

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 Line Items 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.
- 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.
- Line Item released in SAP ERP for Purchase Order creation.

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 either SAP Build Process Automation or SAP Workflow Management. Users connect to their portal and open the Create Purchase Requisition application.

User need to provide

Requestor info

Select Material, Plant, purchasing group and Purchasing organisation. User can select the F4 help to choose a 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 main window is titled 'Item Details' and contains the following sections:

- Requestor Info:** Includes input fields for Name, Unique Id, and Email.
- Item Details:** Includes input fields for Material (with a search icon), Short Text, Plant (with a dropdown arrow), Quantity, Price, Delivery date (with a date picker icon), Purchasing group (with a dropdown arrow), and Purchasing Organisation.
- Items:** A section at the bottom of the form.

At the bottom right of the interface, 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 Line Item 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 Line Item Approval Task.

The Approval User Interface has three sections.

1. Request Header – Requestor details
2. Item Details – Purchase Request Line Item 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.

All Tasks (2)
Approver Approval

REFRESH

Approve Purchase Requisition
0010789498 / 00020
sb-clone-4aa4cc07-a... Medium
Due on 6/4/20, 7:58 PM

Approve Purchase Requisition
0010789498 / 00010
sb-clone-4aa4cc07-a... Medium
Due on 6/4/20, 7:58 PM

Approve Purchase Requisition 0010789498 / 00010

Requisition Header
Item Details
Comments

Requisition Date:

Created by:

Requested by:

ID:

Item Number:

Document Type:

Requestor Comment:

Item Details

Material:

Description:

Document Type:

Purchasing Group:

Plant:

Quantity:

Unit:

Price:

Currency:

Delivery Date:

Comments

↑ ↓ [M]

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.

All Tasks (3)

REFRESH

Rework Purchase Request Line Item 0010790181 / 00010

Venu Medium

Rework Required for Request Document review 1602260073

Venu Medium

Rework Required for Request "Approve Fin document"

Venu Medium

Rework Line Item (as requested by GPO)

Rework Purchase Request Line Item 0010790181 / 00010

Created On: Nov 8, 2020 Priority: **Medium**
 Created By: Venu

[Requisition Header](#) [Item Details](#) [Comments](#)

Requisition Date:

Created by:

Requested by:

ID:

Item Number:

Document Type:

Requester Comment:

[Item Details](#)

Material:

Description:

Document Type:

Update
Delete
Show Log
Claim

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

Created By: Sergey

Medium

[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:	<input type="text" value="2020-11-05"/>
Created by:	<input type="text" value="Sergey"/>
Requested by:	<input type="text" value="Sergey"/>
ID:	<input type="text" value="0010790155"/>
Item Number:	<input type="text" value="00010"/>
Requester Comment:	<input type="text"/>

[Resend](#)

[Delete](#)

[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.

Approver not defined for Purchase Requisition 0010790191 / 00010

Created On: Nov 8, 2020

Priority

Created By: Venu

Medium

- Error description
- Approver
- Requisition Header
- Item Details
- Comments

Error text:

Approver

Name: *

Email: *

Requisition Header

Requisition Date:

Created by:

Requested by:

ID:

Item Number:

Document Type:

Requester Comment:

[Complete](#)

[Show Log](#)

[Claim](#)



Process Visibility Workspace – Transparency on procurement operations

Process visibility service 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.

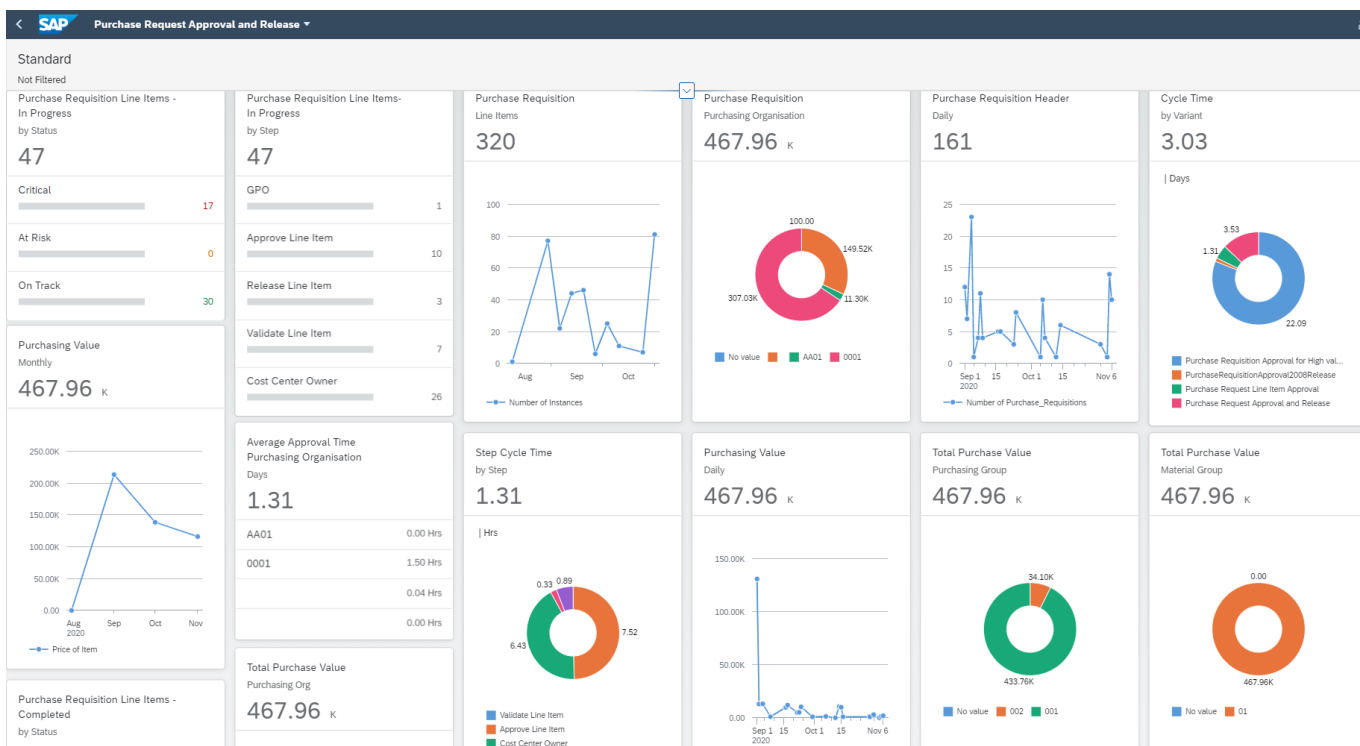
Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Purchase Requisition 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 detailed process visibility dashboard.

Access Process Workspace with SAP Workflow Management

1. Go to Process Flexibility Cockpit
1. Select Purchase Requisition Approval and Release using SAP Workflow Management
2. 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 Line Item: Release the line item in SAP ERP and cancel the approval process.

Delete Line Item: Delete 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.

State: **Open** Cycle Time: **1 Day 1 Hr 13 Min** Start Date: **Nov 6, 2020, 6:44:24 AM**
Status: **Critical** Target Cycle Time: **18 Days 18 Hrs 15 Min** End Date: **—**
Sub-Status: **Process Failed** Target Date: **Nov 25, 2020, 1:00:00 AM**

Information Path Action Logs

Request ID: 0010790167
Requestor Name: Venugopal Chembrakalathil
Item ID: 00010
Material ID: LUNA_S
Material Description: Amber (LUNA_S)
Unit Of Measure: ST
Currency: EUR
Approval Status:
Plant: 0001
Material Group: 01
Purchasing Group: 001
Purchasing Organisation: 0001
Variant: PurchaseRequisitionApproval2008Release
Variant ID: purchaserequisitionapproval2008release
Quantity: 1000.0
Price of Item: 100.0
Delivery Date: Nov 25, 2020

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