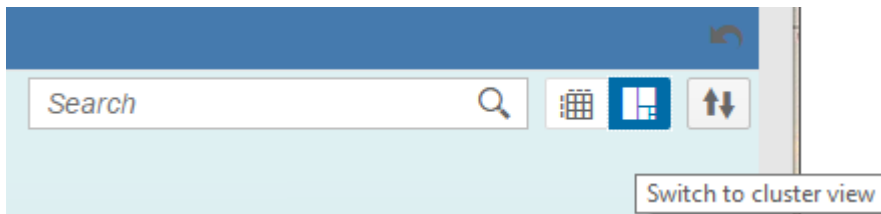
← Open Orders ↻

Filtered by Status (Critical) and Phase (GPO Check)

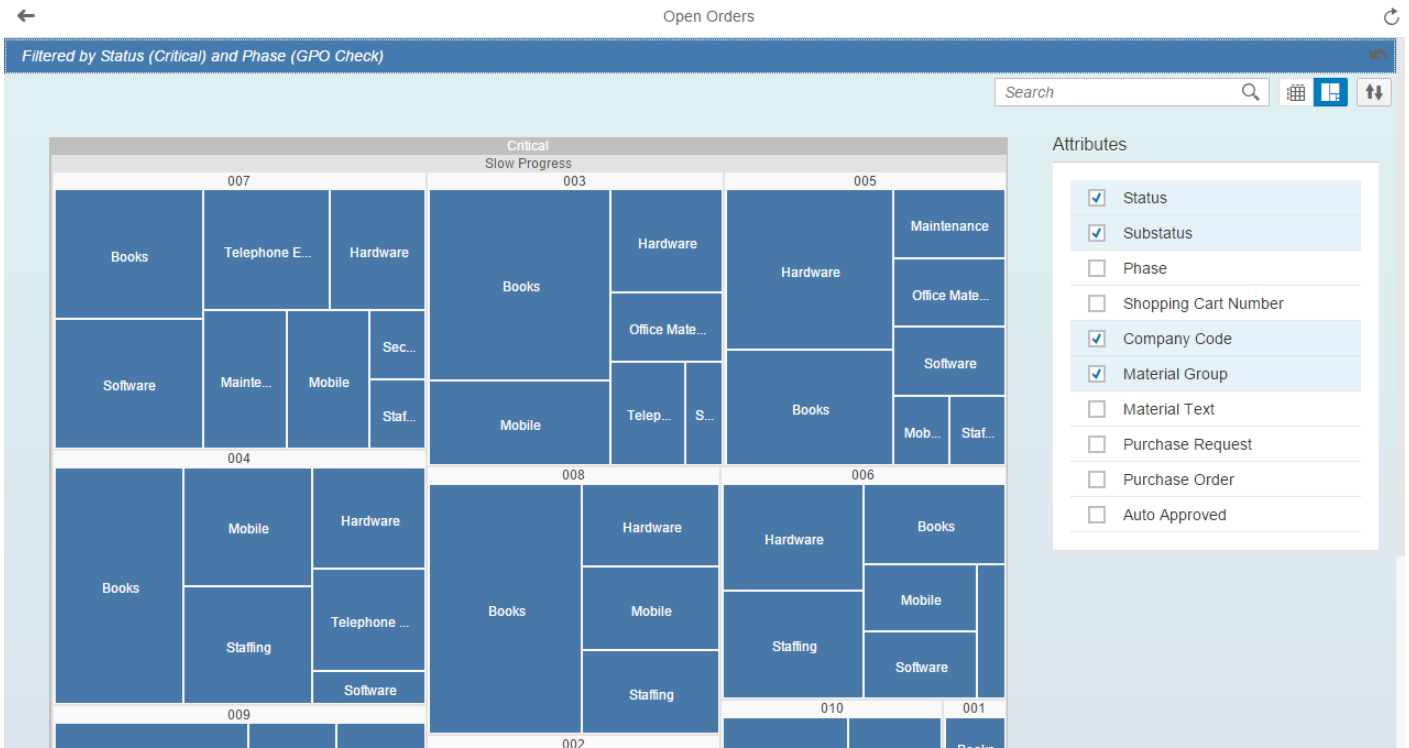
Search 🔍 📄 📑 ⬆️⬆️

Status	Substatus	Shoppi...	Compan...	Material...	Material...	Quantity	Unit Price	Net Price	Purchas...	Purchas...	Auto Ap...	Phase	Elapsed ...
🔴	Slow Progress	8500210187	005	Hardware	Keyboard	13	25 EUR	325 EUR	—	—	Yes	GPO Check	9 days 20 h >
🔴	Slow Progress	8500207432	009	Software	Microsoft Windows 8.1	11	72 EUR	792 EUR	—	—	Yes	GPO Check	9 days 15 h >
🔴	Slow Progress	8500208980	009	Staffing	Professional	6	1,000 EUR	6,000 EUR	—	—	Yes	GPO Check	9 days 9 h >
🔴	Slow Progress	8500216280	003	Telephone Equipments	Headset Model Supreme	2	175 EUR	350 EUR	—	—	Yes	GPO Check	9 days 4 h >
🔴	Slow Progress	8500212847	003	Hardware	HDMI Cable 2.5M	9	50 EUR	450 EUR	—	—	Yes	GPO Check	8 days 22 h >
🔴	Slow Progress	8500207648	008	Books	Getting Started With SAP HCP	17	19 EUR	323 EUR	—	—	Yes	GPO Check	8 days 21 h >
🔴	Slow Progress	8500216248	003	Books	SAP Data Services	20	19 EUR	380 EUR	—	—	Yes	GPO Check	8 days 20 h >
🔴	Slow Progress	8500216279	008	Mobile	MicroSD Card 64 GB	13	40 EUR	520 EUR	—	—	Yes	GPO Check	8 days 18 h >
🔴	Slow Progress	8500212718	007	Maintenance	Infrastructure Service	14	200 EUR	2,800 EUR	—	—	Yes	GPO Check	8 days 17 h >

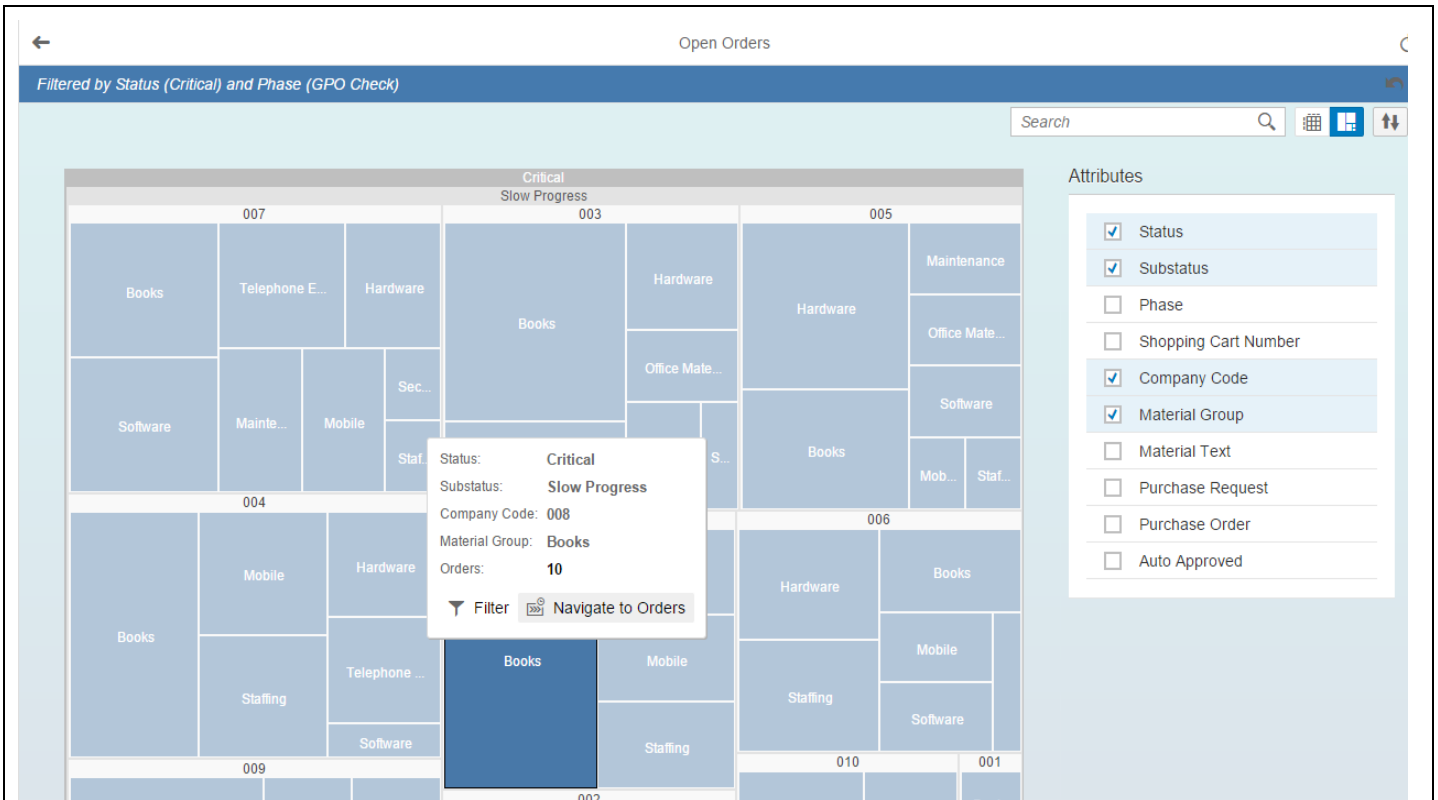
2. Select 'Switch to Cluster View' option (next to Search)



- Explore various clusters by selecting Attributes and filtering as shown the picture below  
Notice that the cluster with *Company Code* as 008 and *Material Group* as Books has the maximum requests waiting to be checked and verified at Global Procurement Office (GPO)



- Select cluster for 008 and Book and click on the **Navigate to Orders**  
You will be navigating to the requests (-stuck in GPO CHECK phase-) bounded for Company with code 008 where the request is for Books material group.



Open Orders

Filtered by Status (Critical) and Substatus (Slow Progress) and Company Code (008) and Material Group (Books) and Phase (GPO Check)

Status	Substatus	Shoppi...	Compan...	Material...	Material...	Quantity	Unit Price	Net Price	Purchas...	Purchas...	Auto Ap...	Phase	Elapsed ...
	Slow Progress	8500207648	008	Books	Getting Started With SAP HCP	17	19 EUR	323 EUR	—	—	Yes	GPO Check	8 days 22 h >
	Slow Progress	8500214325	008	Books	Lead by Example	7	19 EUR	133 EUR	—	—	Yes	GPO Check	7 days 23 h >
	Slow Progress	8500210978	008	Books	Identity Management	3	19 EUR	57 EUR	—	—	Yes	GPO Check	6 days 8 h >
	Slow Progress	8500215282	008	Books	ABAP 7.4 Certification Guide	12	19 EUR	228 EUR	—	—	Yes	GPO Check	6 days 2 h >
	Slow Progress	8500210865	008	Books	SAP Operational Process Intelligence	11	19 EUR	209 EUR	—	—	Yes	GPO Check	5 days 10 h >
	Slow Progress	8500212905	008	Books	Integrating SuccessFactors with SAP	14	19 EUR	266 EUR	—	—	Yes	GPO Check	4 days 8 h >
	Slow Progress	8500205419	008	Books	SAP EWM	20	19 EUR	380 EUR	—	—	No	GPO Check	4 days 3 h >
	Slow Progress	8500205875	008	Books	SAP Operational Process Intelligence	18	19 EUR	342 EUR	—	—	No	GPO Check	3 days 22 h >



5. Select one request by clicking on any row to see detailed information of that request

Status	Substatus	Shoppi...	Compan...	Material...	Material...	Quantity	Unit Price	Net Price	Purchas...	Purchas...	Auto Ap...	Phase	Elapsed ...
	Slow Progress	850020764 8	008	Books	Getting Started With SAP HCP	17	19 EUR	323 EUR	—	—	Yes	GPO Check	8 days 22 h >
	Slow Progress	850021432 5	008	Books	Lead by Example	7	19 EUR	133 EUR	—	—	Yes	GPO Check	7 days 23 h >

**Step 3 – Detailed Information of Request**

Explore complete detail of an individual request together with various status information like how many hours has the request been blocked in the GPO CHECK phase.

1. Check the current overall status of the request and also the status of each phase

**Order**

Status Information Tasks

**15.6%** Complete Order by Jan 25, 2016, 5:04:05 PM  
Order should be in phase PO Approval but is in GPO Check

Start Date: Jan 9, 2016, 5:04:05 PM  
Planned End Date: Jan 25, 2016, 5:04:05 PM  
Forecasted End Date: Mar 6, 2016, 8:21:44 PM



QUALITY CHECK GPO CHECK MONETARY CHECK PO PROCESSING PO APPROVAL

**GPO Check S**

Complete GPO Check by Jan 13, 2016, 5:04:05 AM	
Planned End	Jan 13, 2016, 5:04:05 AM
Actual	6 days 22 h
Target	2 days
Latest Run	
Start Date	Jan 11, 2016, 4:35:33 PM
End Date	—
Time Spent	6 days 22 h

## 2. Check the milestones status under each phase

The screenshot displays the SAP Order status page. At the top, the SAP logo is visible on the left, and the user name 'Bogdan Bruma' is on the right. Below the header, there are tabs for 'Status', 'Information', and 'Tasks'. The main content area shows a progress indicator at 15.6% and a warning message: 'Complete Order by Jan 25, 2016, 5:04:05 PM. Order should be in phase PO Approval but is in GPO Check'. To the right, key dates are listed: Start Date (Jan 9, 2016, 5:04:05 PM), Planned End Date (Jan 25, 2016, 5:04:05 PM), and Forecasted End Date (Mar 6, 2016, 8:21:44 PM). Below this is a Gantt chart with five phases: QUALITY CHECK (Completed with Violations), GPO CHECK (Critical), MONETARY CHECK (Not Started), PO PROCESSING (Not Started), and PO APPROVAL (Not Started). Each phase has small circles below it representing milestones. A message below the Gantt chart states: 'GPO Check Started has not been reached.' At the bottom right, there is a 'Create Task' button.

NOTE: The small circles like  or  under the phases like QUALITY CHECK, GPO CHECK are milestones. For more details on phases and milestones, read the Developer's Guide

3. Navigate to **Information** and **Tasks** tab to view more context details about the request

Order

Status Information Tasks

Related Data

Shopping Cart Number	8500207648
Company Code	008
Material Group	Books
Material Text	Getting Started With SAP HCP
Quantity	17
Unit Price	19 EUR
Net Price	323 EUR
Purchase Request	—
Purchase Order	—
Good Receipt	—
Material ID	0000723369
Auto Approved	Yes

Participants

Requester: 00000000

Processor: ALEREMOTE

Create Task

4. Navigate back, using **Back** button  to the *Open Orders* page after you have explored the content

SAP

Order

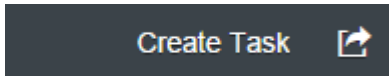
Status Information Tasks

## Step 4 – Creating a Task

After analysing requests, Bogdan has to take action to ensure that these requests are moved out of the GPO CHECK phase on time.

You (-as Bogdan-) will create a task for Thomas, who you know is in charge checking and verifying requests in GPO Thomas would then reply to the task and you can then choose to CONFIRM or REOPEN based on the response from him

1. In the Cluster View, click on **Create Task** button (bottom right on the button bar)



2. Enter *Subject* and *Description* of the task and then click on '**Create**' button to create the task.  
Note: While entering description enter username with prefix @. This symbol is used to identify the user to which will be assigned.

Enter Subject as :

Orders of Books waiting to be checked and verified

Enter Description as :

@Thomas - Why too many orders of books are waiting for be verified ?

New task for this Procurement Ops instance

\*Subject:

Description:

Enter the task details. You can invite participants by prefixing their user IDs with the @ character.

Create Cancel

- The task will be shown in user's **My Workbox** tile.  
Both the assignee (i.e. *Thomas* in this example) and assigner (i.e. *Bogdan* in this example) will see the task in their respective **My Workbox** after they login to OpInt space.me

The screenshot shows the SAP Operational Process Intelligence dashboard. At the top, the SAP logo is on the left, and the user name 'Bogdan Bruma' is on the right. Below the header, the text 'SAP Operational Process Intelligence powered by SAP HANA' is displayed. The main content area features two white tiles on a teal background. The 'My Workbox' tile shows a clipboard icon and the number '1'. The 'Procurement Ops' tile shows three blue chevrons, the number '2,959', and '447 critical' in red text.

- Click on **My Workbox** and Select the task "Orders of Books waiting to be checked and verified"

The screenshot shows the 'My Workbox' view. At the top, there are icons for 'Open' and 'Completed'. Below is a table with the following data:

Type	Subject	Creation Date	Due Date	Status	Priority
	Orders of Books waiting to be checked and verified	Jan 18, 2016		Ready	Medium

5. In Task Description page, select **Edit**

The screenshot shows the SAP Task Description page for the task "Orders of Books waiting to be checked and verified". The page is viewed by user Bogdan Bruma. The task description is "@Thomas - Why too many orders of books are waiting for be verified ?". The task status is "Ready", priority is "Medium", and the due date is empty. The task was created by Bogdan Bruma 3 minutes ago. The task description includes a comment from Bogdan Bruma: "invited THOMAS to the task" (3 minutes ago) and "created the task" (3 minutes ago). The task is assigned to THOMAS. The page has a "Complete" button and an "Edit" button at the bottom right.

Home | **SAP** | Bogdan Bruma ▾

← Orders of Books waiting to be checked and verified

▼ Description

@Thomas - Why too many orders of books are waiting for be verified ?

Post a comment and invite people using @ notation →

**Bogdan Bruma:** invited THOMAS to the task  
3 minutes ago

**Bogdan Bruma:** created the task  
3 minutes ago

**Bogdan Bruma**  
Jan 18, 2016, 3:33:17 PM

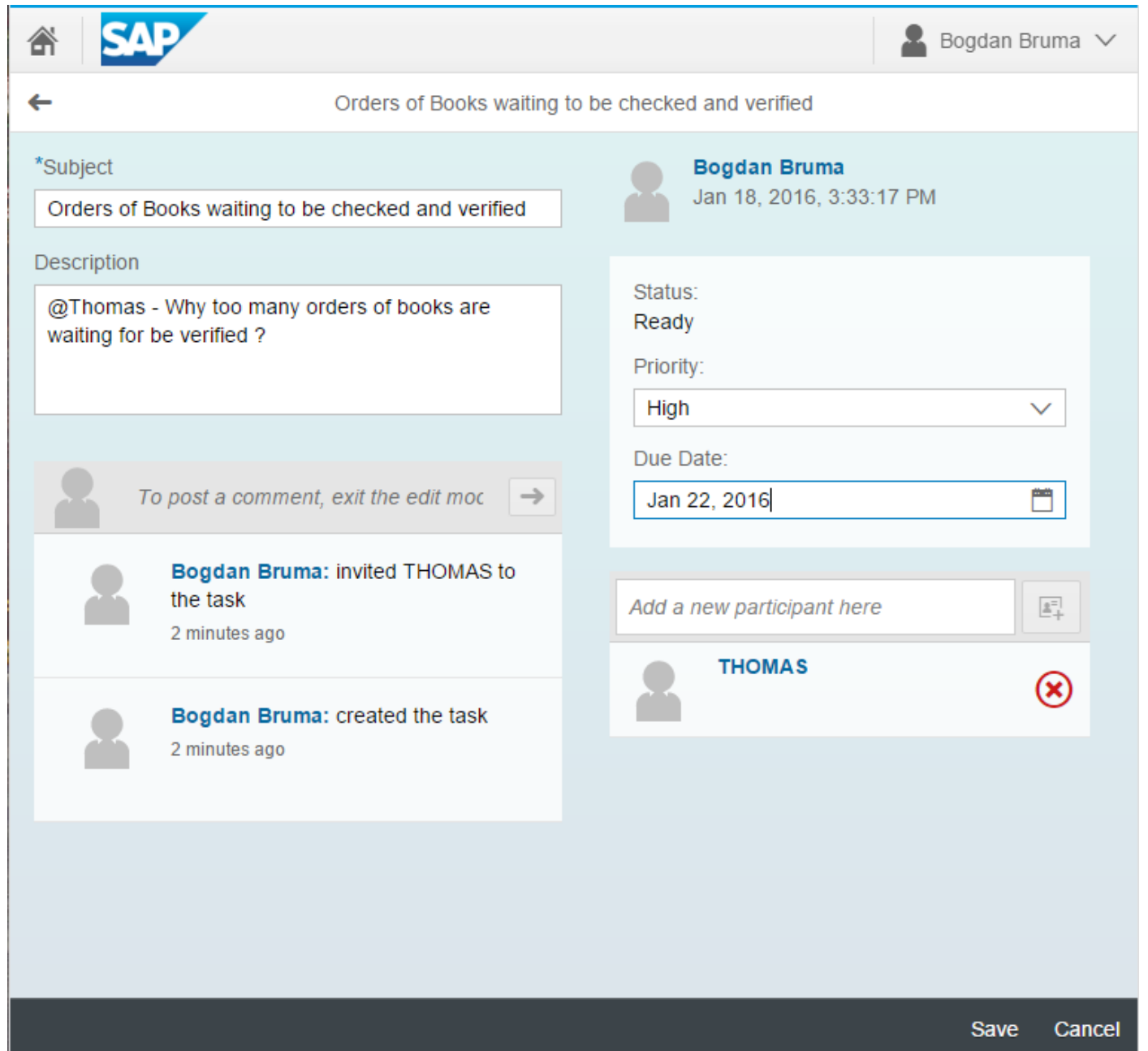
Status	Ready
Priority	Medium
Due Date	

Add a new participant here

**THOMAS**

**Complete** Edit

6. Change the Priority of the task to HIGH and Due Date  
You may also choose to add more participant or delete existing ones



The screenshot shows the SAP task editor interface. At the top, there is a navigation bar with a home icon, the SAP logo, and the user name 'Bogdan Bruma'. Below this is a title bar with a back arrow and the task title 'Orders of Books waiting to be checked and verified'. The main content area is divided into several sections:

- \*Subject:** A text input field containing 'Orders of Books waiting to be checked and verified'.
- Description:** A text input field containing '@Thomas - Why too many orders of books are waiting for be verified ?'.
- User Information:** A profile card for 'Bogdan Bruma' with a timestamp 'Jan 18, 2016, 3:33:17 PM'.
- Status and Settings:** A panel showing 'Status: Ready', 'Priority: High' (selected in a dropdown), and 'Due Date: Jan 22, 2016' (with a calendar icon).
- Activity Log:** A list of actions:
  - 'Bogdan Bruma: invited THOMAS to the task' (2 minutes ago)
  - 'Bogdan Bruma: created the task' (2 minutes ago)
- Participant Management:** A section with an input field 'Add a new participant here' and a plus icon. Below it, a card for 'THOMAS' is shown with a red 'X' icon, indicating it can be removed.

At the bottom right, there are 'Save' and 'Cancel' buttons.

## 7. Save the task

The screenshot shows the SAP mobile app interface for a task. At the top, there is a home icon, the SAP logo, and the user name 'Bogdan Bruma'. The task title is 'Orders of Books waiting to be checked and verified'. The main content area is split into two columns. The left column contains a description, a comment input field with a placeholder 'Post a comment and invite people using @ notation', and a list of activity updates from 'Bogdan Bruma' including updating priority, due date, inviting 'THOMAS', and creating the task. The right column shows the user 'Bogdan Bruma' and a table with task details: Status (Ready), Priority (High), and Due Date (Jan 22, 2016). Below the table is a participant list with 'THOMAS' and an 'Add a new participant here' button. At the bottom right, there are 'Complete' and 'Edit' buttons.

Home | SAP | Bogdan Bruma

← Orders of Books waiting to be checked and verified

Description

@Thomas - Why too many orders of books are waiting for be verified ?

Post a comment and invite people using @ notation

**Bogdan Bruma:** updated the priority  
A few moments ago

**Bogdan Bruma:** updated the due date  
A few moments ago

**Bogdan Bruma:** invited THOMAS to the task  
4 minutes ago

**Bogdan Bruma:** created the task  
4 minutes ago

**Bogdan Bruma**  
Jan 18, 2016, 3:33:17 PM

Status	Ready
Priority	High
Due Date	Jan 22, 2016

Add a new participant here

**THOMAS**

Complete Edit

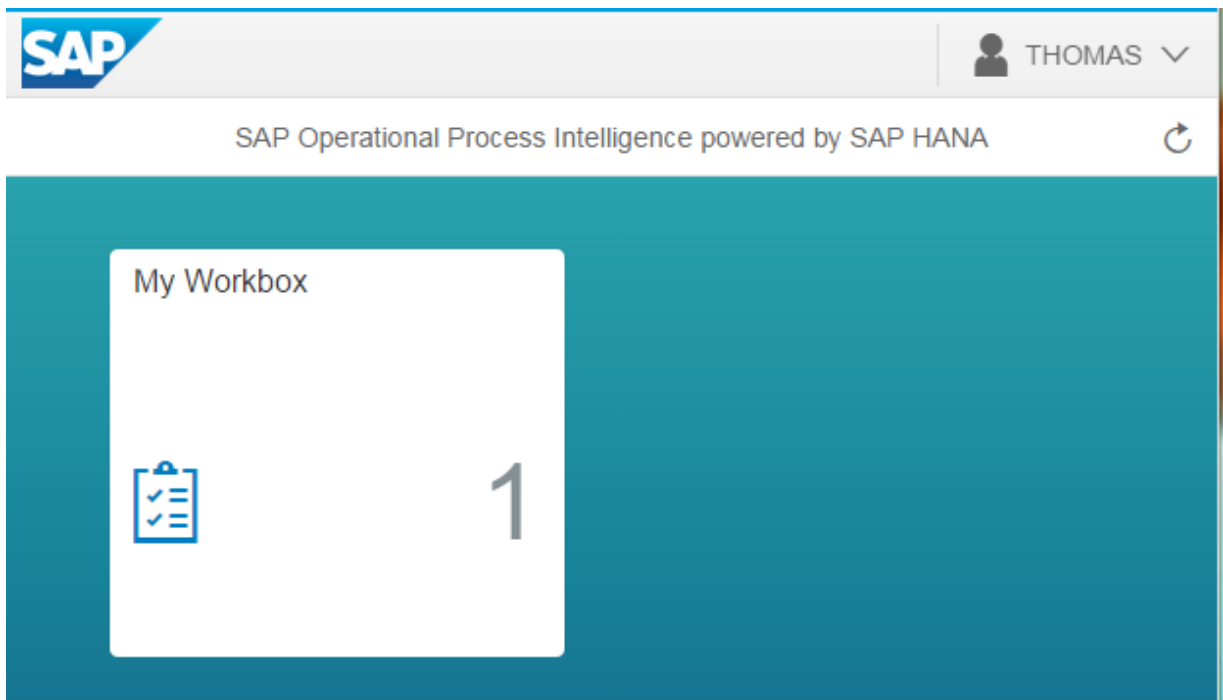
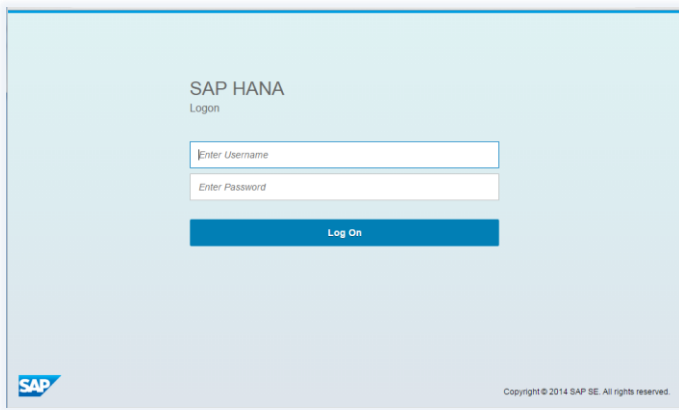


## Step 5 – Task Collaboration

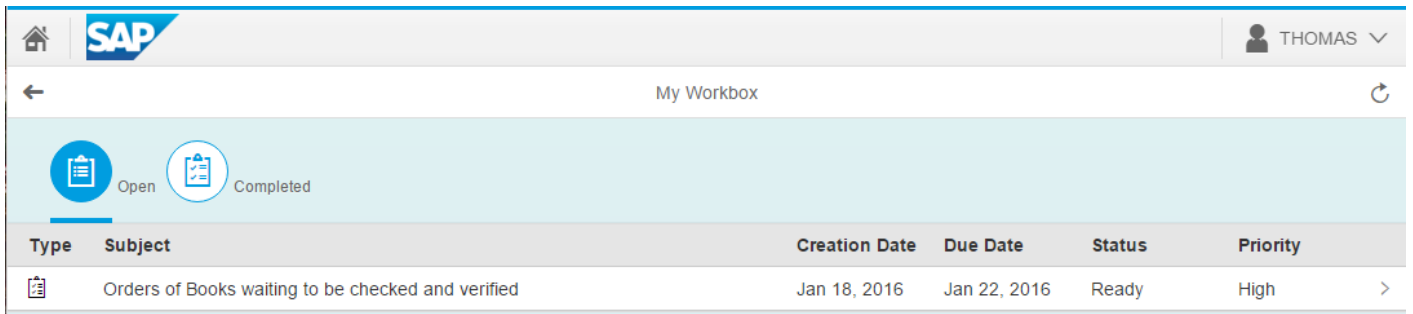
Explore **My Workbox** of the users involved in a task, to see how SAP Operational Process Intelligence helps them to manage their tasks and resolve the issue in a collaborative fashion.

1. Logoff as **Bogdan** user
2. Login to space.me with user: **Thomas** and password: **Abcd1234**

<https://smartprocessapps636d78be.hana.ondemand.com/sap/opi/pv/workspace>



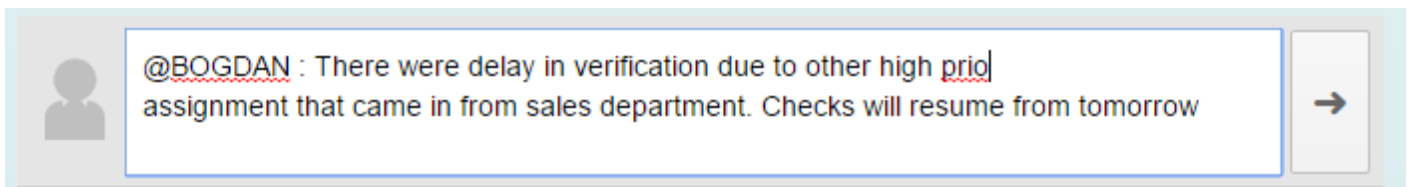
3. Click on **My Workbox** tile to see list of open tasks.



The screenshot shows the SAP My Workbox interface. At the top, there is a navigation bar with the SAP logo on the left and the user name 'THOMAS' on the right. Below the navigation bar, the title 'My Workbox' is centered. There are two circular icons: 'Open' (with a clipboard icon) and 'Completed' (with a checkmark icon). Below these icons is a table with the following columns: Type, Subject, Creation Date, Due Date, Status, and Priority. The table contains one row with the following data:

Type	Subject	Creation Date	Due Date	Status	Priority
	Orders of Books waiting to be checked and verified	Jan 18, 2016	Jan 22, 2016	Ready	High

4. Select the task "*Orders of Books waiting to be checked and verified*" to reply
5. Post a reply/comment and click **COMPLETED** button.  
"@BOGDAN : There were delay in verification due to other high prio assignment that came in from sales department. Checks will resume from tomorrow"



The screenshot shows the input field for replying to a task. On the left, there is a grey silhouette of a person. The input field contains the text: "@BOGDAN : There were delay in verification due to other high prio assignment that came in from sales department. Checks will resume from tomorrow". To the right of the input field is a grey button with a right-pointing arrow.

Orders of Books waiting to be checked and verified

**Description**

@Thomas - Why too many orders of books are waiting for be verified ?

Post a comment and invite people using @ notation

**THOMAS:** @BOGDAN : There were delay in verification due to other high prio assignment that came in from sales department. Checks will resume from tomorrow  
A few moments ago

**Bogdan Bruma:** updated the priority  
3 minutes ago

**Bogdan Bruma:** updated the due date  
3 minutes ago

**Bogdan Bruma:** invited THOMAS to the task

Status	Ready
Priority	High
Due Date	Jan 22, 2016

Add a new participant here

**THOMAS**

Complete Edit

6. Task once completed would appear under **Completed** tab in Thomas' and Bogdan's **My Workbox**

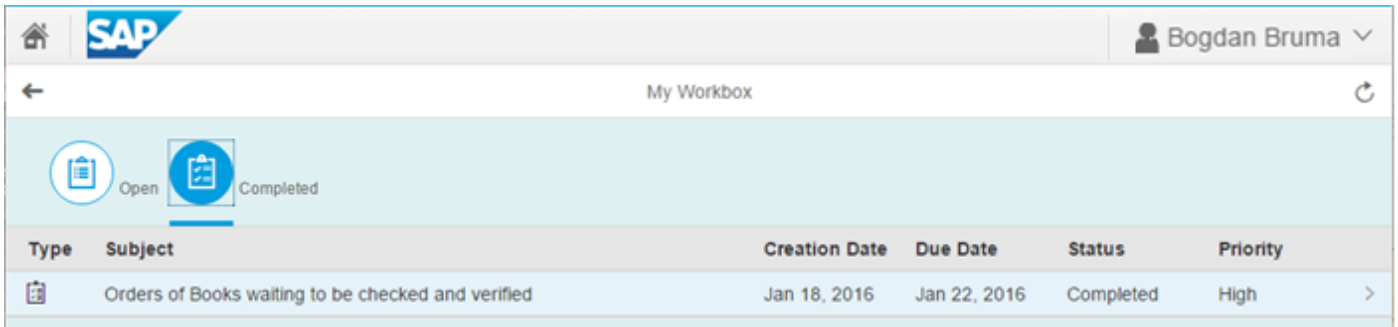
My Workbox

Open Completed

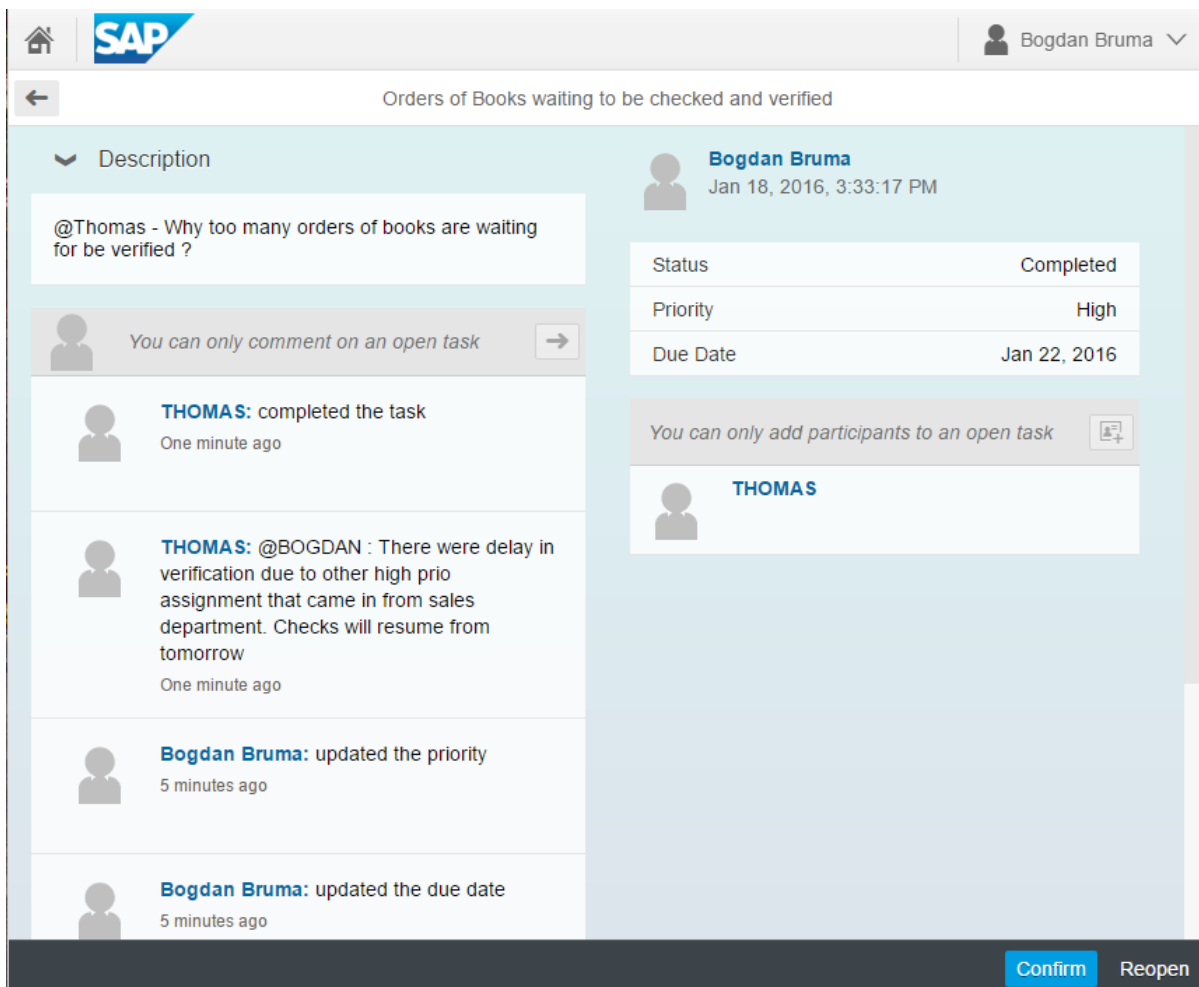
Type	Subject	Creation Date	Due Date	Status	Priority
	Orders of Books waiting to be checked and verified	Jan 18, 2016	Jan 22, 2016	Completed	High

7. Logoff as Thomas and Login to Space.me as **Bogdan** username and password **Abcd1234**

8. Open the **My Workbox** tile and switch to **Completed** tab



9. Select the task “*Orders of Books waiting to be checked and verified*” to open  
See the response from Thomas and click **CONFIRM** button



## Step 6 – Details of Task

Bogdan and Thomas can see complete conversation of task collaboration by choosing that task from their **My Workbox** under Completed tab, at any given time

1. Login to Space.me as **Bogdan** or **Thomas** username and password **Abcd1234**
2. Open **My Workbox** and Select the task.  
If the task is open you will see it in **Open** tab or else in **Completed** tab

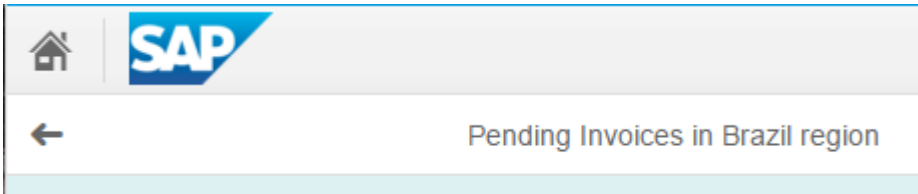
The screenshot shows the SAP Space.me interface for a task titled "Orders of Books waiting to be checked and verified". The user "Bogdan Bruma" is logged in. The task details are as follows:

Status	Confirmed
Priority	High
Due Date	Jan 22, 2016

The task description is: "@Thomas - Why too many orders of books are waiting for be verified ?". The task history shows the following updates:

- Bogdan Bruma:** confirmed the completion of the task (A few moments ago)
- THOMAS:** completed the task (2 minutes ago)
- THOMAS:** @BOGDAN : There were delay in verification due to other high prio assignment that came in from sales department. Checks will resume from tomorrow (2 minutes ago)
- Bogdan Bruma:** updated the priority (6 minutes ago)

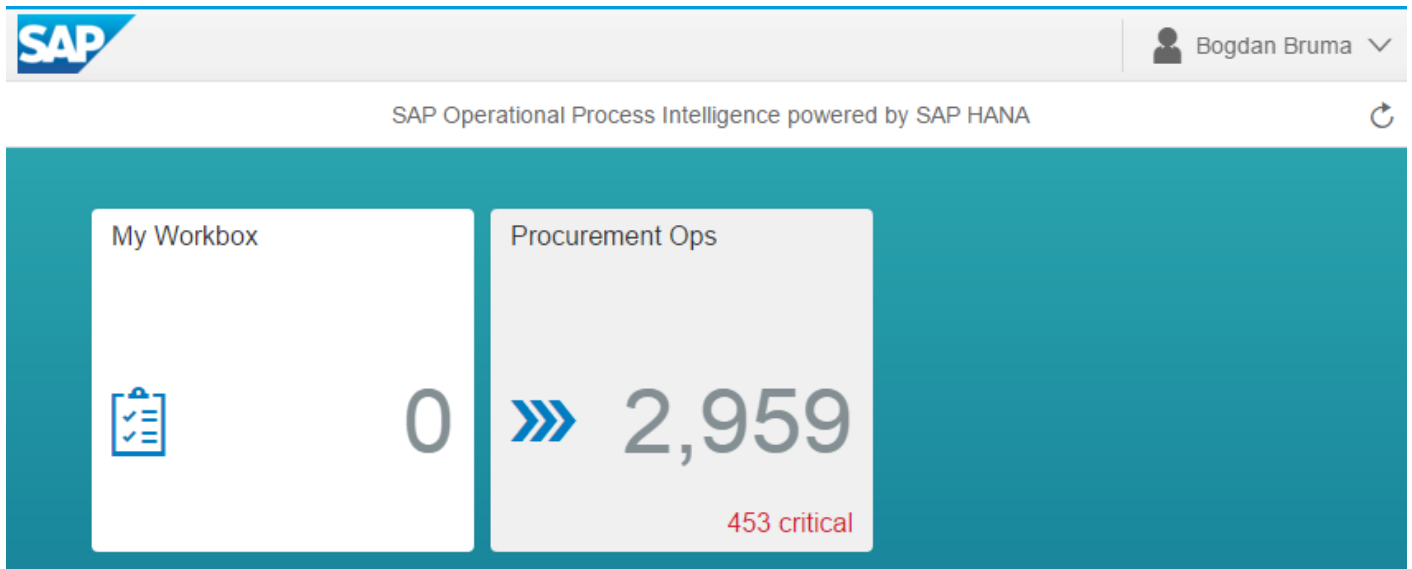
3. Click **Back** button  to reach to the home page



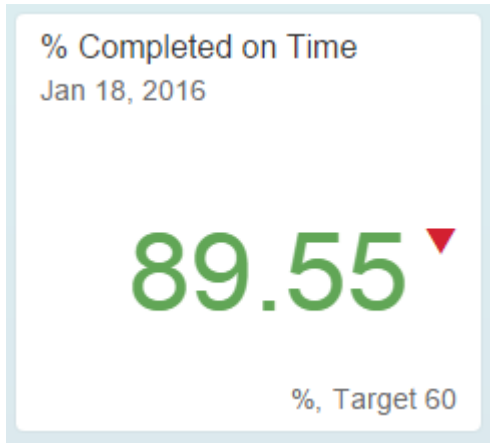
### Step 7 – Details of KPI

Explore key business KPIs, using SAP Operational Process Intelligence, to trace their progress and track if targets are met or overshoot. You can also observe trends to analyse performance and address the bottlenecks in your process before they become problems.

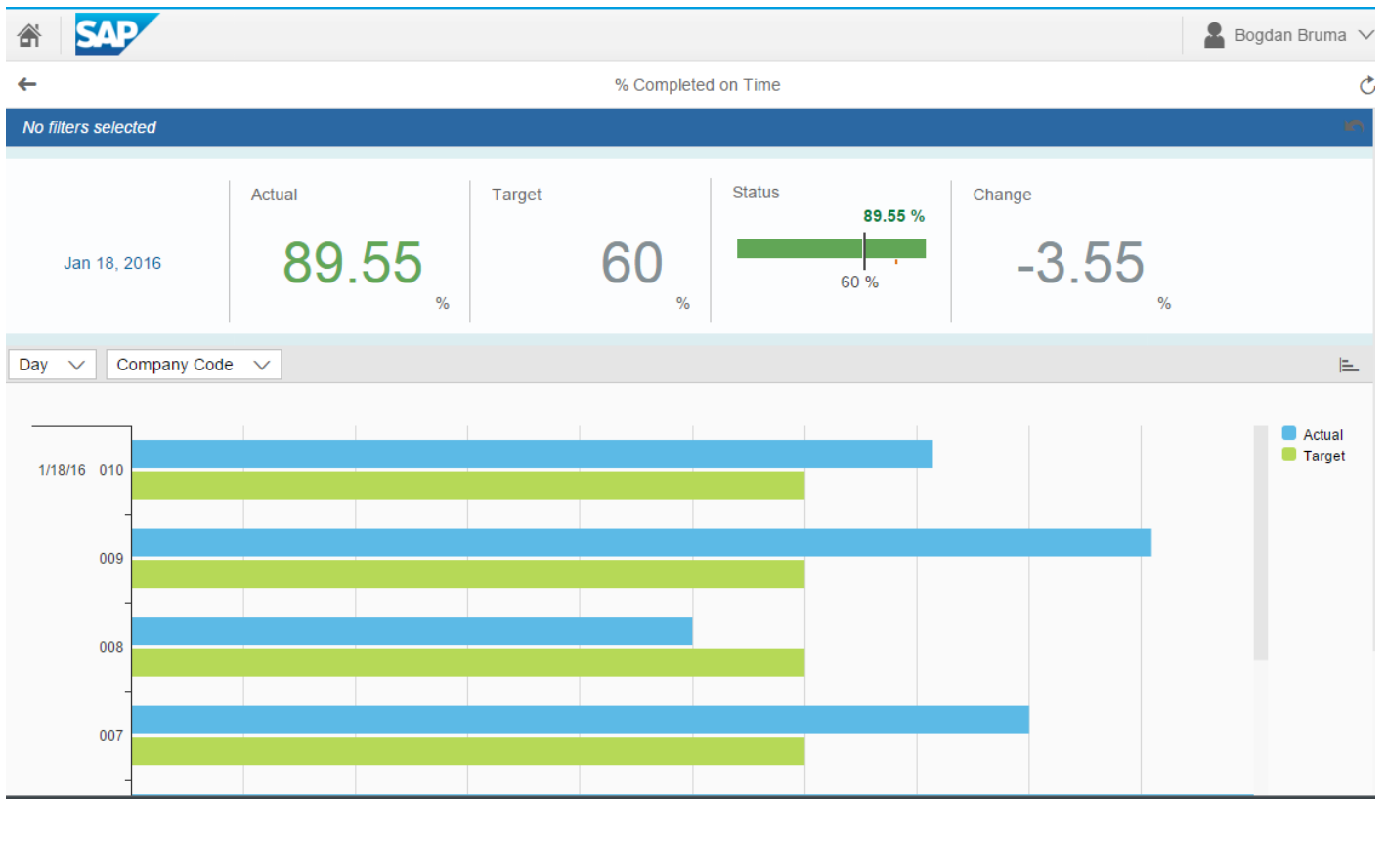
1. Click on **Procurement Ops** tile



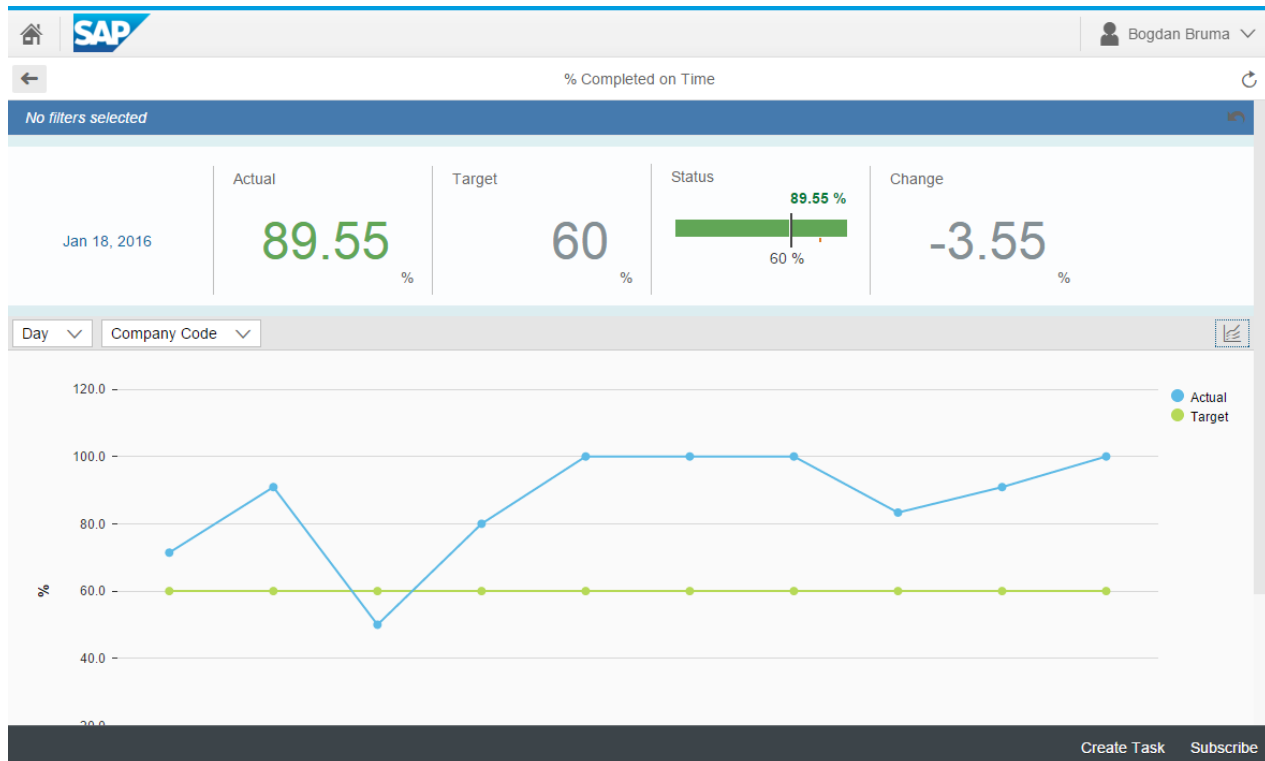
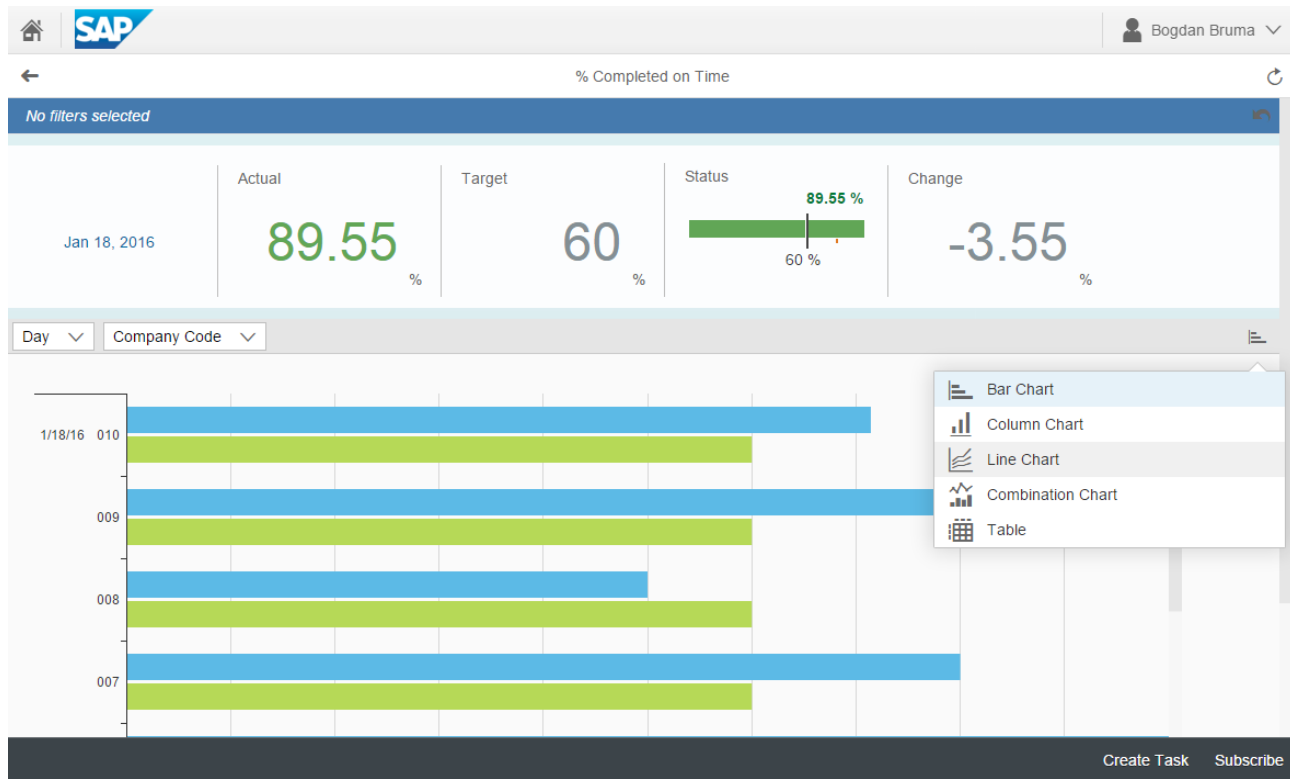
2. Click on “% Completed on Time” tile to see targets and trends of requests. % Completed on Time KPI indicates the requests which are dispatched on time without any violations



3. You can analyze the trend by changing the attributes and adding more attributes to filter the data. You can view the graph as various options like line, column etc.

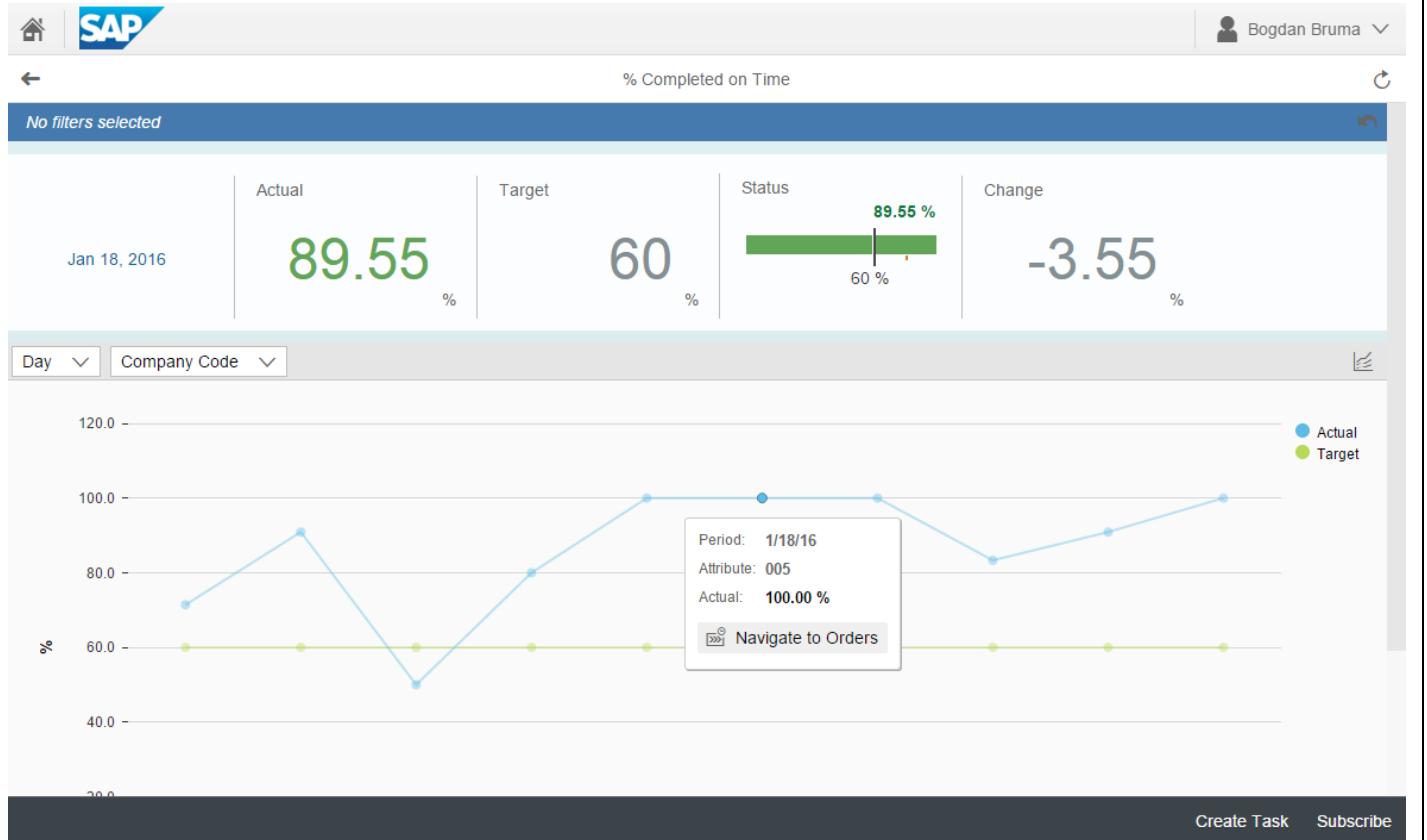


You can change the type of the graph to line chart





You can select on any bubble on the line graph and navigate to the requests

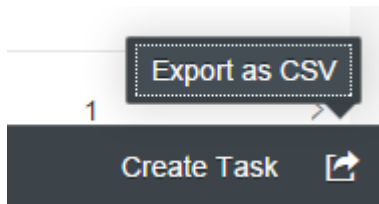


Filtered by Company Code (005)

Shopping...	Company ...	Material G...	Material Text	Quantity	Unit Price	Net Price	Purchase ...	Purchase ...	Auto Appr...	% Complete...
8500214850	005	Books	SAP Business Planning and Consolidation	12	19 EUR	228 EUR	9500612262	3627817438	No	100 %
8500211315	005	Office Materials	Battery Pack of 4	3	16 EUR	48 EUR	9500608727	3627813903	No	100 %
8500210854	005	Mobile	Samsung USB Power Adaptor	8	15 EUR	120 EUR	9500608266	3627813442	No	100 %
8500207440	005	Hardware	Bluetooth Headset	1	67 EUR	67 EUR	9500604852	3627810028	No	100 %
8500214545	005	Hardware	AC Adaptor for Laptops	6	20 EUR	120 EUR	9500611957	3627817133	No	100 %

Create Task

4. In the details page, select icon (  ) to export the complete list of requests into CSV file  
Click on **“Export as CSV”**



The file would be shown as downloaded as CSV



5. Navigate back, using **Back** button (  ) to the *Procurement Ops* home page after you have explored the KPI

