

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

Procure to Order

Purchase Requisition to Purchase Order Approvals
using SAP Workflow Management

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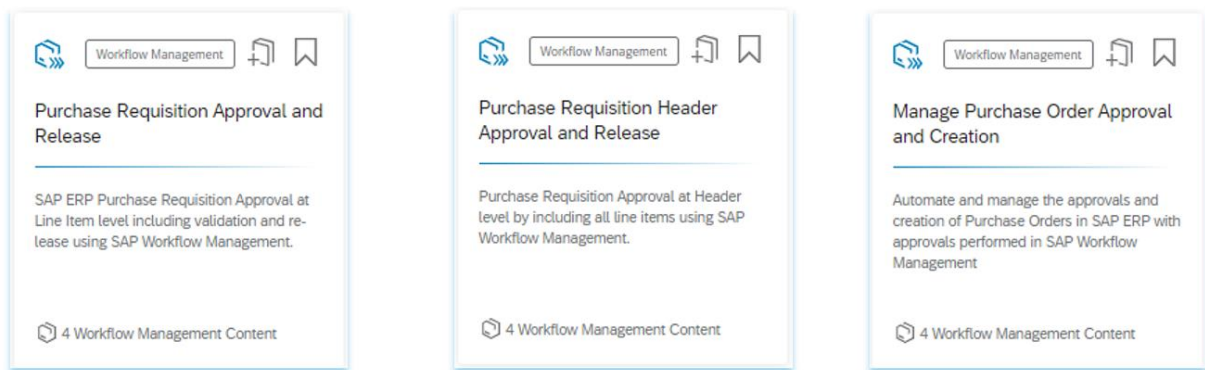
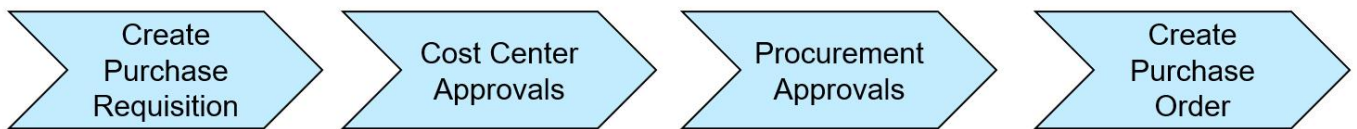
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Overview

This document provides an overview of SAP Workflow Management content that enables the customers to automate the Procure to Order scenario. This includes creating Purchase Requisition Approvals, Release and Purchase Order creation. The main audience of this document are Procurement experts or Procurement Line of Business IT.

Salient features of this content package are

- Orchestrating Purchase Requisition to Purchase Order creation using Workflow management
- Plug and Play with SAP ERP without additional development.
- Process steps are delivered to create net new variants.
- New Process variants can be configured in a low code no code approach.
- Agent determination using Business Rules or SAP ERP or external systems.
- Validation of Line-item attributes using Business Rules.
- Enable approvals at cost center, purchasing organizations and shared service centers.
- Grouping of line items based on various attributes to create Purchase Orders.
- Process visibility and key process performance indicators out of the box.
- Insight to actions using process visibility.
- Integration content to call SAP ERP BAPIs from SAP Workflow Management.



The above three content packages contain Workflows, Decisions, Process visibility and Integration content to orchestrate the Procure to Order scenario. An integrated scenario enables procurement experts to gain flexibility and transparency in their procurement operations.

Live Process Content Packages

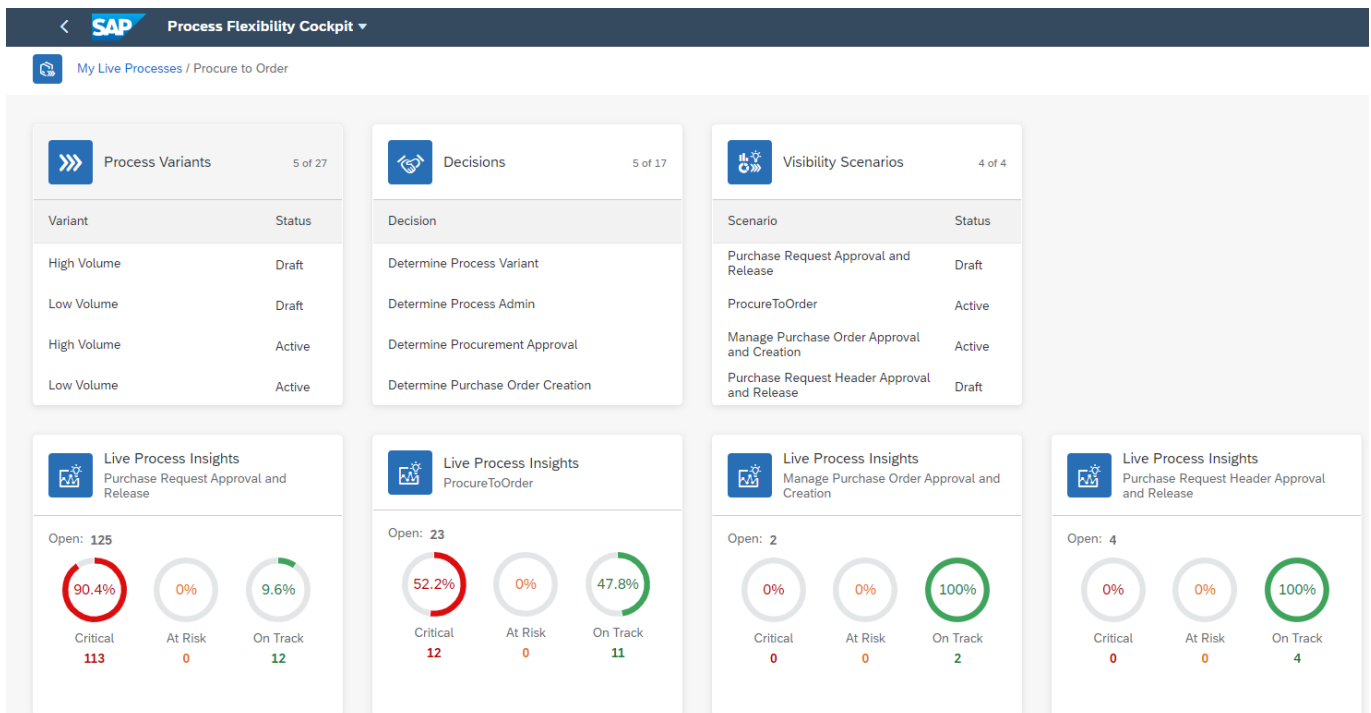
The following content packages are required to automate Purchase Requisition approval, release, and Purchase Order creation.

[Purchase Requisition Approval – Line Items](#)

[Purchase Requisition Approval – Header](#)

[Purchase Order Creation](#)

A central process cockpit enables procurement experts to manage all processes variants, decisions, and process visibility content. The live process insight gives a real time view into process performance and possible to navigate to the respective workflows to get an instance level view.



An orchestration workflow integrates these three content packages and provide flexibility to procurement experts to use the workflows based on various conditions.

The Business Rules content in this package provides flexibility to validate line items, determines approvers using a decision matrix or from external systems including SAP ERP.

The process visibility content provides real time visibility and insights into the approval workflows and provide deeper insight into the individual workflows and process steps.

Configurations

Each of the content package as part of procure to order can be consumed independently or together by making appropriate business configurations using various business rules delivered with these content packages. For e.g.: The following scenarios are possible

1. Cost Center Approval at Line-item level.
2. Purchasing Approval at Header level.

3. Purchase Order creation using a released Purchasing document.
4. Cost Center Approval at line item and Purchasing Approval at Header level.
5. Cost Center Approval at Line-Item level and Purchase Order Creation.
6. Purchasing Approval at Header level and Purchase Order Creation.
7. Cost Center, Purchasing approval and Purchase order creation.

Configure Purchase

Purchase Requisition Approval – Line Items

This content package enables customers to automate approval of Purchase Requisition at line-item level. Cost Center owners can approve the line items in a purchasing document and provide flexibility to add multiple approvers based on various attributes like document id, material category, plant, purchasing group, purchasing organization, net value, or account assignment. It is possible to release the line item or delay this for other approval steps.

Decisions allow to encapsulate the business logic from core applications and supports the reuse of business rules across different business processes. Decisions enable customers to adopt changes in processes without changing the underlying workflows or application logic. SAP Workflow Management has Decision management capabilities enable customers to centrally manage all decisions. Please go through the [Decision Management capabilities](#) in SAP Workflow Management.




Business/Line-Items Approval relevant Decisions

Purchase Requisition Approval and Release of Line-items process enable customers to flexibly configure decisions to gain flexibility to

1. Agent determination Strategy.


2. Determine Approvers
3. Validate Line items
4. Purchase Requisition approval strategy.
5. Determine Process Variants for Purchase Requisition.


Purchase Requisition Rules for SAP ERP

<p> Determine Approver</p> <p>Determine Approver of a Line Item based on various conditions. Possible to use Material group, Purchasing group, Purchasing Organisation, Plant and Price.</p> <p>Revision: 2108</p>	<p> Agent Determination Strategy</p> <p>Determine Approvers from a target system like SuccessFactors, Agent determination from ECC or Business Rules</p> <p>Revision: 2108</p>	<p> Validate Line Item</p> <p>Rules Service Validate attributes of a Line Item from Validate Line Item process step. Possible to validate document type, purchasing organisation, price, purchasing group, plant, material group.</p> <p>Revision: 2108</p>
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


Purchase Requisition Approval – Header

This content package enables customers to automate approval of Purchase Requisition document. Purchasing departments or shared service center could validate or approve the items in a purchasing document and provide flexibility to add multiple approvers based on various attributes like document id, total value etc.

 Purchase Requisition Header Approval and Release

Undo Redo **Save** Activate 

Available Steps (3)

-  **Approve Header**
Approve of Purchase Requisition Header
-  **Release Header**
Release Purchase Requisition after approval
-  **Validate Header**
Validation of Purchase Requisition Header data using...

```

graph TD
    Start(( )) --> Validate[Validate Header]
    Validate --> Approve[Approve Header]
    Approve --> Release[Release Header]
    Release --> End(( ))
  
```

Process Variant Properties

Name *

Process

Description







Purchasing/Header Approval - Decisions

Purchase Requisition Header Approval and Release process enable customers to flexibly configure decisions to gain flexibility to

1. Purchase Requisition approval strategy.
2. Determine Process Variants for Purchase Requisition.
3. Determine Procurement Approval
4. Determine Workflow Template for Header Approval
5. Determine Process Administrators
6. Determine Purchase Order Creation

Configure the decision **Determine Procurement Approval** (Header approval). to enable procurement approval together with Cost Center approval (Line Items). Make sure you will release the line items only in Procurement approval (Header) and not in Cost Center approval (Line Item).

Base Purchase Requisition Rules for SAP ERP

 Determine Process Variant Process variant to be used for a purchase requisition line item based on different conditions. Possible conditions are Request date, Material Group, Purchasing Group, Purchasing Organisation, Plant and Price. Revision: 2108	 Determine Process Admin Rule service used in NotifyAdmin workflow to identify process admin's email based on status of the instance. Revision: 2108	 Determine Procurement Approval Determination the need for procurement approval Revision: 2108	 Determine Purchase Order Creation Create Purchase Order after completing a Purchase Requisition Approval Revision: 2108
 Determine Workflow Template For Header Approval Determine workflow template for header approval Revision: 2108	 Purchase Requisition Approval Strategy Purchase requisition approval strategy based on header or line items Revision: 2108		

Purchase Order Approval and Creation

This content package enables customers to automate Purchase Order creation of an approved and released Purchasing document. Procurement experts could configure the criteria to group line items using Purchasing Organisation, Purchasing Group, Company Code, Tax Code, Supplier Id, Inco Terms and Payment Terms.

SAP Manage Process Variants

High Volume

Undo Redo Save Activate

Available Steps (3)

- ApprovePurchaseOrderCreation
Determine Approvers based on Business Rules or External Service and notify the...
- CreatePurchaseOrder
Create Purchase orders for every Purchase requisition document line item group...
- EnrichPurchaseRequisition
Enrich Purchase requisition document with additional attributes like Company code,...

```

graph TD
    Start(( )) --> Enrich[Enrich Purchase Requisition]
    Enrich --> Approve[Approve Purchase Order Creation]
    Approve --> Create[Create Purchase Order]
    Create --> End(( ))
  
```

Process Variant Properties

General Start Conditions

Name*
High Volume

Process
Approve and Create Purchase Order

Description
defaultvariant

Purchase Order Approval and Creation - Decisions

Manage Purchase Order Approval and Creation enable customers to flexibly configure decisions to gain flexibility to

1. Determine Grouping Strategy
2. Determine Grouping Attributes.
3. Determine Approver Strategy.
4. Determine Approvers.
5. Determine Process Administrator

Configure the decision **Determine Purchase Order Creation**. to enable Purchase Order Creation together with Cost Center approval (Line Items) and Purchasing approval (Header).

Purchase order Rules for SAP ERP



Purchase Order Approval Strategy

Rule service used in the approval process step to identify the approver determination type. It can be 'Business Rules' based or 'External Service' based.

Revision: 2108



Determine Approvers

Rule service used in the approval process step to identify the potential approvers based on different company policy.

Revision: 2108



Determine Grouping Attributes

Rule service used to identify the Purchase requisition attributes relevant for grouping to create Purchase orders

Revision: 2108



Purchase Requisition Grouping Strategy

Rule service used to identify the grouping determination type. It can be 'Business Rules' or 'External Service'

Revision: 2108



Determine Process Admin

Rule service used in NotifyAdmin workflow to identify process admin's email based on status of the instance.

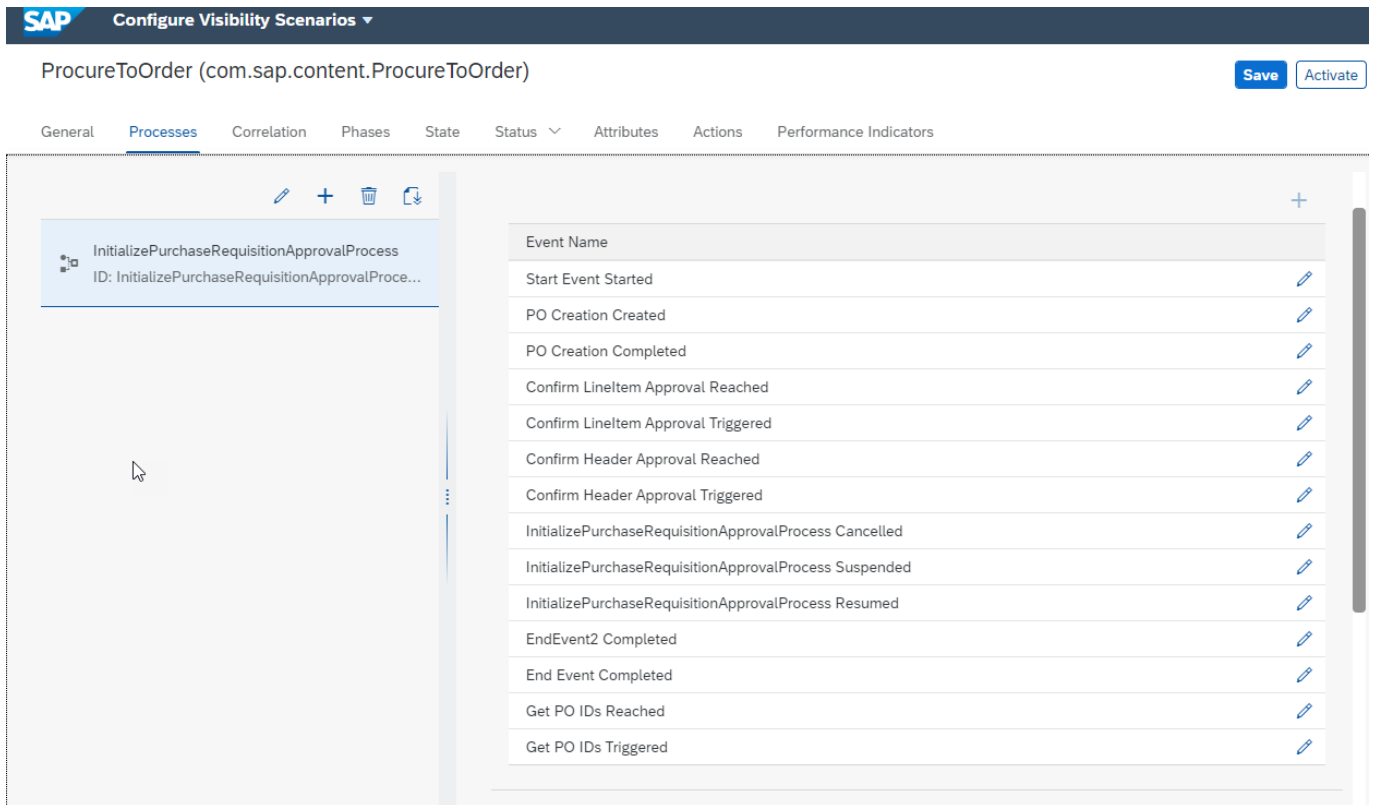
Revision: 2108

Configure Visibility Scenarios – ProcureToOrder(optional)

This visibility scenario gives an out of the box end-to-end visibility right from Purchase Requisition Line items approval to Purchase Requisition Header approval to Purchase Order approval and creation.

1. Go to Process Flexibility Cockpit
2. Select Purchase Requisition Approval and Release using SAP Workflow Management.
3. Click Visibility Scenarios and Select **ProcureToOrder**
4. This scenario gives an end-to-end visibility of Purchase Requisition line-item approvals, Purchase Requisition Header approvals and Purchase order creation all in one view

Please go through [help documentation](#) on how to model a visibility scenario.



Access Process Workspace - ProcureToOrder

1. Go to Process Flexibility Cockpit
2. Select Purchase Requisition Approval and Release using SAP Workflow Management
3. Click Live Process Insights ProcureToOrder

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

