Purchase Requisition Release Strategy

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PR Release Strategy (Business)

What is a Purchase Requisition?

Usage: A Purchase Requisition (PR) is an internal document used in organizations to request the procurement department to purchase goods or services. It's a key step before creating a Purchase Order (PO).

Purpose: PRs serve to formally request needed items or services, initiate the procurement process, and ensure that the request is justified and aligned with the business needs.

Role of Release Strategy in PR:

The release strategy for PR involves defining specific criteria and approval processes that a PR must undergo before it can be processed further. This includes the following:

Approval Levels: Based on the value, material type, or department, different levels of approval may be required.

Controlled Procurement: Ensures that only necessary and budget-approved requisitions are processed, reducing wasteful spending.

Compliance and Governance: Adheres to company policies and regulatory requirements, minimizing risks of non-compliance.

Business Benefits:

Cost Management: The company can manage costs effectively and prevent unauthorized expenditures by ensuring that each PR is reviewed and approved by appropriate authorities.

Process Efficiency: This strategy streamlines the procurement process by setting clear guidelines on who needs to approve PRs, reducing procurement delays.

Strategic Procurement: Encourages strategic thinking about procurement needs, prioritizing requisitions based on company strategies and goals.

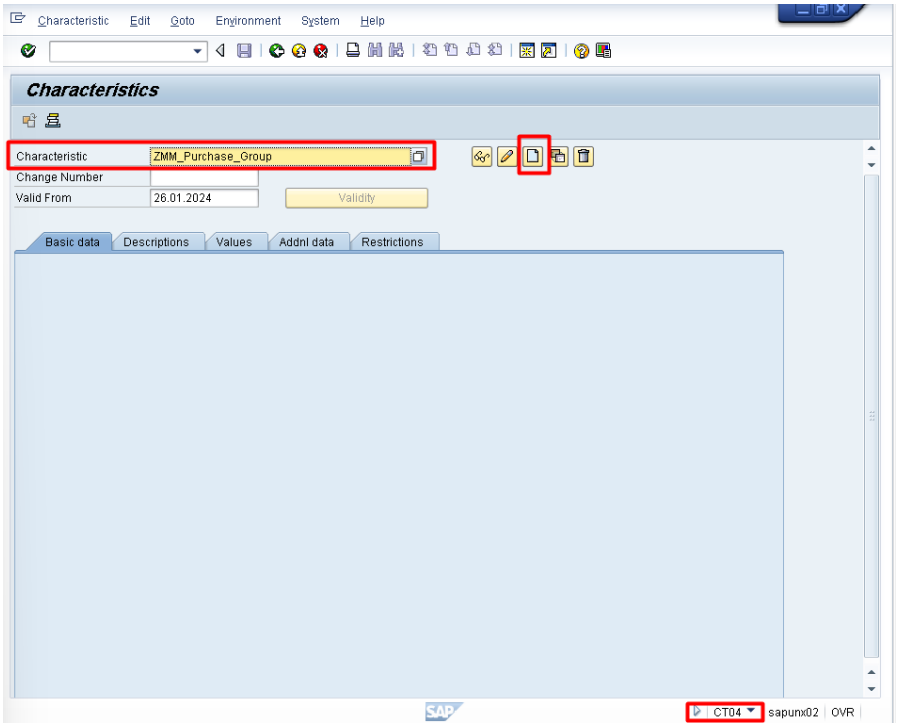
PR Release Strategy on the line-item level (Purchase Group)

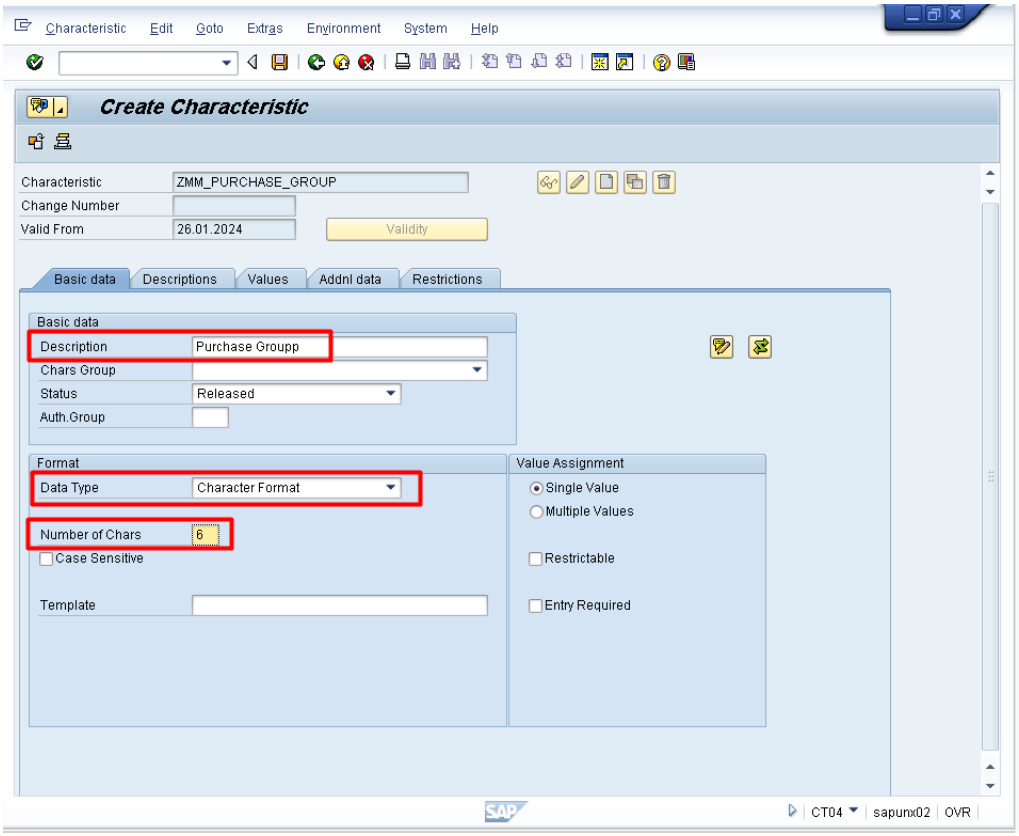
Spro ➔ Material Management ➔ Purchasing ➔ PR ➔ Release Strategy ➔ Procedure with Classification ➔ Edit Characteristics (CT04)

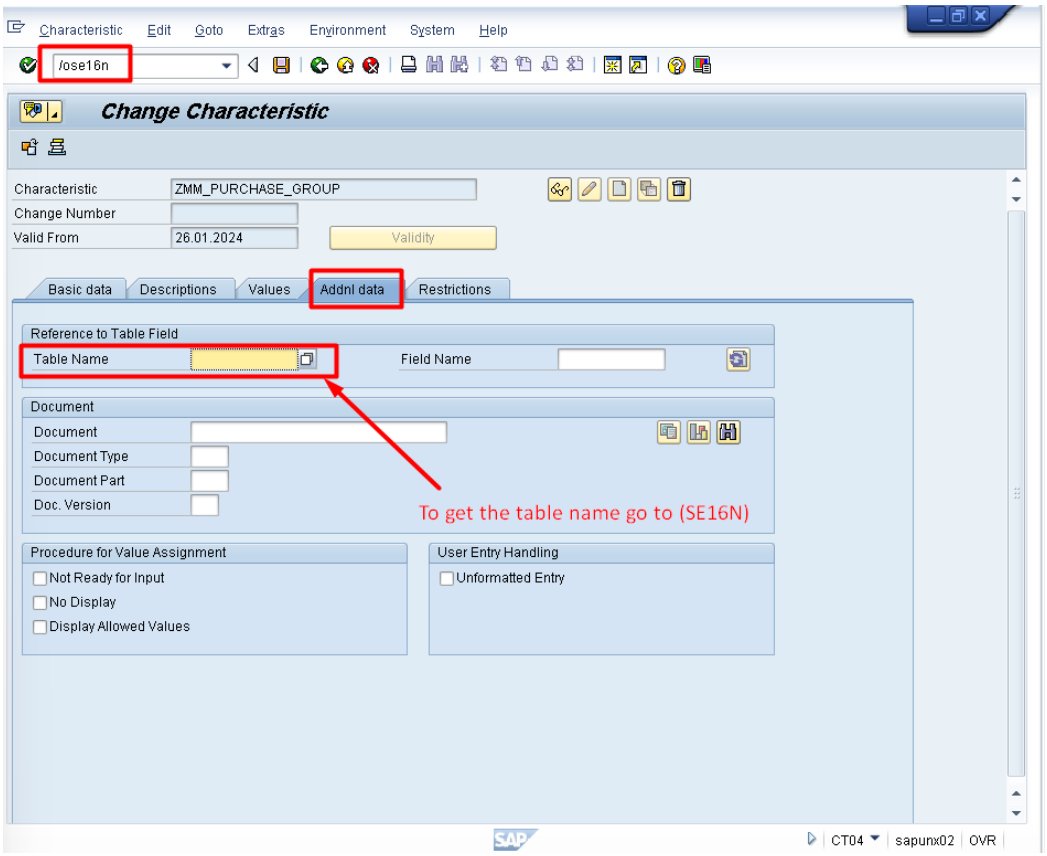
1st Master Data (characteristics & Class)

(We create the Chars. To assign it to the Class to be created and assign the release strategy to be created to the Class that contains the chars.)

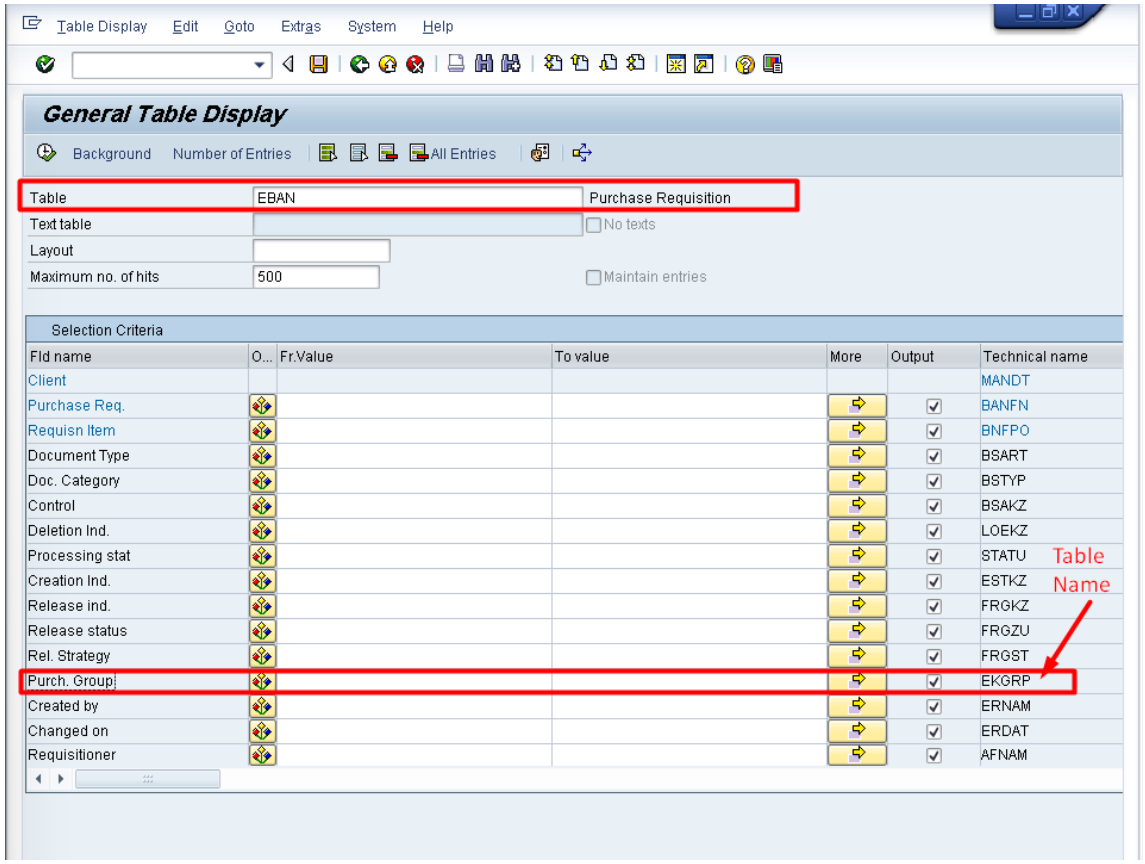
- Create characteristics >> T-Code "CT02"

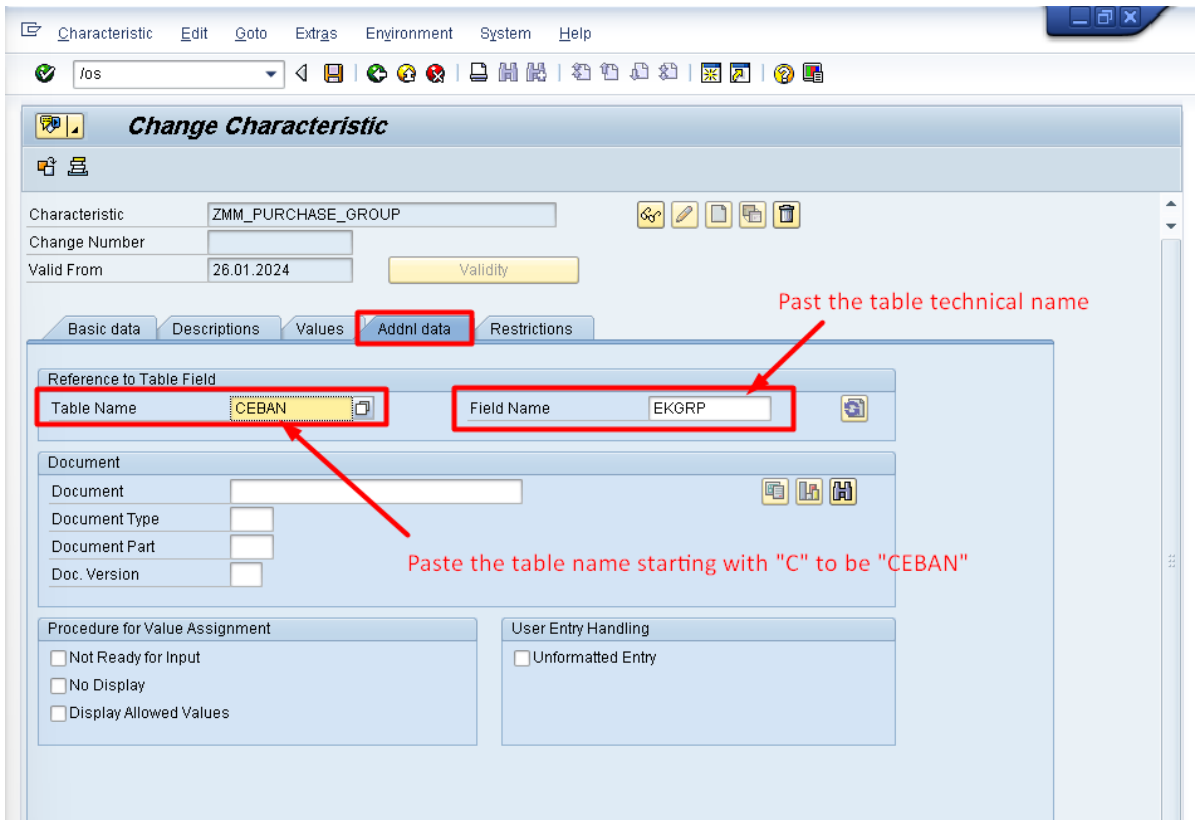






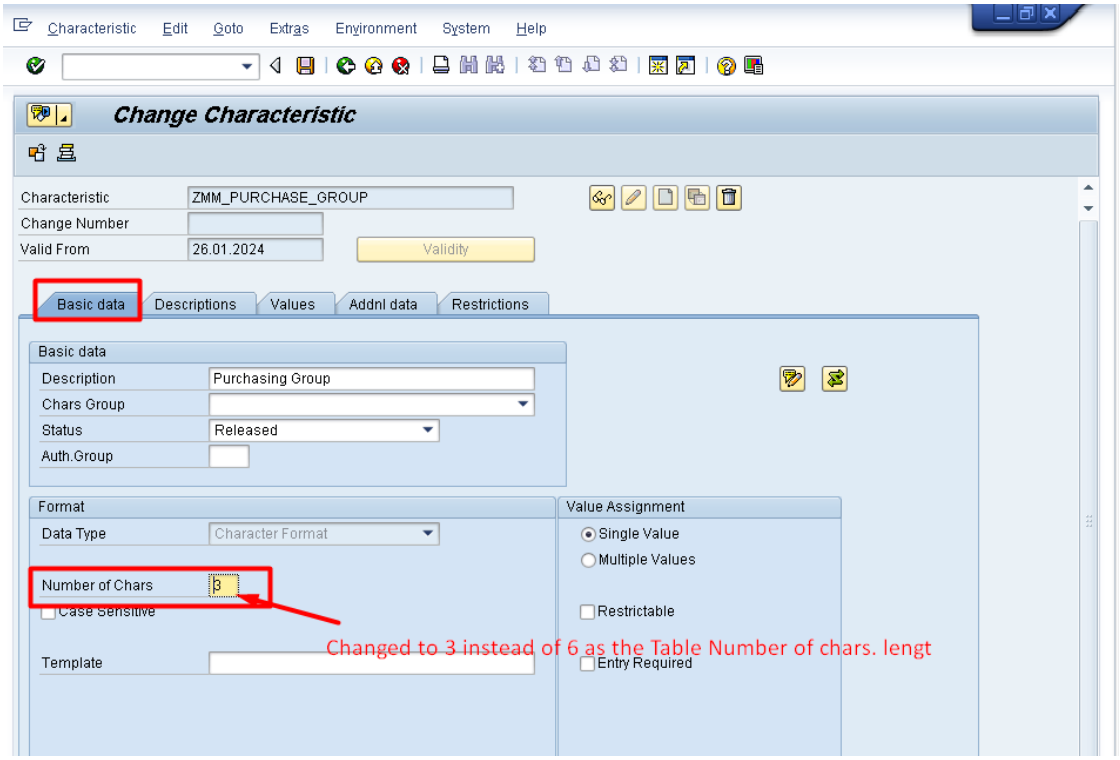
To get the table technical name, go to (SE16N) ➔ enter (EBAN) in the table name (PR) ➔ Search for Purch. Group to get the Table technical name. (EKGRP) copy it.

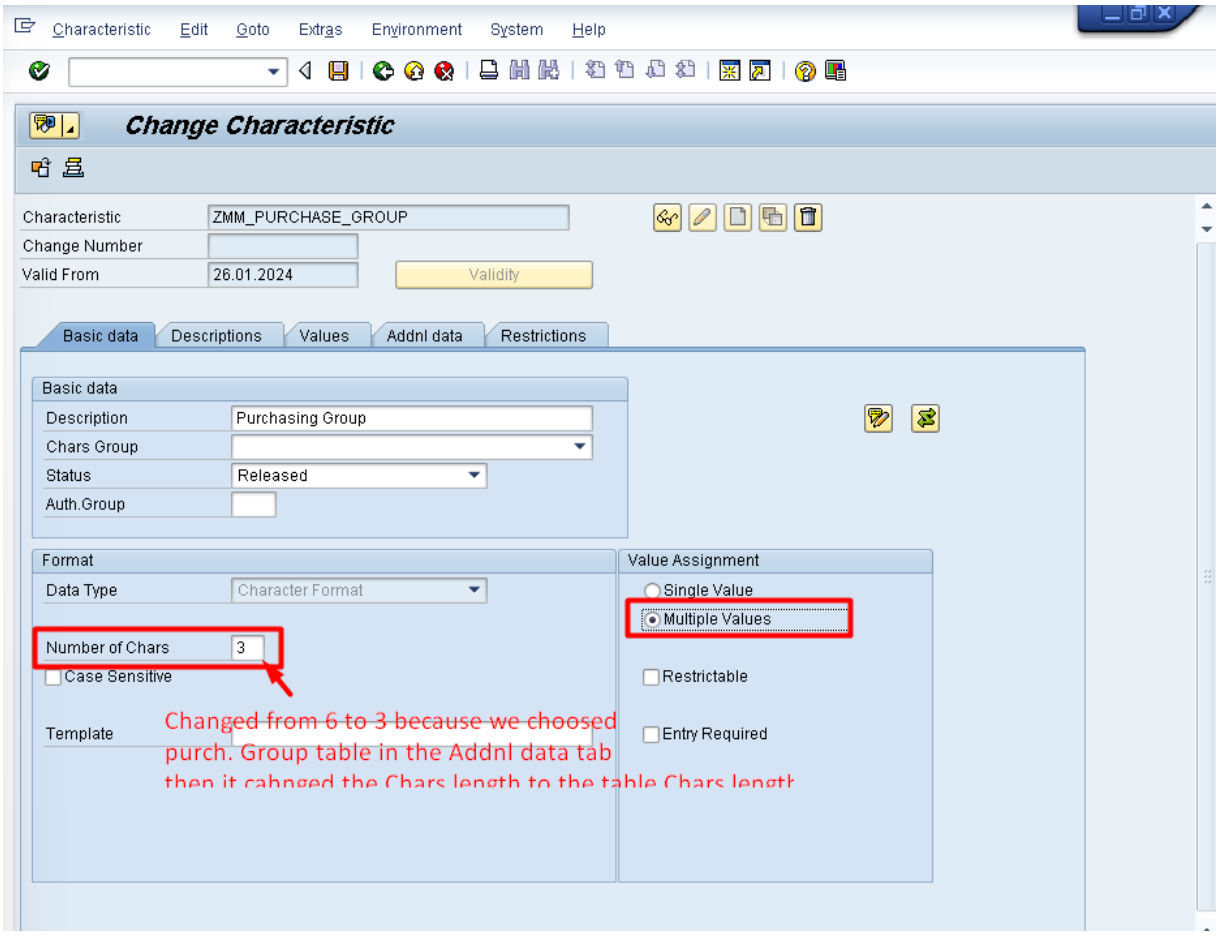




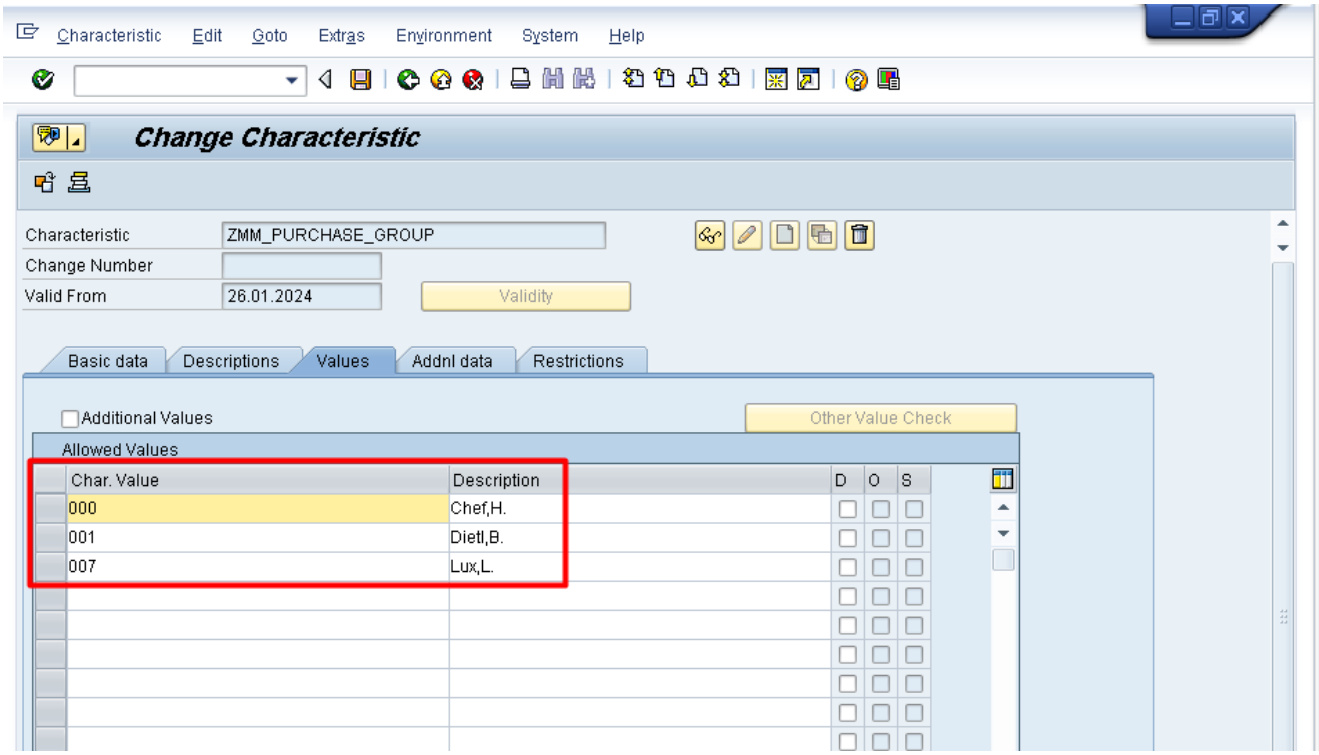
We add "**C**" to "**EBAN**" to be "**CEBAN**" to **indicate** that this is a **characteristic** of the Table "EBAN" which is the **PR Table**.

If we open the basic data tab again, we will find the number of chars. (chars. Length of the purchase Group)

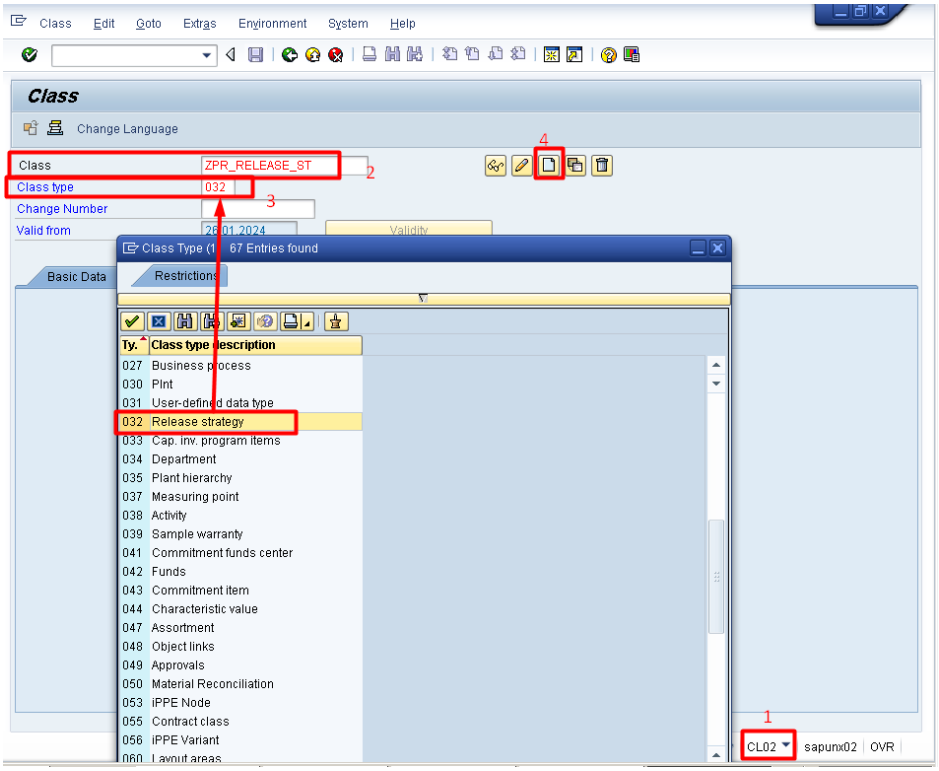


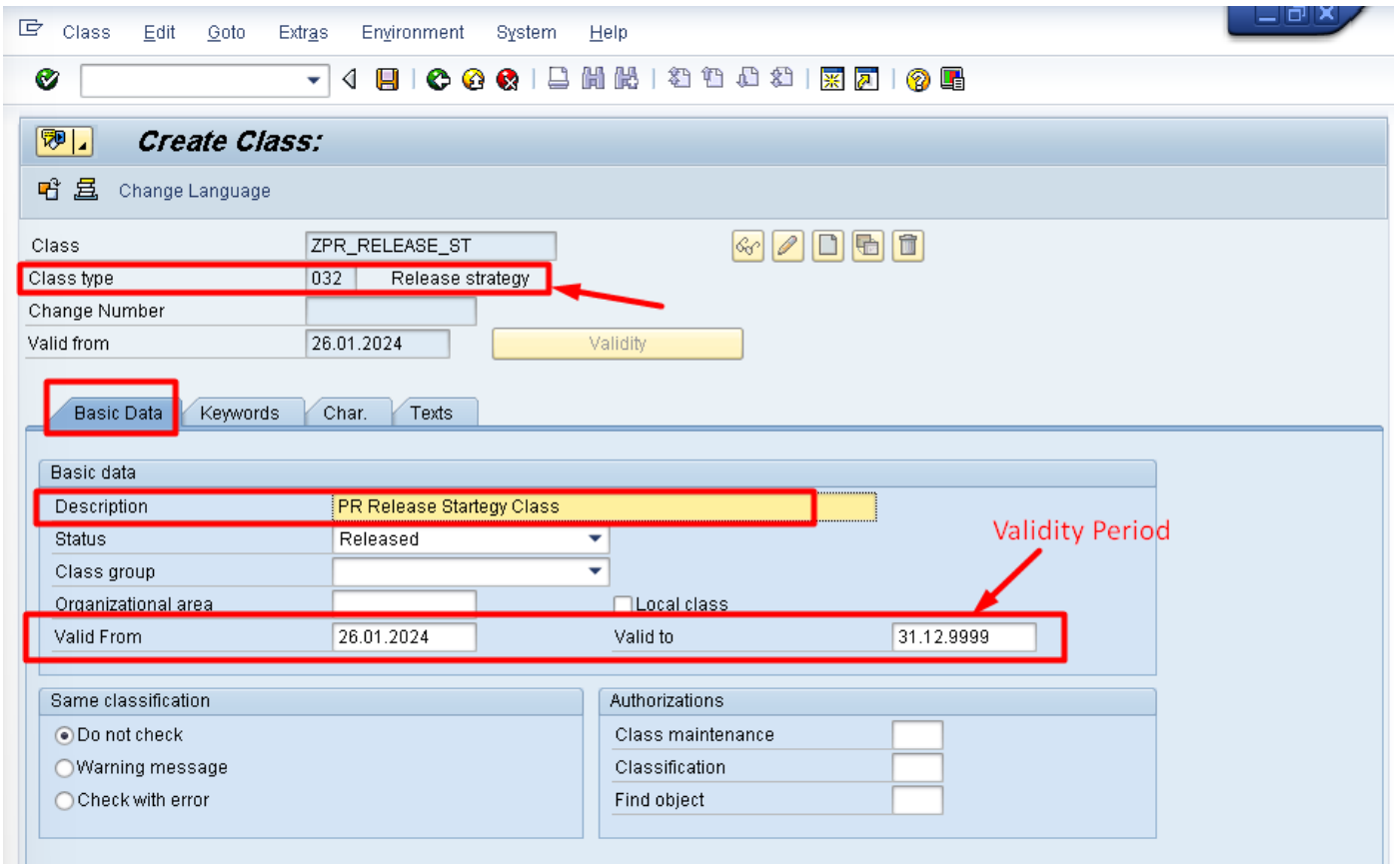


Multiple Values to assign more than one purchase Group ➔ then Save ➔ back to crate the Class (CL02)

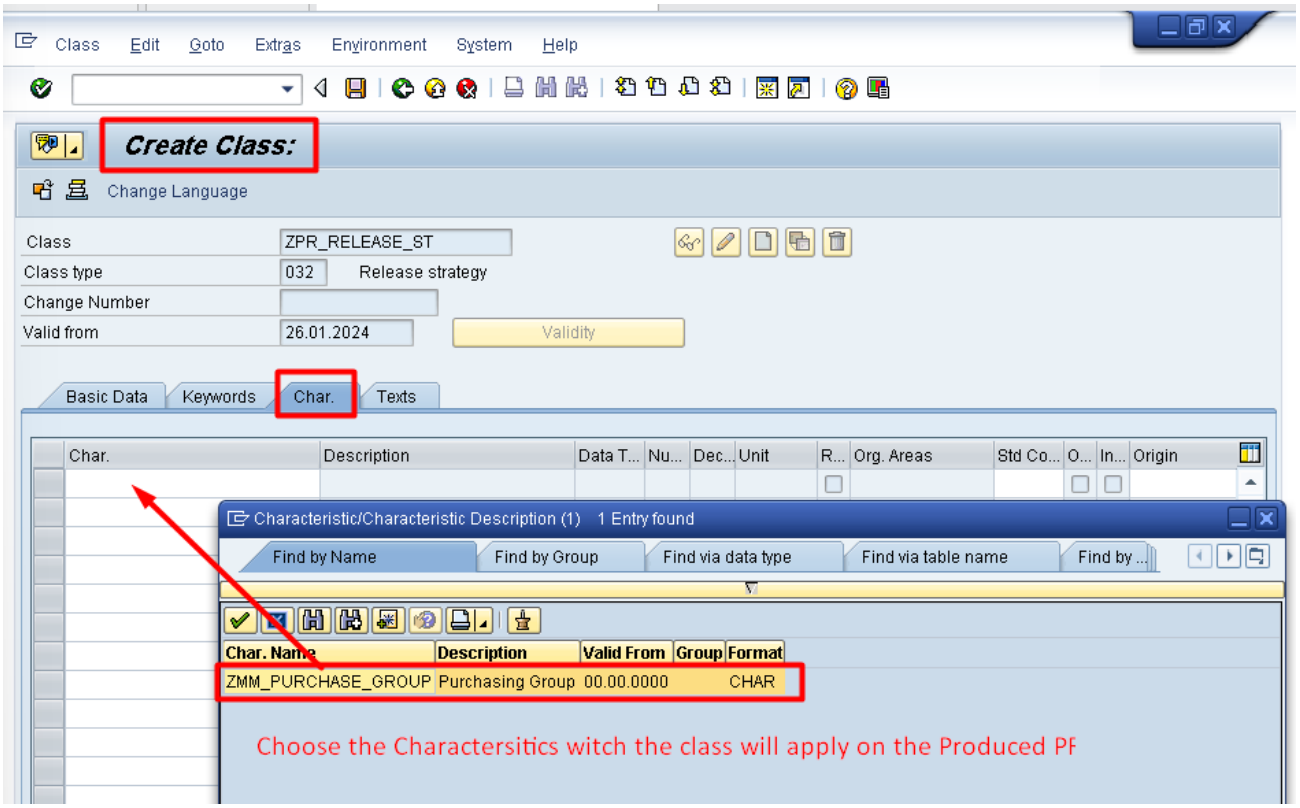


➢ Class Creation >> T-Code "CL02"

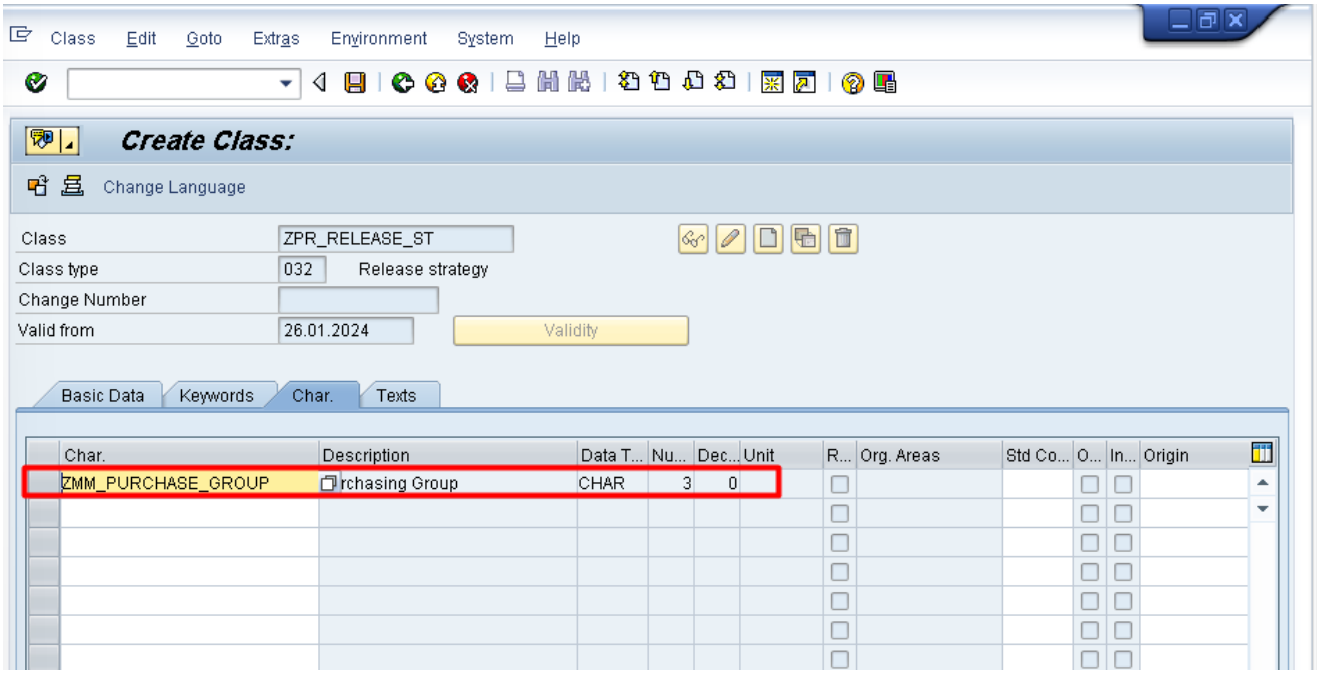




Open Char. Tab ➔ Choose the Characteristic at which the



We added the characteristics of the purchase group that we had previously created.



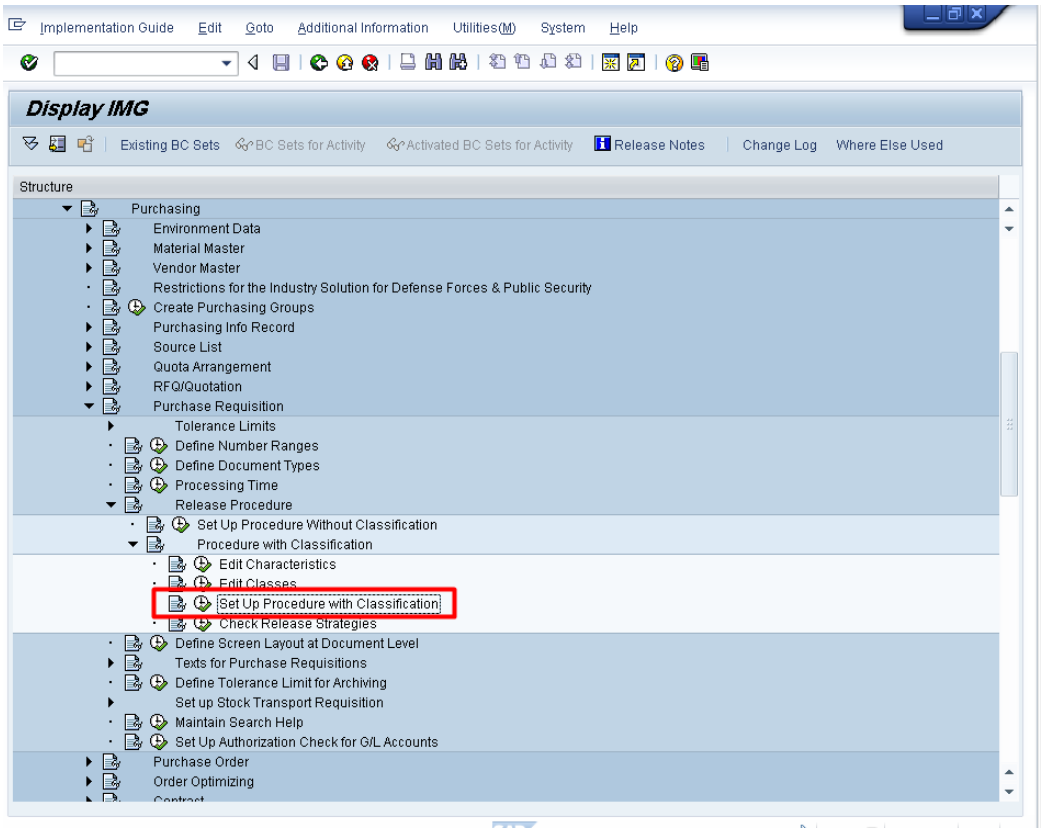
Save

When we use that Class, these characteristics will be applied to PR.

⇨ Go to Configuration to create the release strategy.

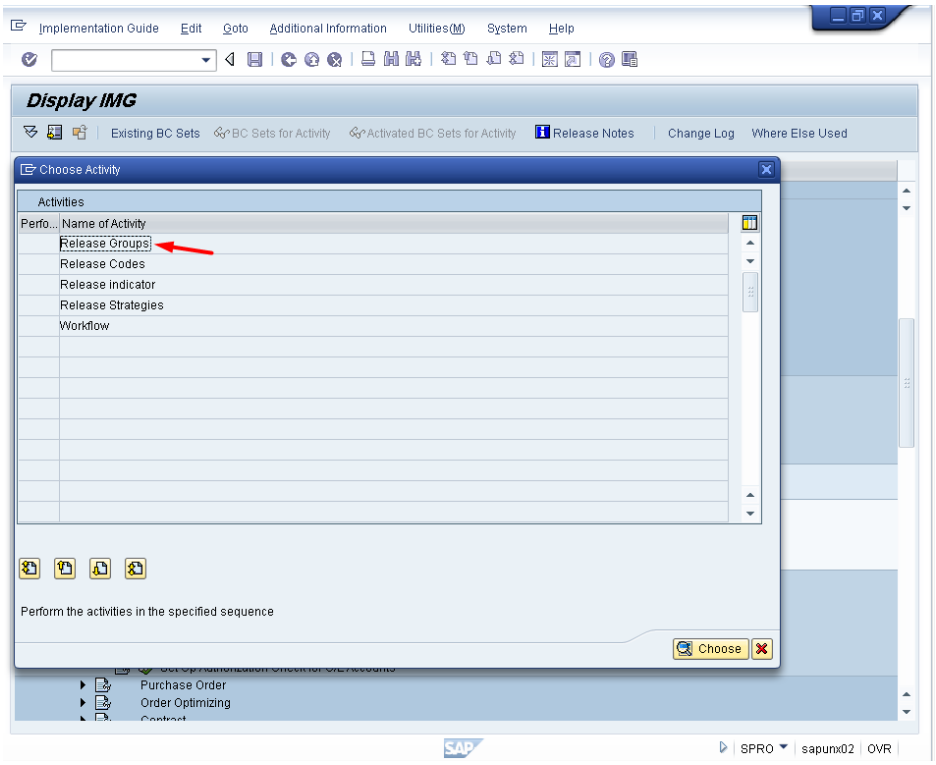
2nd Configuration

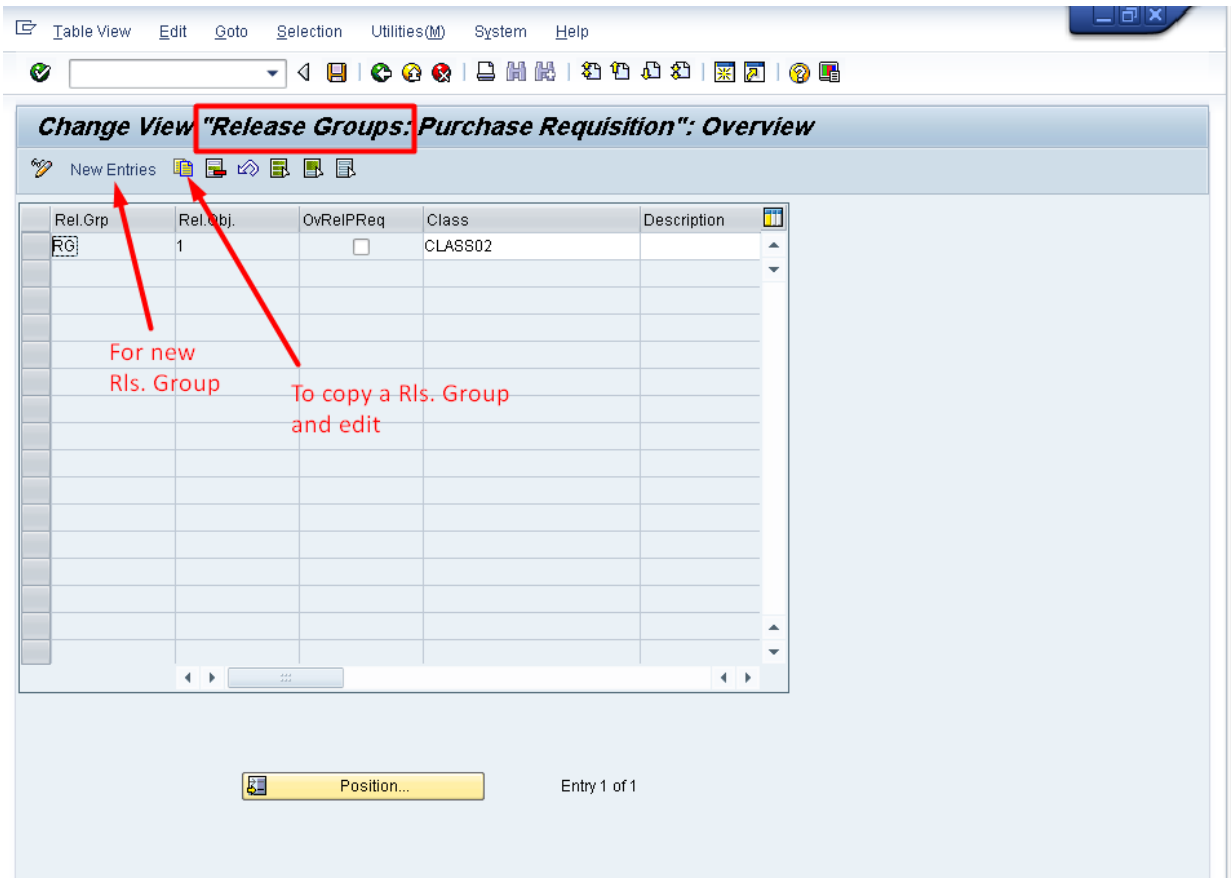
Spro ➔ Material Management ➔ Purchasing ➔ PR ➔ Release Strategy ➔ Procedure with Classification ➔ Set up Procedure with Classification.



Follow the system steps to create the Release Strategy.

Release Group:





Create a Rel. Grp. Code and Description. In addition, we assign the Class created to the Rel. Grp.

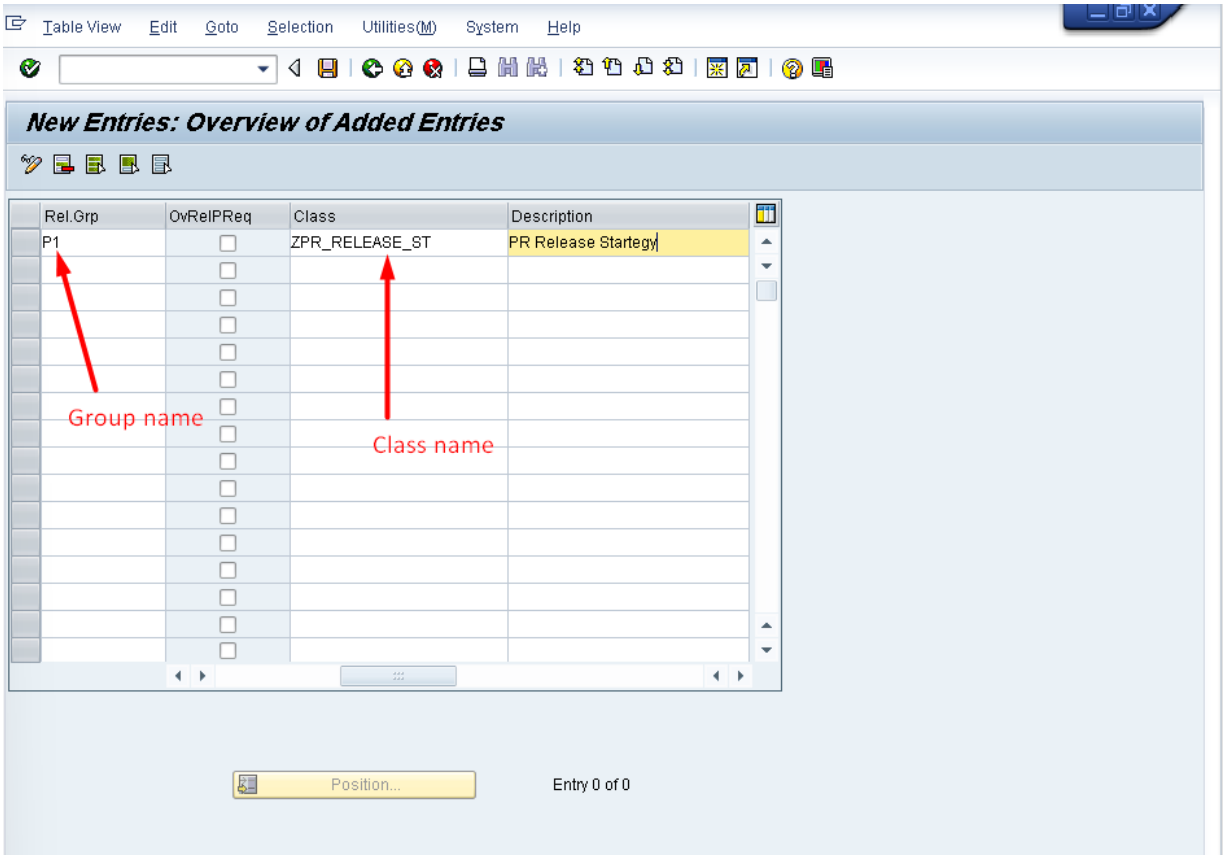


Table View
Edit
Goto
Selection
Utilities(M)
System
Help
New Entries: Overview of Added Entries
Rel.Grp
OvRelPReq
Class
Description
P1
ZPR_RELEASE_ST
PR Release Startegy
Group name
Class name
Position...
Entry 0 of 0

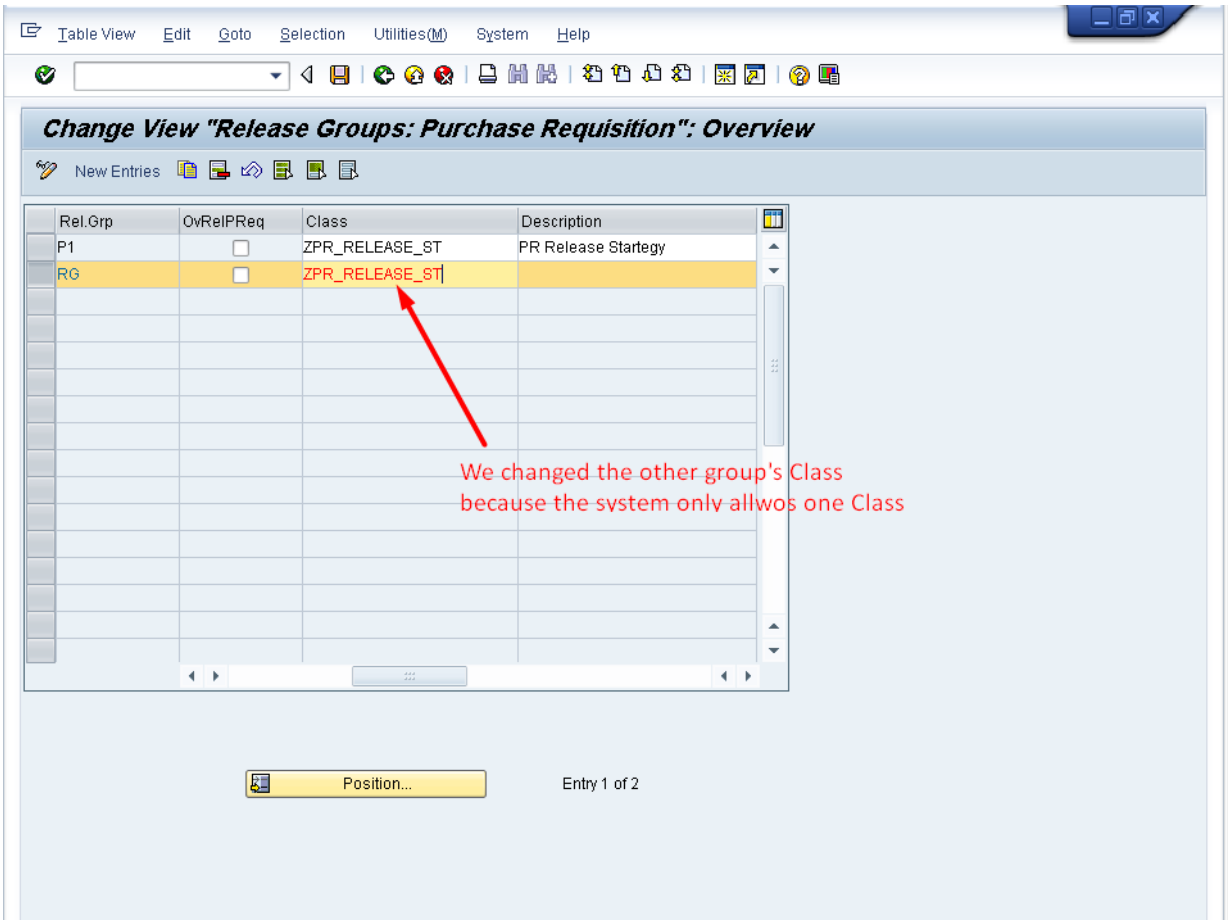
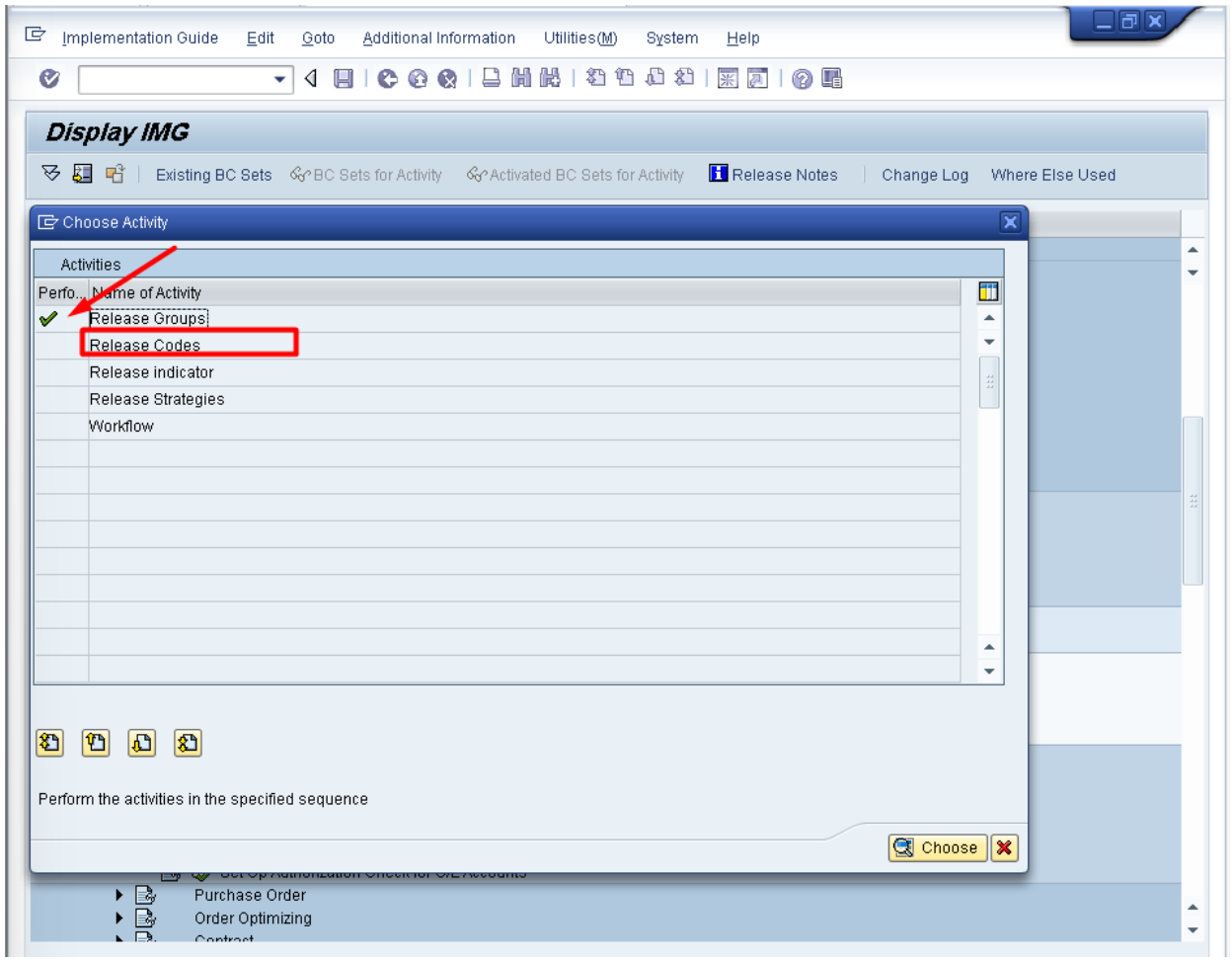
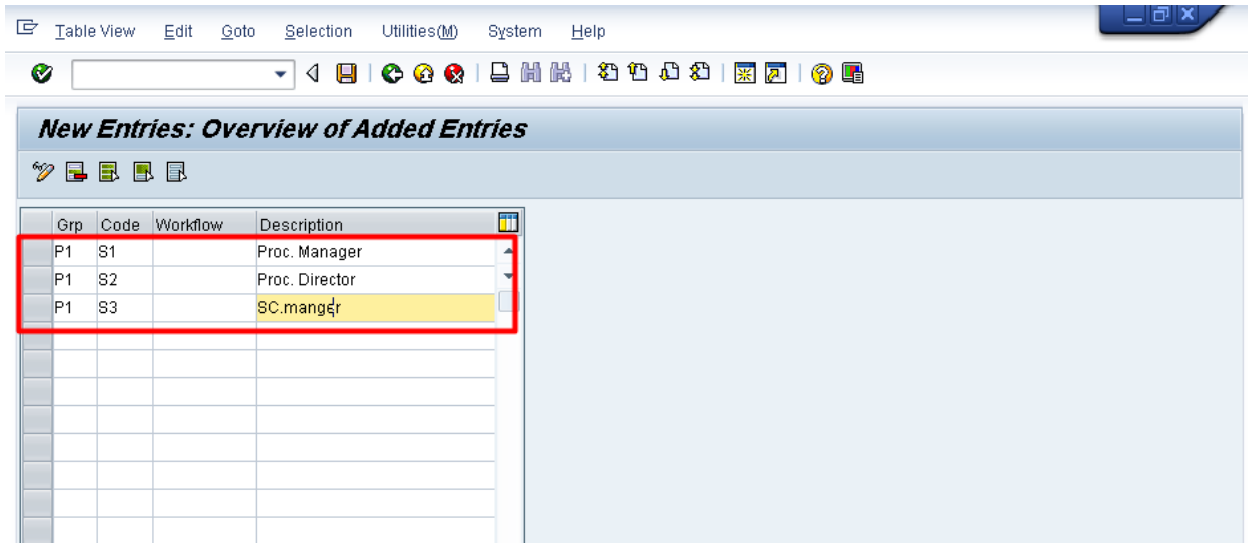


Table View
Edit
Goto
Selection
Utilities(M)
System
Help
Change View "Release Groups: Purchase Requisition": Overview
New Entries
Rel.Grp
OvRelPReq
Class
Description
P1
ZPR_RELEASE_ST
PR Release Startegy
RG
ZPR_RELEASE_ST
We changed the other group's Class
because the system only allwos one Class
Position...
Entry 1 of 2

Release Codes:





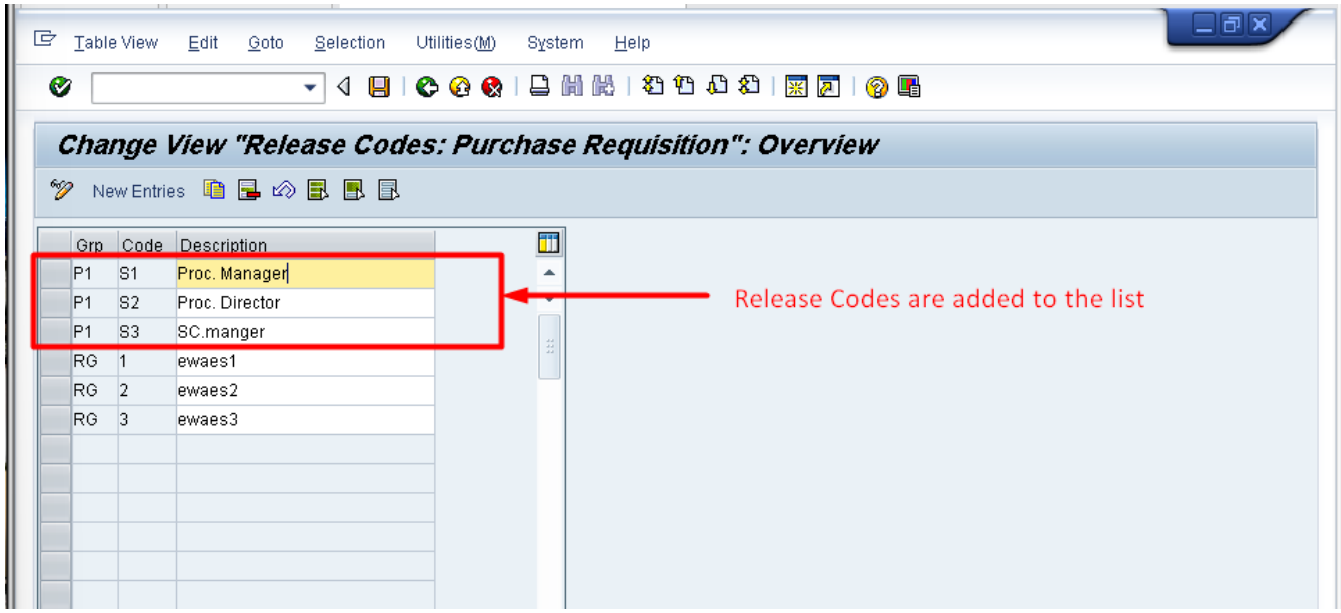
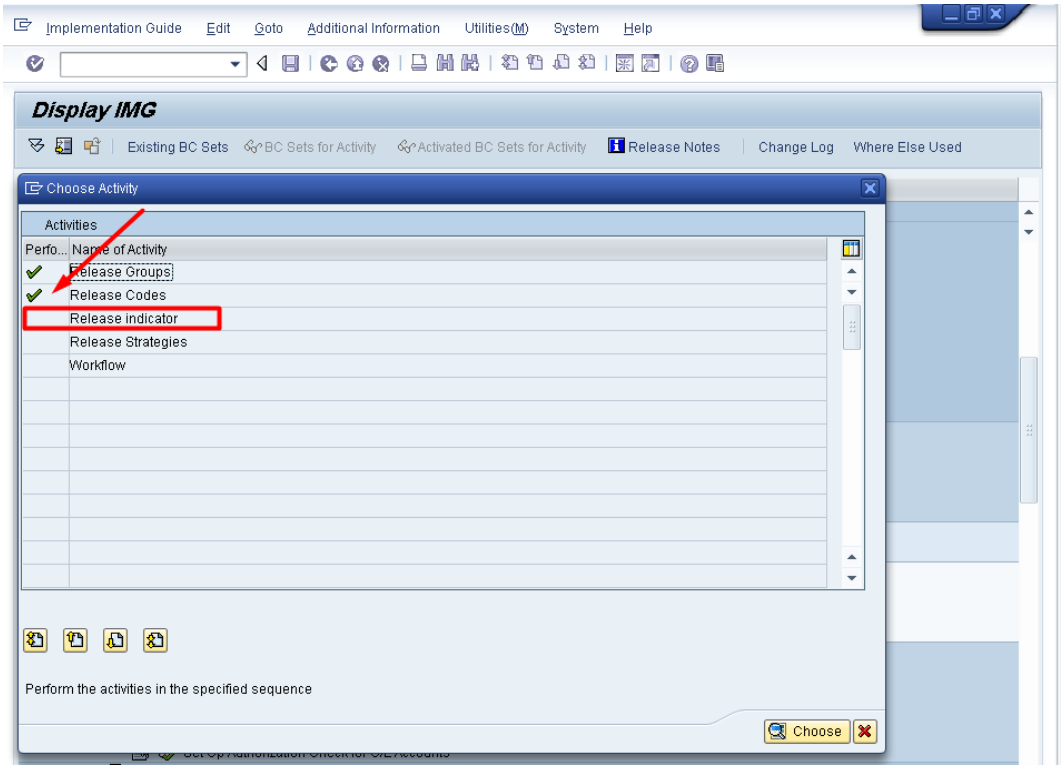


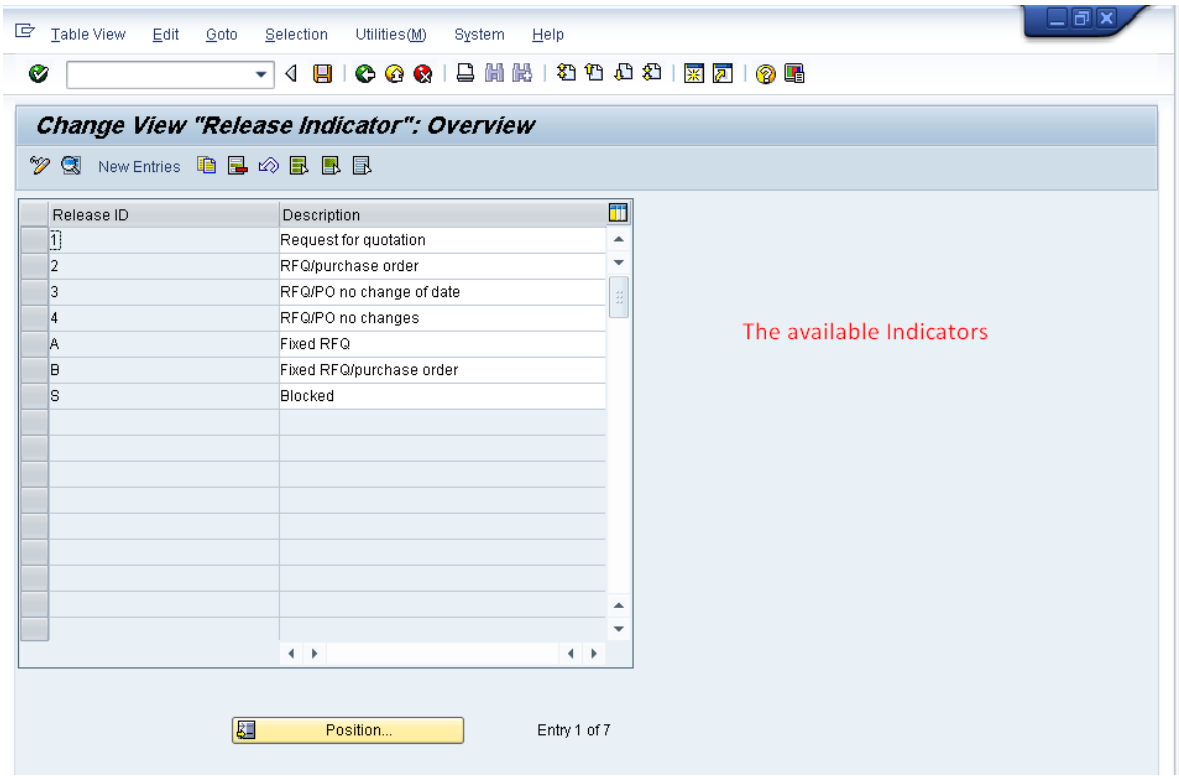
Table View
Edit
Goto
Selection
Utilities(M)
System
Help
Change View "Release Codes: Purchase Requisition": Overview
New Entries
Grp
Code
Description
P1
S1
Proc. Manager
P1
S2
Proc. Director
P1
S3
SC.manger
RG
1
ewaes1
RG
2
ewaes2
RG
3
ewaes3
Release Codes are added to the list

Release Indicators:

Release Indicators control the field selection of the PR if it can be.

(Changed/blocked / PR to ROF/ PO…. etc.)





Add a new Indicator. (Change Indicator)

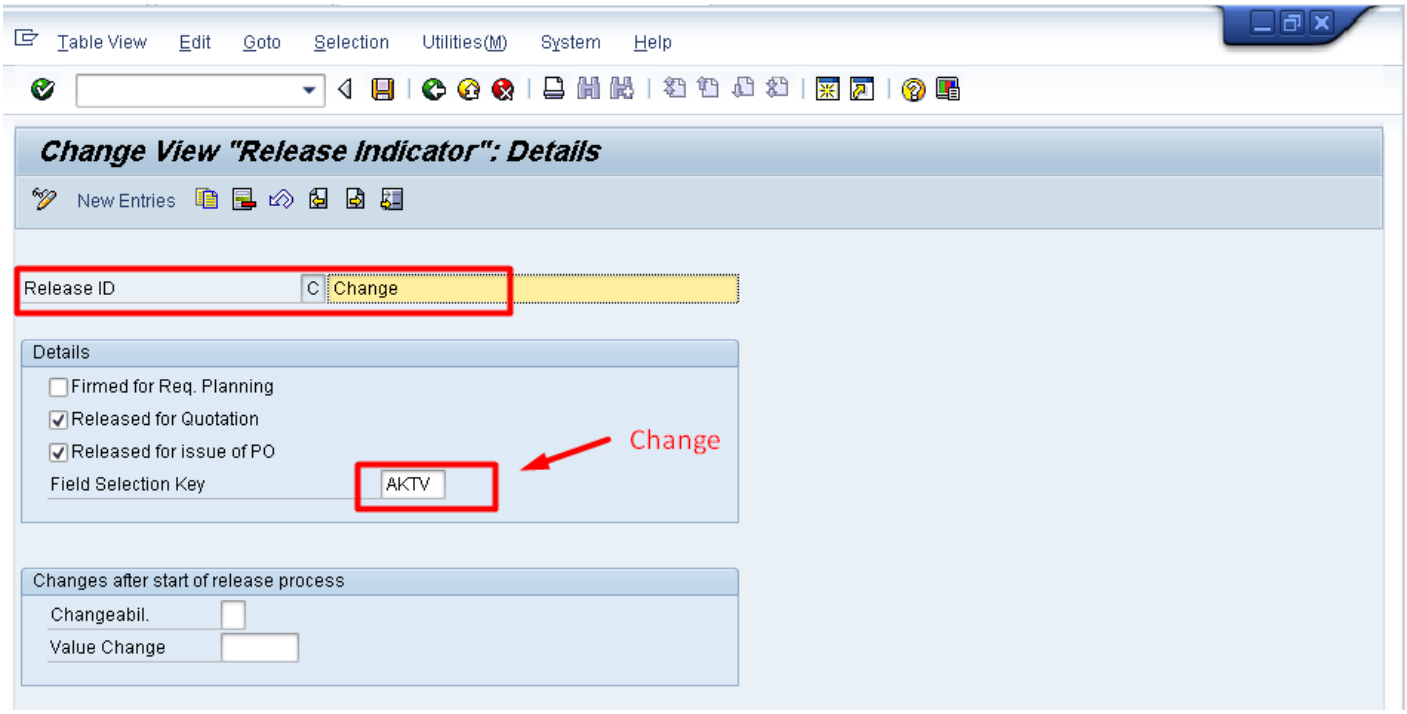


Table View Edit Goto Selection Utilities(M) System Help
Change View "Release Indicator": Details
New Entries
Release ID
C
Change
Details
Firmed for Req. Planning
Released for Quotation
Released for issue of PO
Field Selection Key
AKTV
Change
Changes after start of release process
Changeabil.
Value Change

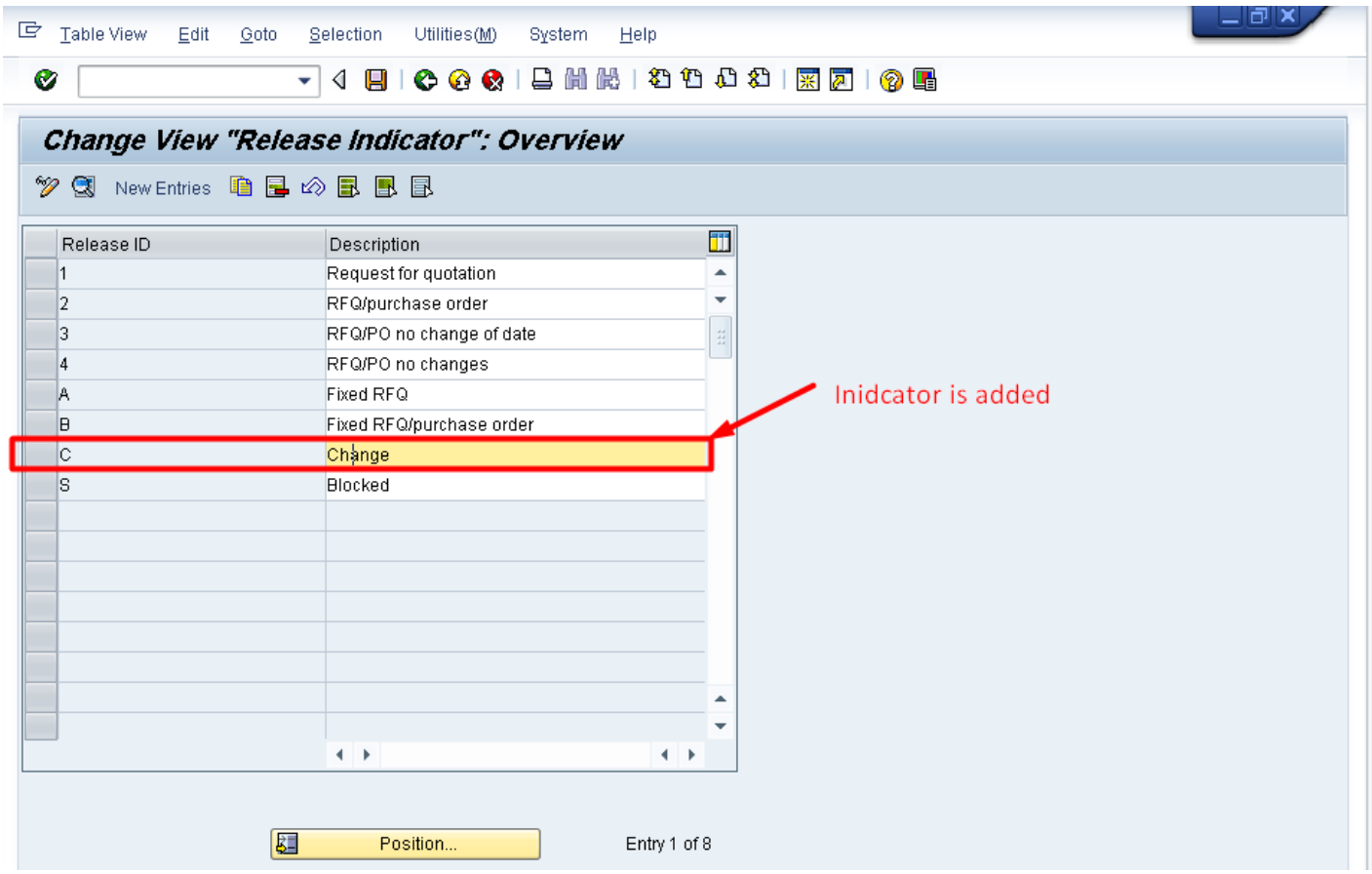
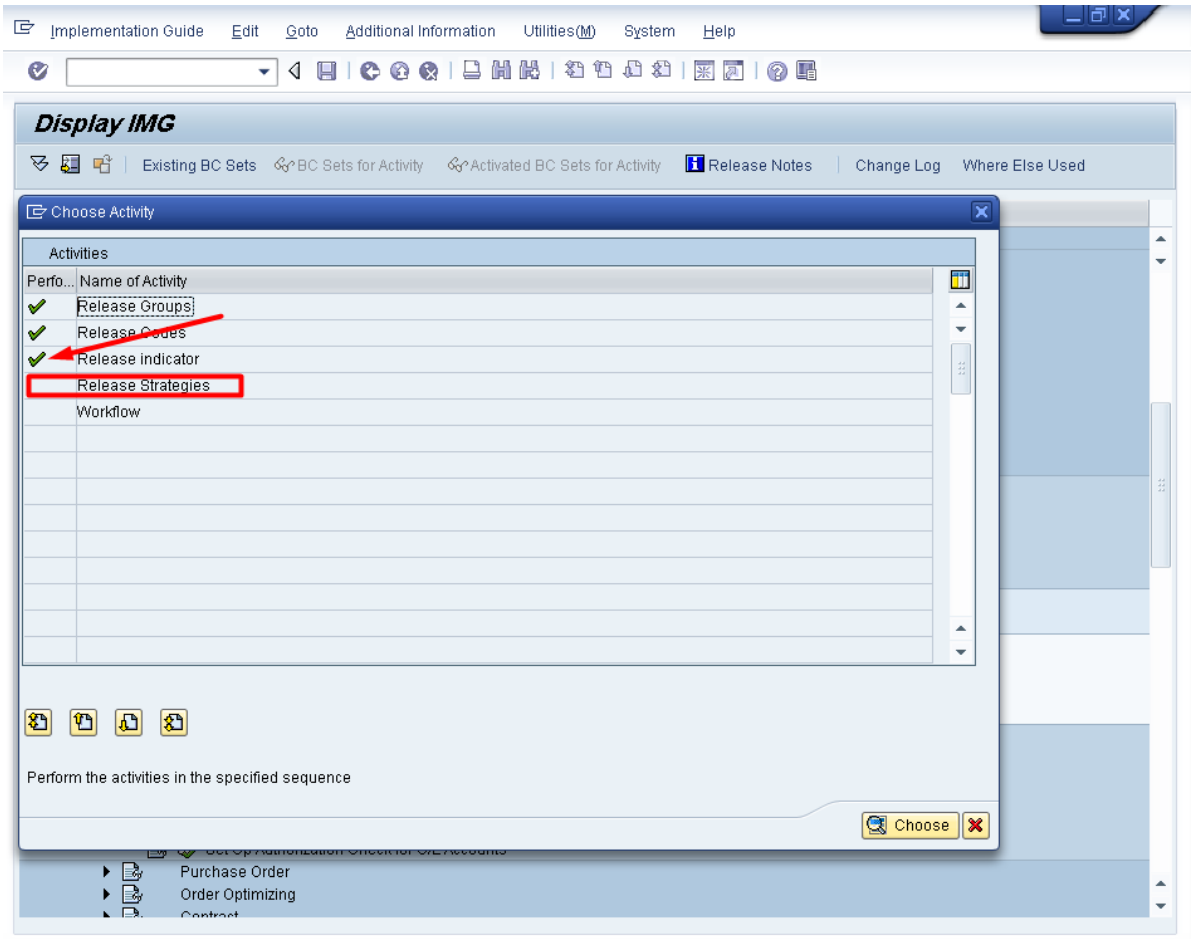
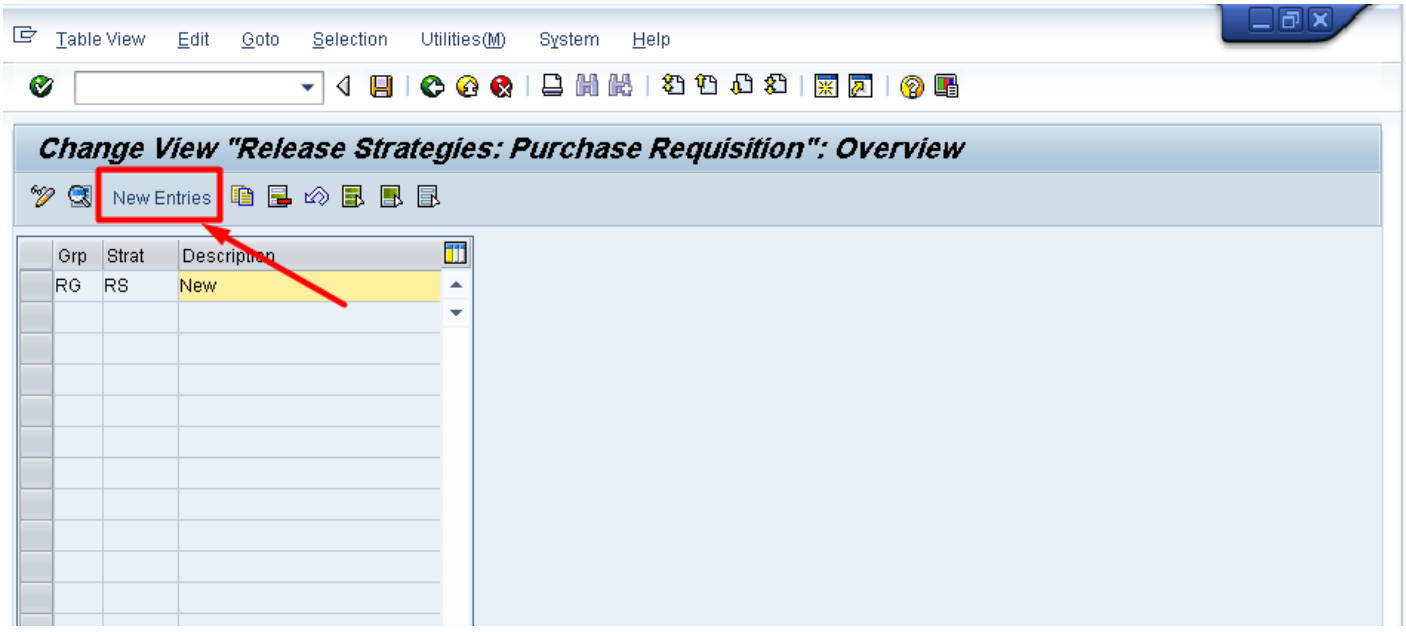


Table View Edit Goto Selection Utilities(M) System Help
Change View "Release Indicator": Overview
New Entries
Release ID
Description
1
Request for quotation
2
RFQ/purchase order
3
RFQ/PO no change of date
4
RFQ/PO no changes
A
Fixed RFQ
B
Fixed RFQ/purchase order
C
Change
S
Blocked
Inidcator is added
Position...
Entry 1 of 8

Release Strategy:





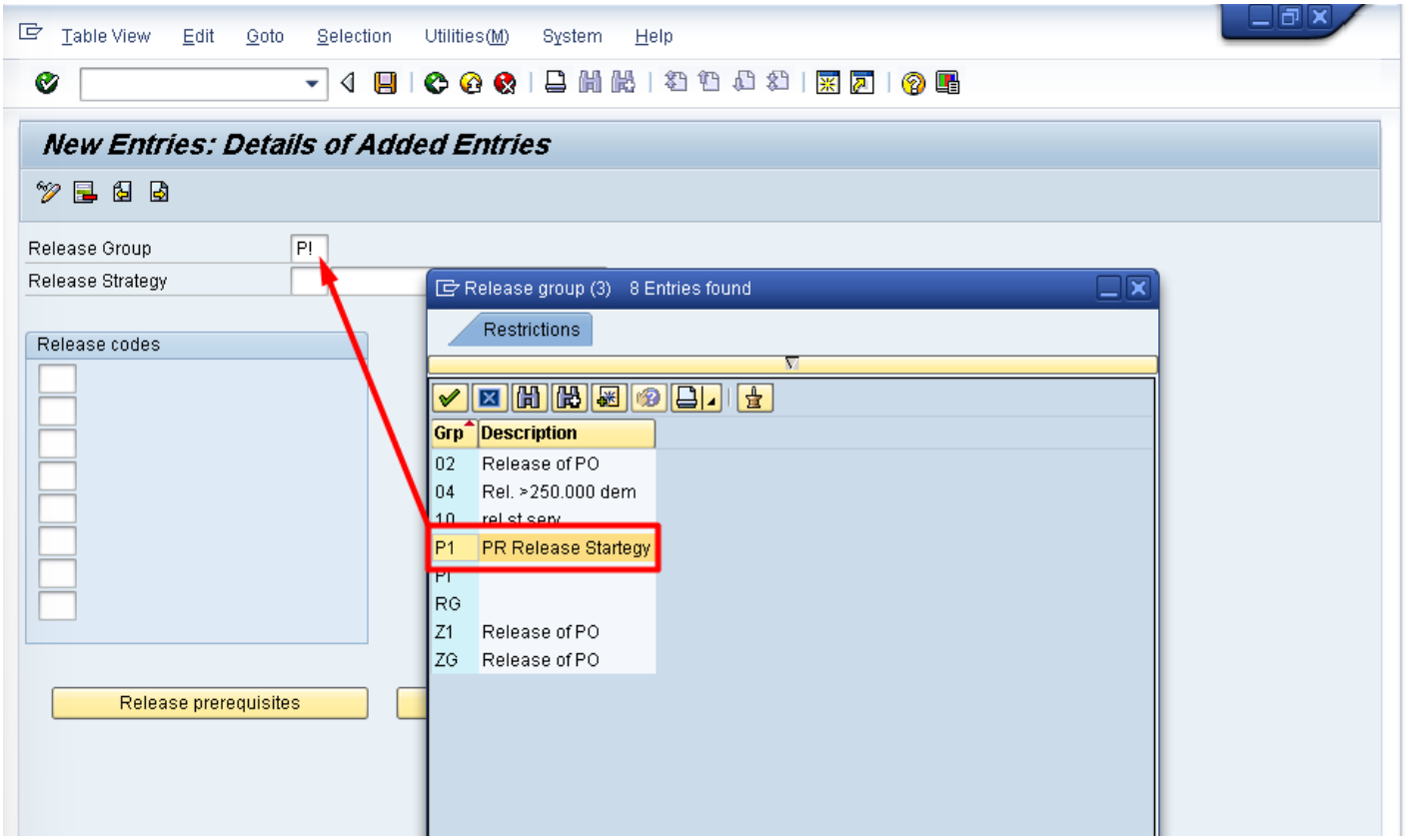


Table View
Edit
Goto
Selection
Utilities(M)
System
Help
New Entries: Details of Added Entries
Release Group
P!
Release Strategy
Release codes
Release prerequisites
Release group (3) 8 Entries found
Restrictions
Grp
Description
02 Release of PO
04 Rel. >250.000 dem
P1 PR Release Startegy
RG
Z1 Release of PO
ZG Release of PO

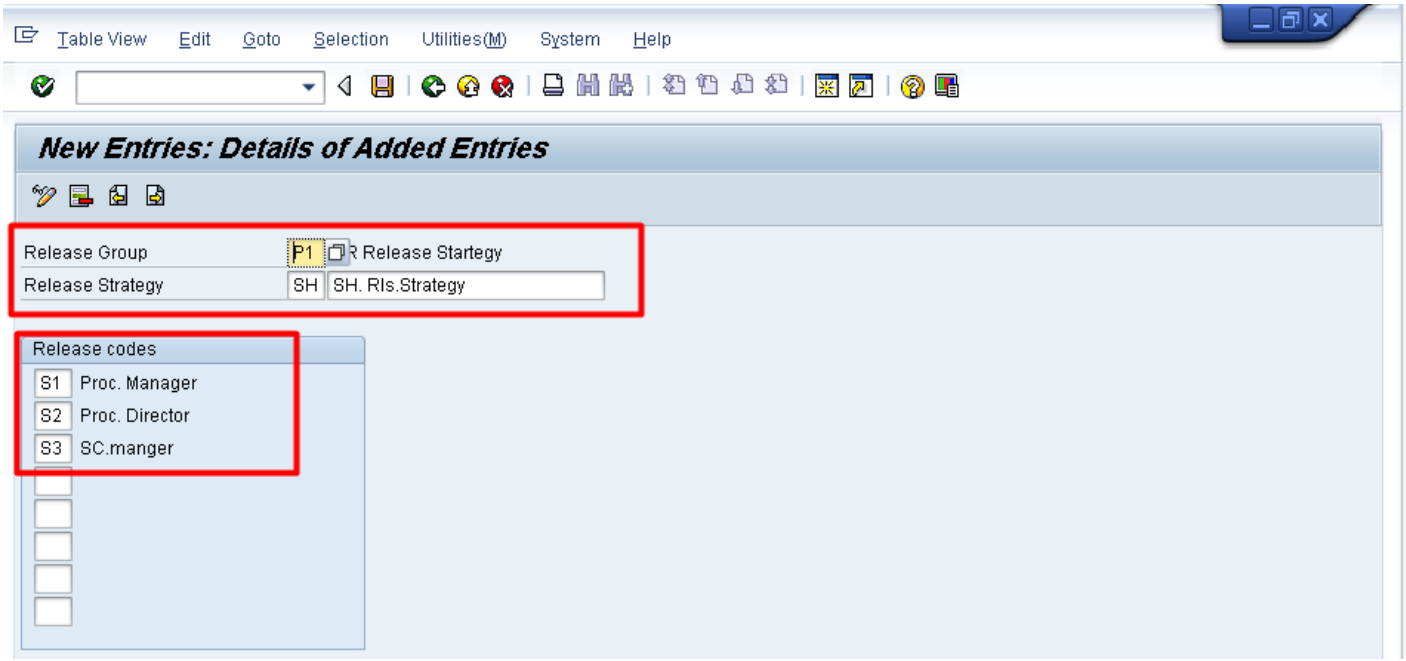
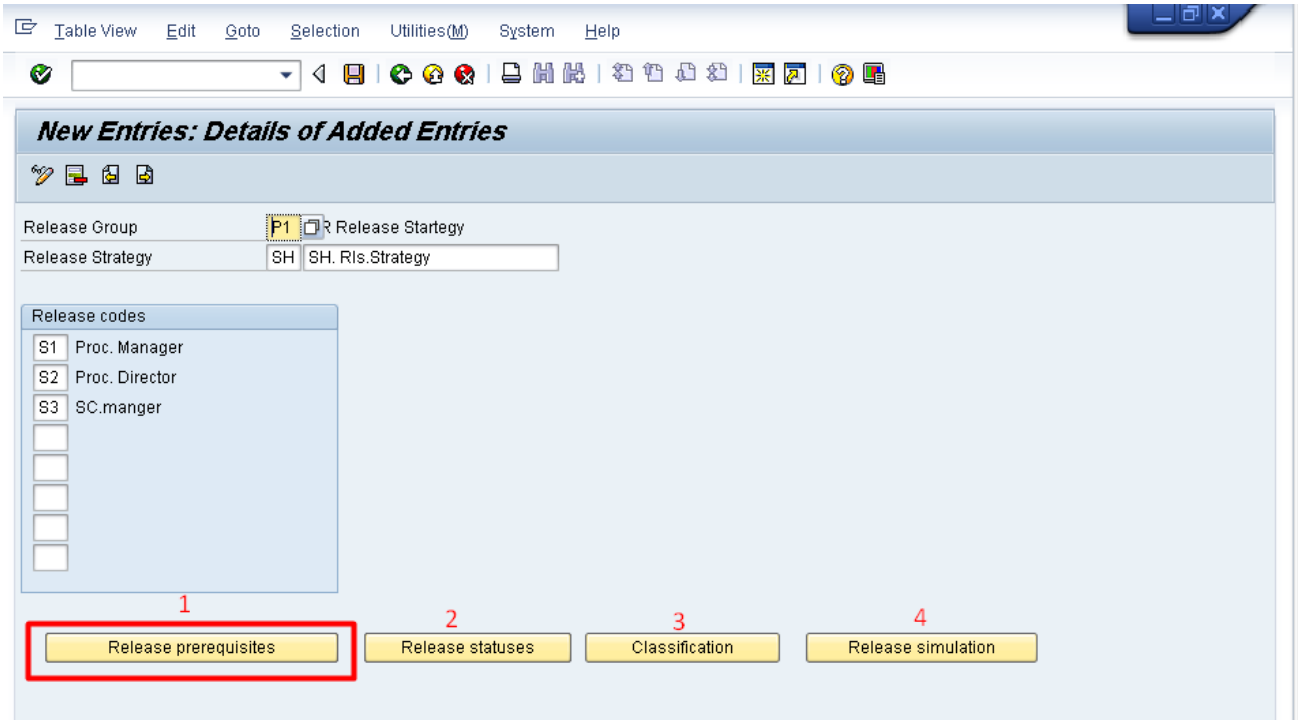
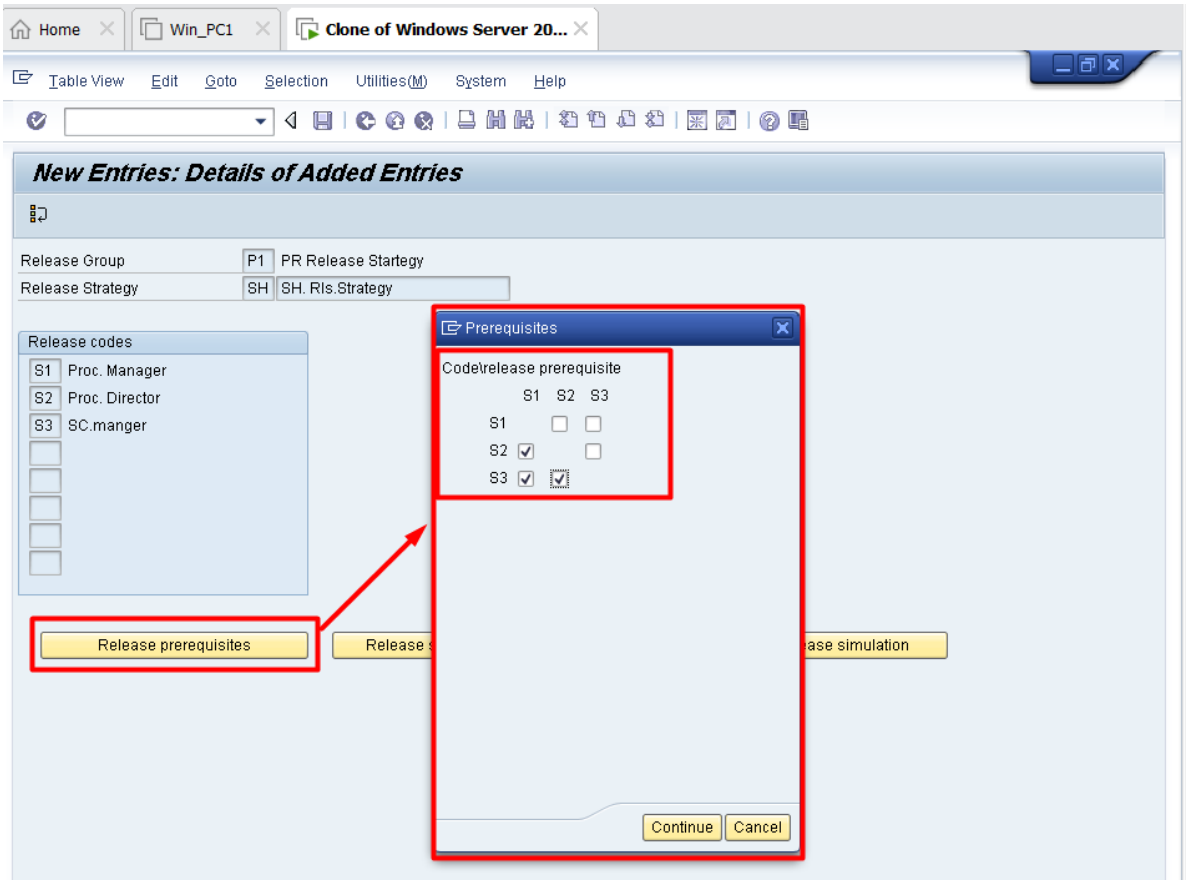


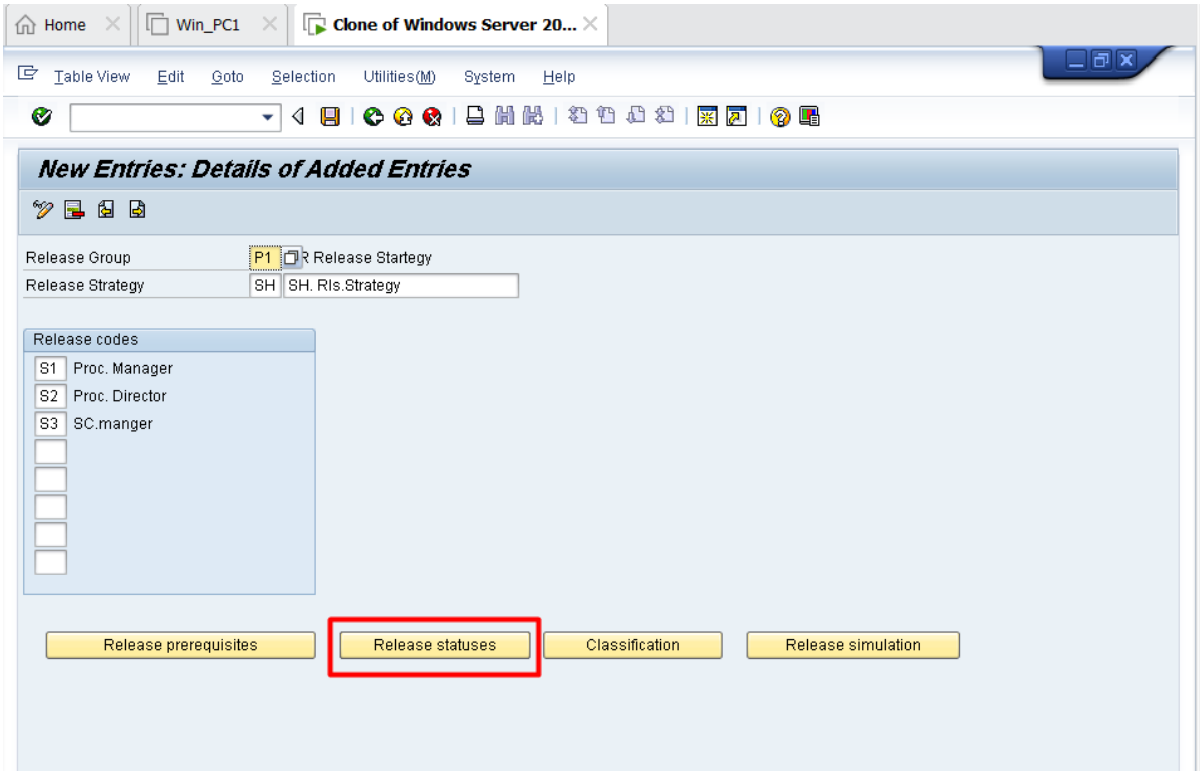
Table View
Edit
Goto
Selection
Utilities(M)
System
Help
New Entries: Details of Added Entries
Release Group
P1
R Release Startegy
Release Strategy
SH
SH. Rls.Strategy
Release codes
S1 Proc. Manager
S2 Proc. Director
S3 SC.manger

Release Prerequisites:





Release Status:



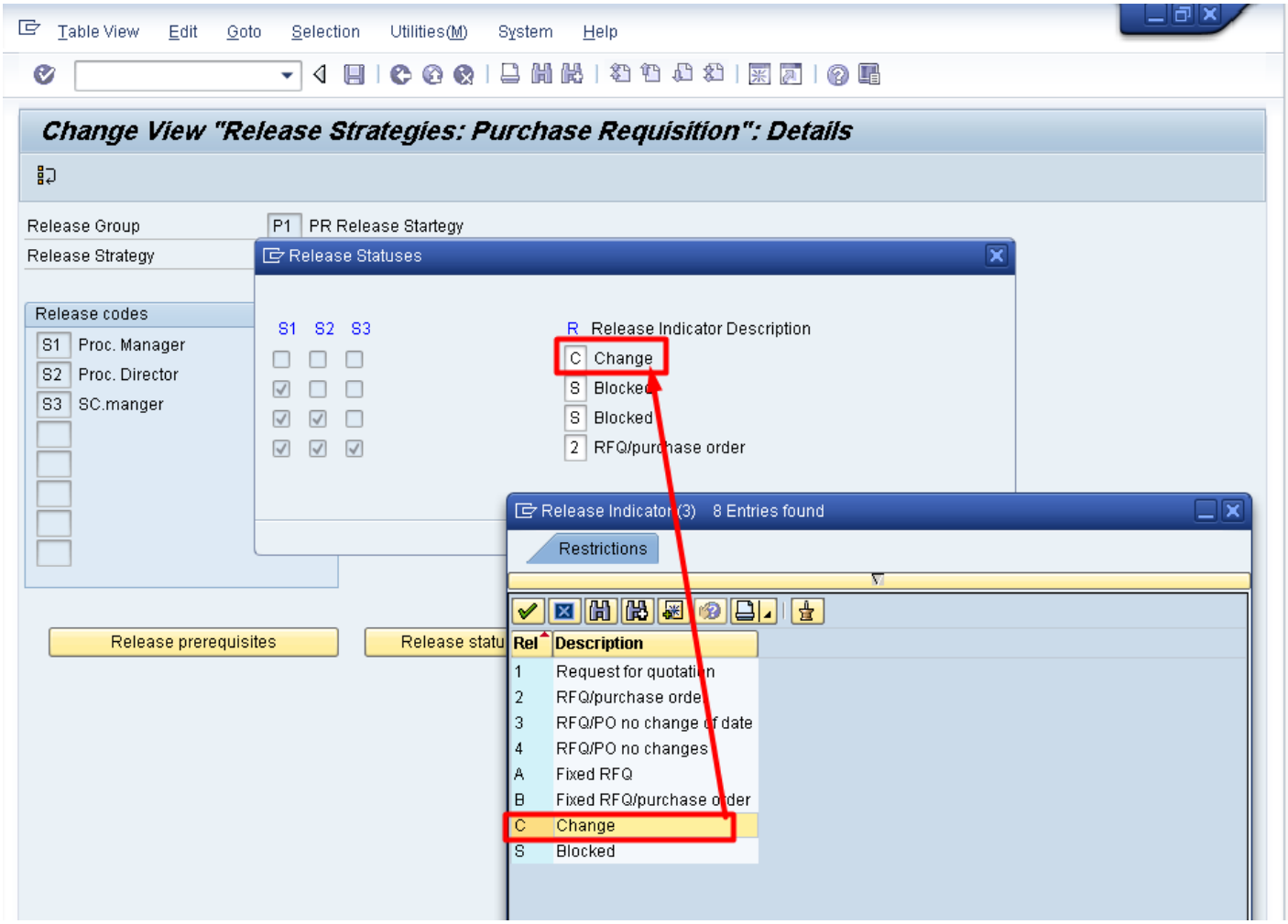


Table View Edit Goto Selection Utilities(M) System Help
Change View "Release Strategies: Purchase Requisition": Details
Release Group P1 PR Release Startegy
Release Strategy
Release codes
S1 Proc. Manager
S2 Proc. Director
S3 SC.manger
Release Statuses
S1 S2 S3
R Release Indicator Description
C Change
S Blocked
S Blocked
2 RFQ/purchase order
Release Indicator (3) 8 Entries found
Restrictions
Rel Description
1 Request for quotation
2 RFQ/purchase order
3 RFQ/PO no change of date
4 RFQ/PO no changes
A Fixed RFQ
B Fixed RFQ/purchase order
C Change
S Blocked
Release prerequisites
Release statu

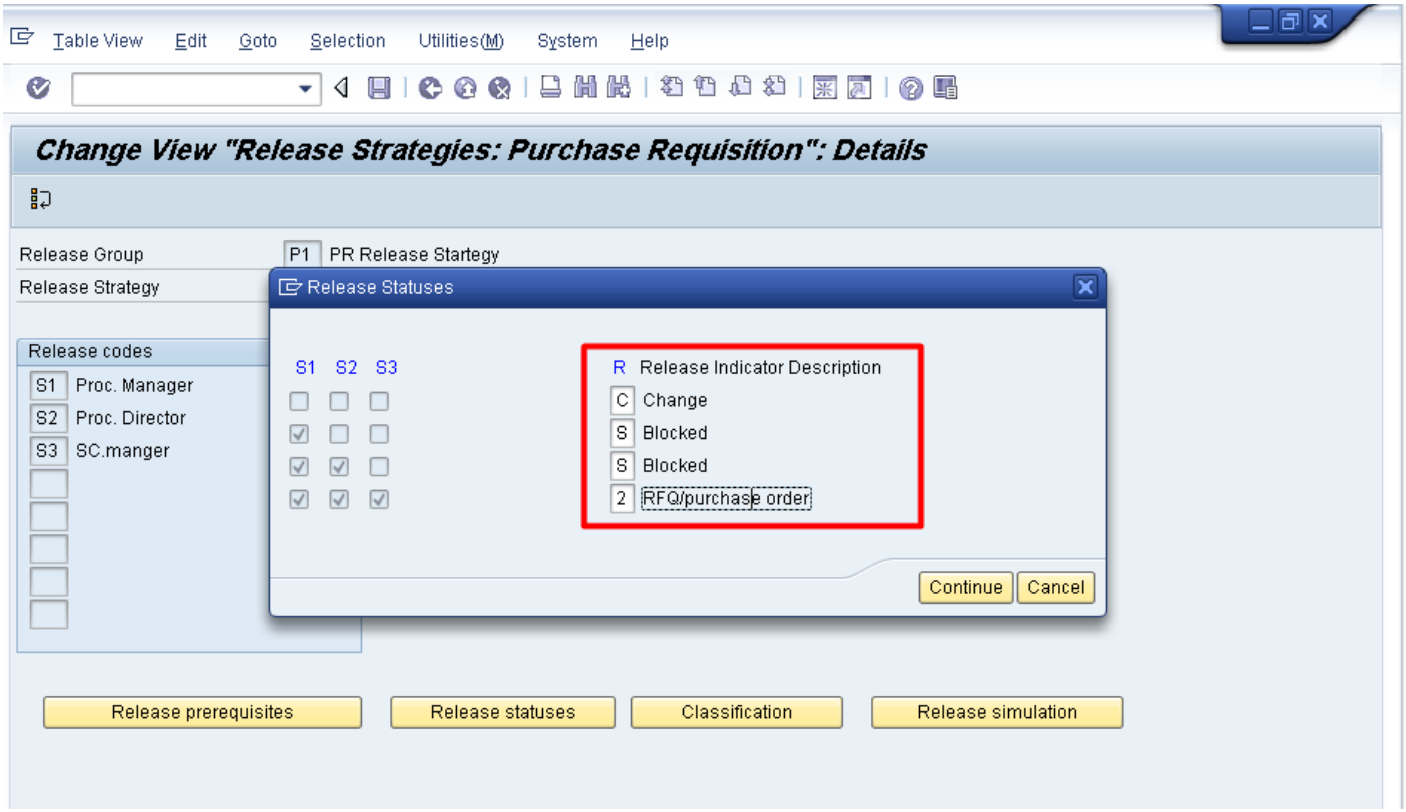


Table View Edit Goto Selection Utilities(M) System Help
Change View "Release Strategies: Purchase Requisition": Details
Release Group P1 PR Release Startegy
Release Strategy
Release codes
S1 Proc. Manager
S2 Proc. Director
S3 SC.manger
Release Statuses
S1 S2 S3
R Release Indicator Description
C Change
S Blocked
S Blocked
2 RFQ/purchase order
Continue Cancel
Release prerequisites
Release statuses
Classification
Release simulation

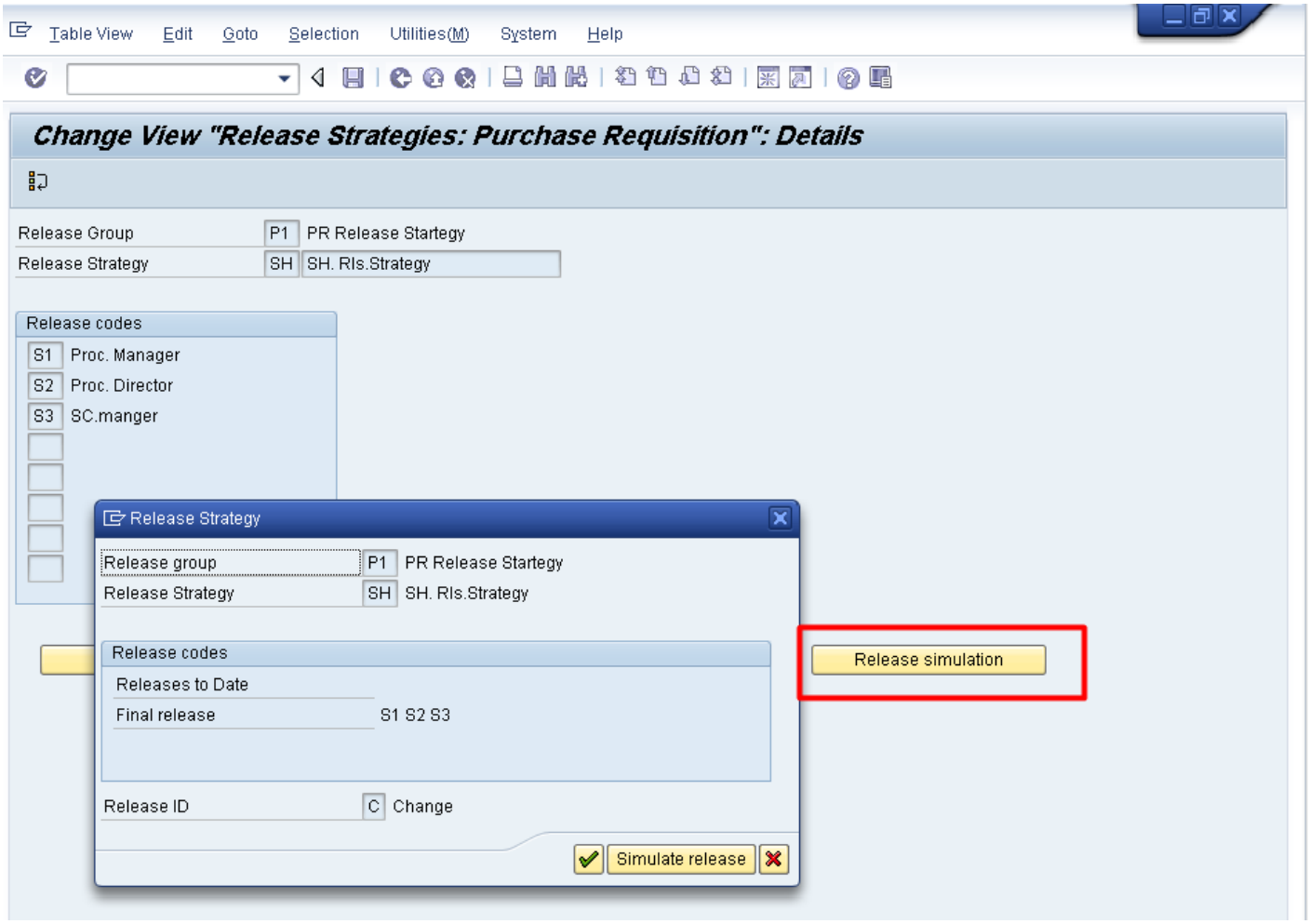
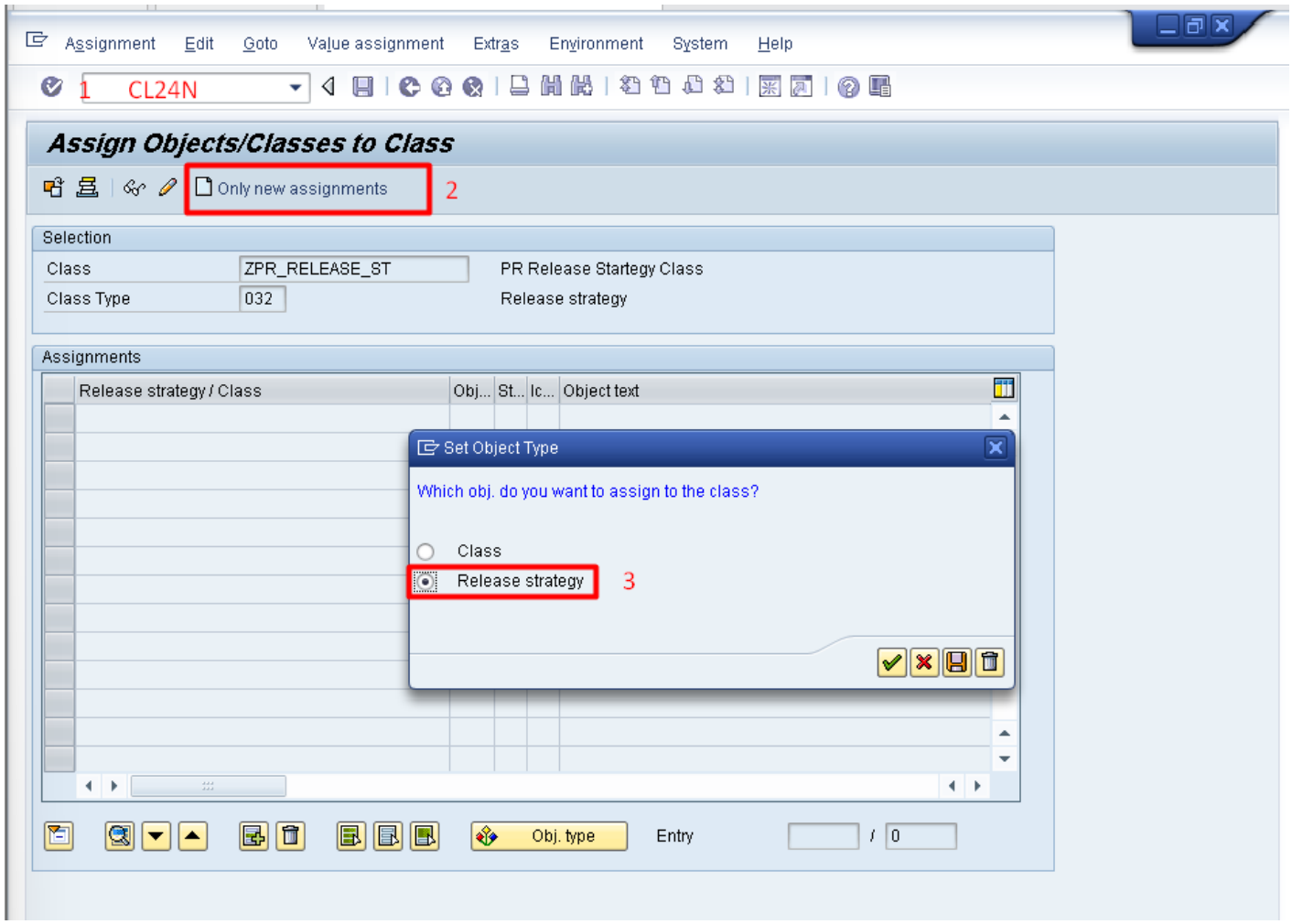
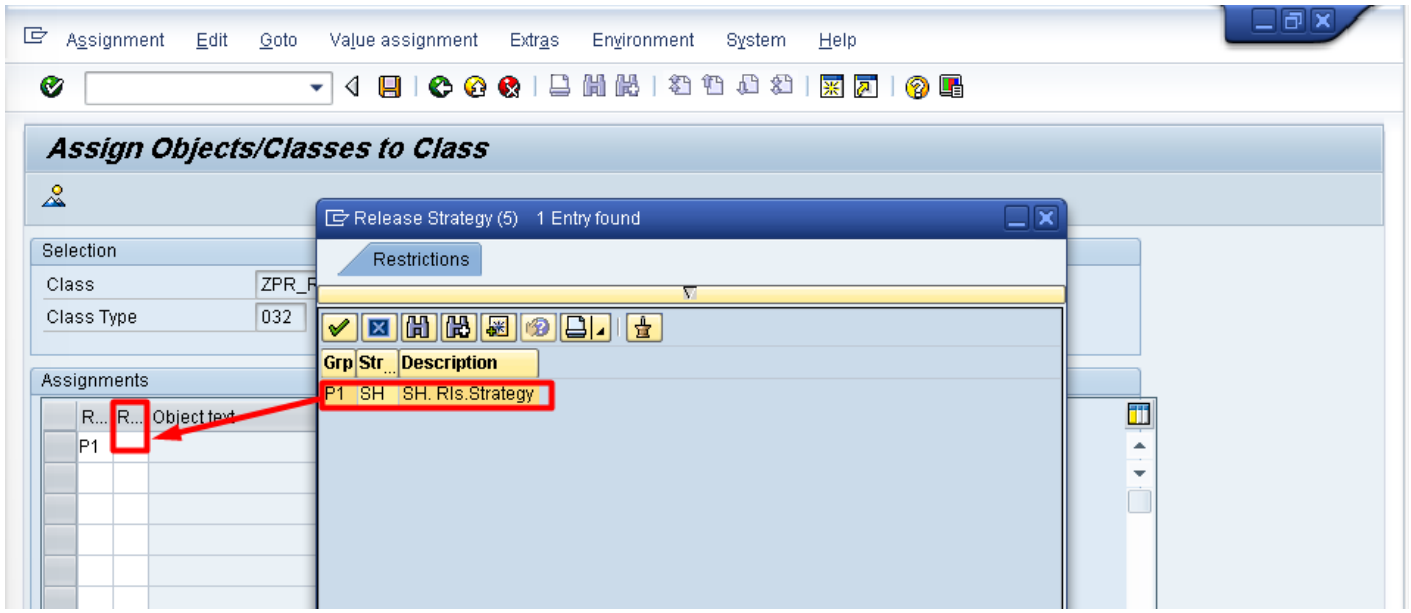
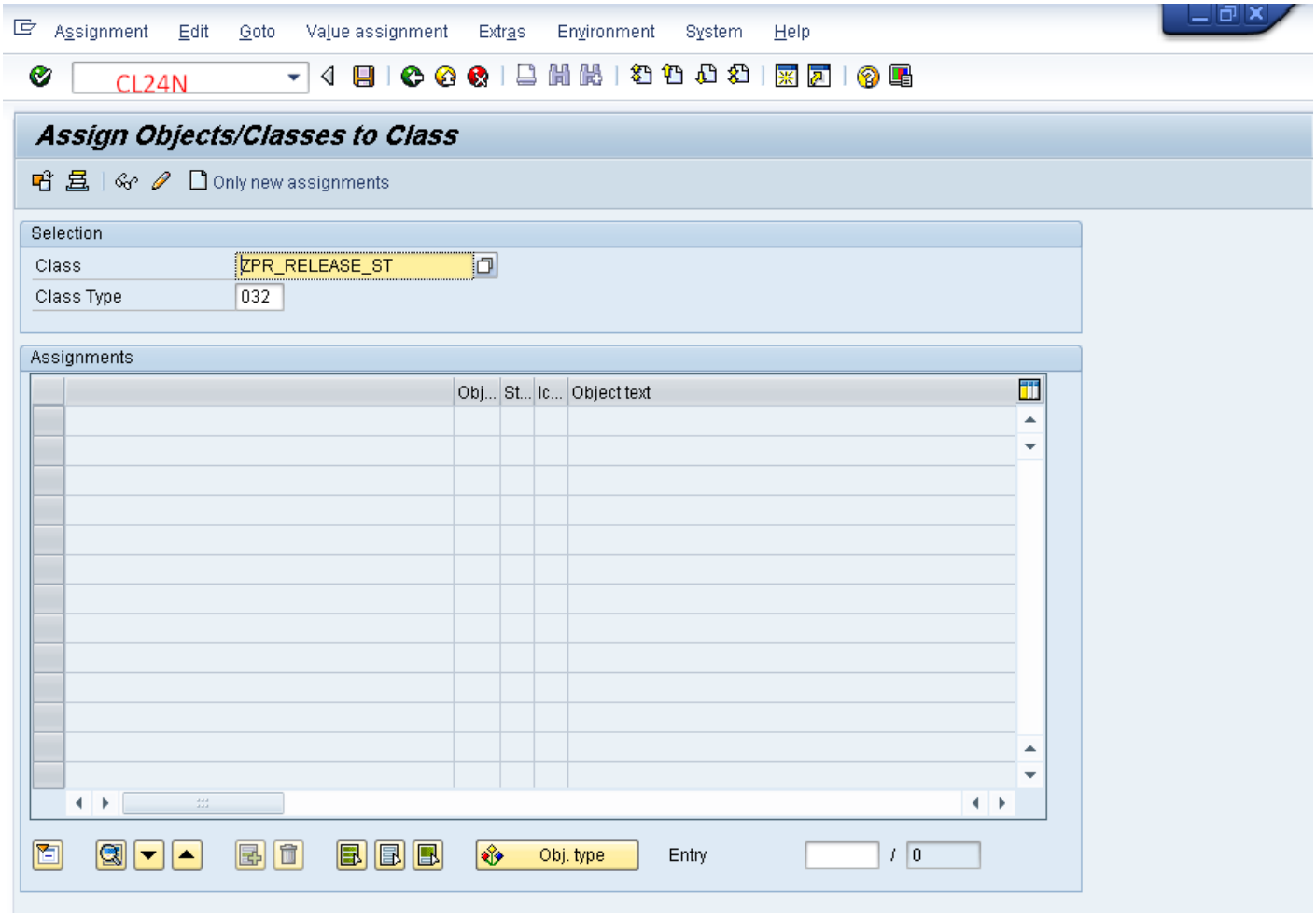


Table View
Edit
Goto
Selection
Utilities(M)
System
Help
Change View "Release Strategies: Purchase Requisition": Details
Release Group
P1
PR Release Startegy
Release Strategy
SH
SH. RIs.Strategy
Release codes
S1
Proc. Manager
S2
Proc. Director
S3
SC.manger
Release Strategy
Release group
P1
PR Release Startegy
Release Strategy
SH
SH. RIs.Strategy
Release codes
Releases to Date
Final release
S1 S2 S3
Release ID
C
Change
Simulate release
Release simulation

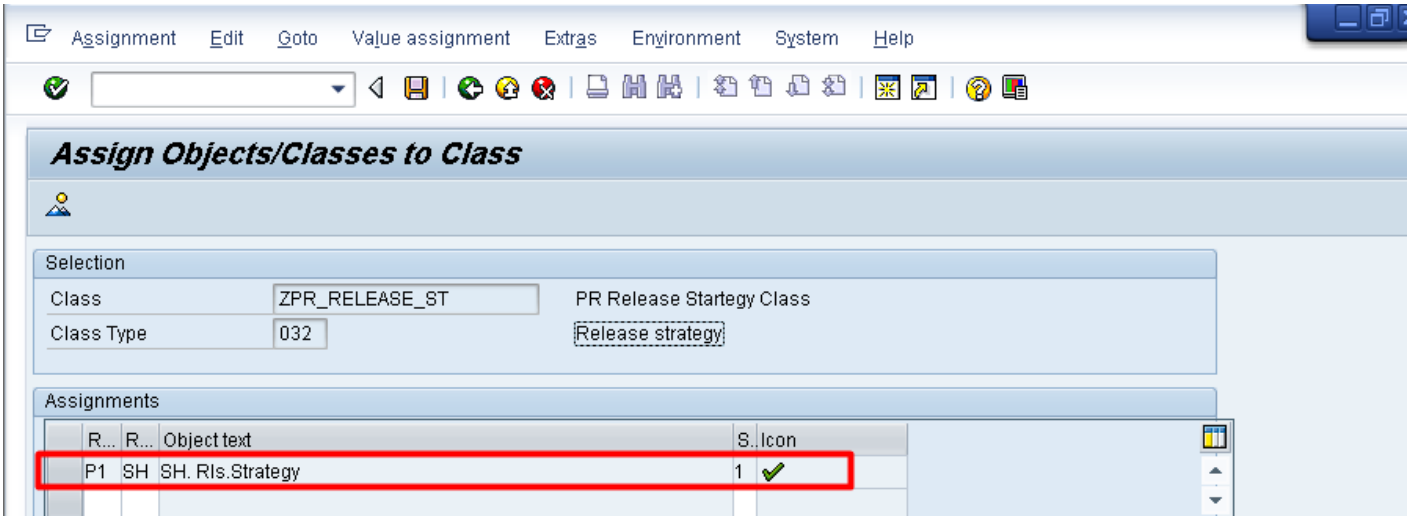
3rd Assign the Release Strategy to the Class:





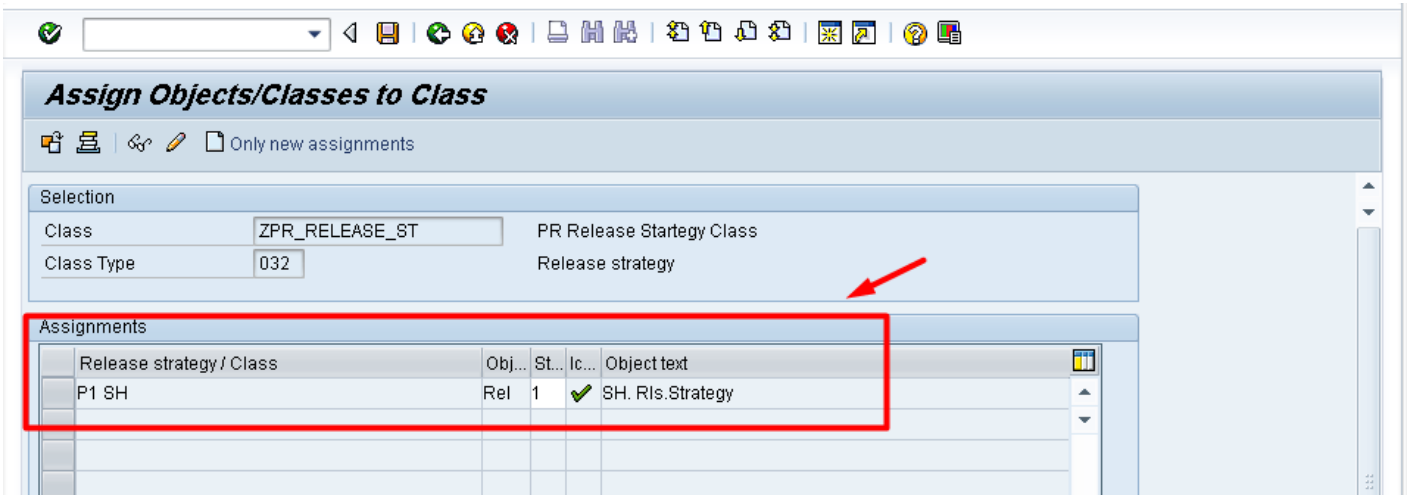

Assignment Edit Goto Value assignment Extras Environment System Help
CL24N
Assign Objects/Classes to Class
Only new assignments
Selection
Class
ZPR_RELEASE_ST
Class Type
032
Assignments
Obj... St... Ic... Object text
Obj. type
Entry
/ 0

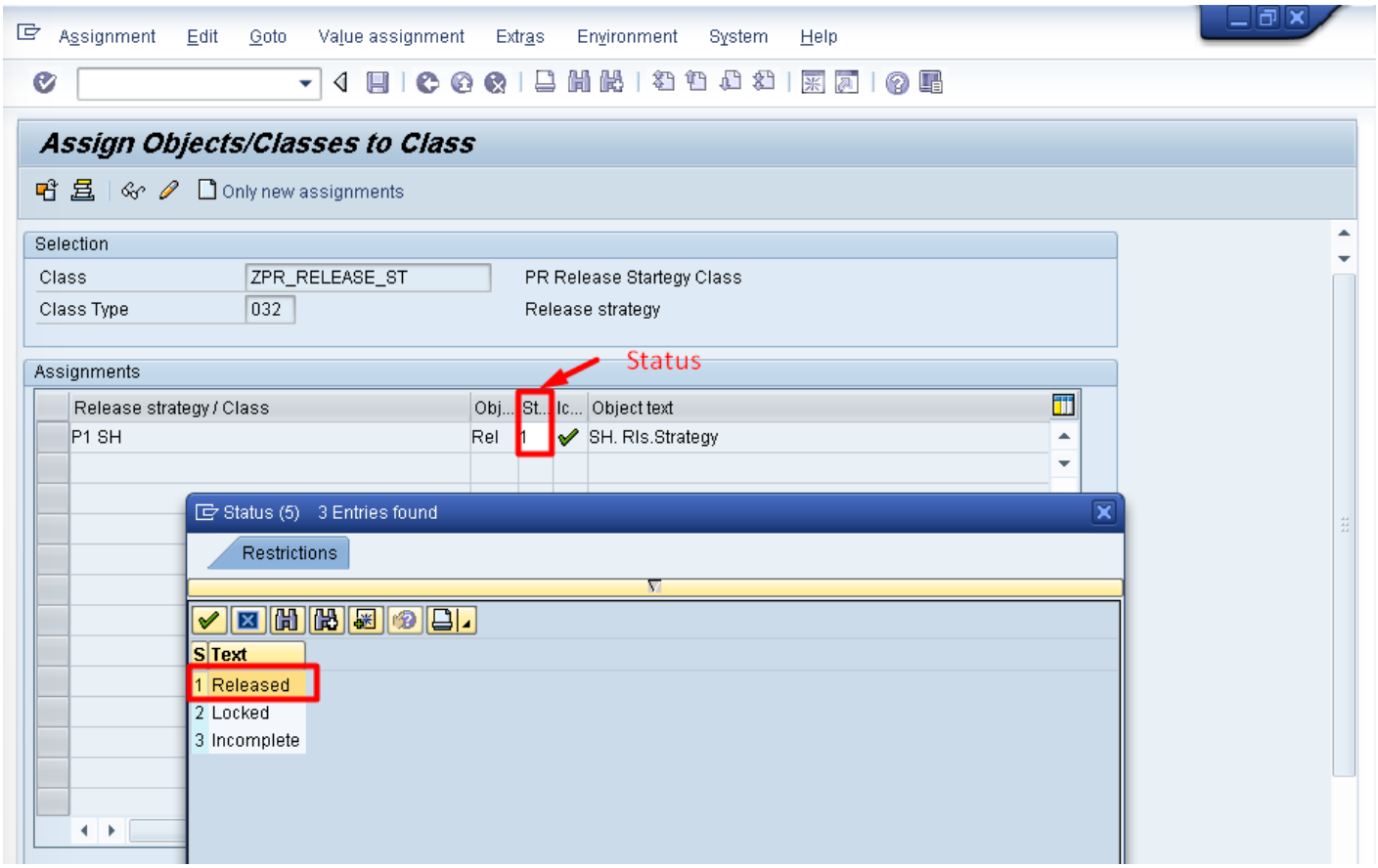
Enter.


Assignment Edit Goto Value assignment Extras Environment System Help
Assign Objects/Classes to Class
Selection
Class
ZPR_RELEASE_ST
PR Release Startegy Class
Class Type
032
Release strategy
Assignments
R... R... Object text S.. Icon
P1 SH SH. RIs.Strategy 1

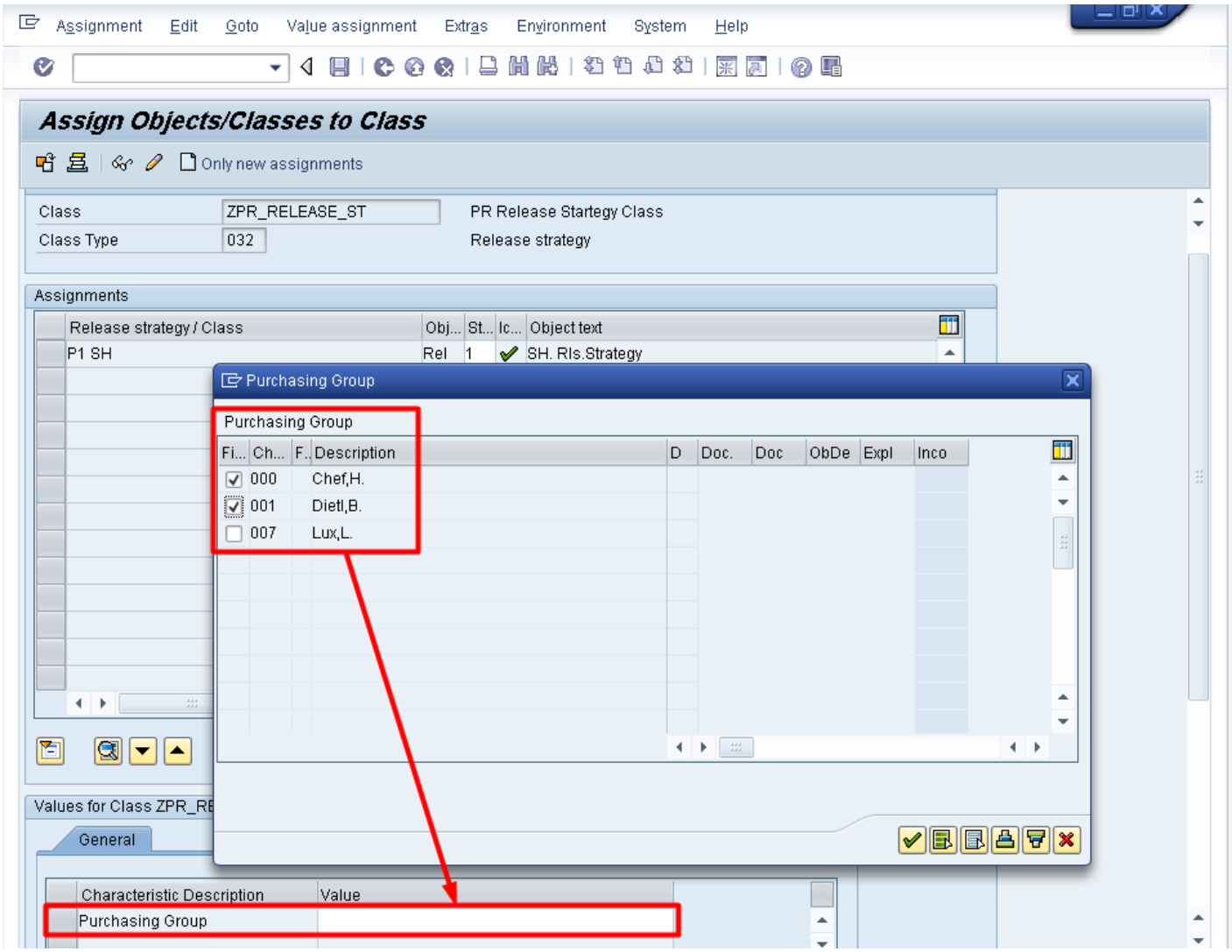
Save.

CL24N


Assign Objects/Classes to Class
Only new assignments
Selection
Class
ZPR_RELEASE_ST
PR Release Startegy Class
Class Type
032
Release strategy
Assignments
Release strategy / Class
Obj...
St...
Ic...
Object text
P1 SH
Rel
1
SH. RIs.Strategy


Assignment
Edit
Goto
Value assignment
Extras
Environment
System
Help
Assign Objects/Classes to Class
Only new assignments
Selection
Class
ZPR_RELEASE_ST
PR Release Startegy Class
Class Type
032
Release strategy
Assignments
Status
Release strategy / Class
Obj...
St...
Ic...
Object text
P1 SH
Rel
1
SH. RIs.Strategy
Status (5) 3 Entries found
Restrictions
S Text
1 Released
2 Locked
3 Incomplete

This Release Strategy will be activated in the IT and SW Purchase Groups.

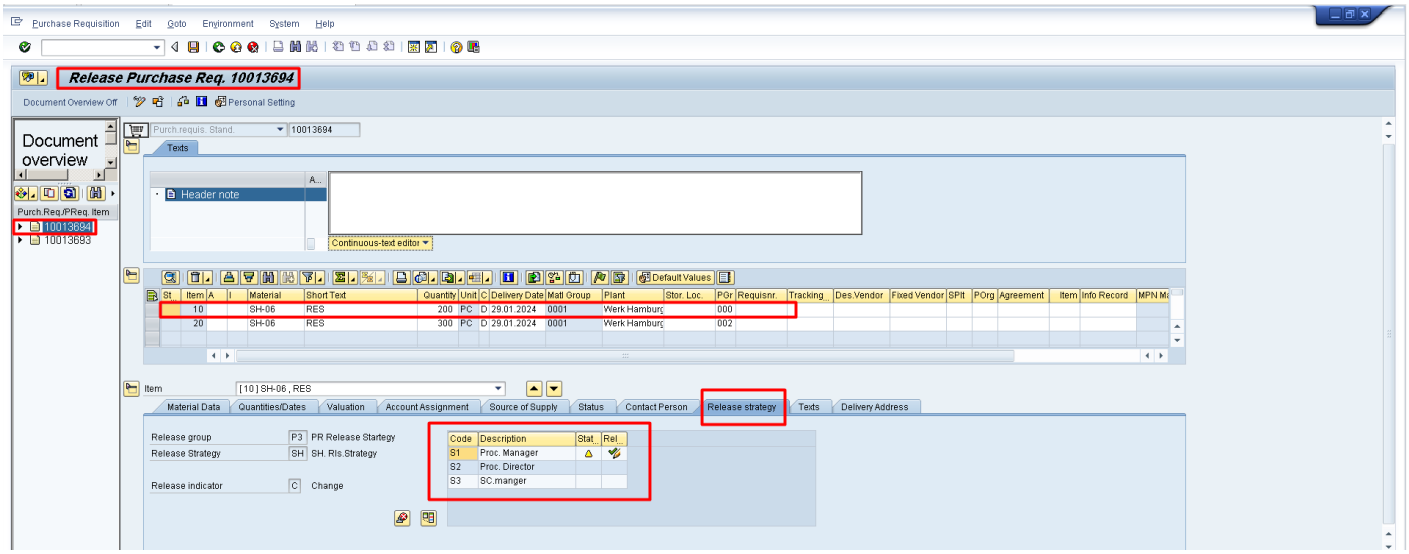


Configuration Check

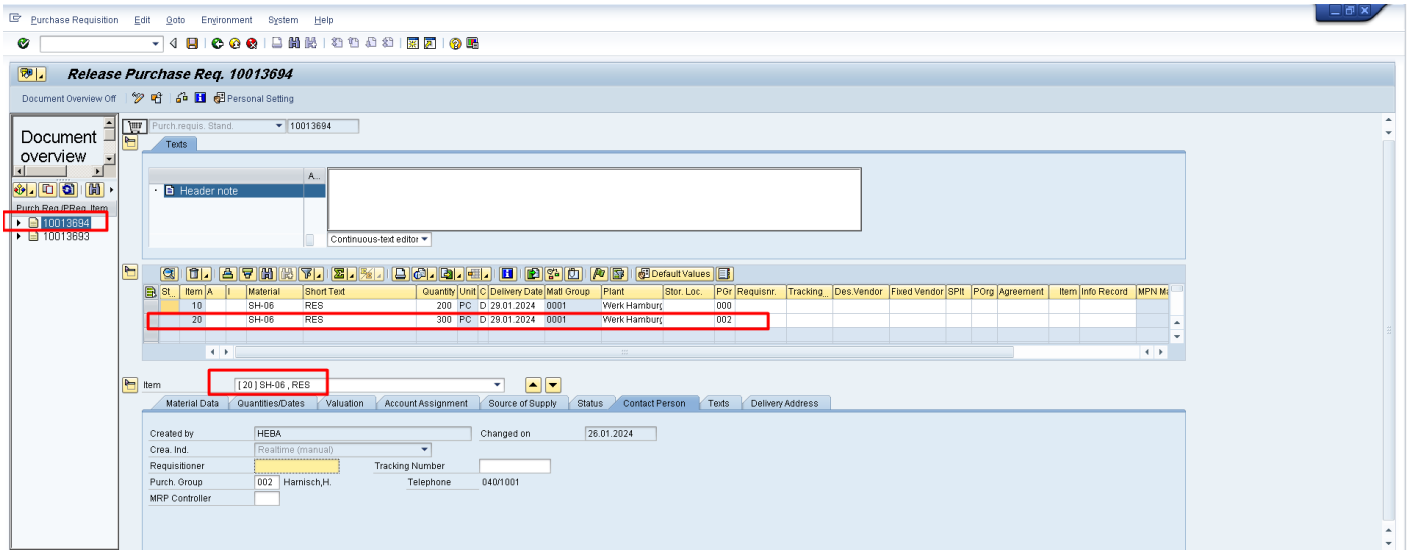
4th: Let's run the business cycle.

Create PR ➔ ME51N ➔ ME54N

Line Item 1 with release strategy. (With Purchase Group 000)



Line Item 2 without the release strategy. (With Purchase Group 002)



PR no. 10013694

"Each line item is assigned to a **different purchasing group;** the release strategy is activated on the 1st line only.