

SAP CLOUD PLATFORM | EXTERNAL

## User Guide

# Purchase Requisition Approval and Release in SAP ERP using SAP Cloud Platform Workflow Management

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# Overview

This document provides information about how to use the user interfaces of Purchase Requisition Approval and Release Process. The main audience of this document are Procurement experts, Developers, Procurement IT experts and end users.

This content package enables SAP ERP customers to automate Purchase Request approval and release process using SAP Cloud Platform Workflow Management without additional development in SAP ERP.

Purchase Requisition Approval and Release Process enable customers to automate approval and release of Line Items in a flexible and transparent way. It provides flexibility in choosing process variants depending on attributes like Request date, Price, Material Group, Document Type, Plant, Purchasing Group and Purchasing Organization etc. When a requestor creates a Purchase Request with line items in SAP ERP, pre-configured Process Variants are triggered in SAP Cloud Platform Workflow Management.

- Line Item data validated using Business Rules before approval.
- Approvers are determined using a Business Rule / external system.
- Approvers are notified via email.
- Approvers have two decision options (Approve, Reject), and based on the decision, the next approval step will be created or requested for a rework or delete the line item and terminate the approval process.
- Line Item released in SAP ERP for PO creation.

Process Operators, Approvers, Requestors, Procurement IT are the target users of the user interfaces explained in this document,

# My Inbox to Approve/Rework/Manage exceptions.

SAP Cloud Platform Workflow Management My Inbox enable line of business users to claim and complete their task. Please go through [SAP My Inbox documentation](#) for more details.

## Approve Purchase Request Line Item

A Purchase Request Line Item can be approved using SAP Cloud Platform Workflow Management My Inbox. Please refer [help documentation on how to access My Inbox](#).

Access My Inbox application.

An approver will get list of tasks. Select the Purchase Request Line Item Approval Task.

The Approval User Interface has three sections.

1. Request Header – Requestor details
2. Item Details – Purchase Request Line Item details
3. Comments - Comments from Approvers

The Approver can make the following decisions with comments,

1. Approve
2. Reject

The screenshot displays the 'Approver Approval' interface. On the left, there is a task list under 'All Tasks (2)'. The selected task is 'Approve Purchase Requisition 0010789498 / 00010' with a 'Medium' priority and a due date of '6/4/20, 7:58 PM'. The main area shows the details for this task, including a 'Requisition Header' section with fields for Requisition Date (2020-05-12), Created by (Requestor), Requested by (PREQUISITION), ID (0010789498), Item Number (00010), Document Type (NB), and Requestor Comment (New Laptop). Below this is the 'Item Details' section with fields for Material (STANDARD), Description (Laptop), Document Type (NB), Purchasing Group (002), Plant (0001), Quantity (6.000), Unit (ST), Price (900.0000), Currency (USD), and Delivery Date (2020-05-12). At the bottom, there is a 'Comments' section and a row of action buttons: 'Approve' (green), 'Reject' (red), 'Show Log', 'Claim', and a share icon.

# Rework Purchase Request Line Item

An approver can reject the Purchase Request Line item. The requestor will get email notification and a task to either rework or delete the line item.

The Rework User Interface has the following sections.

1. Requisition Header
2. Item Details
3. Comments

The requestor can make the following decisions.

Update – Make the required modifications with comments and submit the Item for approval

Delete – Delete the line item and cancel the approval Process.

The screenshot displays the 'Approver Approval' interface for a purchase requisition. The interface is divided into a left sidebar and a main content area.

**Left Sidebar (All Tasks (2)):**

- Search: 0010789498
- REFRESH
- Approve Purchase Requisition 0010789498 / 00020 (Medium, Due on 6/4/20, 7:58 PM)
- Approve Purchase Requisition 0010789498 / 00010 (Medium, Due on 6/4/20, 7:58 PM)

**Main Content Area (Approver Approval):**

Approve Purchase Requisition 0010789498 / 00010

Requisition Header | Item Details | Comments

**Requisition Header:**

- Requisition Date: 2020-05-12
- Created by: Requestor
- Requested by: PREQUISITION
- ID: 0010789498
- Item Number: 00010
- Document Type: NB
- Requestor Comment: New Laptop

**Item Details:**

- Material: STANDARD
- Description: Laptop
- Document Type: NB
- Purchasing Group: 002
- Plant: 0001
- Quantity: 6.000
- Unit: ST
- Price: 900.0000
- Currency: USD
- Delivery Date: 2020-05-12

**Comments:**

Approve Reject Show Log Claim

# Process Visibility Workspace – Transparency on procurement operations

Process visibility enable Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. Process visibility capability in SAP Cloud Platform Workflow Management enable customers gain out of the box process visibility into their deployed processes. Please refer [help documentation](#) for more details.

## Purchase Request Approval and Release

Purchase Request Approval and Release Process content package provide out of the box visibility on all the deployed process variants in SAP Cloud Platform Workflow Management. A process owner or line of business expert will be able to enhance the visibility scenario.

## Access Process Workspace

1. Go to Process Flexibility Cockpit
    1. Select Purchase Requisition Approval and Release using SAP Cloud Platform Workflow Management
    2. Click Live Process Insights Purchase Request Approval and Release
- Please go through [help documentation](#) how to access process workspace.

