



SAP PO Workflow



SAP Knowledge Hub

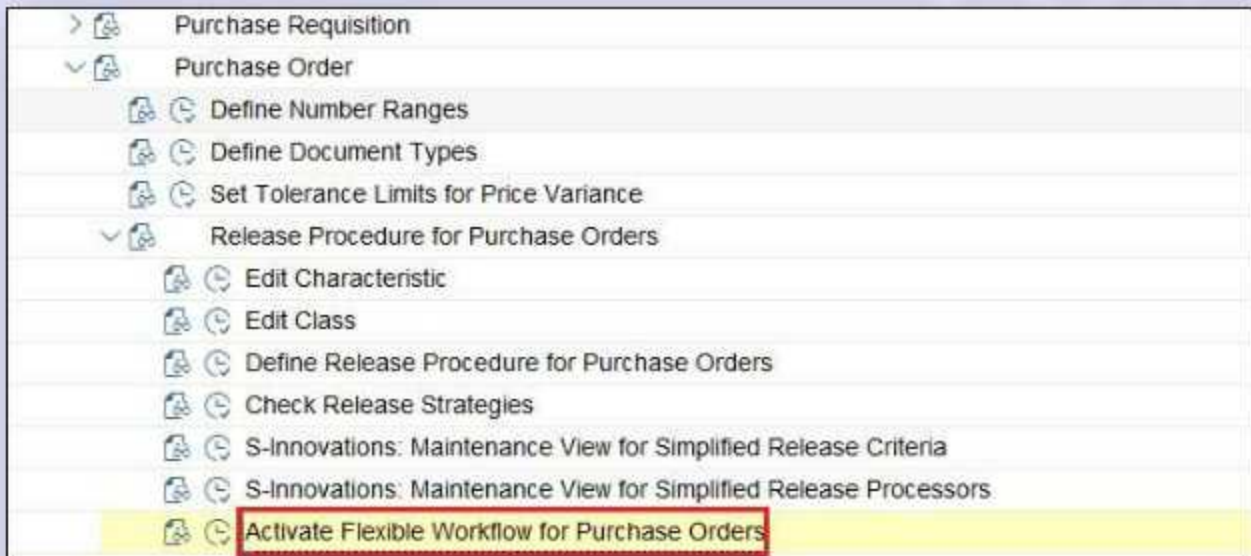
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Steps for Activation of Flexible Workflow

Go to SPRO → IMG → Materials Management → Purchasing → Purchase Order → Release Procedure for Purchase Orders → Activate Flexible Workflow for Purchase Orders



- Based on document type we can activate flexible workflow. Here we have selected document type NB. For other document types we can have classic release strategy.
- Save the changes and TR will be generated.

<input type="checkbox"/>	Type	Doc. Type Descript.	Scenario based workflow
<input type="checkbox"/>	NB	Standard Purch Order	<input checked="" type="checkbox"/>
<input type="checkbox"/>	NB2	Enh.Ret.to Supplier	<input type="checkbox"/>
<input type="checkbox"/>	NB2C	Enh. Rets STO CC	<input type="checkbox"/>
<input type="checkbox"/>	NBXE	XLO Inter Com PO	<input type="checkbox"/>
<input type="checkbox"/>	NBXI	XLO Intra Company	<input type="checkbox"/>
<input type="checkbox"/>	TST	Test Doc Type PO	<input type="checkbox"/>
<input type="checkbox"/>	UB	Stock Transp. Order	<input type="checkbox"/>
<input type="checkbox"/>	UB2	Enh. Rets STO IC	<input type="checkbox"/>
<input type="checkbox"/>	UD	StockTranspOrderDel	<input type="checkbox"/>

Note: I am using copied version of NB document that is RNB

Logon to your Fiori launchpad and open Manage Workflows for Purchase orders App.

- Go to app finder search for app

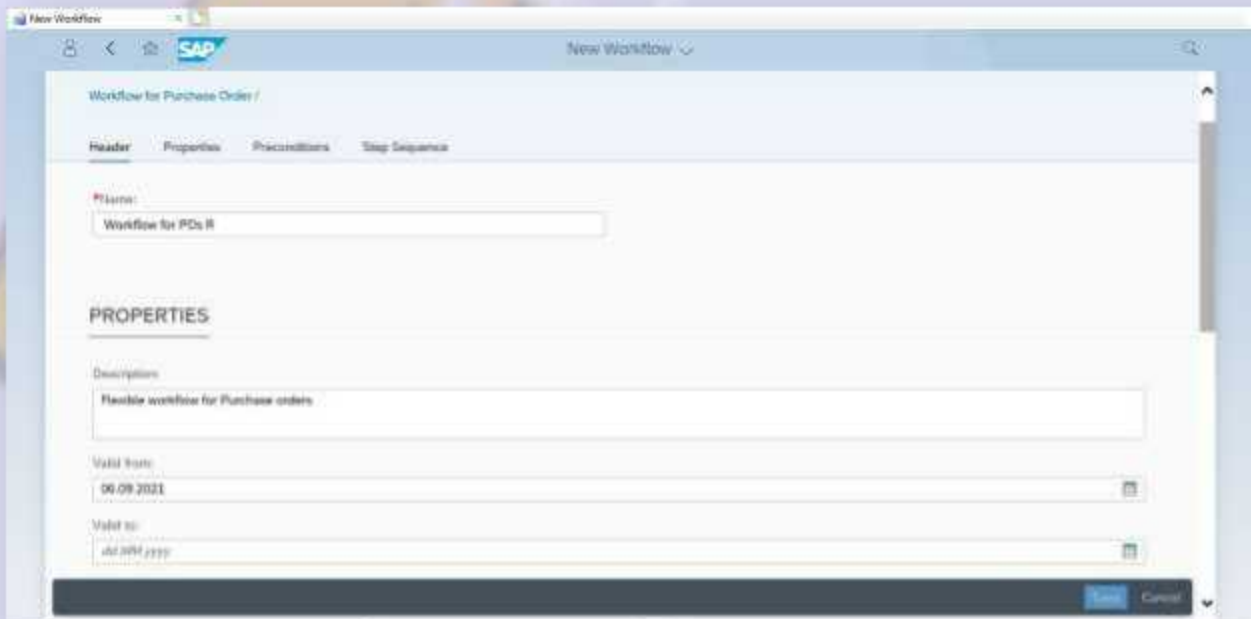


Once the App opened select Add to create new workflow.



Name	Order	Status	Valid from	Valid to
Automatic Release of Purchase Order	0	Inactive		

Give a name and description to workflow. Even you can specify validity period (Optional).



Workflow for Purchase Order /

Header Properties Preconditions Step Sequence

Name: Workflow for POs R

PROPERTIES

Description: Flexible workflow for Purchase orders

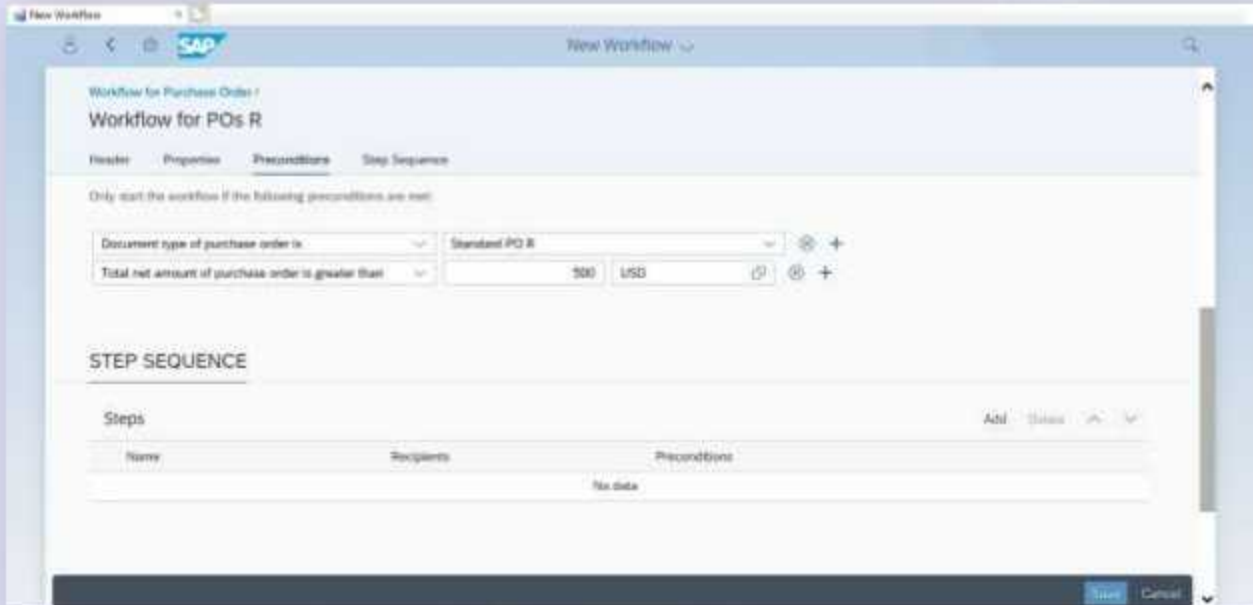
Valid from: 06.09.2021

Valid to: 31.12.9999

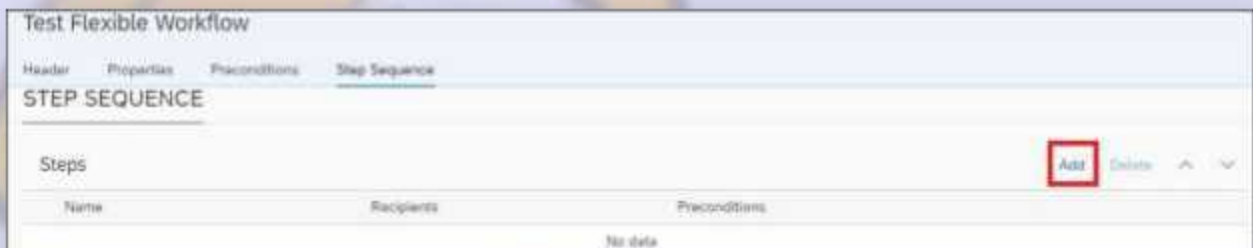
Save Cancel

Now select Preconditions Tab and choose predefined conditions from drop down as per requirement.

- We can add one or more conditions and once these conditions met workflow will be triggered or it will be release automatically.
- select + button to add new condition.



- Select Step Sequence and choose Add to maintain Person responsible for approval and other conditions.



- From drop down select Release of Purchase Order.

Workflow for Purchase Order / Test Flexible Workflow /

Automatic Release of Purchase Order

Header Recipients Preconditions Exception Handling

Name:

Optional. If you do not enter a name, the step type is used.

Type:

Automatic Release of Purchase Order

Automatic Release of Purchase Order

Release of Purchase Order

- Here Assignment can be either by Role/ User. Now selecting User.



Workflow for Purchase Order / Test Flexible Workflow /

Release of Purchase Order

Header Recipients Preconditions Exception Handling

RECIPIENTS

Assignment By:

Role ▼

Role

User

Step to be completed by:

- One of the recipients
- All of the recipients

- To make Used ID visible, responsible person should be created as Employee (PA30) and synchronized with Business partner.
- Now select person responsible from list available.

Items			
<input type="checkbox"/>	User ID	Full Name	Employee ID
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>	SANDEEPREDD	Mr sandeep Reddy	00000003

- As we already maintained conditions this step can be optional.

PRECONDITIONS

Only start the step if the following preconditions have been met:

(None) ⊗ +

- Now Choose Add and then Save.
- Go to starting screen, select the saved Workflow and Activate it. Until it is Active state workflow will not get triggered.

Edit Activate Copy Delete

- If we have multiple workflows we can even define the Order.
- ****Workflow once activated can only be deactivated/deleted, no way to Edit.**

Test Flexible Workflow 1 Active

- We have successfully activated Flexible workflow for Purchase Order, now lets Test the same.

2. Testing of Flexible Workflow and Approval Process:


Now let's create a purchase order which satisfies the given conditions of workflow. we have selected below two conditions;

1. Document Type: NB (Standard PO)
2. Total Net Amount of PO > 500 USD

Vendor: Org. Date:
 Delivery Invoice Conditions Texts Address Communication Partners Additional Data Org. Data Status Payment Processing IncoTerms Flex...
 Net

 Standard Purch Order created under the number

- If Purchase order status is seen, it shows in Approval.

 Purchase order is in approval. You can only display it, not edit it.

- Approval details can be seen at Header Level, Flexible workflow Tab.

Address Communication Partners Additional Data Org. Data Status Payment Processing IncoTerms Flexible Workflow NF Default Values

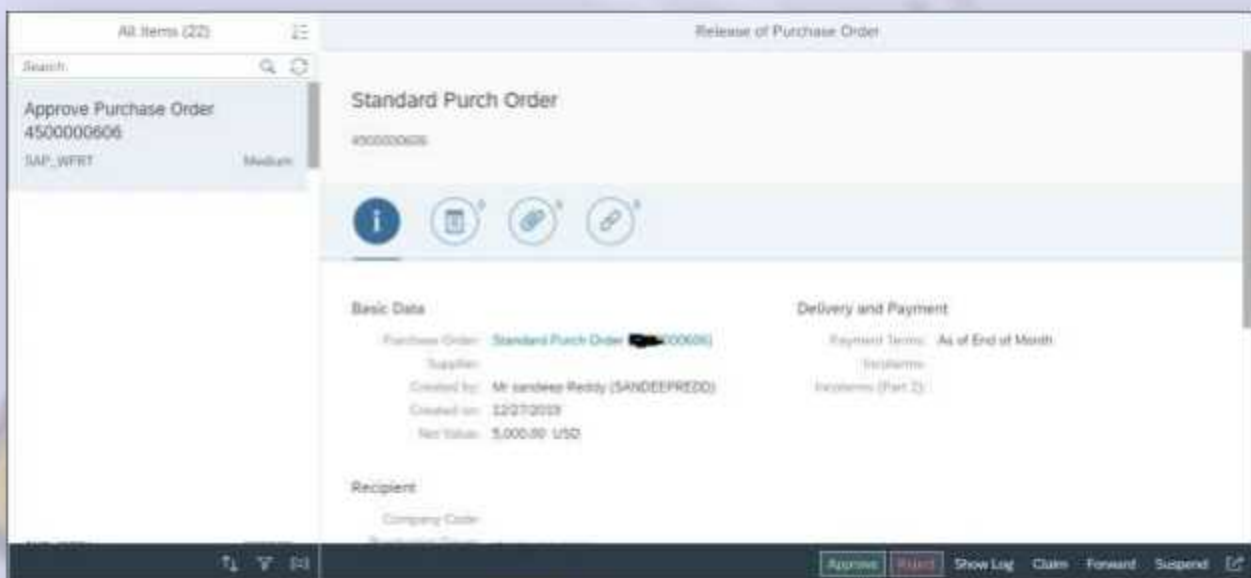
Approval Steps

Type Name	Status	Processors	Recipients
Release of Purchase Order	0%	Mr sandeep Reddy	Mr sandeep Reddy

- Now go to My Inbox App.



- We can see the Purchase order which satisfied given conditions is waiting for Approval.
- Here the responsible person can Approve, Reject and Forward the PO.



- To forward the PO for approval, select the other user from list.

Forward

Search 🔍

Mr. [Name] ✎

- While Approving you can give your comments and submit.

Submit Decision

You have selected "Approve".

Approved |

Submit
Cancel

- We have Successfully Activated and Tested the Flexible Workflow for Purchase Orders.
- The Same procedure can also be used to Activate Flexible workflow for Purchase requisition, Contracts, supplier Quotations and Scheduling Agreements.

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