

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

## Configuration Guide

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

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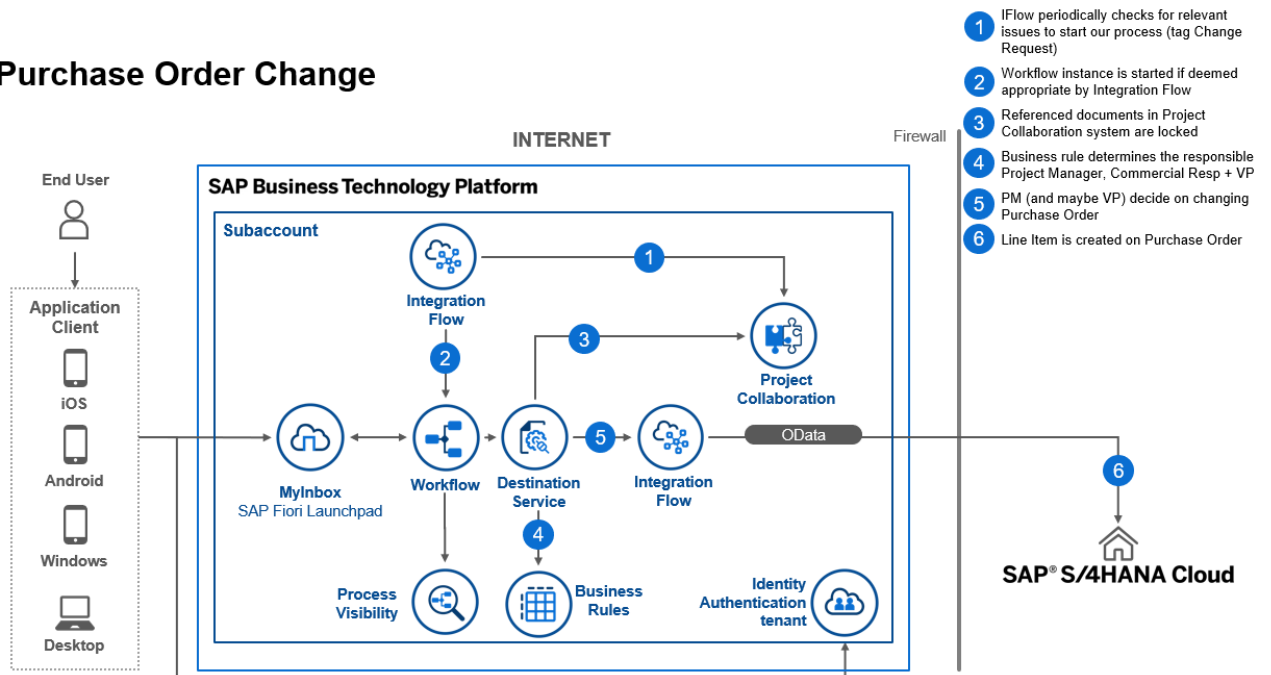
# Overview

This document provides information about configuration steps to consume the package **Purchase Order Change**. The main audiences of this document are Project Manager, Vice President, Commercial Responsible, Developers and Product Owners.

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 escalated 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 receives an email with the 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:

- Automatically update Purchase Order Change process status to reflect the current execution in the Workflow
- Orchestrate communication between to Project Manager, Vice President and Commercial Responsible

## Purchase Order Change



# Artifacts

A package consists of process templates, process steps, process variants, decisions, and process visibility models. Please refer [help documentation](#) about these artifacts.

## Process

A process template is a set of business activities and tasks that, once completed, fulfills an organization goal. **Purchase Order Change** package contains the following process template:

**Purchase Order Change Default** – Contains the steps needed for the scenario

A business process can be broken down logically into smaller parts or steps. Each process step is a collection of activities to perform a specific task. For example, an approval process step can contain activity to determine the approvers, approval task, notifications, and handle the approval result. Table 1 represents the list of process steps/sub flows available to be used in **Purchase Order Change**.

**Table 1. Process Steps**

Process Steps	Cardinality	Detailed Description
Prepare System	1..1	The Prepare System step is a mandatory preconfigured step in the process variant and it is not available for process step selection in process variant. It will prepare data for Decide Purchase Order Change. This step prepares the data such as Project information, Issue information, Purchase Order information and sets the referenced document status to be reviewed.
Decide Purchase Order Change	1..1	Mandatory step that has to be placed first in a Process Variant. In this step, the Project Manager Reviews the Project, Purchase Order and Issue details and takes a decision if a change of the Purchase Order is required or not. If change required, then the process executes to the Project Manager to pass change details. The next step is based on a definable threshold and will send an escalated approval where the Vice President decides to Accept/Reject that Purchase Order change by given Purchase Order details. If no Purchase Order change is required, in the first step the Project Manager directly declines that Purchase Order change process.
Update Purchase Order	0..1	Optional step that has to be placed after Decide Purchase Order Change. In this step the Purchase Order is updated with a new line item based on data provided by the Project Manager and approved by the Vice President. If this step is not added to the variant, no automatic update of the Purchase Order will happen and the update will have to be done manually.
Finalization	1..1	The Finalization step is a mandatory preconfigured step in the process variant and it is not available for process step selection in process variant. In this step, based on Update Purchase Order status the final email is sent to the Project Manager, Vice President and Commercial Responsible with Issue details, Approval Details and the Purchase Order details. If Purchase Order change failed and there's a need to manually update, then the Commercial Responsible will receive an email with Purchase Order details for manually updating the Purchase Order and Project Manager and Vice

		President also receive a mail with that status.
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The process has attributes, and these attributes are available in process visibility to search approval process instances and to define process performance indicators. Please see Table 3 for more details.

**Table 3. Process Attributes.**

<b>Process Attributes</b>	<b>Detailed Description</b>
Project Display ID	Project Id
Issue Id	Issue Id
Variant	Variant
Variant Id	Variant Id
Purchase Order Number	Purchase Order Number
Issue Category	Issue Category
Project Status	Project Status
Issue Priority	Issue Priority
Issue Date	Date of the issue
Issue Processor Company	Issue Processor Company
Issue Processor Person	Person who is processing the issue
Project Owner	Project Owner
Project End Date	Project end date
Project Geo Co-ordinates	Geo location
Purchase Order Type	PO Type
Purchase Order Language	Language of Purchase Order
Purchase Order Currency	PO Currency

## Process Variants

A process variant consists of multiple process steps configured by a line of business expert. It is possible to create multiple variants of the same process.

Please refer [help documentation](#) about how to import content packages and configure a process variant.

The screenshot displays the SAP Process Variant Designer interface for a process variant named "Purchase Order Change Default". At the top, there are buttons for "Undo", "Redo", "Save", and "Activate". The main workspace is divided into three panels:

- Available Steps (2):** A list of two steps: "Decide Purchase Order..." (with a document icon) and "Update Purchase Order for..." (with a magnifying glass icon). Each step includes a brief description of its function.
- Diagram:** A flowchart showing the sequence of steps. It starts with a green start circle, followed by the "Decide Purchase Order Change" step (with a document icon and a lock symbol), then the "Update Purchase Order" step (with a magnifying glass icon), and ends with a red end circle.
- Process Variant Properties:** A panel on the right containing fields for "Name" (Purchase Order Change Default), "Process" (Purchase Order Change Default), "Description" (The default variant for Purchase Order change contains all steps in the recommended sequence to execute the workflow successfully.), and "Workflow Definition ID" (com.sap.content.purchaseorderchange.pu...).

## Import Purchase Order Change and Configure Process Variants with SAP Build Process Automation

1. In the [SAP Build Process Automation Store](#), search for live process package Purchase Order Change and import the same. This content package has one process template and process variant(s) for that template.
2. In the Application Development [Lobby](#), click to open the package with name Purchase Order Change. This opens the package in a new tab/window.
3. Click the + icon next to the process template to create a new process variant.
4. Enter Name of the new Process Variant (ex, Two Step Approval).
5. Click the newly created Process Variant tile to save and activate the process variant.
6. The process variant has a default implementation with two steps and at least one level of approval.
7. It is possible to remove steps like “Approval for Purchase Order Change” from a process variant only if there are multiple approvals. Please note that whether a step is mandatory or optional, and how many a times any step can be used within a variant, are dependent on the constraints defined on the process steps.
8. Save and activate the variant. A successful activation will create a new workflow definition in the account that can be viewed in the [Monitor Processes and Workflows app](#).

## Import Purchase Order Change and Configure Process Variants with SAP Workflow Management

1. In Process Flexibility Cockpit app, search for content package **Purchase Order Change**. and import the same. Please refer the standard help document about [how to import a content package](#). This content package has one process template and process variant(s) for that template are required.
2. Open content package in Flexibility Cockpit and click Process Variants tile.
3. Click New Process Variant.
4. Enter Name of the new Process Variant (ex, default) and select “Purchase Order Change” as Process.
5. Click the newly created Process Variant tile to save and activate the process variant.
6. The process variant has a default implementation with two steps.
7. Save and activate the variant. A successful activation will create a new workflow definition in the account that can be viewed in the Monitor Workflows – Workflow Definition app in SAP Fiori Launchpad.
8. Update the Determine Process Variant Policy and include the newly created workflow definition ID in the rule

## Prepare System

The Prepare System step is a mandatory preconfigured step in the process variant and it is not available for process step selection in process variant. It will prepare data for Decide Purchase Order Change. This step prepares the data such as Project information, Issue information, Purchase Order information and sets the referenced document status to be reviewed.

## Decide Purchase Order Change

Mandatory step that has to be placed after Prepare System in a Process Variant. In this step, the Project Manager Reviews the Project, Purchase Order and Issue details and takes a decision if a change of the

Purchase Order is required or not. If change required, then the process executes to the Project Manager to pass change details. The next step is based on a definable threshold and will send an escalated approval where the Vice President decides to Accept/Reject that Purchase Order change by given Purchase Order details. If no Purchase Order change is required, in the first step the Project Manager directly declines that Purchase Order change process.

- Drag the step into the variant. Place it first in the variant. Place it exactly once

### Update Purchase Order

Optional step that has to be placed after Decide Purchase Order Change. In this step the Purchase Order is updated with a new line item based on data provided by the Project Manager and approved by the Vice President

- Drag the step into the variant. Place it after Decide Purchase Order Change. Place it exactly once

### Finalization

The Finalization step is a mandatory preconfigured step in the process variant and it is not available for process step selection in process variant. In this step, based on Update Purchase Order status the final email is sent to the Project Manager, Vice President and Commercial Responsible with Issue details, Approval Details and the Purchase Order details. If Purchase Order change failed and there's a need to manually update, then the Commercial Responsible will receive an email with Purchase Order details for manually updating the Purchase Order and Project Manager and Vice President also receive a mail with that status.

## Decisions & Policies

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 Build Process Automation or SAP Workflow Management has business rules capabilities that enables customers to centrally manage all decisions. Please go through the [business rules capabilities](#) in SAP Build Process Automation or SAP Workflow Management.

**Purchase Order Change** enable customers to flexibly configure decisions to gain flexibility to

1. Determine Project Manager
2. Determine VP Approval
3. Determine Commercial Responsible
4. Determine Variant Information

### 1. Determine Project Manager

**Rule Service Name:** [Determine Project Manager](#)

**Input:** Determine Project Manager Input (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
Project Id	String	Project Id



**Output:** Determine Project Manager Output (Structure Type)

Determine Project Manager Information

ATTRIBUTE	TYPE	DESCRIPTION
User Id	String	User Id
Group Id	String	Group Id
Email	String	Email id

**Where Used:** Decide Purchase Order Change, Finalization

## 2. Determine VP Approval

**Rule Service Name:** Determine VP Approval

**Input:** Determine VP Approval Input (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
Project Id	String	Project Id
POPrice	String	Purchase Order Price

**Output:** Determine VP Approval Output (Structure Type)

Determine Vice President Approval Information

ATTRIBUTE	TYPE	DESCRIPTION
User Id	String	User Id
Group Id	String	Group Id
Email	String	Email id

**Where Used:** Decide Purchase Order Change, Finalization

## 3. Determine Commercial Responsible

**Rule Service Name:** Determine Commercial Responsible

**Input:** Determine Commercial Responsible Input (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
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Project Id	String	Project Id
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**Output:** Determine Commercial Responsible Output (Structure Type)

Determine Commercial Responsible Information

ATTRIBUTE	TYPE	DESCRIPTION
User Id	String	User Id
Group Id	String	Group Id
Email	String	Email id

**Where Used:** Update Purchase Order, Finalization

#### 4. Determine Variant Information

**Rule Service Name:** Determine Variant Information

**Input:** Determine Variant Information Input (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
Project Id	String	Project Id

**Output:** Determine Variant Information Output (Structure Type)

Determine Variant Information

ATTRIBUTE	TYPE	DESCRIPTION
Admin User Id	String	User Id
Admin Group Id	String	Group Id
Admin Email	String	Email id
Variant Id	String	Variant Id
Escalation Time	String	Escalation Time in Hours

**Where Used:** Prepare System, Decide Purchase Order Change, Update Purchase Order, Finalization

## Process Visibility

Process Visibility capability in SAP Build Process Automation or SAP Workflow Management 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.

**Purchase Order Change** process content package provide out of the box visibility on all the process variants in SAP Build Process Automation or SAP Workflow Management. Line of business expert will be able to enhance the visibility scenario to their requirements.

### Configure Visibility Scenarios in SAP Build Process Automation

1. Go to the Application Development Lobby.
2. Select Purchase Order Change Project.
3. Click to open **Purchase Order Change** scenario.
4. Click Activate button.

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

### Configure Visibility Scenarios in SAP Workflow Management

1. Go to Process Flexibility Cockpit.
2. Select **Visibility on Purchase Order Change Dashboard** tile.
3. Click Visibility Scenarios tile.
4. Select Purchase Order Change scenario.

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

### Access Process Workspace in SAP Build Process Automation

1. The process visibility scenario can be accessed using SAP Launchpad Service. Refer to the help document for [creating UI applications on central SAP Fiori Launchpad](#) for SAP Build Process Automation.
2. Once you have added the applications process Visibility Scenario Instances (with app ID com.sap.spa.pv.instances) and Visibility Scenario Dashboard (with app ID com.sap.spa.pv.ovp), follow the below steps to add a tile to access the Purchase Order Change dashboard.
  - a. Navigate into "Visibility Scenario Dashboard".
  - b. On the screen that opens, choose Create a Local Copy.
  - c. To use custom texts, choose Edit and adapt the texts in the General section.
  - d. You can use a custom title, description, and subtitle for the tile.
  - e. Choose the Navigation tab.
  - f. Under the Intent section, ensure that the value in the Action tab is unique for every application.
  - g. Under the Parameters section, provide the following:

Parameter Name	Parameter Value
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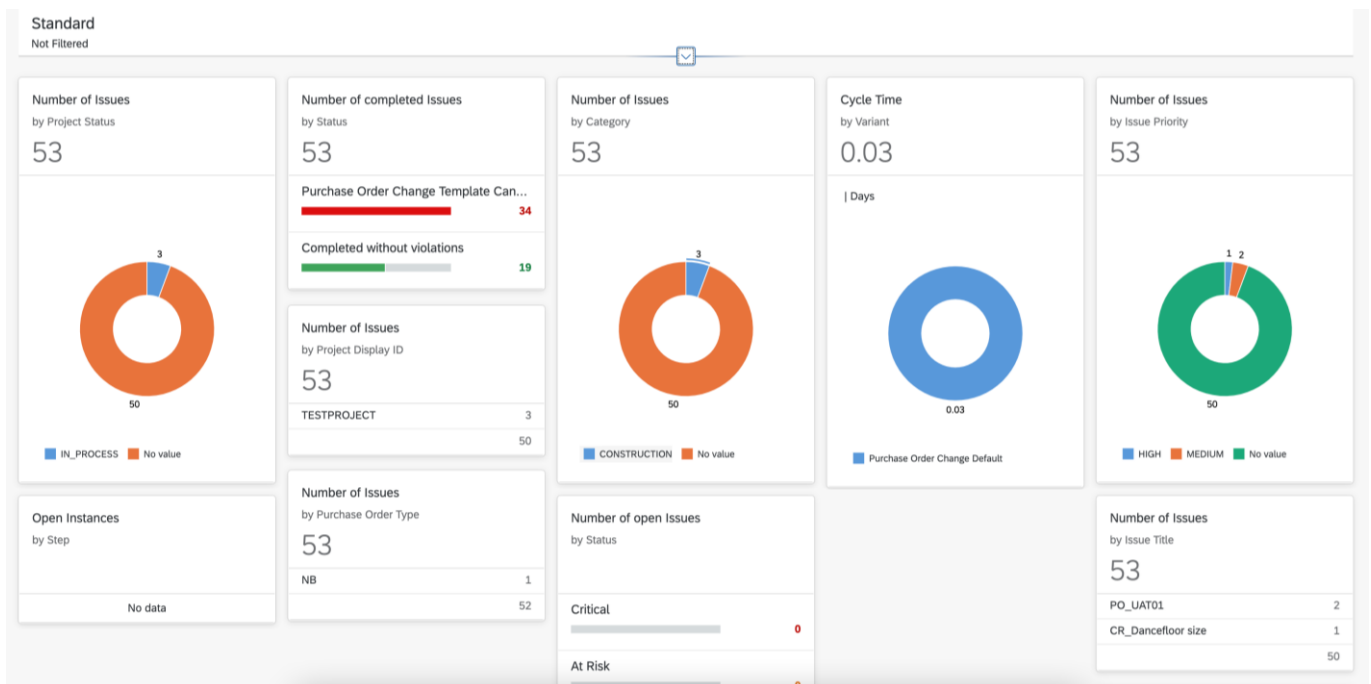
Name	scenariold
Default Value	com.sap.content.purchaseorderchange
Required	Toggle to Yes

- h. Choose Save.
- i. Assign the local copy to a group and make sure that they're visible to users. For more information, see [Assign Apps to a Group and to a Catalog](#) and [Assign Content to a Role](#).

3. Once created, select app that corresponds to "Purchase Order Change".
4. User will see the process visibility dashboard.

### Access Process Workspace in SAP Workflow Management

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



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