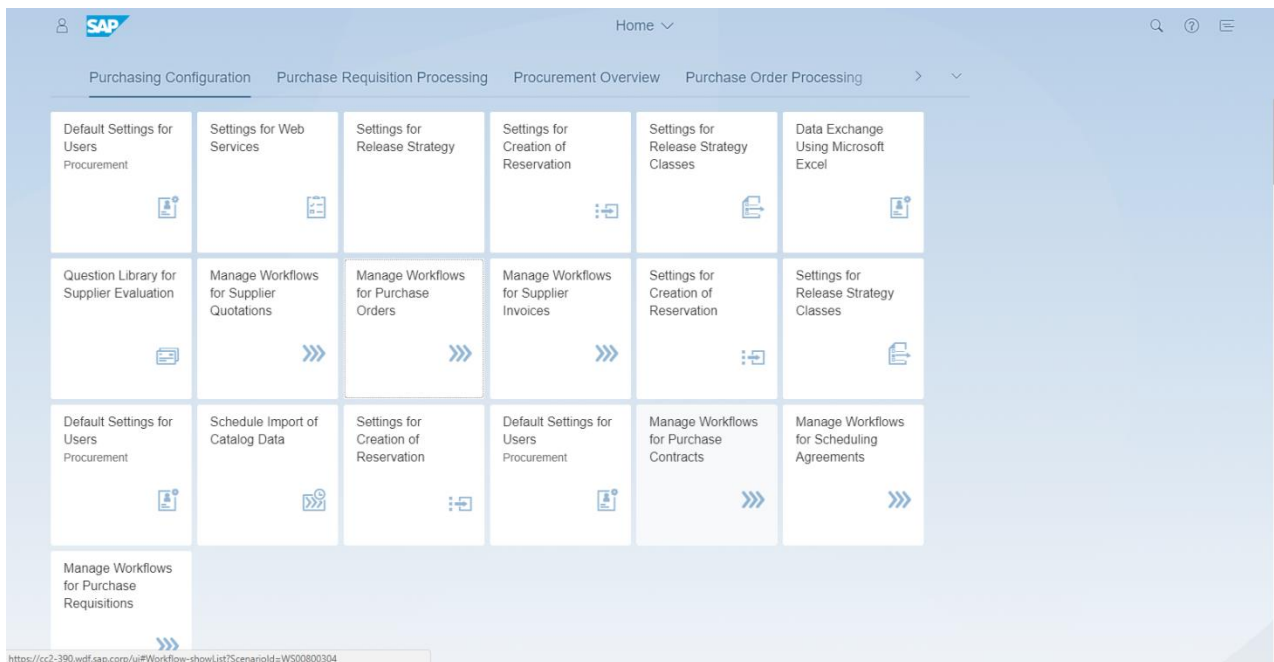





Configuring Flexible Workflows for Purchase Orders

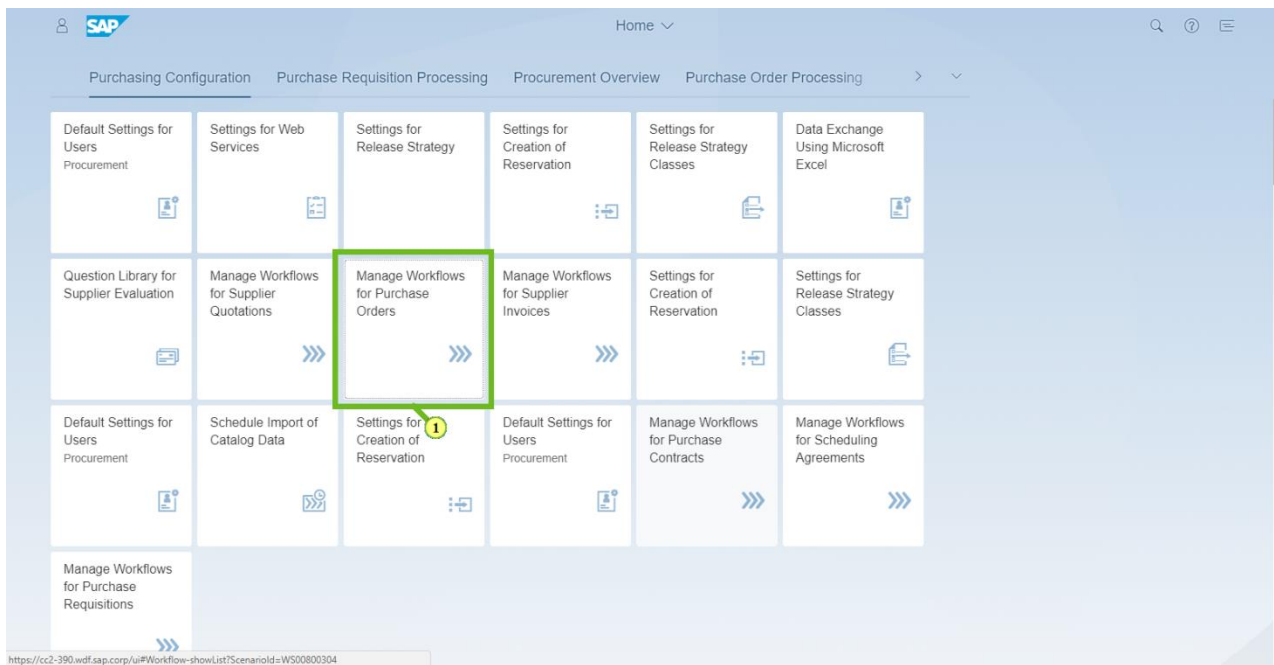
CONFIGURING FLEXIBLE WORKFLOWS FOR PURCHASE ORDERS





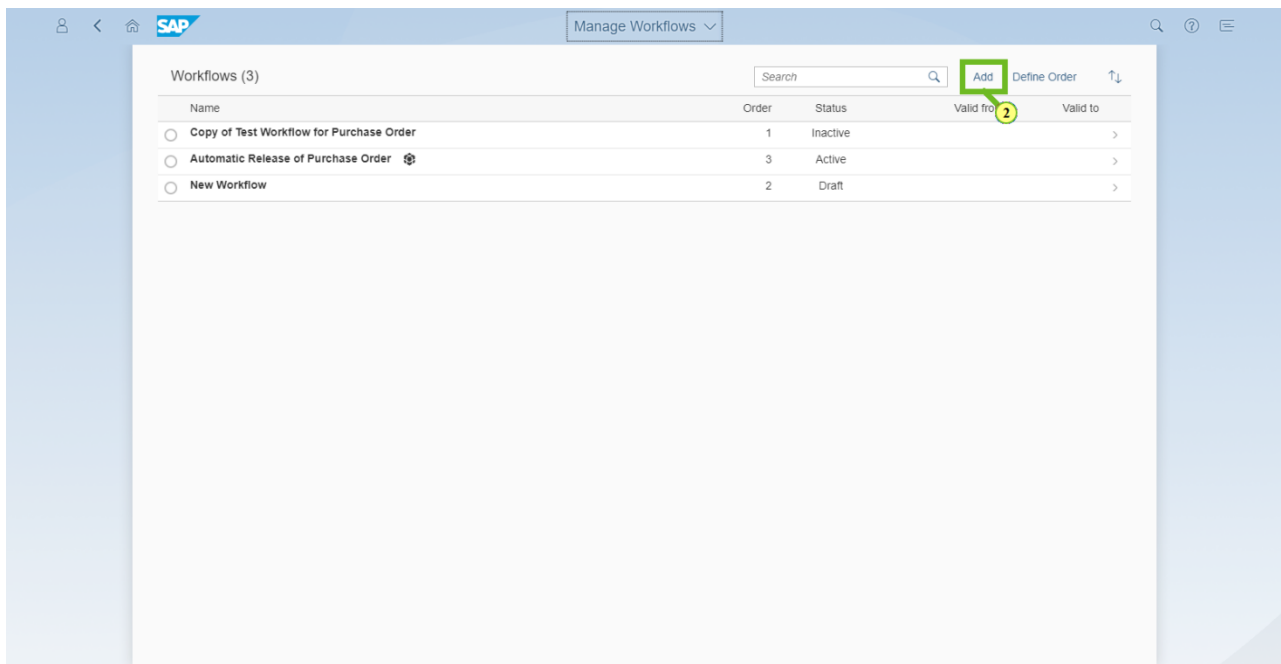
Would you like to know more about how a purchaser configures a flexible workflow for purchase Orders?

If so, follow this interactive tutorial.

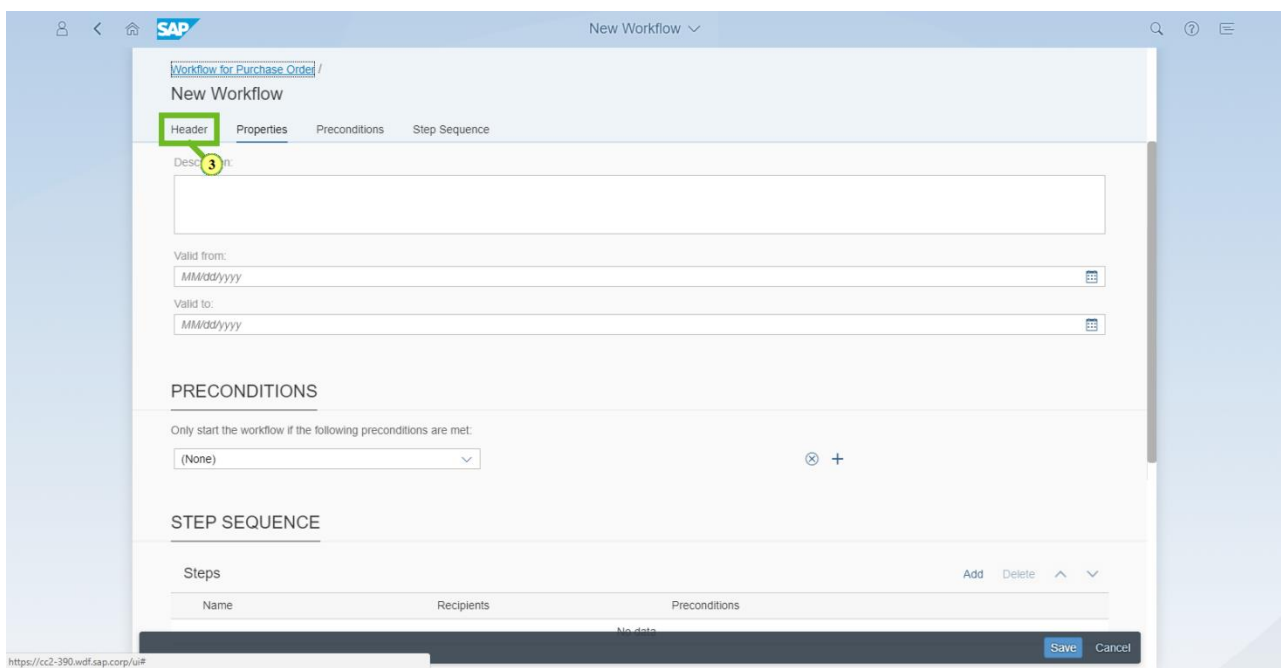


(1) To open the app, select the *Manage Workflows for Purchase Orders* tile.

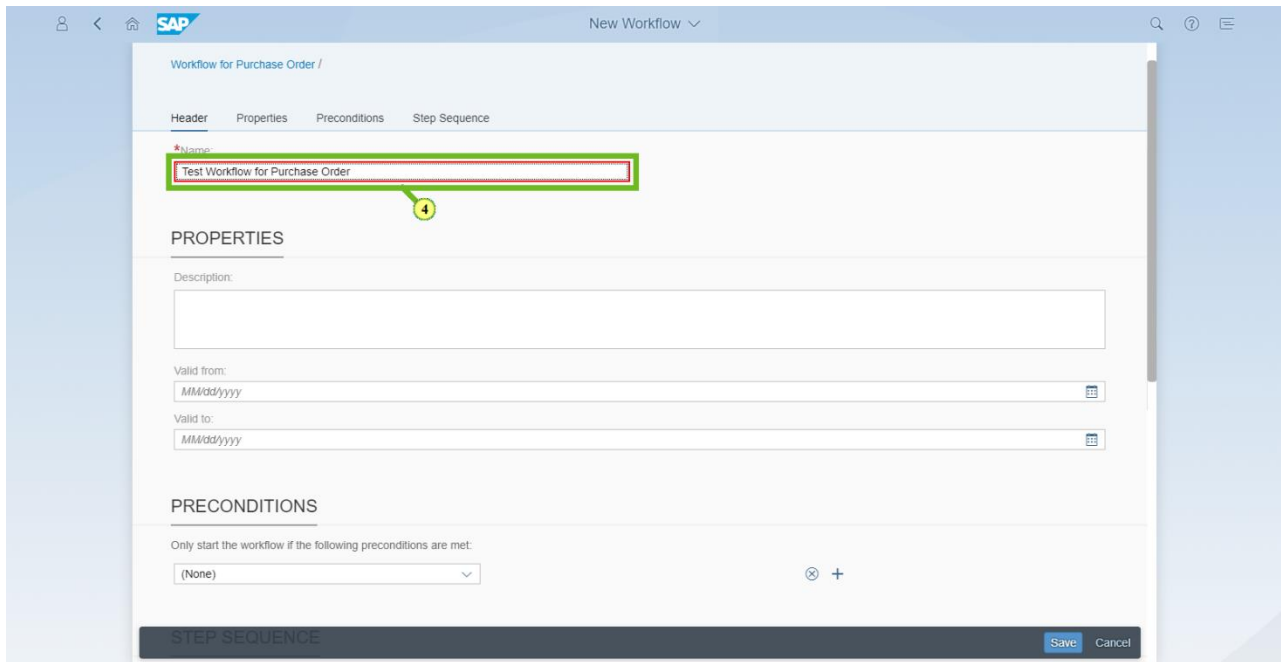
CONFIGURING FLEXIBLE WORKFLOWS FOR PURCHASE ORDERS



(2) Choose *Add*.



(3) Choose *Header*.



Workflow for Purchase Order /

Header Properties Preconditions Step Sequence

*Name:
Test Workflow for Purchase Order

PROPERTIES

Description:

Valid from:
MM/dd/yyyy

Valid to:
MM/dd/yyyy

PRECONDITIONS

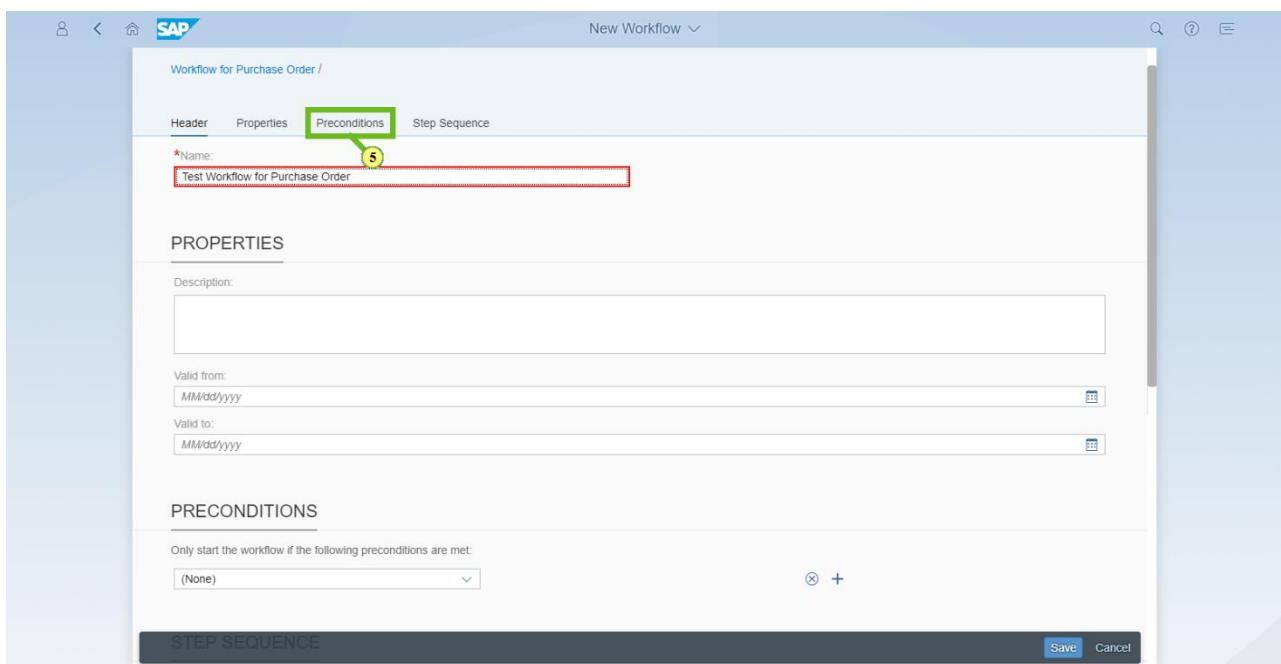
Only start the workflow if the following preconditions are met:

(None)

STEP SEQUENCE

Save Cancel

(4) In the *Name* field, enter **Test Workflow for Purchase Order** and press Enter.



Workflow for Purchase Order /

Header Properties Preconditions Step Sequence

*Name:
Test Workflow for Purchase Order

PROPERTIES

Description:

Valid from:
MM/dd/yyyy

Valid to:
MM/dd/yyyy

PRECONDITIONS

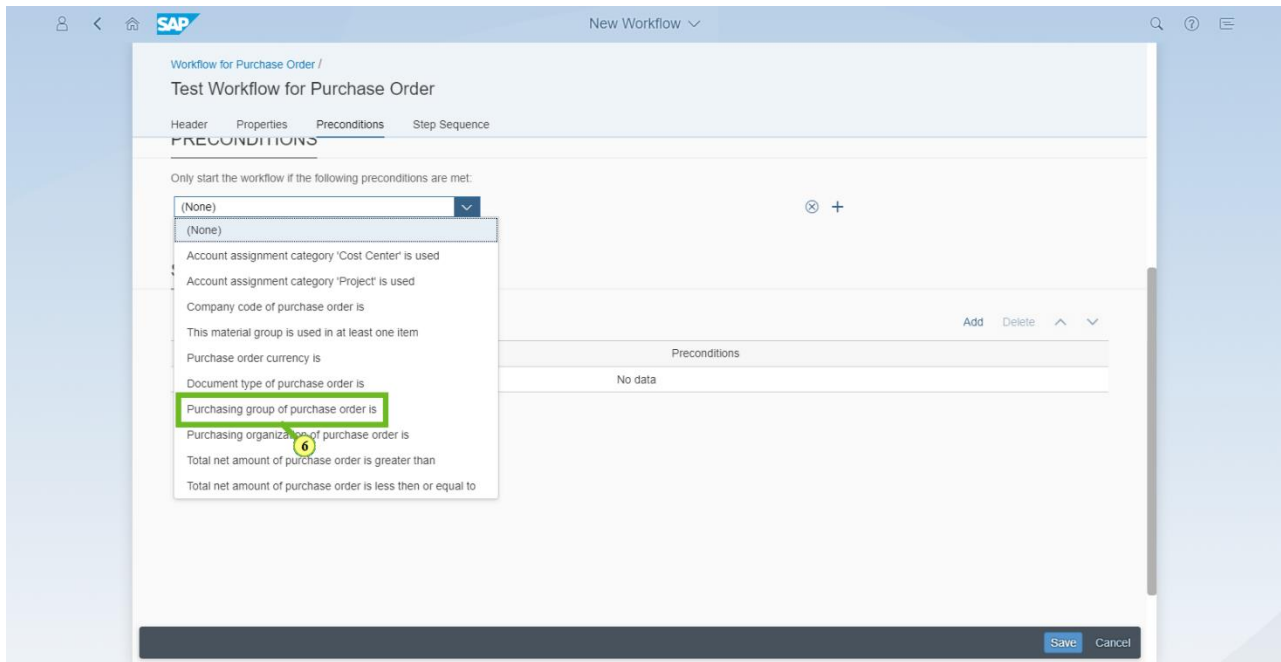
Only start the workflow if the following preconditions are met:

(None)

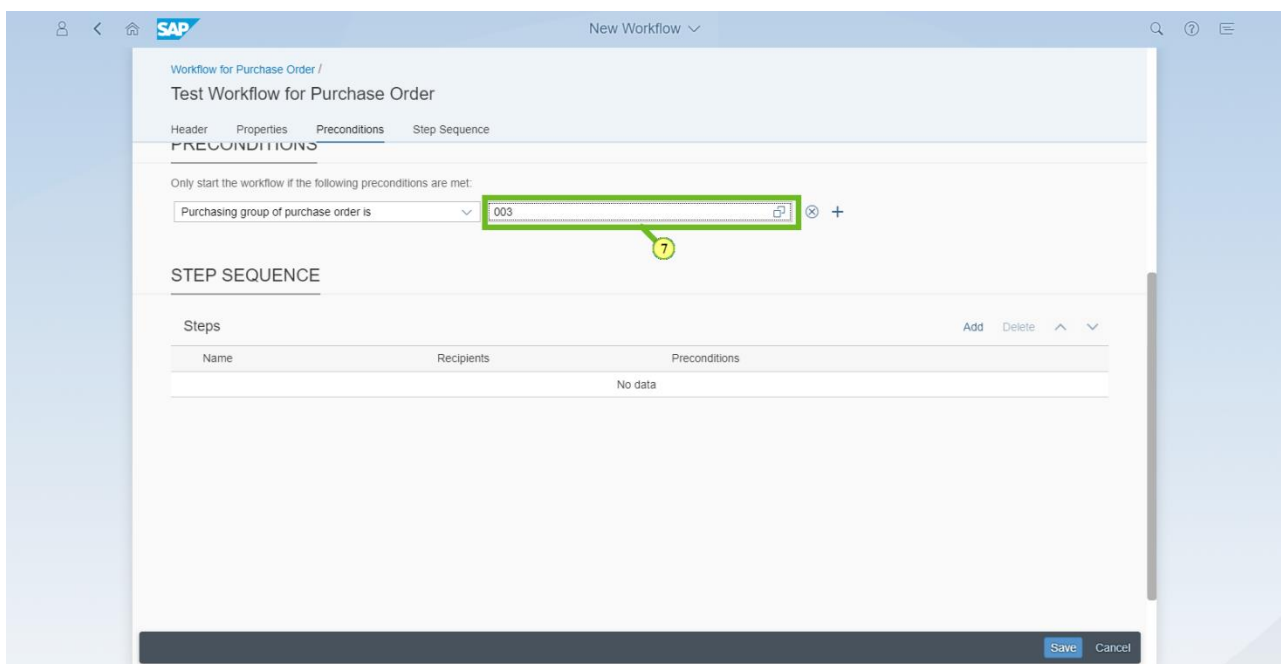
STEP SEQUENCE

Save Cancel

(5) Choose *Preconditions*.



(6) Open the list and select *Purchasing Group of purchase order is*.



(7) In the *PurchasingGroup* field enter **003**.

CONFIGURING FLEXIBLE WORKFLOWS FOR PURCHASE ORDERS

Workflow for Purchase Order /
Test Workflow for Purchase Order

Header Properties Preconditions Step Sequence

PRECONDITIONS

Only start the workflow if the following preconditions are met:

Purchasing group of purchase order is 003

Purcha	Purchasing Grp Name	Tel no. purch. group	Telephone	Extension	Fax number	Email Address
003	Group 003	770 840 9421	331	1	770 840 9000	a

STEP SEQUENCE

Steps

Name	Recipients	Preconditions
No data		

Add Delete ^ v

Save Cancel

(8) Choose *003 Group 003*.

Workflow for Purchase Order /
Test Workflow for Purchase Order

Header Properties Preconditions Step Sequence

PRECONDITIONS

Only start the workflow if the following preconditions are met:

Purchasing group of purchase order is 003

STEP SEQUENCE

Steps

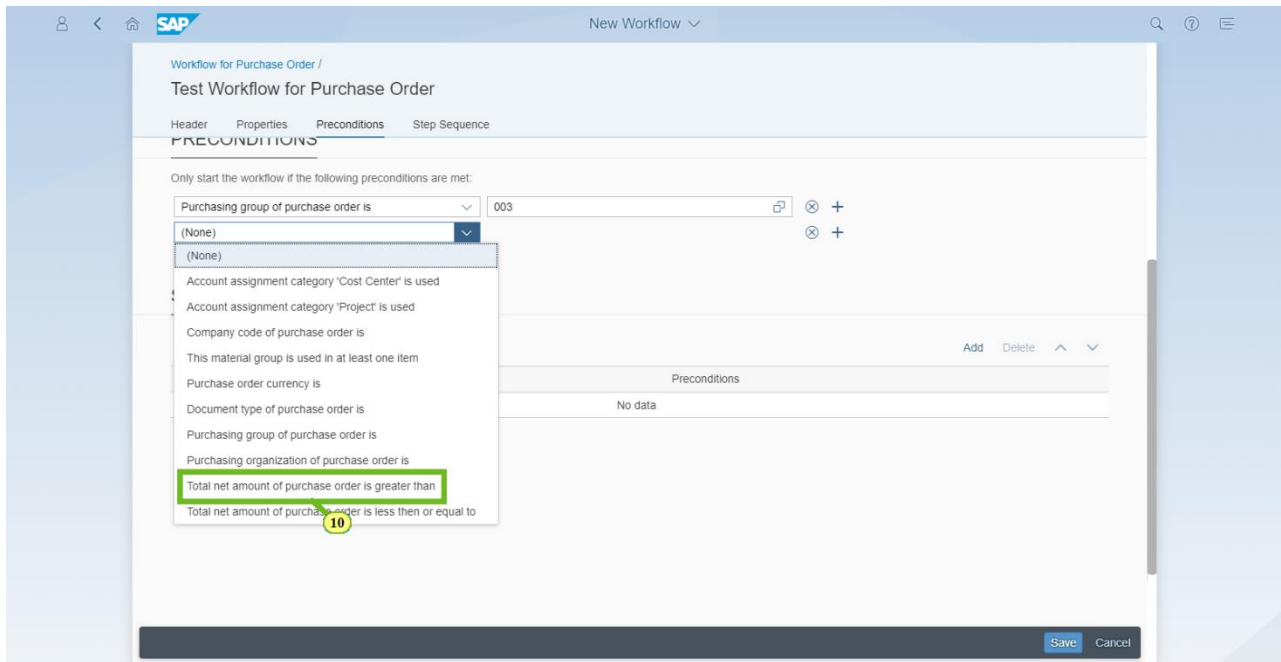
Name	Recipients	Preconditions
No data		

Add Delete ^ v

Save Cancel

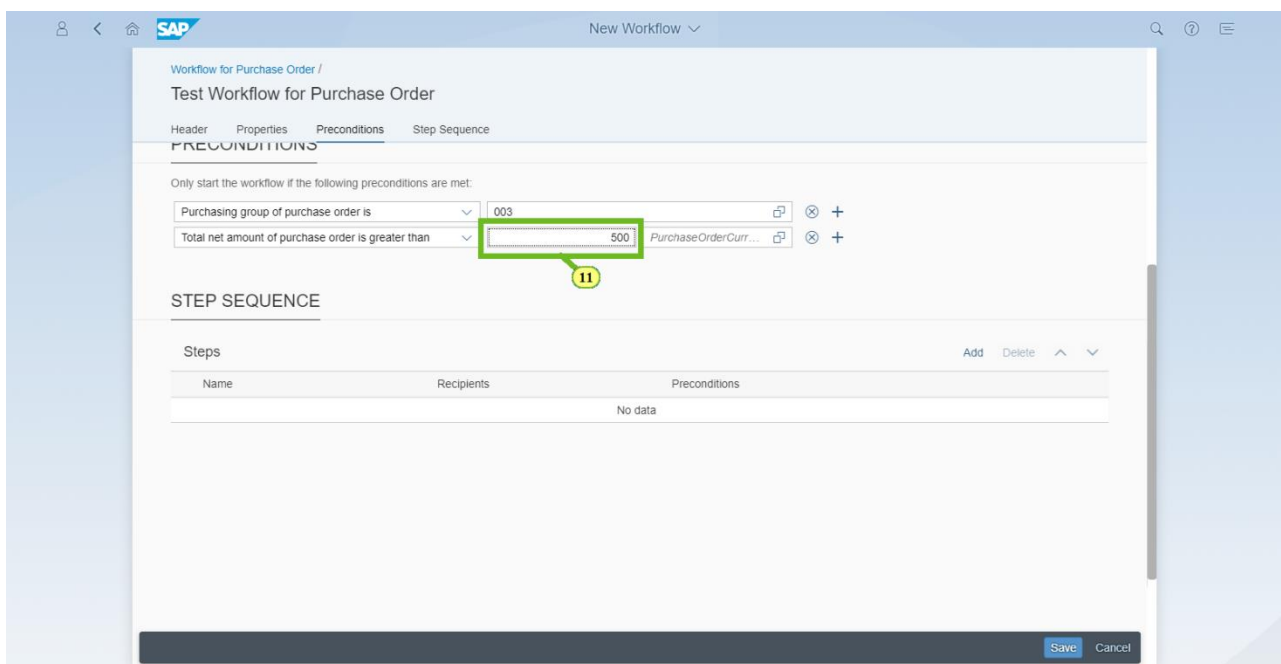
(9) Choose *Add*.

CONFIGURING FLEXIBLE WORKFLOWS FOR PURCHASE ORDERS



The screenshot shows the 'Preconditions' tab in the SAP Workflow Configuration interface. The title is 'Test Workflow for Purchase Order'. Below the title are tabs for 'Header', 'Properties', 'Preconditions', and 'Step Sequence'. The 'Preconditions' section states: 'Only start the workflow if the following preconditions are met:'. A dropdown menu is open for the 'Purchasing group of purchase order is' field, which currently has the value '003'. The dropdown list contains several options, with 'Total net amount of purchase order is greater than' highlighted by a green box and a yellow callout bubble labeled '10'. Other options in the list include '(None)', 'Account assignment category 'Cost Center' is used', 'Account assignment category 'Project' is used', 'Company code of purchase order is', 'This material group is used in at least one item', 'Purchase order currency is', 'Document type of purchase order is', 'Purchasing organization of purchase order is', and 'Total net amount of purchase order is less then or equal to'. The 'Preconditions' table below the list is empty, showing 'No data'. At the bottom right are 'Save' and 'Cancel' buttons.

(10) Open the list and select *Total net amount of purchase order is greater than*.



The screenshot shows the 'Step Sequence' tab in the SAP Workflow Configuration interface. The title is 'Test Workflow for Purchase Order'. Below the title are tabs for 'Header', 'Properties', 'Preconditions', and 'Step Sequence'. The 'Step Sequence' section states: 'Only start the workflow if the following preconditions are met:'. A dropdown menu is open for the 'Total net amount of purchase order is greater than' field, which currently has the value '500'. The dropdown list contains several options, with 'Total net amount of purchase order is greater than' highlighted by a green box and a yellow callout bubble labeled '11'. Other options in the list include '(None)', 'Account assignment category 'Cost Center' is used', 'Account assignment category 'Project' is used', 'Company code of purchase order is', 'This material group is used in at least one item', 'Purchase order currency is', 'Document type of purchase order is', 'Purchasing organization of purchase order is', and 'Total net amount of purchase order is less then or equal to'. The 'Step Sequence' table below the list is empty, showing 'No data'. At the bottom right are 'Save' and 'Cancel' buttons.

(11) In the *PurchaseOrderTotalNet* field enter **500**.

CONFIGURING FLEXIBLE WORKFLOWS FOR PURCHASE ORDERS

The screenshot shows the 'Preconditions' tab of the 'Test Workflow for Purchase Order' configuration. Two preconditions are listed:

- Purchasing group of purchase order is 003
- Total net amount of purchase order is greater than 500

The second precondition is selected, and a dropdown menu is open showing 'PurchaseOrderCurr...' as the selected option. A yellow callout bubble with the number 12 points to this dropdown.

Below the preconditions is the 'STEP SEQUENCE' section, which is currently empty. At the bottom right, there are 'Save' and 'Cancel' buttons.

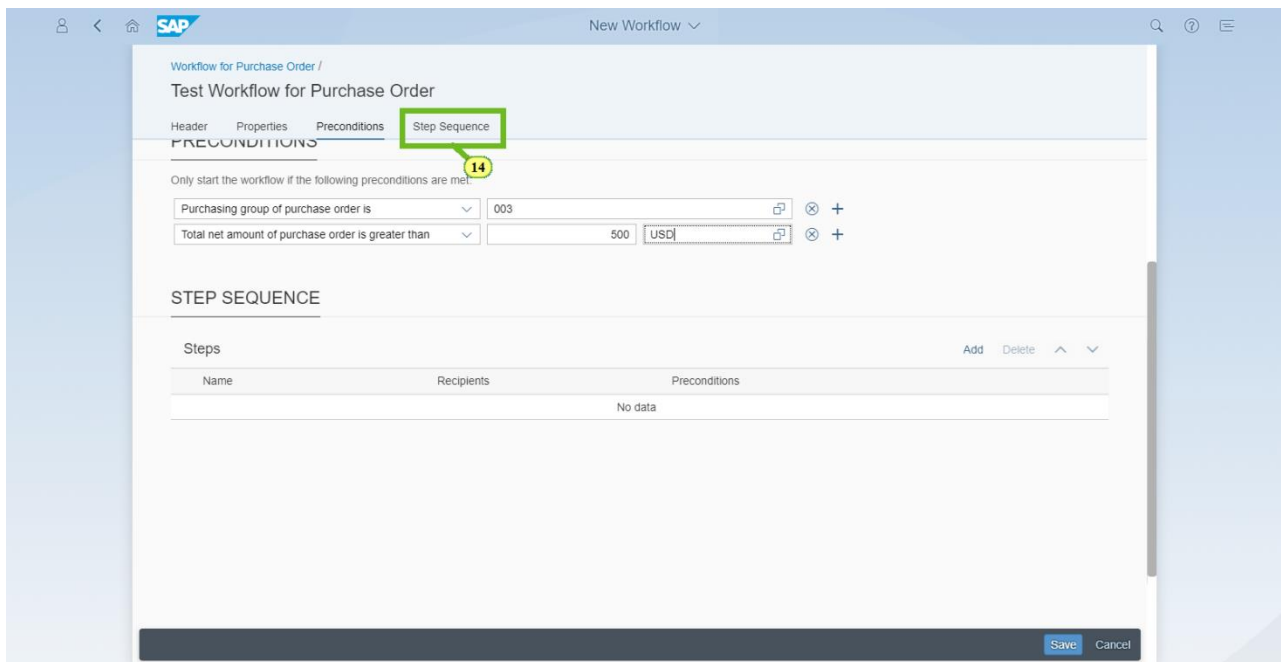
(12) In the *PurchaseOrderCurr* field, enter **USD**.

This screenshot shows the same configuration as the previous one, but with the 'PurchaseOrderCurr...' dropdown menu expanded. The 'USD' option is selected, and a yellow callout bubble with the number 13 points to it. The dropdown menu shows the following details for 'USD':

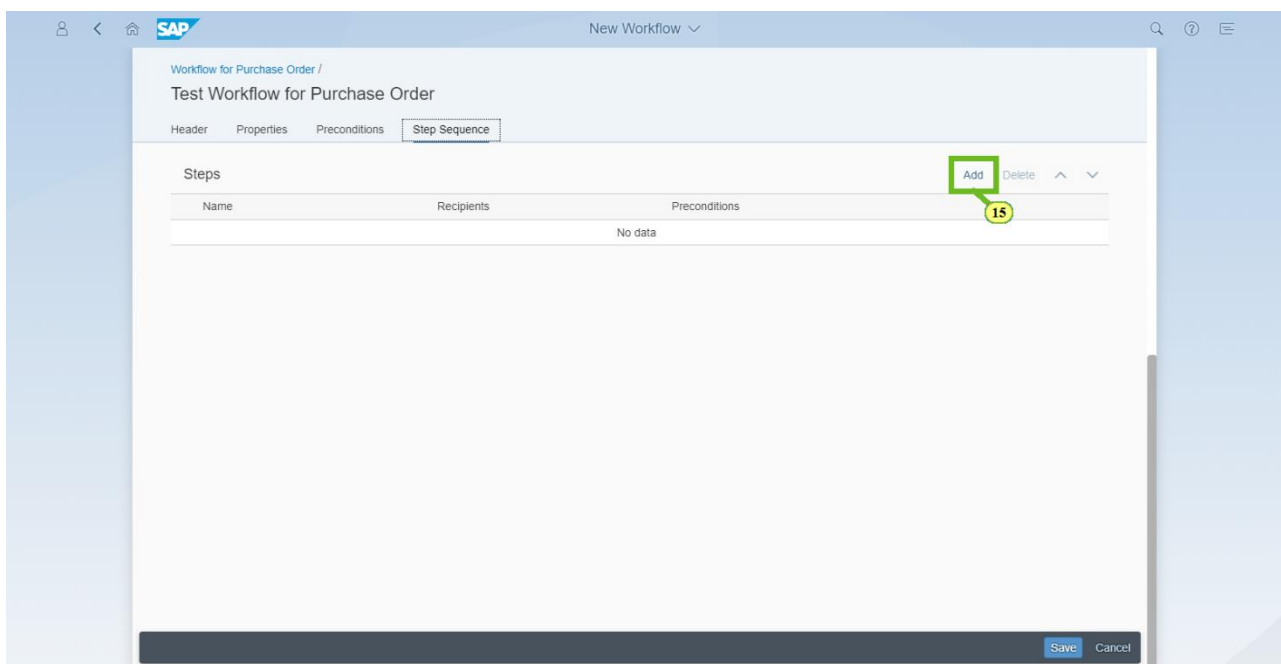
Currency	Long Text	Decimals	ISO 4217	Altern	Prim
USD	United States Dollar	2	USD	840	No

The 'STEP SEQUENCE' section remains empty. 'Save' and 'Cancel' buttons are at the bottom right.

(13) Select *USD*.



(14) Choose *Step Sequence*.



(15) Choose *Add*.

The screenshot shows the 'New Step' configuration window in SAP. The title bar indicates 'Workflow for Purchase Order / Test Workflow for Purchase Order /'. The main heading is 'Automatic Release of Purchase Order'. Below this, there are tabs for 'Header', 'Recipients', 'Preconditions', and 'Exception Handling'. The 'Header' tab is active, showing fields for 'Name' (with a hint: 'Optional. If you do not enter a name, the step type is used.') and 'Type'. The 'Type' dropdown menu is open, showing a list of options: 'Automatic Release of Purchase Order', 'Automatic Release of Purchase Order', and 'Release of Purchase Order'. The third option, 'Release of Purchase Order', is highlighted with a green box and a yellow circle containing the number 16. Below the 'Type' field, it says 'The recipients are determined automatically.' The 'PRECONDITIONS' section shows a dropdown set to '(None)' with a hint: 'Only start the step if the following preconditions have been met:'. The 'EXCEPTION HANDLING' section shows 'No business exceptions available.' At the bottom right, there are 'Add' and 'Cancel' buttons.

(16) Open the list and select *Release of Purchase Order*.

The screenshot shows the 'New Step' configuration window in SAP, now with the title 'Release of Purchase Order'. The 'Type' dropdown is set to 'Release of Purchase Order'. The 'Recipients' tab is active, showing the 'Assignment By:' section. The 'Role:' dropdown is open, showing a list of roles: 'Agent Determination by Customization', 'Agent Determination by Customization', 'Manager of Last Approver', 'Manager of Workflow Initiator', 'Manager of Workflow Initiator's Manager', 'Person Responsible for Cost Center with Highest Debit', and 'Person Responsible for Project with Highest Debit'. The fourth option, 'Manager of Workflow Initiator', is highlighted with a green box and a yellow circle containing the number 17. Below the 'Role' field, there is a 'PRECONDITIONS' section with a hint: 'Only start the step if the following preconditions have been met:'. At the bottom right, there are 'Add' and 'Cancel' buttons.

(17) Open the list and select *Manager of Workflow Initiator*.

New Step

Workflow for Purchase Order / Test Workflow for Purchase Order /

Release of Purchase Order

Header Recipients Preconditions Exception Handling

Name:

Type:

RECIPIENTS

Assignment By:

☒ Role:

☐ User:

Step to be completed by:

☒ One of the recipients

☐ All of the recipients

PRECONDITIONS

18

(18) Choose *Add*.

New Workflow

Workflow for Purchase Order /

Test Workflow for Purchase Order

Header Properties Preconditions Step Sequence

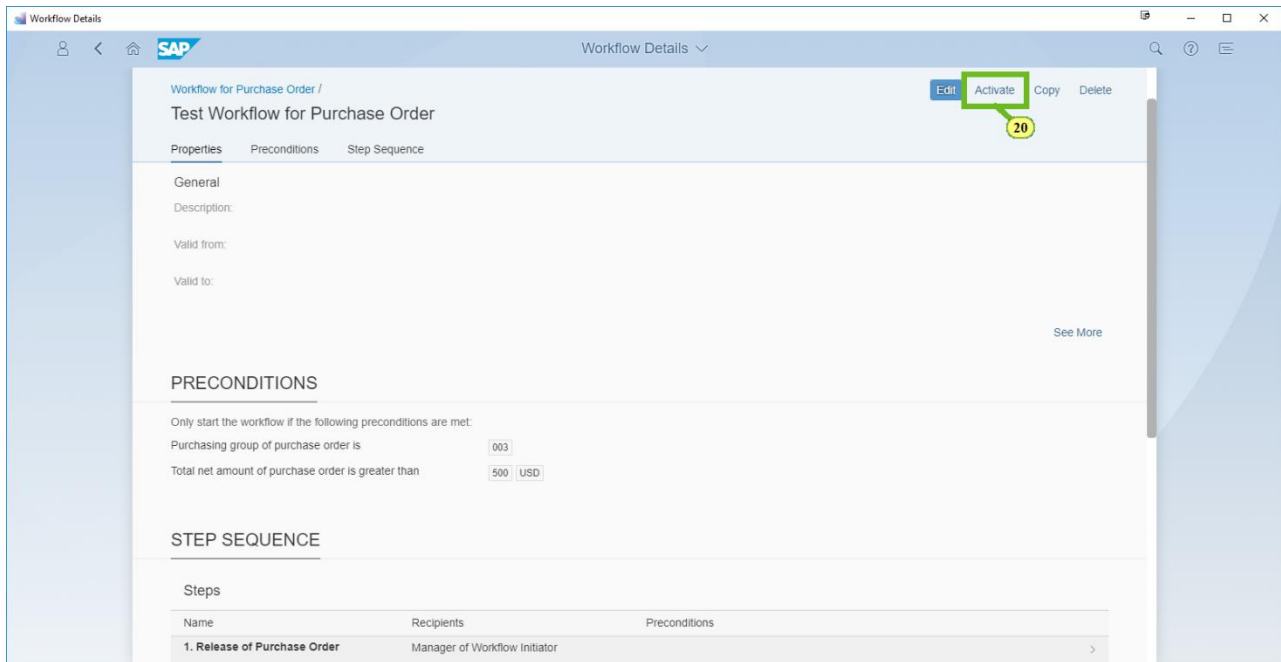
Steps

Name	Recipients	Preconditions
1. Release of Purchase Order	Manager of Workflow Initiator	

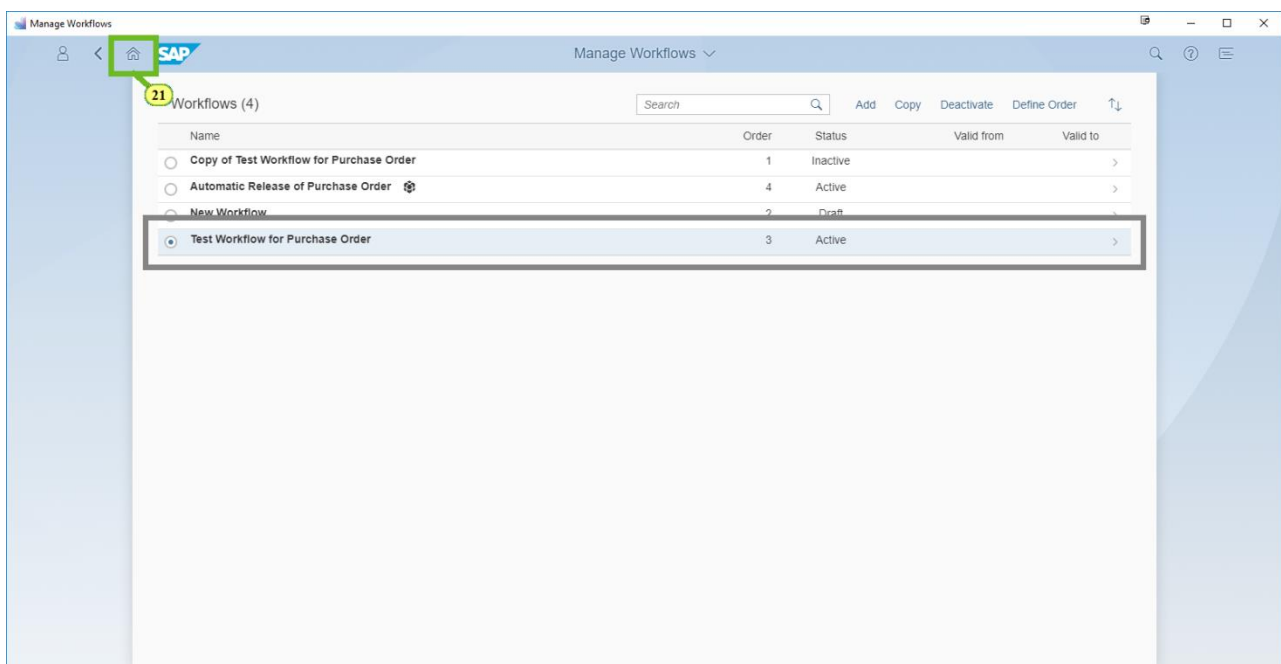
^ v

19

(19) Choose *Save*.

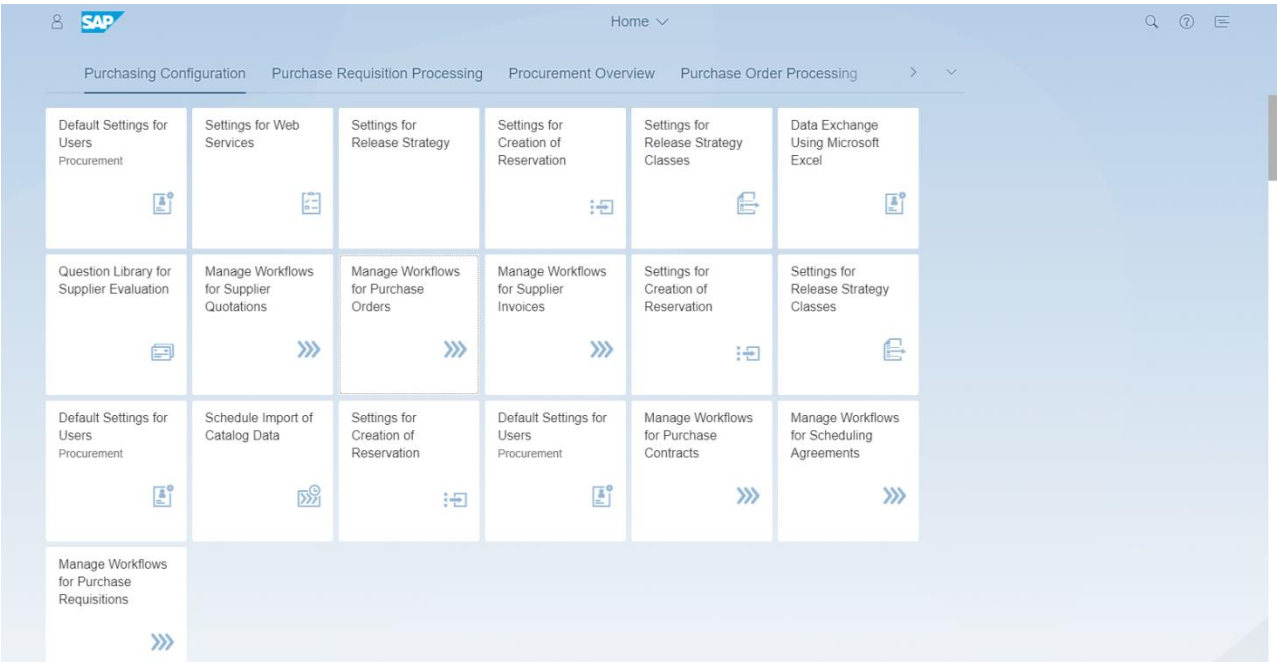



(20) Choose *Activate*.



(21) Here you have activated the the Test Workflow for a Purchase Order.

To return to the launchpad, choose *Home*.





You have successfully configured flexible workflows for a purchase order.

This concludes the interactive tutorial.