

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

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## End User Guide

# Purchase Order Change with SAP Workflow Management or SAP Build Process Automation

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# Overview

This document provides information about how to use the **Purchase Order Change** using SAP Workflow Management or SAP Build Process Automation. Project Manager, VP Approvers, Commercial Responsible & other approvers are the target users of this document.

The process will check in regular intervals if an issue that might lead to a change in the project scope has been added and closed and will then start the approval workflow. First, the referenced documents are locked. Afterwards, the project manager will have to decide if the issue leads to a change in the Purchase order. If so, the PM will have to supply additional data and confirm. If the change value exceeds a customizable threshold, an additional VP approval will be needed. If all relevant approvals are there, an additional line item will be added to the Purchase Order. If line-item creation fails, the Process Administrator receive an email with error and take a decision on purchase order creation fail and the Process Administrator decides to abort process, the mail will be sent with line-item details to Commercial Responsible to manually update the purchase order. Finally, in last step Project Manager, Vice President and Commercial Responsible will receive an email with Issue, Purchase Order and Approval details.

Salient features of this content package are:

- Review Purchase Order Change, Change Purchase Order and VP Approval task by respective users using My Inbox.
- Gain visibility on Purchase Order Change process flow using SAP BTP Workflow Management's Visibility capability.
- Automatic update of the Purchase Order to reflect the increase/decrease in costs
- Automatic sending of summary mails to the stakeholders to keep them informed

# My Inbox Task

“My Inbox” application enables line of business users to claim and complete their task. Please go through [SAP My Inbox documentation](#) for more details.

The **Purchase Order Change** enables the Project Manager, Vice President to view the approval tasks in My Inbox. They could also make a decision to what can they do the approval task, and what is the outcome.

## Review Purchase Order Change

Prerequisites:

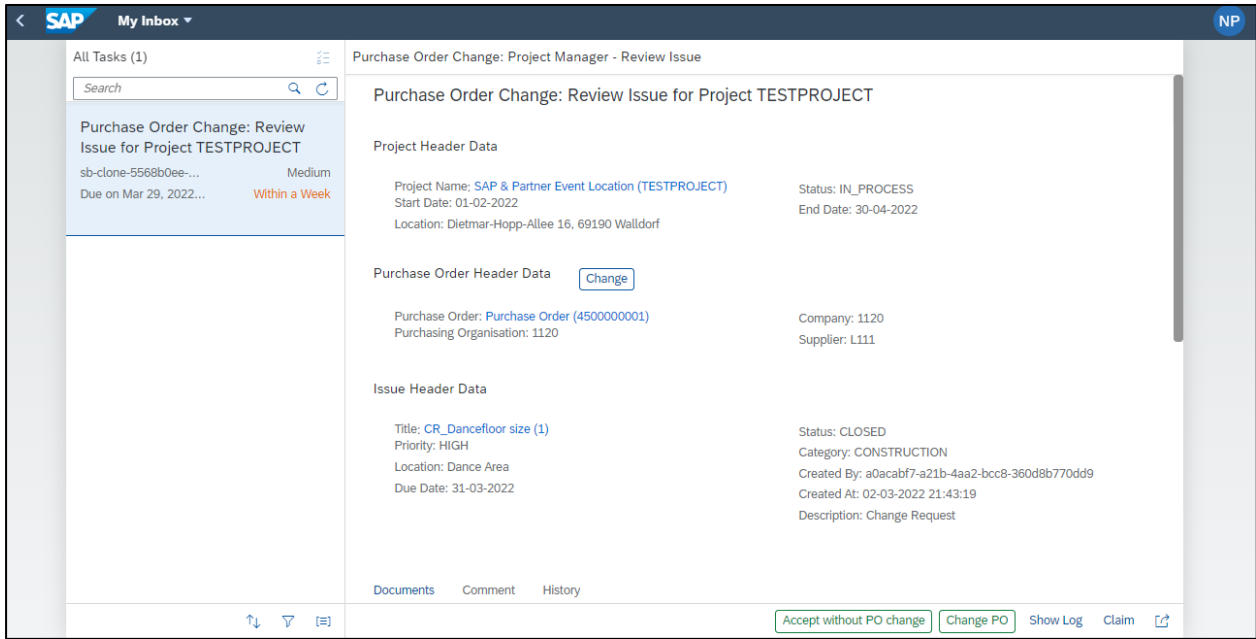
Create a project in SAP S/4HANA Cloud for Projects, Project Collaboration and add the technical administrator to your project. Make sure to log in as the admin and accept the invitation, otherwise the user won't be able to access the data via the API.

Create an issue for a project with the prefix “PO\_”. Assign a Purchase Order (and optionally some documents) to the Issue. Proceed with working on the issue. As soon as it is completed, set the status to Closed. A closed issue with the prefix will trigger the Workflow for this particular issue.

The first task for User interaction is Review Purchase Order details along with Project and Issue.

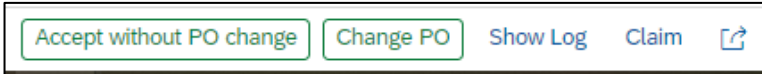
1. **Project Header:** The first section of UI section displays the Project information e.g. Name, start date end date, status etc.
2. **Purchase Order Header:** The second section of UI contain Purchase order details. Here the user has an option to select the correct Purchase Order from the list of Purchase Orders (if multiple have been added to the Project).
3. **Issue Header:** The third section contains Issue details
4. **Documents:** The fourth section has a list of documents that are added related to that issue.
5. **Comment:** The comment section gives the user the possibility to add a comment to each user task
6. **History:** The History section contains user history or actions that were taken on each task or step.

The Project Manager receives a task to review Project, Purchase Order and Issue information and decide to either change Purchase Order or not. If change not required, then the Project Manager simply clicks on "Accept without PO Change" and the process will be finished. If change is required, then the Project Manager simply clicks on "Change PO" button and process will continue.



The Project Manager can make one of the following decisions:

1. **Accept without PO change** - Click **Accept without PO change** if PO Change not required after reviewing all information.
2. **Change PO** – Click **Change PO** if Purchase Order change required after reviewing all information and to continue the process.



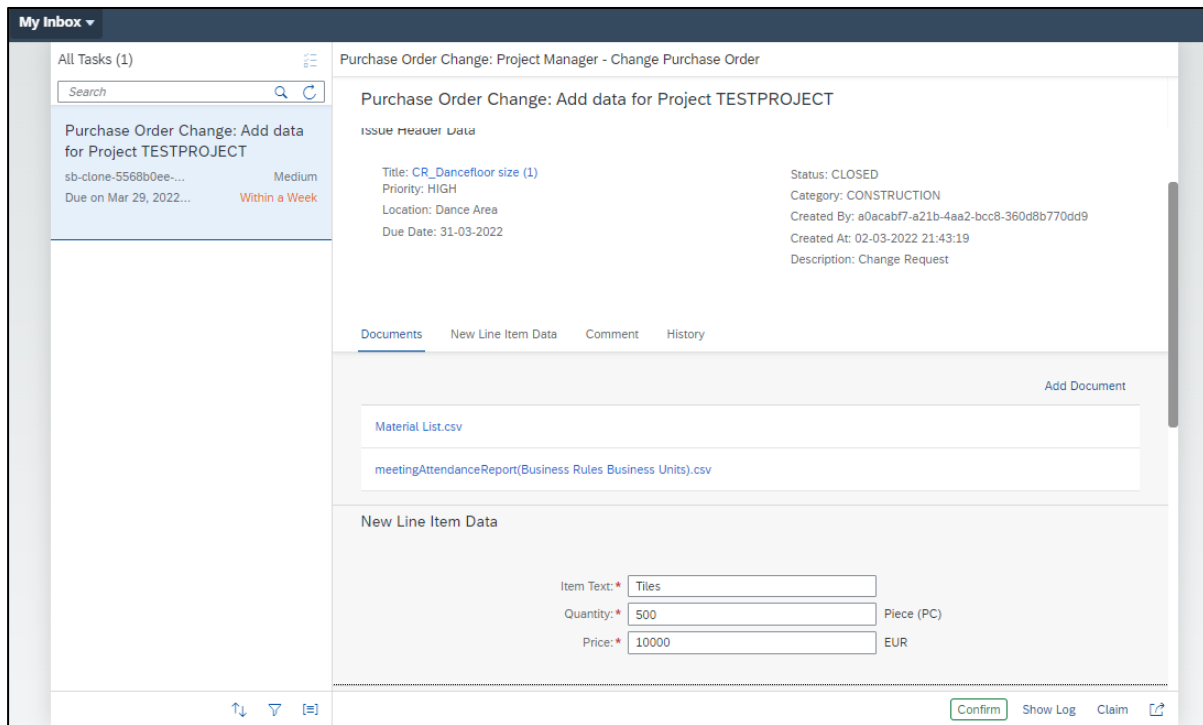
## Change Purchase Order

The UI will display below data for Change Purchase Order along with necessary information.

1. **Project Header:** The first section of UI section displays the Project information e.g. Name, start date end date, status etc.
2. **Purchase Order Header:** The second section of UI contain Purchase order details.
3. **Issue Header:** The third section contains Issue details
4. **Documents:** The fourth section has a list of documents that are added related to that issue and project. The button enables the user to navigate to the Document Management of SAP S/4HANA Cloud for Projects, Project Collaboration
5. **New Line-Item Data:** Change Purchase Order task has a section to supply details that will be used to add one new line item to the Purchase Order:
  - a. The currency is taken from the Purchase Order automatically.
  - b. The material is a dummy material (V250-200 in the default configuration). Irrespective of the dummy material, the new line item will have the original material picked from the existing purchase order.
  - c. The quantity can be entered by the user, and unit of measure is from the dummy material.
  - d. The price can be entered by the user.
  - e. The item text can be entered by the user.

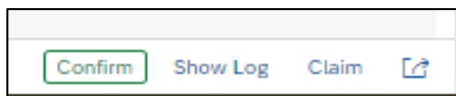
If either the quantity or the price is a negative value, the newly added line item will be posted as a returns item which will decrease the total value of the Purchase Order in the SAP S/4HANA Cloud system. (As of writing, the current Fiori app Manage Purchase Orders does not support displaying the fact that an item is a returns item. As soon as a returns item is added to a Purchase Order, the S/4HANA Cloud system will automatically fallback to the 'Advanced' app)
6. **Comment:** The comment section gives the user the possibility to add a comment to each user task
7. **History:** The History section contains user history or actions that were taken on each task or step.

The Project manager receives a task with Project, Purchase Order and Issue information then he/she enters a necessary information like new item name, quantity with unit, price with currency in the respective input fields required comment and then confirms the task by clicking on **Confirm** button and task will be forwarded for escalated Approval if exceeding the threshold.



The Project Manager can have following decision:

1. **Confirm** - Click **Confirm** to confirm the task with required inputs by Project Manager.



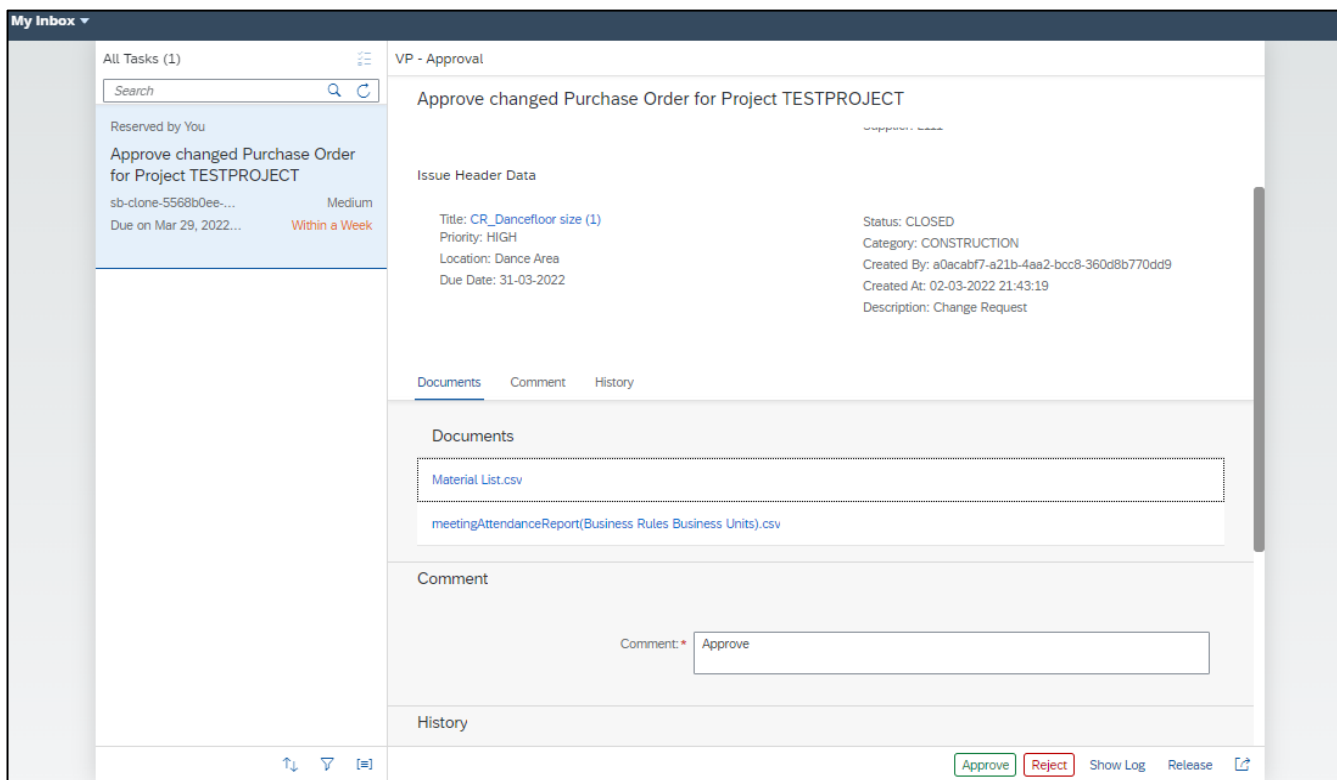
## Vice President Approval

The UI will display below data for Vice President Approval task along with necessary information.

1. **Project Header:** The first section of UI section displays the Project information e.g. Name, start date end date, status etc.
2. **Purchase Order:** The second section of UI contain Purchase order details.
3. **Issue Header:** The third section contains Issue details
4. **Documents:** The fourth section has a list of documents that are added related to that issue and project.
5. **Comment:** The comment section gives the user the possibility to add a comment to each user task
6. **History:** The History section contains user history or actions that were taken on each task or step

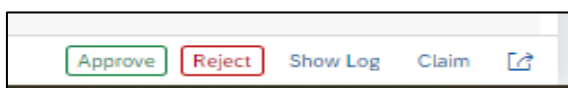
The Vice President receives a task from Project Manager to take final decision on Purchase Order Change. The Vice President reviews all information along with necessary inputs and Approves/Rejects the Purchase Order Change process. If approved, then the process will be

forwarded to create a new line item for Purchase Order. If rejected, then process will continue to Finalization step.



The Vice President can have following decision:

1. **Approve** - Click **Approve** to accept purchase order change by Vice President.
2. **Reject** – Click **Reject** to reject purchase order change by Vice President.





## Error Handling

When a technical error occurs in one of the workflow steps (for example, while calling an API), the workflow will enter into an erroneous state. An [action](#) has been configured in the process visibility scenario to handle any faulty state of the process template.

The Error Handling workflow will fetch the data of the erroneous workflow instance and determine the email address of the responsible admin for this workflow. The admin then will receive a notification via email asking them to check the root cause of the error in the workflow instance and to either retry the faulty task or to terminate the instance altogether.

# Process Visibility Workspace

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

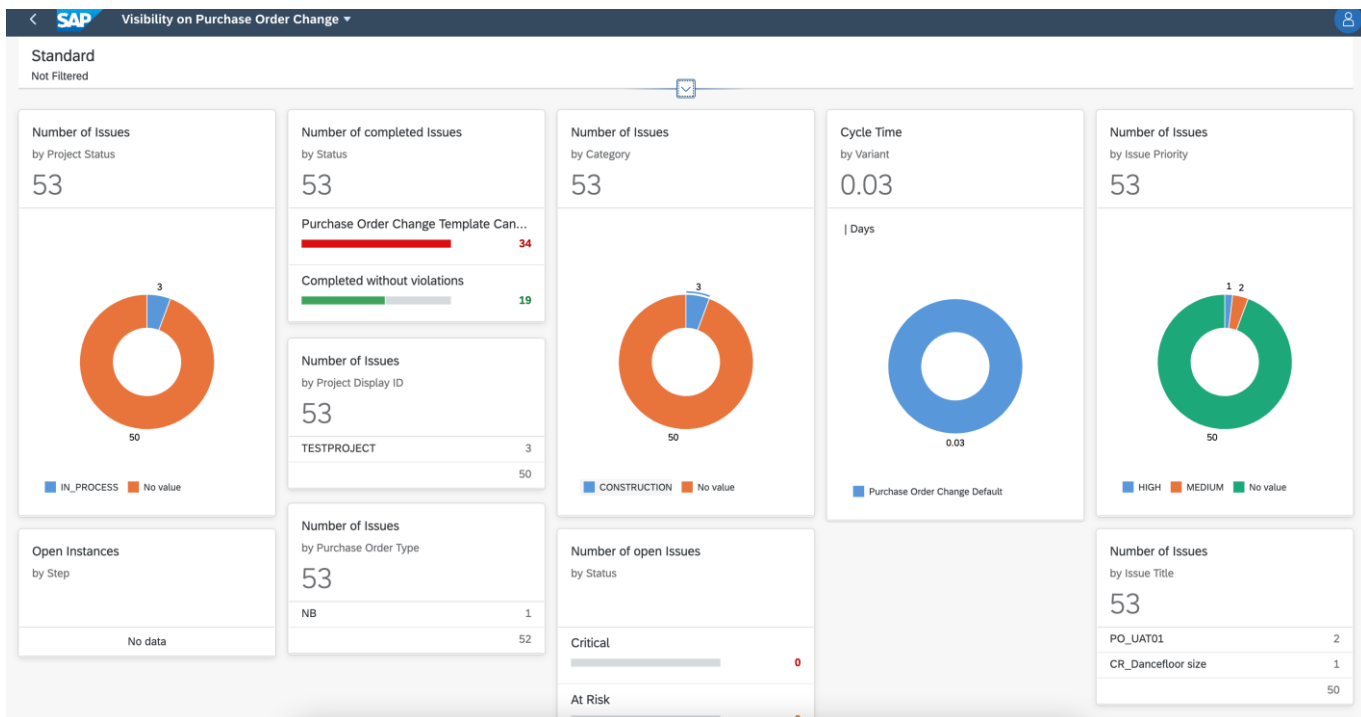
The **Purchase Order Change** package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Workflow Management or SAP Build Process Automation. A process owner or line of business expert will be able to enhance the visibility scenario.

## Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Purchase Order Change”. For more information on how to add scenario-specific tiles, refer to the [help documentation](#).
2. Click the scenario-specific tile in the Fiori Launchpad.
3. User will see a detailed process visibility dashboard.

## Access Process Workspace with SAP Workflow Management

1. Go to Process Flexibility Cockpit.
2. Select **Purchase Order Change** tile.
3. Click Live Process Insights **Purchase Order Change**
4. User will see the below detailed process visibility screen.



5. Besides the standard process performance indicators which are delivered with all SAP workflows, this scenario contains additional process performance indicators like:

- Number of Issues by Issue Priority,
- Number of Issues by Purchase Order Type,
- Number of Issues by Category,
- Number of Issues by Issue Title, etc.

Please go through [help documentation](#) on how to access process workspace.