

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

Procure to Order Purchase Requisition to Purchase Order Approvals using SAP Build Process Automation

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Overview

This document provides an overview of SAP Workflow Management content that enables the customers to automate the Procure to Order scenario. This includes creating Purchase Requisition Approvals, Release and Purchase Order creation. The main audience of this document are Procurement experts or Procurement Line of Business IT.

Salient features of this content package are

- Orchestrating Purchase Requisition to Purchase Order creation using Workflow management
- Plug and Play with SAP ERP without additional development.
- Process steps are delivered to create net new variants.
- New Process variants can be configured in a low code no code approach.
- Agent determination using Business Rules or SAP ERP or external systems.
- Validation of Line-item attributes using Business Rules.
- Enable approvals at cost center, purchasing organizations and shared service centers.
- Grouping of line items based on various attributes to create Purchase Orders.
- Process visibility and key process performance indicators out of the box.
- Insight to actions using process visibility.
- Integration content to call SAP ERP BAPIs from SAP Workflow Management.



The above three content packages contain Workflows, Decisions, Process visibility and Integration content to orchestrate the Procure to Order scenario. An integrated scenario enables procurement experts to gain flexibility and transparency in their procurement operations.

Live Process Content Packages

The following content packages are required to automate Purchase Requisition approval, release, and Purchase Order creation.

[Purchase Requisition Approval – Line Items](#)

[Purchase Requisition Approval – Header](#)

[Purchase Order Creation](#)

A central process cockpit enables procurement experts to manage all processes variants, decisions, and process visibility content. The live process insight gives a real time view into process performance and possible to navigate to the respective workflows to get an instance level view.

An orchestration workflow integrates these three content packages and provide flexibility to procurement experts to use the workflows based on various conditions. The Business Rules content in this package provides flexibility to validate line items, determines approvers using a decision matrix or from external systems including SAP ERP.

The process visibility content provides real time visibility and insights into the approval workflows and provide deeper insight into the individual workflows and process steps.

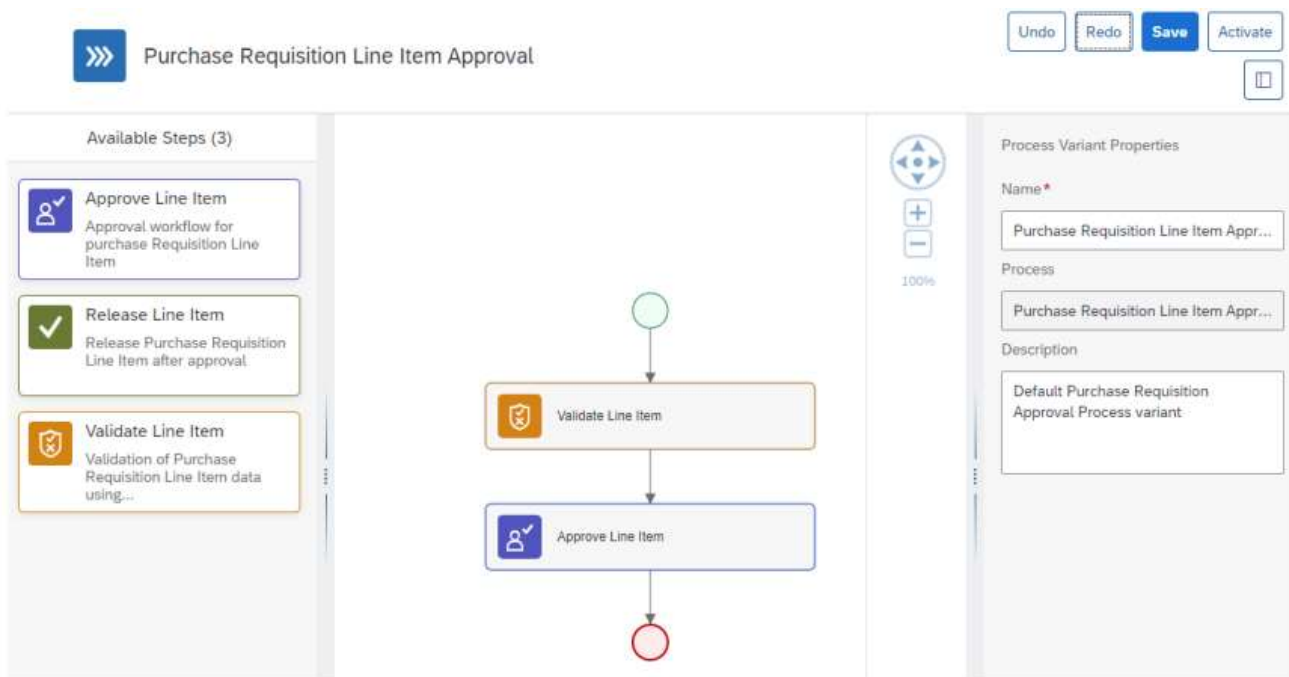
Configurations

Each of the content package as part of procure to order can be consumed independently or together by making appropriate business configurations using various business rules delivered with these content packages. For example, the following scenarios are possible:

1. Cost Center Approval at Line-item level.
2. Purchasing Approval at Header level.
3. Purchase Order creation using a released Purchasing document.
4. Cost Center Approval at line item and Purchasing Approval at Header level.
5. Cost Center Approval at Line-Item level and Purchase Order Creation.
6. Purchasing Approval at Header level and Purchase Order Creation.
7. Cost Center, Purchasing approval and Purchase order creation.

Configure Purchase Requisition Approval – Line Items

This content package enables customers to automate approval of Purchase Requisition at line-item level. Cost Center owners can approve the line items in a purchasing document and provide flexibility to add multiple approvers based on various attributes like document id, material category, plant, purchasing group, purchasing organization, net value, or account assignment. It is possible to release the line item or delay this for other approval steps.



Business/Line-Items Approval relevant Decisions

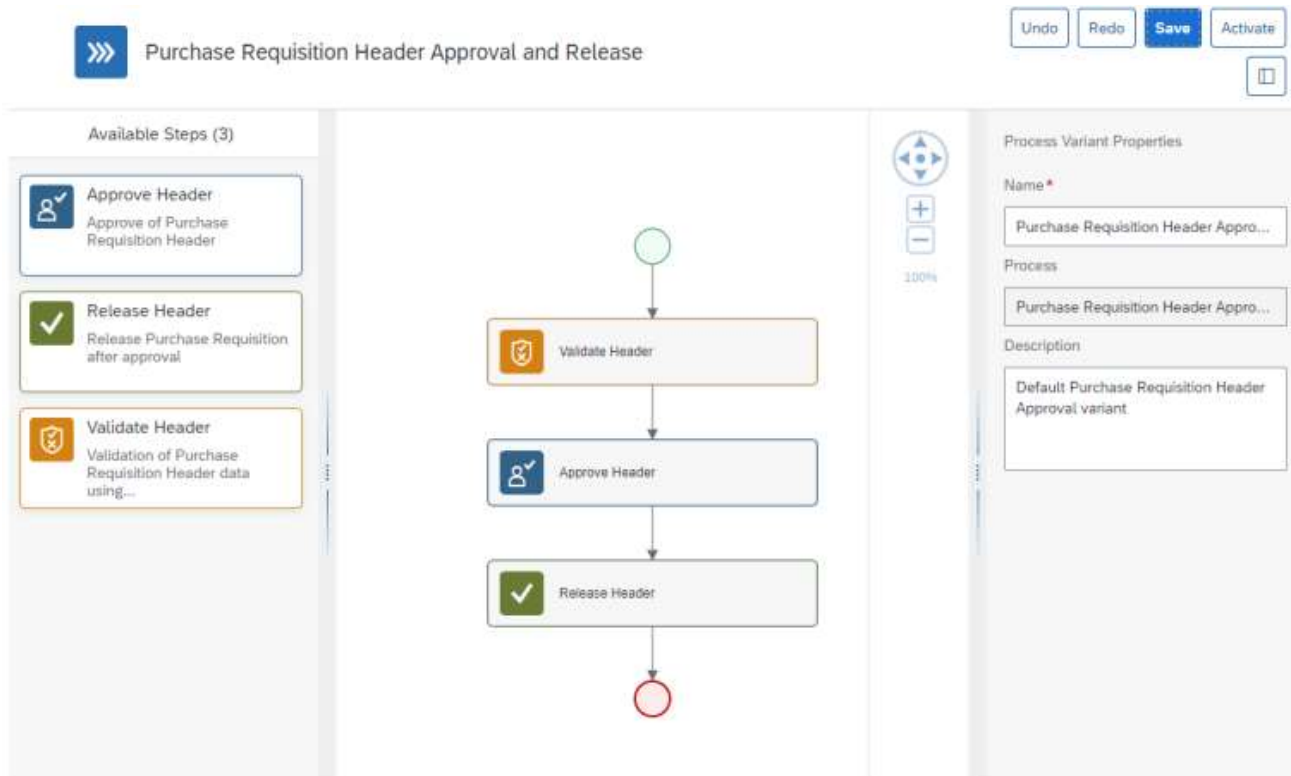
Decisions allow to encapsulate the business logic from core applications and supports the reuse of business rules across different business processes. Decisions enable customers to adopt changes in processes without changing the underlying workflows or application logic.

Purchase Requisition Approval and Release of Line-items process enable customers to flexibly configure decisions to gain flexibility to:

1. Agent determination Strategy
2. Determine Approvers
3. Validate Line items
4. Purchase Requisition approval strategy.
5. Determine Process Variants for Purchase Requisition.

Configure Purchase Requisition Approval – Header

This content package enables customers to automate approval of Purchase Requisition document. Purchasing departments or shared service center could validate or approve the items in a purchasing document and provide flexibility to add multiple approvers based on various attributes like document id, total value etc.



Purchasing/Header Approval - Decisions

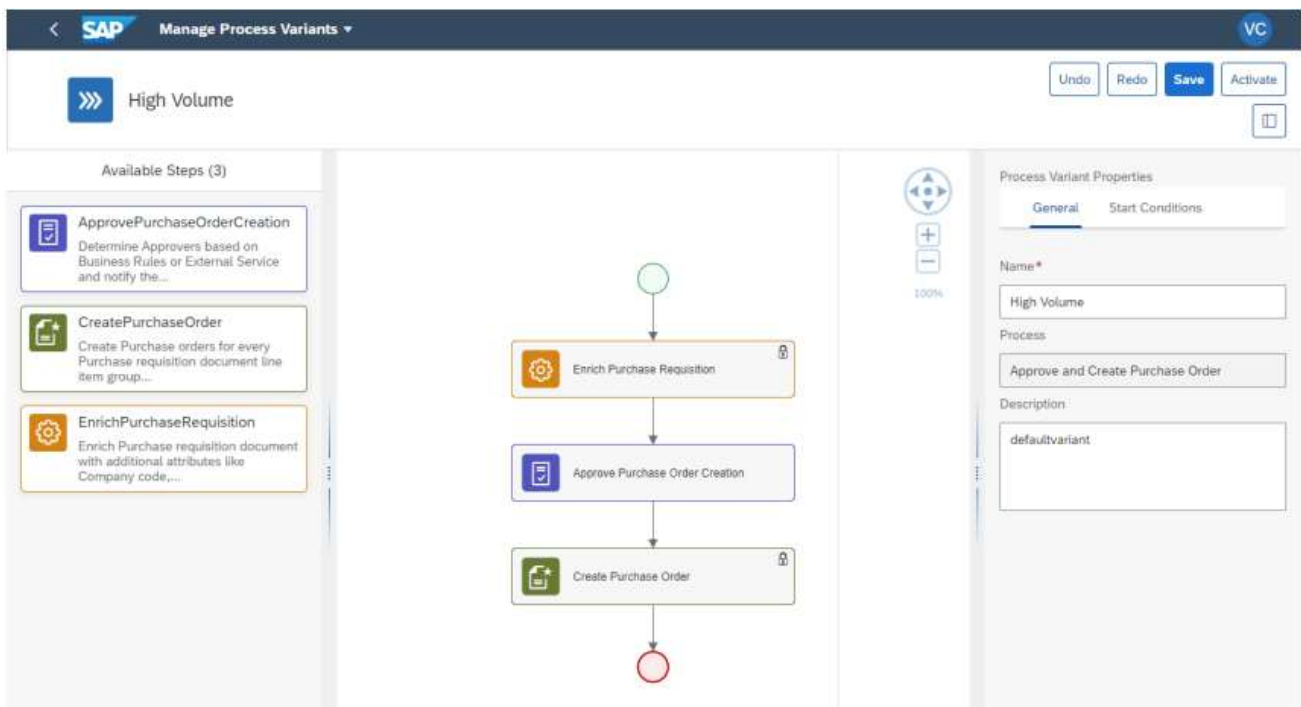
Purchase Requisition Header Approval and Release process enable customers to flexibly configure decisions to gain flexibility to:

1. Purchase Requisition approval strategy.
2. Determine Process Variants for Purchase Requisition.
3. Determine Procurement Approval
4. Determine Workflow Template for Header Approval
5. Determine Process Administrators
6. Determine Purchase Order Creation

Configure the decision **Determine Procurement Approval** (Header approval) to enable procurement approval together with Cost Center approval (Line Items). Make sure you will release the line items only in Procurement approval (Header) and not in Cost Center approval (Line Item).

Configure Purchase Order Approval and Creation

This content package enables customers to automate Purchase Order creation of an approved and released Purchasing document. Procurement experts could configure the criteria to group line items using Purchasing Organization, Purchasing Group, Company Code, Tax Code, Supplier ID, Inco Terms and Payment Terms.



Purchase Order Approval and Creation - Decisions

Manage Purchase Order Approval and Creation enable customers to flexibly configure decisions to gain flexibility to

1. Determine Grouping Strategy
2. Determine Grouping Attributes.
3. Determine Approver Strategy.
4. Determine Approvers.
5. Determine Process Administrator

Configure the decision **Determine Purchase Order Creation** to enable Purchase Order Creation together with Cost Center approval (Line Items) and Purchasing approval (Header).

Configure Visibility Scenarios – ProcureToOrder (optional)

This visibility scenario gives an out of the box end-to-end visibility right from Purchase Requisition Line items approval to Purchase Requisition Header approval to Purchase Order approval and creation.

1. Go to Process Flexibility Cockpit
2. Select Purchase Requisition Approval and Release using SAP Workflow Management.
3. Click Visibility Scenarios and Select **ProcureToOrder**
4. This scenario gives an end-to-end visibility of Purchase Requisition line-item approvals, Purchase Requisition Header approvals and Purchase order creation all in one view

The screenshot displays the SAP Process Flexibility Cockpit interface for the 'ProcureToOrder' scenario. The title bar shows 'ProcureToOrder (com.sap.content.ProcureToOrder)' with 'Save' and 'Activate' buttons. The main area is divided into two panes. The left pane shows a process definition for 'InitializePurchaseRequisitionApprovalProcess' with its ID. The right pane, titled 'Event Name', lists various events in a table, each with an edit icon.

| Event Name |
|--|
| Start Event Started |
| PO Creation Created |
| PO Creation Completed |
| Confirm Lineltem Approval Reached |
| Confirm Lineltem Approval Triggered |
| Confirm Header Approval Reached |
| Confirm Header Approval Triggered |
| InitializePurchaseRequisitionApprovalProcess Cancelled |
| InitializePurchaseRequisitionApprovalProcess Suspended |
| InitializePurchaseRequisitionApprovalProcess Resumed |
| EndEvent2 Completed |
| End Event Completed |
| Get PO IDs Reached |
| Get PO IDs Triggered |

Access Process Workspace - ProcureToOrder

1. Go to Process Flexibility Cockpit
2. Select Purchase Requisition Approval and Release using SAP Workflow Management
3. Click Live Process Insights ProcureToOrder

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

