

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

User Guide

Purchase Requisition Approval and Release in SAP ERP using SAP Workflow Management or SAP Build Process Automation

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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 Build Process Automation or SAP Workflow Management without additional development in SAP ERP.

Purchase Requisition Approval and Release Process enable customers to automate approval and release of Purchase Requisitions 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 Build Process Automation or SAP Workflow Management.

- Line Item data validated using Business Rules before approval.
- Approvers are determined using a Business Rule / external system.
- Multiple approvers and approval tasks in a process step and determined dynamically.
- 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.
- All line Item will be released in SAP ERP for Purchase Order creation.

SAP Build Process Automation or SAP Workflow Management shall not be used to store or process sensitive personal data. This service can be used if you have a legal ground to process personal data.

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

Create Purchase Requisition

A user can create a purchase requisition using SAP Build Process Automation or SAP Workflow Management. Users connect to their portal and open the Create Purchase Requisition application.

User needs to provide

- Requestor info
- Select Material, Plant, purchasing group and Purchasing organisation. User can select the F4 help to choose material and the related plant.
- Quantity, Price and Delivery Date.
- Add each item to the cart by clicking Add to Cart button.
- Submit the order for approval by clicking Order button.

The screenshot shows the SAP 'Create Purchase Requisition' application interface. The form is titled 'Item Details' and is divided into two main sections: 'Requestor Info' and 'Item Details'. The 'Requestor Info' section contains three input fields: 'Name', 'User ID', and 'Email'. The 'Item Details' section contains several input fields: 'Material' (with a search icon), 'Item Text', 'Plant' (a dropdown menu), 'Quantity' (with a numeric keypad), 'Unit' (with a dropdown menu), 'Delivery Date' (with a date picker icon), 'Purchasing group' (a dropdown menu), and 'Purchasing Organisation'. At the bottom right of the form, there are two buttons: 'Add to Cart' and 'Order'.

My Inbox to Approve/Rework/Manage exceptions.

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 can be approved using SAP Build Process Automation or SAP 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 Approval Task.

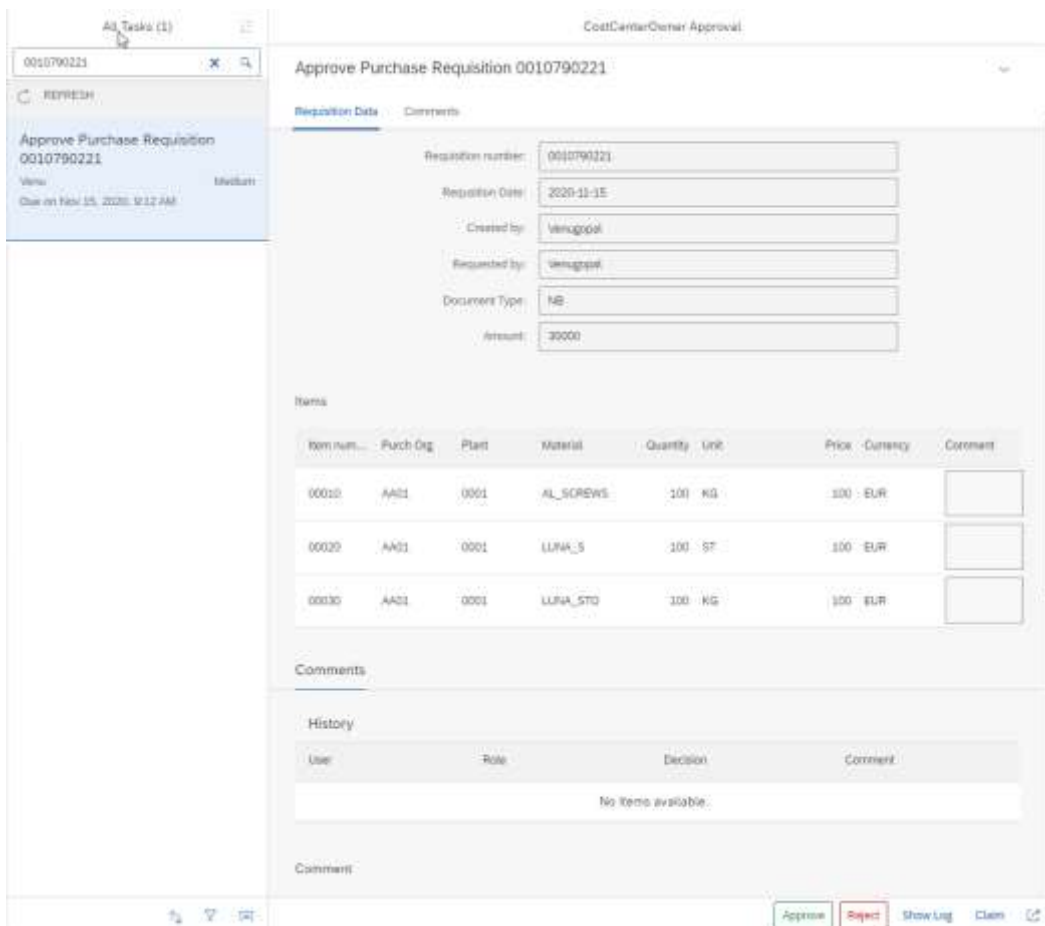
The Approval User Interface has three sections.

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

The Approver can make the following decisions with comments,

Approve – Approve the request with comment.

Reject – Reject the comment and the requestor could rework or delete the line item.



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.

MG All Tasks (1)

0010790221

REFRESH

Reserved by You

Rework Purchase Requisition
0010790221

Venu Medium

Rework Purchase Requisition (as requested by CostCenterOwner)

Rework Purchase Requisition 0010790221

Created On: Nov 15, 2020 Priority
Created By: Venu Medium

Requisition Data Comments

Header

Requisition number: 0010790221

Requisition Date: 2020-11-15

Created by: Venugopal

Requested by: Venugopal

Document Type: NB

Items

Item num...	Purch Org	Plant	Material	Quantity	Unit	Price	Currency	Comment
00010	AA01	0001	AL_SCREWS	100	KG	100	EUR	
00020	AA01	0001	LUNA_S	100	ST	100	EUR	
00030	AA01	0001	LUNA_STD	100	KG	100	EUR	

Comments

History

User	Role	Decision	Comment
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Update Delete Show Log Release

Update errors while releasing line item

When there is an error while releasing a purchase requisition line item, a task is created and assigned to the process administrator. The administrator can either fix the issue and send it for release or delete the line item.

Update Errors for Requisition 0010790155 / 00010

Created On: Nov 5, 2020 Priority: **Medium**
Created By: Sergey

[Update errors](#) [Requisition Header](#) [Item details](#) [Comments](#)

Details

Error code	Error message
W5058	Data in REQUISITION_ITEM_OLD for item 00010 does not correspond to current database status

Requisition Header

Requisition Date:

Created by:

Requested by:

ID:

Item Number:

Requester Comment:

[Resend](#) [Delete](#) [Show Log](#) [Claim](#) [Share](#)

Update Approver Determination source

Approvers of each step is determined either using a business rule or from external systems like SAP ERP, SuccessFactors or any other applications. If there is no approver determination source not defined, a task is created and assigned to the Process Administrator.

All Tasks (1) ☰

0010790226 ✕ 🔍

REFRESH

Approver determination source not defined for Purchase Requisition...
Venu Medium

Get Approver Determination System Manager

Approver determination source not defined for Purchase Requisition 0010790226

Created On: Nov 15, 2020 Priority
Created By: Venu Medium

[Error description](#) [Requisition Data](#) [Comments](#)

Error text:

Requisition Data

Header

Requisition number:

Requisition Date:

Created by:

Requested by:

Document Type:

Items

Item num...	Purch Group	Purch Org	Plant	Material	Quantity	Unit	Price	Currency
00010	001	AA01	0001	LUNA_5	1	ST	100	EUR

Comments

Complete Send to Requestor Show Log Claim 🔗

Update Approver

If approver determination is failing for an approval step, a task is assigned to the process administrator to assign an approver. The administrator can assign an approver and update the task.

All Tasks (1)

Update Approver CostCenterOwner

0010790223

REFRESH

Approver not defined for Purchase Requisition 0010790223

Venu Medium

Approver not defined for Purchase Requisition 0010790223

Created On: Nov 15, 2020
Created By: Venu

Priority
Medium

Error description Approver Requisition Data Comments

Error text: Approver are not defined

Approver

Name: *

Email: *

Requisition Data

Requisition Header

Requisition number: 0010790223

Requisition Date: 2020-11-15

Created by: Venugopal.Ch

Requested by: Venugopal.Ch

Document Type: NB

Requisition Items

Item nu...	Purch. Gr...	Purch. org.	Plant	Material	Quantity	Unit	Price	Currency	Comment
00010	001	AA01	0001	LUNA_S	1	ST	100	EUR	

⌵ ⌴ ⌵

Complete 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 Build Process Automation or SAP 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 Build Process Automation or SAP Workflow Management. A process owner or line of business expert will be able to enhance the visibility scenario.

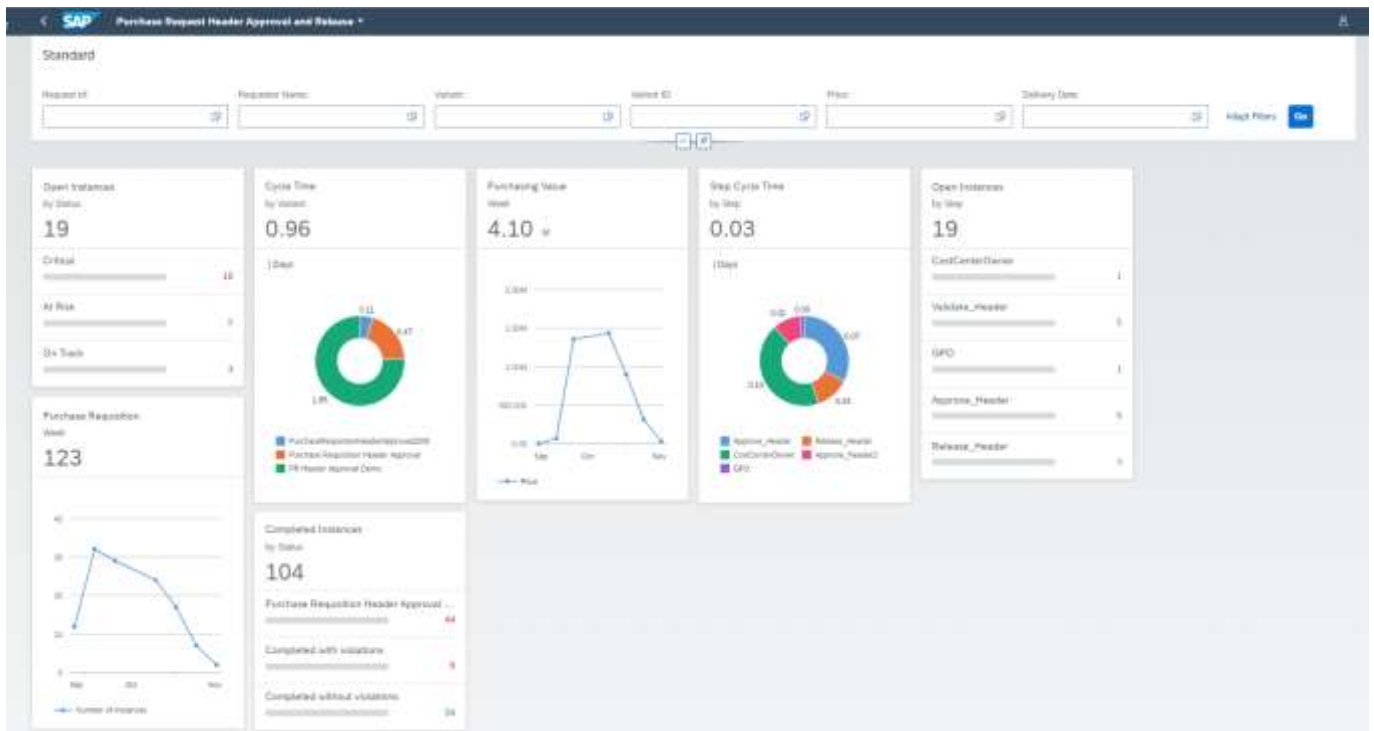
Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Purchase Requisition Header Approval and Release”. 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 Purchase Requisition Approval and Release using SAP Workflow Management
3. Click Live Process Insights Purchase Request Approval and Release

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



Insight to Action

All critical, overdue, failed and suspended instances are notified in real time to the respective process owners or administrators. Process owners/operators could trigger actions based on the process status. The following actions are available at an instance level.

Release: Release Purchase Request with all line items in SAP ERP and cancel the approval process.

Delete: Delete Purchase Request with all the line item and cancel the approval process.

Restart Approval Process: Restart the approval process and cancel the current one. The new approval process will be started from the beginning.

Instance

State: **Open** Cycle Time: **11 Days 18 Hrs 28 Min** Start Date: **Nov 3, 2020, 2:10:41 PM**
Status: **Critical** Target Cycle Time: **22 Days 16 Hrs 49 Min** End Date: **—**
Sub-Status: **Process Suspended** Target Date: **Nov 26, 2020, 1:00:00 AM**

Information Path Action Logs

Request Id: 0010790144
Requestor Name: Venugopal Chembrakalathil
Variant: Purchase Requisition Header Approval
Variant ID: purchaserequisitionheaderapproval
Price: 100000.0
Delivery Date: Nov 26, 2020

[Release](#) [Delete](#) Restart Approval Process