

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Maintain Purchase Info Record using SAP Build Process Automation or SAP Workflow Management

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Overview

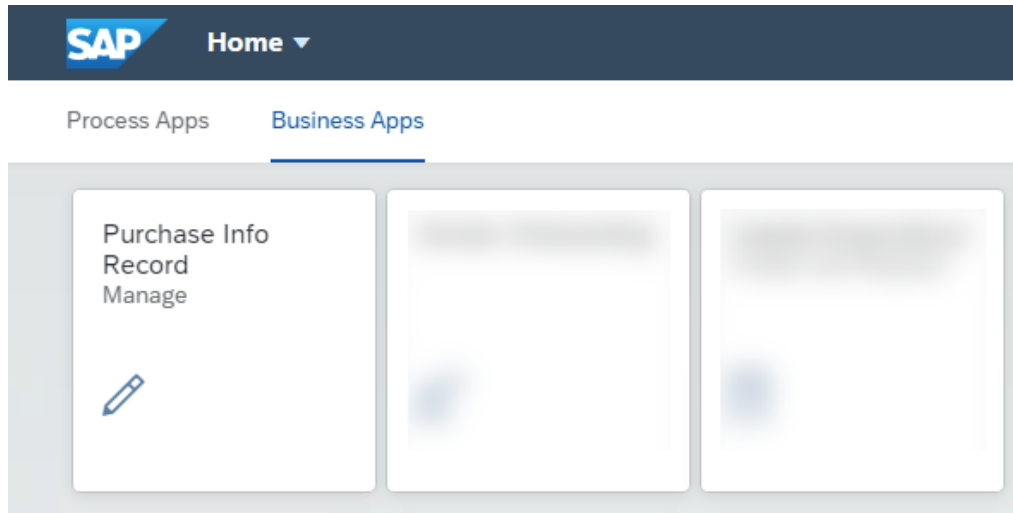
This document provides information about how to use the user interfaces of Purchase Info Record Maintenance. Process Operators, Approvers, Requestors, Procurement IT are the target users of the user interfaces explained in this document.

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 changes a Purchase Info Record, a pre-configured process variant is triggered in SAP Build Process Automation or SAP Workflow Management based on configurable business conditions.

- 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 configurable 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 Business Technology Platform 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.

Manage Purchase Info Record

Hide Filter Bar Filters **Go**

Material: Vendor: Purchase Organization: Info Record Category:

Info Record Create Change







Info Record	Material	Vendor	Plant	Purchase Organization	Info Record Category	Standard Quantity	Planned Delivery Time (days)
No data							

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:	<input type="text"/>
Vendor:*	100020  Vendor
Material:*	Please enter Material 
Material Group:	Please enter Material Group 
Purchase Organization:*	Please enter Purchase Organization 
Plant:*	Please enter Plant 
Info Record Category:*	Standard 

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="1"/> 
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
Cancel	Cancel	Cancel

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

General **Purchase Organization Data** Condition Data





Purchase Group:*	001		Einkäufer 1
Planned Delivery Time:*	2	days	
Standard Quantity:*	2	EA	

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

General Purchase Organization Data **Condition Data**

Price:*	<input type="text" value="Please enter price of the material"/>
Currency Code:*	EUR 
Price Unit:*	1
Order Unit:*	EA 
Valid From:*	<input type="text" value="Please enter valid from date"/> 
Valid to:*	<input type="text" value="Please enter valid to date"/> 

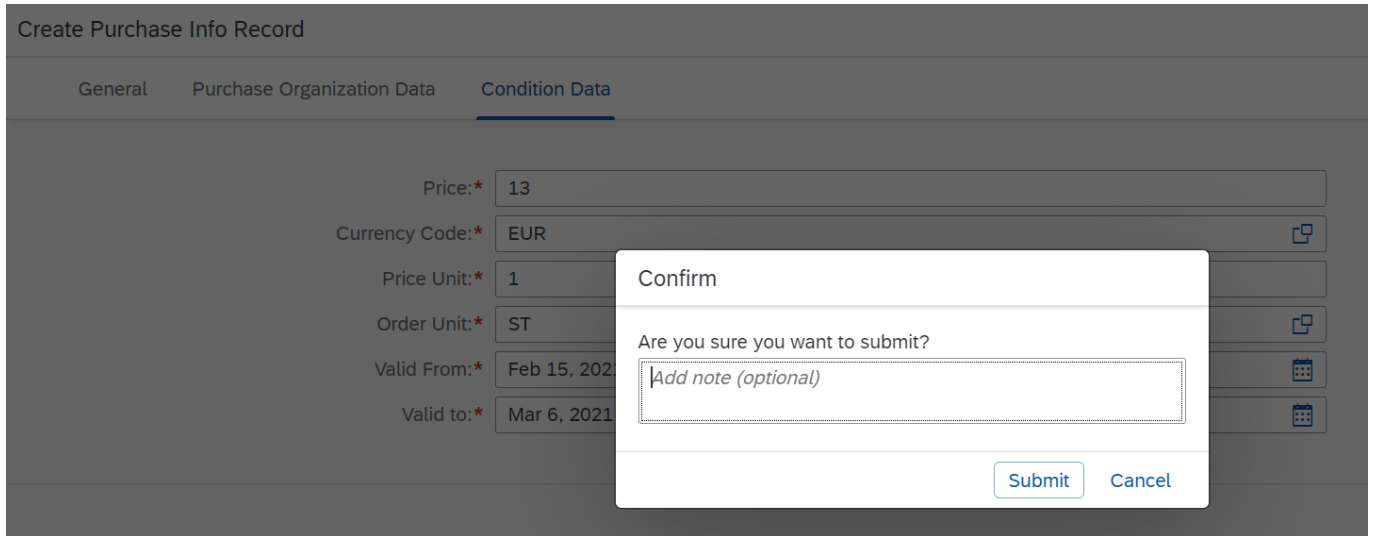
Save Cancel

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.

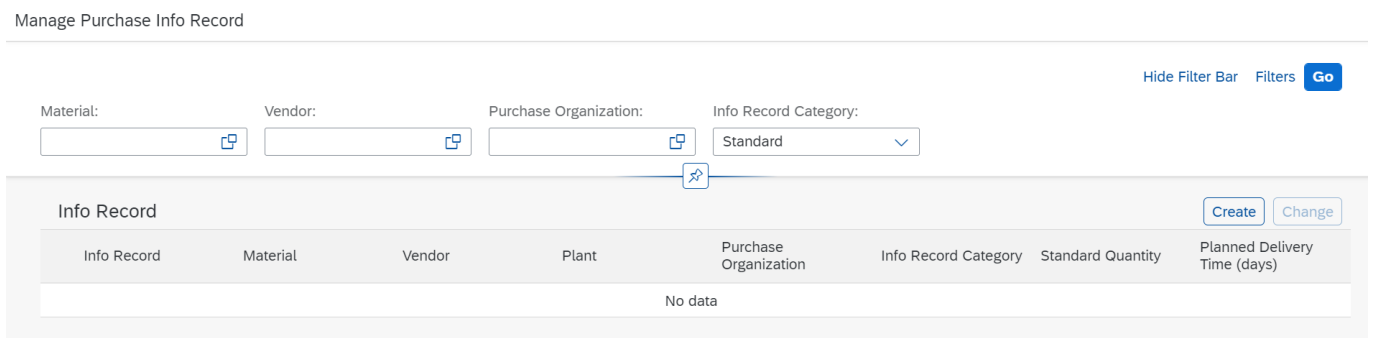
If the validation is successful, the Requester can provide a comment (optional) that can be shared with the approvers.



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:

Material (55)	Material (100)	Material (100)
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
Cancel	Cancel	Cancel

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.

Manage Purchase Info Record

Hide Filter Bar Filters **Go**

Material: 1191 Vendor: 100280 Purchase Organization: Info Record Category: Standard

Info Record Create Change

Info Record	Material	Vendor	Plant	Purchase Organization	Info Record Category	Standard Quantity	Planned Delivery Time (days)
5300003392	1191	100280	0001	0001	Standard	10.000 KG	5

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.

Material: Vendor: Purchase Organization: Info Record Category:

Info Record

Create **Change**

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	>

Display Purchase Info Record

General Purchase Organization Data Condition Data

Info Record:
 Vendor: **Claus**
 Material: **Lead**
 Material Group:
 Purchase Organization: **Kopie EKORG 0001**
 Plant: **Werk 0001**
 Info Record Category:

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.

Material: Vendor: Purchase Organization: Info Record Category:

Info Record

Create **Change**

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

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

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:* 001 Einkäufer 1

Planned Delivery Time:* 5 days

Standard Quantity:* 10.000 KG

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:* 10

Currency Code:* EUR

Price Unit:* 1

Order Unit:* KG

Valid From:* Feb 15, 2021

Valid to:* Feb 27, 2021

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.

Confirm

Are you sure you want to submit?

Add note (optional)

Submit Cancel

My Inbox to Approve or Reject Purchase Info Record

My Inbox application enables 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 task can be approved using 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 shows 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. The task is created by Apurv. Below the details 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

SAP Process Visibility service 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.

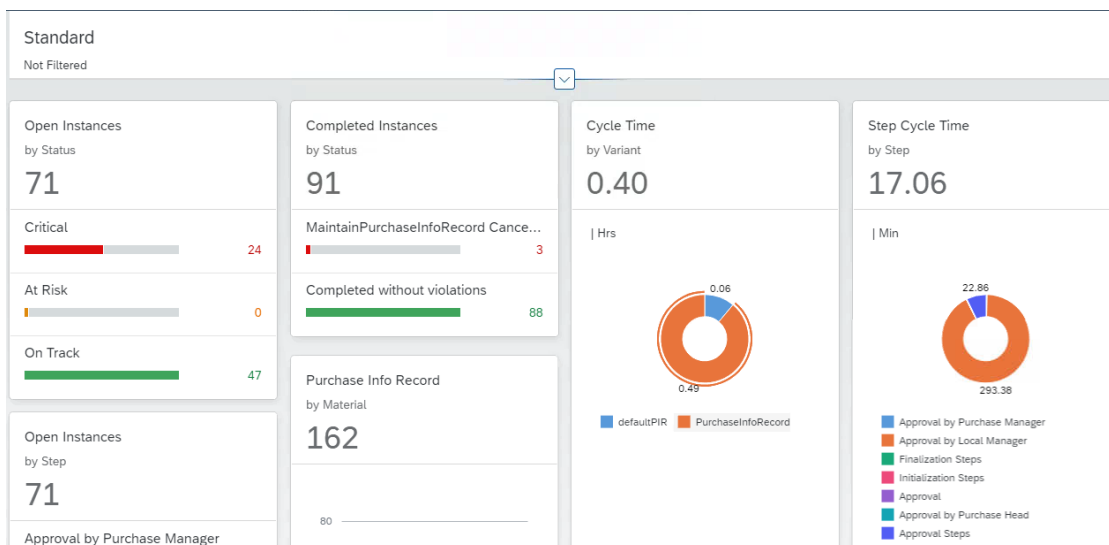
The “Maintain Purchase Info Record” live process content package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Build Process Automation or SAP Workflow Management. A process owner or line of business expert will be able to enhance the 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 “Maintain Purchase Info Record”. 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 the below detailed process visibility dashboard.

Access Process Workspace with SAP Workflow Management

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.