

SAP CLOUD PLATFORM | EXTERNAL

## End User Guide

# Maintain Purchase Info Record

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## Overview

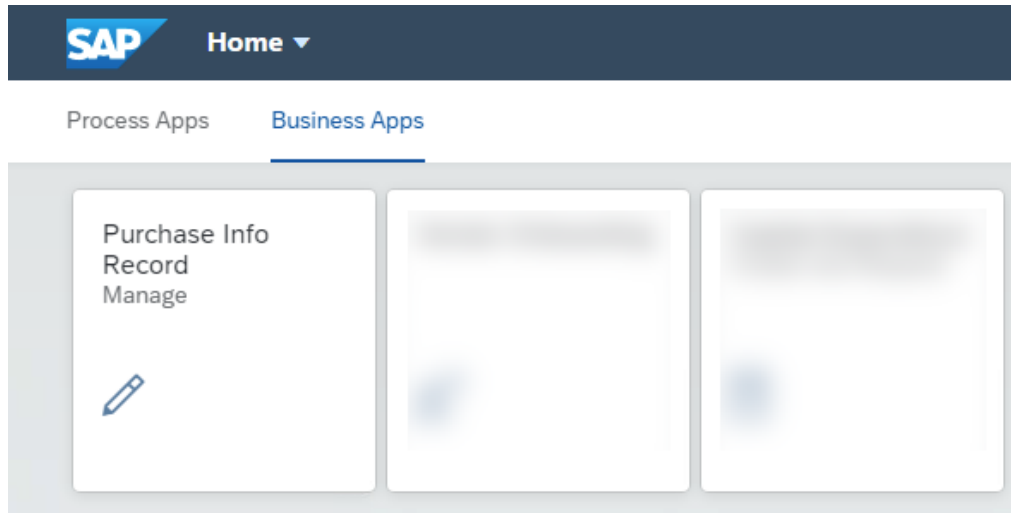
This document provides information about how to use the user interfaces of Purchase Info Record Maintenance. Process Operators, Approvers, Requestors, Procurement IT are the target users of the user interfaces explained in this document.

Maintain Purchase Info Record enable customers to automate the creation, change and approval of Info Record in a flexible and transparent way. It provides flexibility in choosing process variants depending on attributes like Material, Vendor, Price, Material Group, Plant, Purchasing Group and Purchasing Organization etc. When a requestor creates or change a Purchase Info Record, pre-configured Process Variants are triggered in SAP Cloud Platform.

- Info Record data validated using Business Rules before approval.
- Configure multi-level approval based on various parameters like prices variance, plant, material, purchase organization, vendor, etc.
- Approvers are determined using a Business Rule.
- Requester and approvers are automatically notified via email about the approval status and task assignment respectively.
- Approvers have two decision options (Approve and Reject) and based on the decision, the next steps will be processed or stopped.
- On approval, the Purchase Info Record is automatically replicated in SAP ERP.

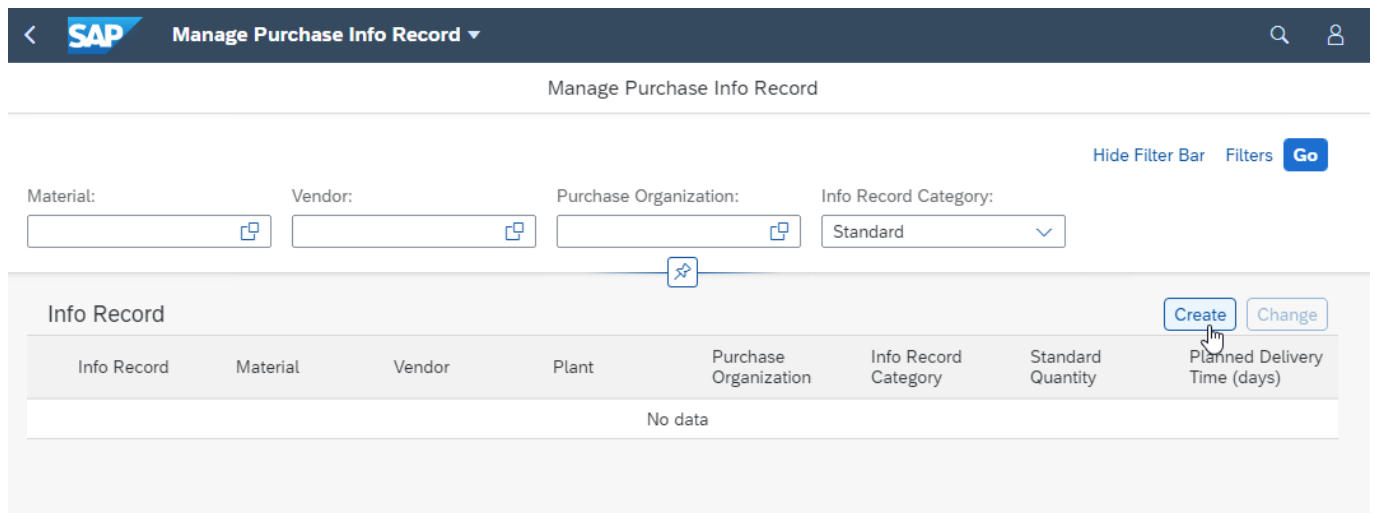
# Manage Purchase Info Record Application

The manage Purchase Info Record SAPUI5 application enables the line of business users to create, change and display Purchase Info Record. Once enabled, the application can be accessed from the SAP Fiori Launchpad tile Purchase Info Record – Manage.



## Create Purchase Info Record

From the Manage Purchase Info Record application, the user can submit a request to create a new purchase info record by selecting the Create button.



In the Create Purchase Info Record screen, the user is presented with three sections - General, Purchase Organization Data and Condition Data. User can navigate to the Purchase Organization Data and Condition Data sections only after filling the following mandatory information in the General section:

1. Vendor
2. Material
3. Purchase Organization
4. Plant
5. Info Record Category

Create Purchase Info Record

---

General
Purchase Organization Data
Condition Data

---

Info Record:

Vendor:\*  Vendor

Material:\*

Material Group:

Purchase Organization:\*

Plant:\*

Info Record Category:\*

Save
Cancel

Here, user can type the information or choose from the value help. In the value help pop-up, the user can search by providing either the name or description along with wildcard (\*) as given in the example below:

Material (55)	Material (100)	Material (100)
<input type="text" value="1191"/>	<input type="text" value="Finished"/>	<input type="text" value="↑"/>
1191 Lead	201 AK Finished Product - Handmade bags	141 Roland SCM
A44_000_0000001191 Finished prod A44_000_0000001191	442 MATP_Finished	142 Roland SCM
A45_000_0000001191 Finished prod A45_000_0000001191	534 Finished product CZ01 1	143 Roland SCM2
C32_000_0000001191 Finished prod C32_000_0000001191	1166 Semi finished Product	144 Roland SCM
C33_000_0000001191	1655	145
<span style="color: #0070c0;">Cancel</span>	<span style="color: #0070c0;">Cancel</span>	<span style="color: #0070c0;">Cancel</span>

Similarly, user can search for other fields like Vendor, Purchase Organization, Material Group, Purchase Group, Plant.


In the Purchase Organization Data section, the Purchase Group, Planned Delivery Time in days, Standard Quantity are mandatory. Unit of measure for Standard Quantity is automatically retrieved from the Material chosen in the General section.

Create Purchase Info Record

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General   **Purchase Organization Data**   Condition Data

---

Purchase Group:\*  

Planned Delivery Time:\*

Standard Quantity:\*

In the Condition section the following fields are available.

1. Price
2. Currency Code – This will be auto populated based on the Material. User can change it as per the requirement. Search help will be available to choose the currency.
3. Price Unit – This will be defaulted as 1. User can change it as per the need or requirement.
4. Order Unit - This will be auto populated based on the Material. User can change it as per the requirement. Search help will be available to choose the order unit.
5. Valid From – User can choose the “Valid From” dates from the calendar using search option. Please provide the valid dates otherwise error message will be thrown to the user to input valid dates.
6. Valid to - User can choose the “Valid to” dates from the calendar using search option. Please provide the valid dates otherwise error message will be thrown to the user to input valid dates.


Create Purchase Info Record

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General   Purchase Organization Data   **Condition Data**


---


Price:\*

Currency Code:\*  

Price Unit:\*

Order Unit:\*  

Valid From:\*  

Valid to:\*  

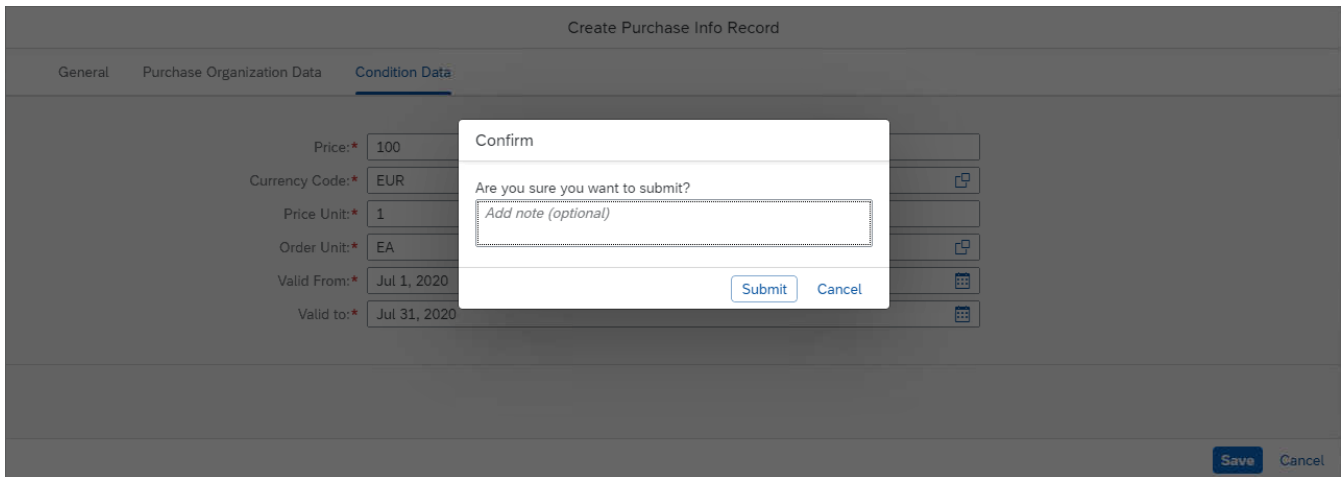
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**Save**   Cancel

On click of save, the following validations are performed, and appropriate messages are shown to the user:

- mandatory field checks.
- check for similar record that is in approval.
- validate the record with master data that includes existence in SAP ERP as well as assignment to the related attributes.

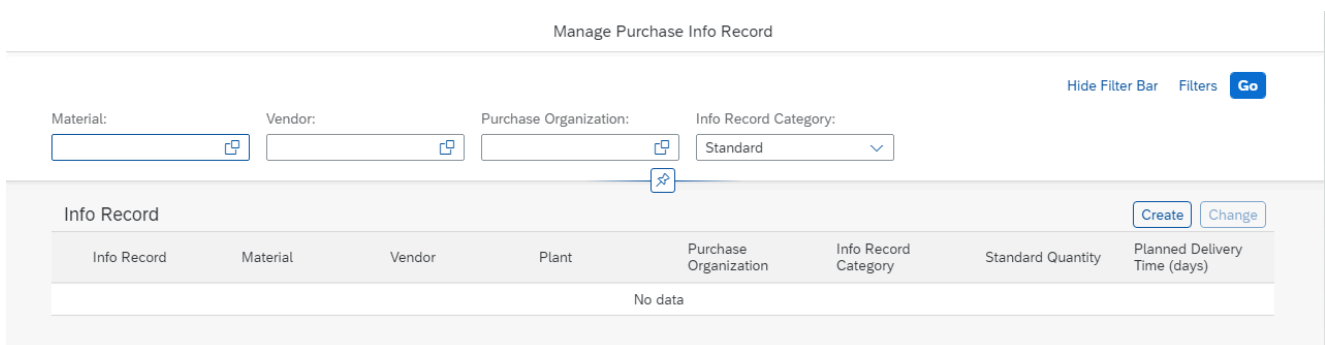
If the validation is successful, the Requester can provide a comment (optional) that can be shared with the approvers.



This will trigger an approval process and the requestor will be notified at every approval step about the decision.

## Search existing Purchase Info Record

An existing Purchase Info Record can be searched from the Manage Purchase Info Record application based on a combination of Material, Vendor, Purchase Organization and Info Record Category.



To use the value help, use F4 key or click the button shown below.



In the value help pop-up enter the search criteria like the ID or description together with wildcard (\*) as given in the example below:

The image displays three side-by-side value help pop-up windows. Each window has a search bar at the top and a list of results below. The first window is for Material (55) with search criteria "1191", showing results like "1191 Lead" and "A44\_000\_0000001191 Finished prod A44\_000\_0000001191". The second window is for Material (100) with search criteria "Finished", showing results like "201 AK Finished Product - Handmade bags" and "442 MATP \_Finished". The third window is for Material (100) with search criteria "1", showing results like "141 Roland SCM" and "142 Roland SCM". Each window has a "Cancel" button at the bottom.

Similarly, user can add additional filters to the search using Vendor, Purchase Organization and Purchase Group. Based on the combination of filters, the matching Purchase Info Record is listed in a tabular format.

The screenshot shows the SAP "Manage Purchase Info Record" interface. At the top, there are filter fields for "Material:" (value: 1191), "Vendor:" (empty), "Purchase Organization:" (empty), and "Info Record Category:" (value: Standard). A "Go" button is next to the filters. Below the filters is a table titled "Info Record" with columns: Info Record, Material, Vendor, Plant, Purchase Organization, Info Record Category, Standard Quantity, and Planned Delivery Time (days). The table contains 10 rows of data, each with a radio button in the first column and a right-pointing arrow in the last column. Buttons for "Create" and "Change" are located at the top right of the table area.

Info Record	Material	Vendor	Plant	Purchase Organization	Info Record Category	Standard Quantity	Planned Delivery Time (days)
<input type="radio"/> 5300003392	1191	100280	0001	0001	Standard	10.000 KG	5
<input type="radio"/> 5300003399	1191	AP_VEN10	0001	0001	Standard	10.000 ST	10
<input type="radio"/> 5300003409	1191	100090	0001	0001	Standard	10.000 KAR	10
<input type="radio"/> 5300003450	1191	100441	0001	0001	Standard	20.000 KG	30
<input type="radio"/> 5300003459	1191	100000	0001	0001	Standard	30.000 KG	30
<input type="radio"/> 5300003460	1191	ABVEND01	0001	0001	Standard	16.000 KAR	10
<input type="radio"/> 5300003461	1191	VNDR_JN	0001	0001	Standard	7.000 KAR	95
<input type="radio"/> 5300003474	1191	CSB_LIEF_0	0001	0001	Standard	20.000 KG	20
<input type="radio"/> 5300003480	1191	100020	0001	0001	Standard	10.000 KAR	10
<input type="radio"/> 5300003485	1191	100003	0001	0001	Standard	20.000 KAR	10



## Display Purchase Info Record

A list of Purchase Info Record will be displayed based on the selection by user (see the above section on how to search for Purchase Info Record based on various combination). The user will be able to click on any line to view the purchase info record in a read-only mode.

The screenshot shows the 'Manage Purchase Info Record' interface. At the top, there are search filters: Material (1191), Vendor, Purchase Organization, and Info Record Category (Standard). Below the filters is a table of 'Info Record' entries. A hand cursor is pointing to the first row.

Info Record	Material	Vendor	Plant	Purchase Organization	Info Record Category	Standard Quantity	Planned Delivery Time (days)
<input type="radio"/> 5300003392	1191	100280	0001	0001	Standard	10.000 KG	5
<input type="radio"/> 5300003399	1191	AP_VEN10	0001	0001	Standard	10.000 ST	10
<input type="radio"/> 5300003409	1191	100090	0001	0001	Standard	10.000 KG	10

The screenshot shows two side-by-side views of the 'Display Purchase Info Record' interface. The left view shows the 'General' tab with fields for Info Record (5300003392), Vendor (100280), Material (1191), Purchase Organization (0001), Plant (0001), and Info Record Category (Standard). The right view shows the 'Condition Data' tab with fields for Price (31.00), Currency Code (EUR), Price Unit (1), Order Unit (KG), Valid From (Jul 2, 2020), and Valid to (Sep 11, 2020).

The screenshot shows the 'Display Purchase Info Record' interface with the 'Purchase Organization Data' tab selected. It displays fields for Purchase Group (001), Planned Delivery Time (5 days), and Standard Quantity (10.000 KG). The name 'Einkäufer 1' is visible in the top right corner.

## Change Purchase Info Record

From the list of purchase info record, the user will also be able submit a change request using the Change button. When the radio button of the purchase info record that needs to be changed is

selected the Change button will be available to initiate a change request.

Manage Purchase Info Record

Hide Filter Bar   Filters   **Go**

Material:    Vendor:    Purchase Organization:    Info Record Category:

Info Record	Material	Vendor	Plant	Purchase Organization	Info Record Category	Standard Quantity	Planned Delivery Time (days)	
<input checked="" type="radio"/> 5300003471	1181	100000	0001	0001	Standard	31.000 EA	12	>
<input type="radio"/> 5300003476	1181	100441	0001	0001	Standard	10.500 EA	11	>
<input type="radio"/> 5300003482	1181	100090	0001	0001	Standard	10.000 EA	10	>

In the Change Purchase Info Record screen, the General tab is read-only.

Change Purchase Info Record

**General**   Purchase Organization Data   Condition Data

Info Record:\*

Vendor:\*  Krishnendu

Material:\*  rktyre2

Material Group:

Purchase Organization:\*  Kopie EKORG 0001

Plant:\*  Werk 0001

In the Purchase Organization Data section, the user can modify the Purchase Group, Planned Delivery Time and Standard Quantity.

Change Purchase Info Record

General   **Purchase Organization Data**   Condition Data

Purchase Group:\*   Einkäufer 4

Planned Delivery Time:\*

Standard Quantity:\*

In the Condition Data section, user will be able to change the Price, and condition validity period.

Change Purchase Info Record

General Purchase Organization Data **Condition Data**

Price:\*

Currency Code:\*

Price Unit:\*

Order Unit:\*

Valid From:\*

Valid to:\*

**Save** Cancel

After filling the needed information, user can click on the Save button to start an approval workflow and provide a comment (optional) that will be visible to the approvers.

Change Purchase Info Record

General Purchase Organization Data **Condition Data**

Price:\*

Currency Code:\*

Price Unit:\*

Order Unit:\*

Valid From:\*

Valid to:\*

**Confirm**

Are you sure you want to submit?

**Submit** **Cancel**

**Save** Cancel

# My Inbox to Approve or Reject Purchase Info Record

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 Info Record

A Purchase Info Record can be approved using SAP Cloud Platform My Inbox application. Please refer [help documentation on how to access My Inbox](#).

An approver will get a list of tasks. Select the Purchase Info Record Approval Task.

The screenshot displays the SAP My Inbox application interface. On the left, a sidebar shows a list of tasks under 'All Tasks (46)'. The main area displays a task titled 'Approve Purchase Info Record by Local Manager'. The task details include: 'Approve Info Record Change for Material rkyre2 and Vendor Mirek Prochazka - Vendor', 'Created On: Jul 7, 2020', 'Priority: Medium', and 'Due On: Jul 7, 2020'. Below the task details, there are tabs for 'General', 'Purchase Organization Data', 'Condition Data', 'Approval History', and 'Comments'. The 'General' tab is active, showing a form with the following fields: 'Purchase Info Record Number: 5300003482', 'Material: 1181', 'Material Description: rkyre2', 'Material Group: ', 'Material Group Description: ', 'Vendor: 100090', 'Vendor description: Mirek Prochazka - Vendor', and 'Purchase organization: 0001'. At the bottom right, there are buttons for 'Approve', 'Reject', 'Show Log', 'Release', and a share icon.

The Approval User Interface has five sections.

1. Request Header that has the details about the approval request
2. General – Purchase Info Record General details
3. Purchase Organization Data - Purchase Info Record Purchase Organization details
4. Condition Data - Purchase Info Record Condition details
5. Approval History – Record of the previous approvals, if any.
6. Comments - Comments from Approvers and Requester

The Approver can make the following decisions:

1. Approve
2. Reject

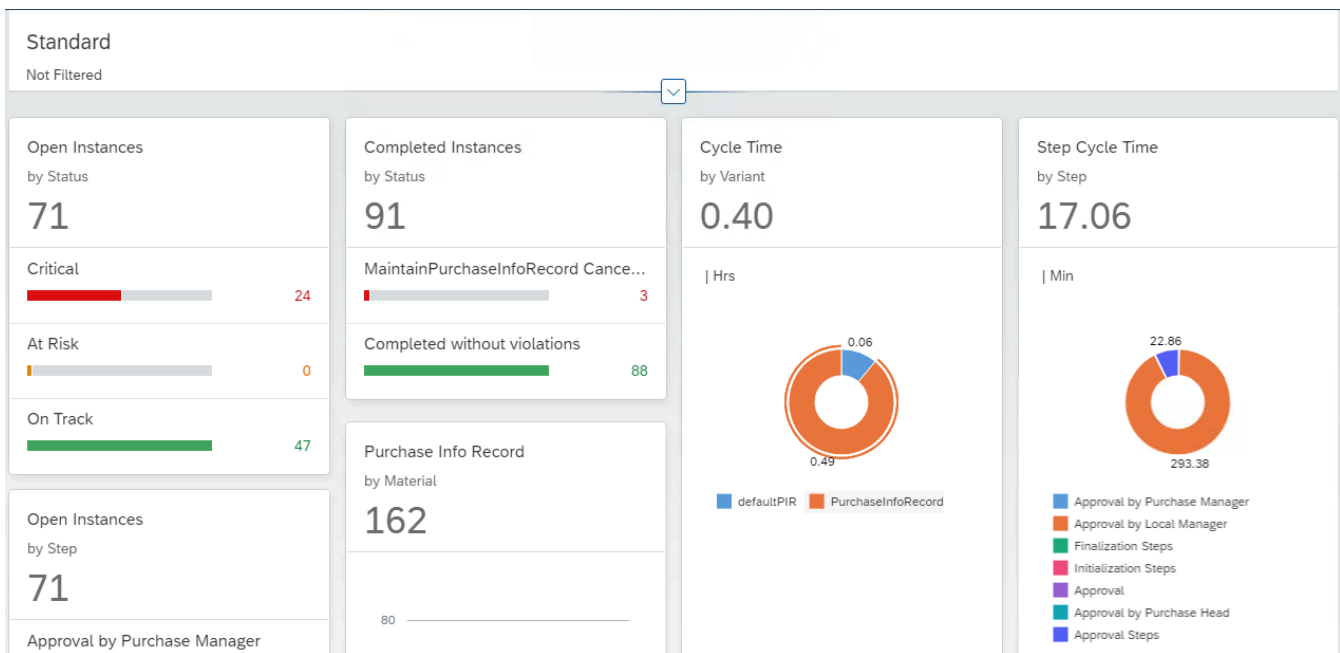
# Process Visibility Workspace

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

The Maintain Purchase Info Record live process content package provide out of the box visibility to process performance indicators for 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.
2. Select Maintain Purchase Info Record.
3. Click Live Process Insights - Manage Purchase Info Record.



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