



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.



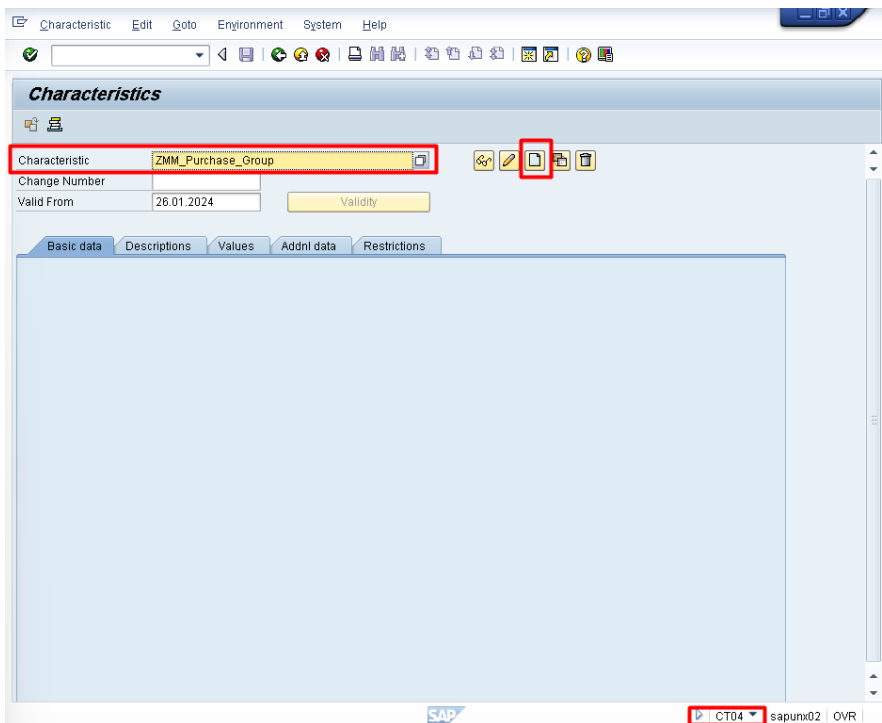
PR Release Strategy on the line-item level (Purchase Group)

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”





Characteristic Edit Goto Extras Environment System Help

Create Characteristic

Characteristic: ZMM_PURCHASE_GROUP

Change Number:

Valid From: 26.01.2024

Validity

Basic data Descriptions Values Addnl data Restrictions

Basic data

Description: Purchase Group

Chars Group:

Status: Released

Auth. Group:

Format

Data Type: Character Format

Number of Chars: 6

Case Sensitive: ☐

Template:

Value Assignment

Single Value ☒ Multiple Values ☐

Restrictable ☐

Entry Required ☐

SAP CT04 sapunx02 OVR

Characteristic Edit Goto Extras Environment System Help

Change Characteristic

Characteristic: ZMM_PURCHASE_GROUP

Change Number:

Valid From: 26.01.2024

Validity

Basic data Descriptions Values Addnl data Restrictions

Reference to Table Field

Table Name:

Field Name:

Document

Document:

Document Type:

Document Part:

Doc. Version:

Procedure for Value Assignment

Not Ready for Input ☐ No Display ☐ Display Allowed Values ☐

User Entry Handling

Unformatted Entry ☐

To get the table name go to (SE16N)

SAP CT04 sapunx02 OVR

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.



Table Display Edit Goto Extras System Help

General Table Display

Background Number of Entries All Entries

Table EBAN Purchase Requisition

Text table ☐ No texts

Layout

Maximum no. of hits 500 ☐ Maintain entries

Field name	O...	Fr.Value	To value	More	Output	Technical name
Client						MANDT
Purchase Req.					<input checked="" type="checkbox"/>	BANFN
Requisn Item					<input checked="" type="checkbox"/>	BNFPO
Document Type					<input checked="" type="checkbox"/>	BSART
Doc. Category					<input checked="" type="checkbox"/>	BSTYP
Control					<input checked="" type="checkbox"/>	BSAKZ
Deletion Ind.					<input checked="" type="checkbox"/>	LOEKZ
Processing stat					<input checked="" type="checkbox"/>	STATU
Creation Ind.					<input checked="" type="checkbox"/>	ESTKZ
Release ind.					<input checked="" type="checkbox"/>	FRGKZ
Release status					<input checked="" type="checkbox"/>	FRGZU
Rel. Strategy					<input checked="" type="checkbox"/>	FRGST
Purch. Group					<input checked="" type="checkbox"/>	EKGRP
Created by					<input checked="" type="checkbox"/>	ERNAM
Changed on					<input checked="" type="checkbox"/>	ERDAT
Requisitioner					<input checked="" type="checkbox"/>	AFNAM

Table Name

Characteristic Edit Goto Extras Environment System Help

Change Characteristic

Characteristic ZMM_PURCHASE_GROUP

Change Number

Valid From 26.01.2024

Validity

Basic data Descriptions Values Addnl data Restrictions

Reference to Table Field

Table Name CEBAN

Field Name EKGRP

Paste the table technical name

Paste the table name starting with "C" to be "CEBAN"

Document

Document

Document Type

Document Part

Doc. Version

Procedure for Value Assignment

☐ Not Ready for Input

☐ No Display

☐ Display Allowed Values

User Entry Handling

☐ Unformatted Entry

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)

Characteristic: ZMM_PURCHASE_GROUP
Change Number:
Valid From: 26.01.2024

Basic data | Descriptions | Values | Addnl data | Restrictions

Basic data
Description: Purchasing Group
Chars Group:
Status: Released
Auth.Group:

Format
Data Type: Character Format
Number of Chars: 3
☐ Case Sensitive
Template:

Value Assignment
☒ Single Value
☐ Multiple Values
☐ Restrictable
☐ Entry Required

Changed to 3 instead of 6 as the Table Number of chars. length

Characteristic: ZMM_PURCHASE_GROUP
Change Number:
Valid From: 26.01.2024

Basic data | Descriptions | Values | Addnl data | Restrictions

Basic data
Description: Purchasing Group
Chars Group:
Status: Released
Auth.Group:

Format
Data Type: Character Format
Number of Chars: 3
☐ Case Sensitive
Template:

Value Assignment
☐ Single Value
☒ Multiple Values
☐ Restrictable
☐ Entry Required

Changed from 6 to 3 because we choosed purch. Group table in the Addnl data tab then it cahnged the Chars length to the table Chars length



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

Change Characteristic

Characteristic: ZMM_PURCHASE_GROUP
Change Number:
Valid From: 26.01.2024
Validity:

Basic data Descriptions Values Addnl data Restrictions

☐ Additional Values Other Value Check

Char. Value	Description	D	O	S
000	Chef, H.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001	Dietl, B.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
007	Lux, L.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

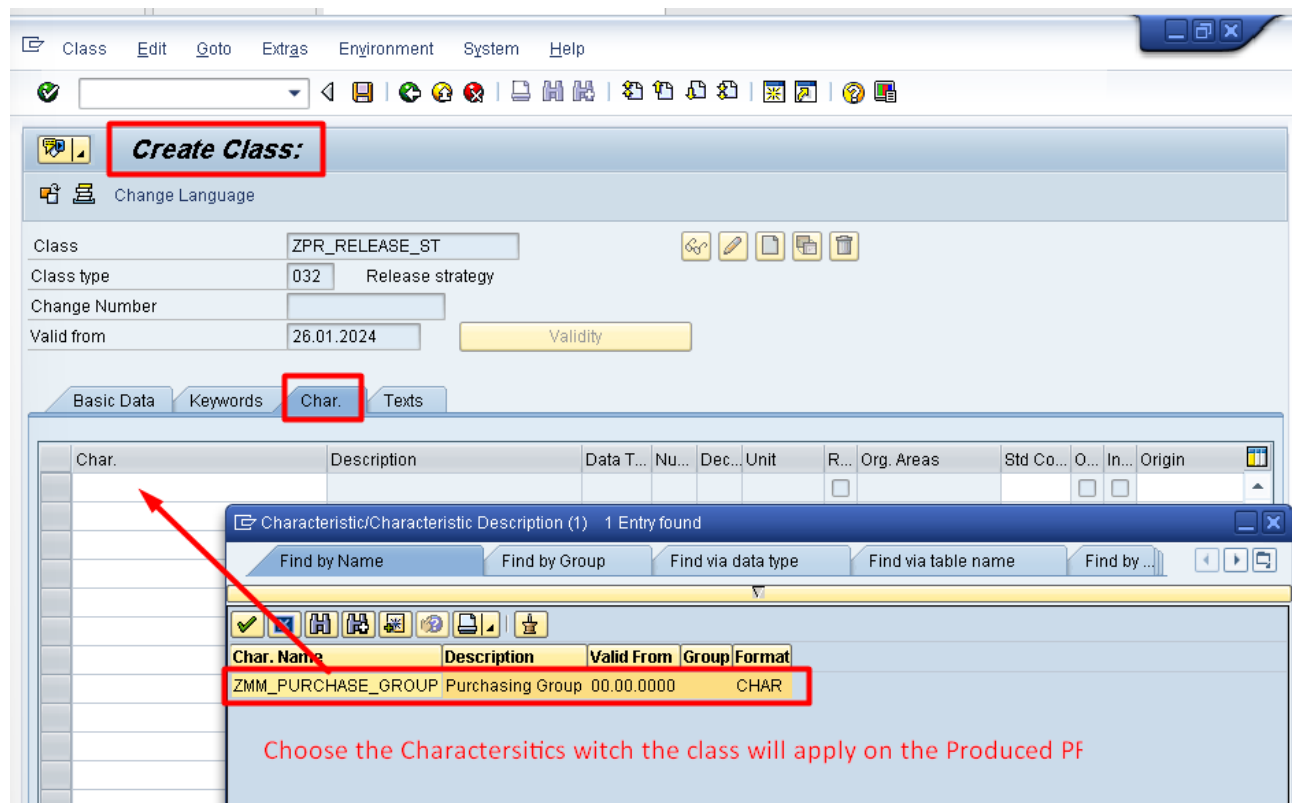


➤ Class Creation >> T-Code "CL02"

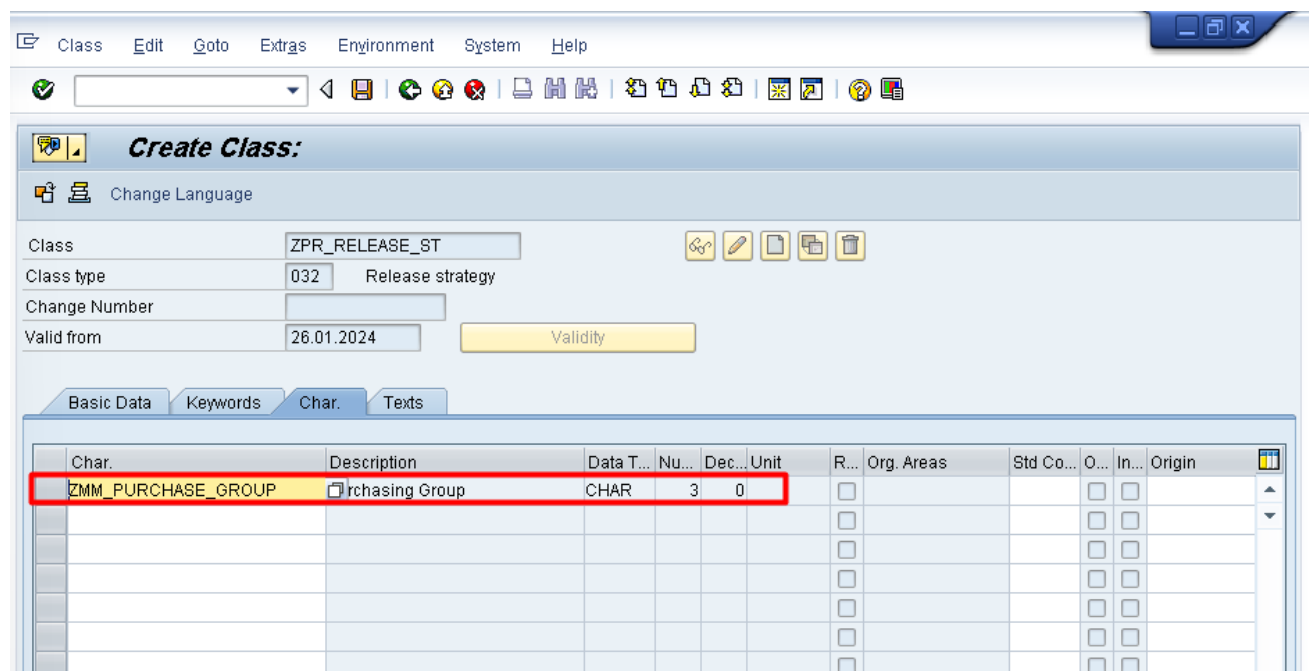
The screenshot shows the SAP 'Class' creation interface. The 'Class' field is set to 'ZPR_RELEASE_ST' (labeled 2). The 'Class type' field is set to '032' (labeled 3). A 'Change Number' field is also present. A 'Valid from' date of '26.01.2024' is entered. A 'Validity' button is visible. A 'Class Type' selection dialog is open, showing a list of class types. '032 Release strategy' is selected (labeled 4). The 'CL02' transaction code is visible in the bottom right corner (labeled 1).

The screenshot shows the 'Create Class' screen in SAP. The 'Class' field is 'ZPR_RELEASE_ST'. The 'Class type' is '032 Release strategy' (labeled 1). The 'Change Number' field is empty. The 'Valid from' date is '26.01.2024'. The 'Validity' button is present. The 'Basic Data' tab is selected (labeled 2). The 'Basic data' section shows the 'Description' as 'PR Release Startegy Class' (labeled 3). The 'Status' is 'Released'. The 'Class group' is empty. The 'Organizational area' is empty. The 'Valid From' date is '26.01.2024' and the 'Valid to' date is '31.12.9999' (labeled 4). A red arrow points to the 'Valid to' date field with the text 'Validity Period'. The 'Same classification' section has 'Do not check' selected. The 'Authorizations' section has 'Class maintenance', 'Classification', and 'Find object' all set to 'No'.

Open Char. Tab → Choose the Characteristic at which the



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



Save

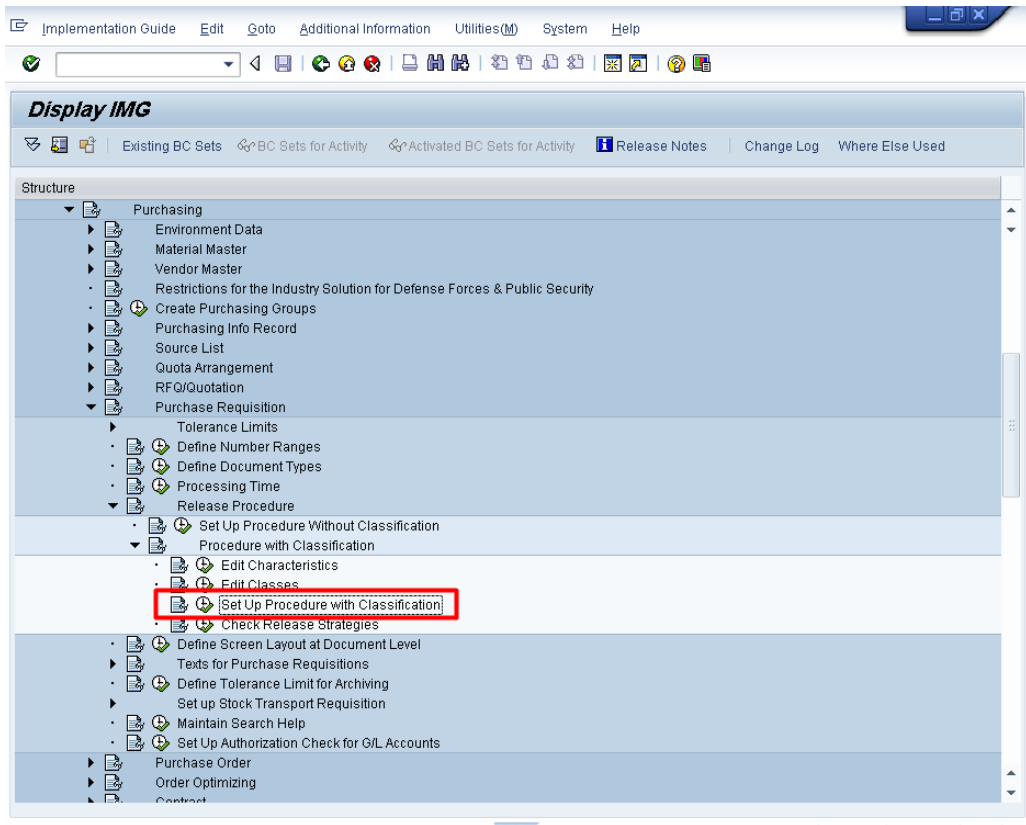
When we use that Class, these characteristics will be applied to PR.

⇒ Go to Configuration to create the release strategy.



2nd Configuration

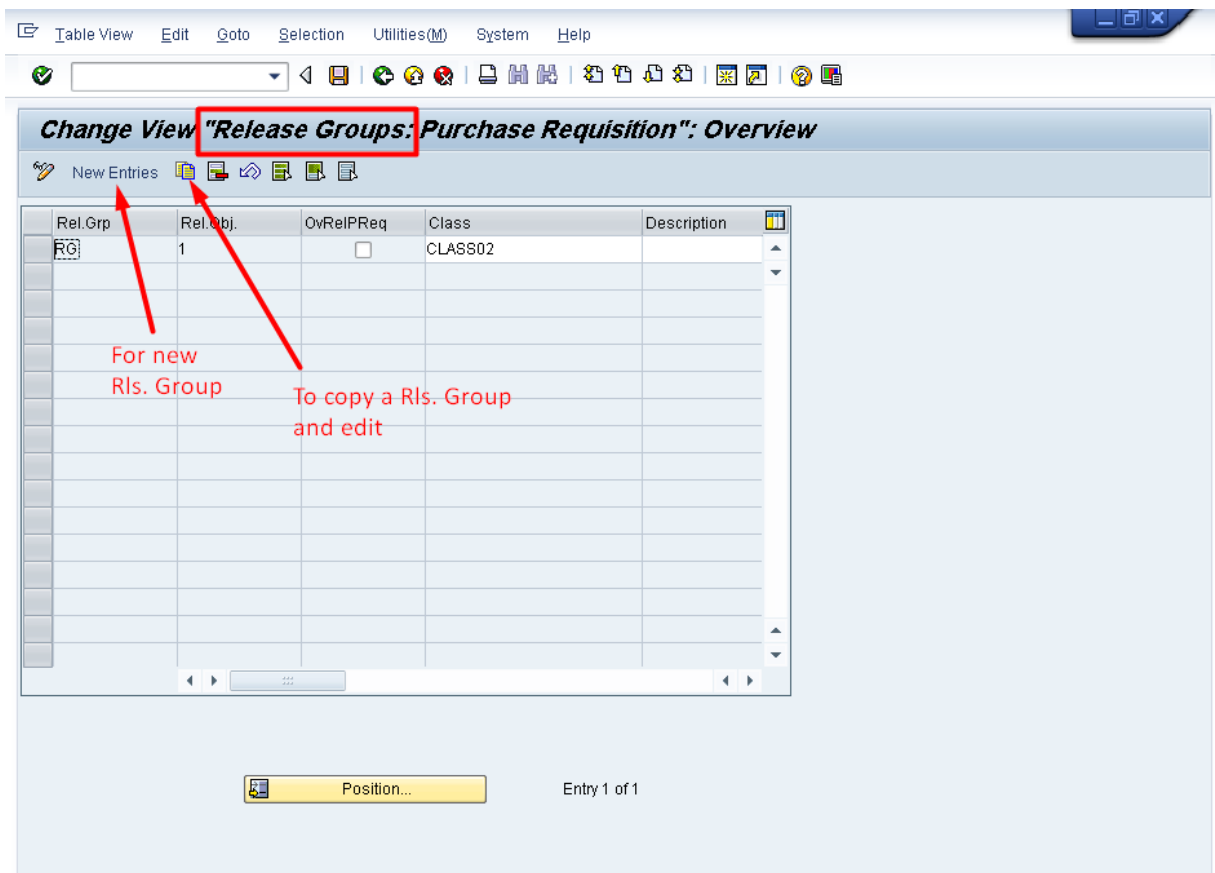
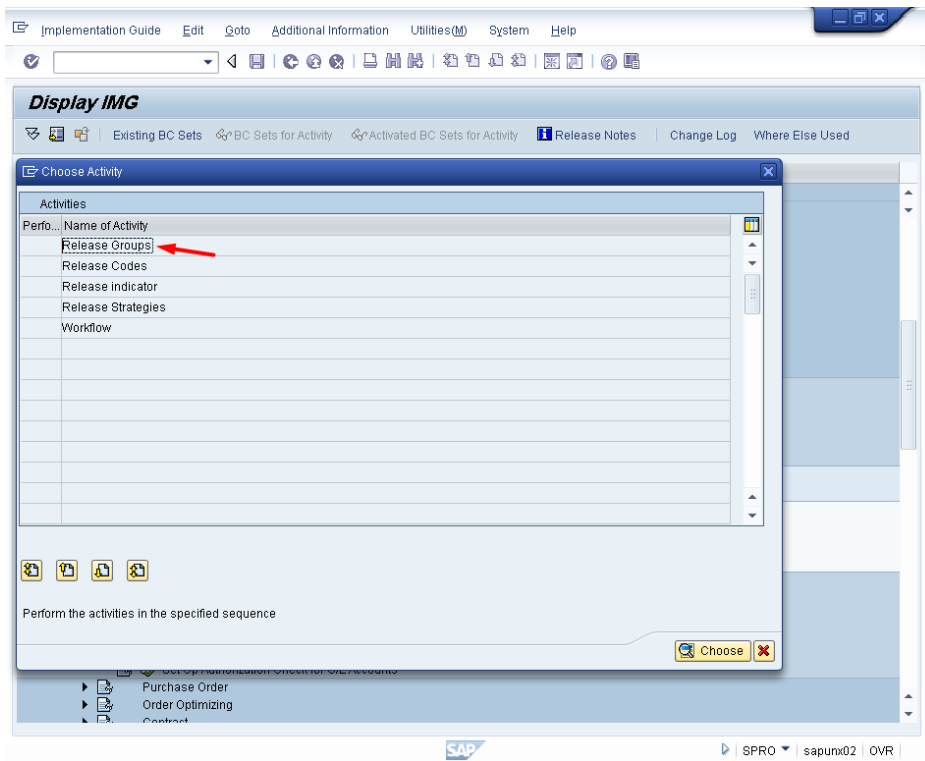
Spro → Material Management → Purchasing → PR → Release Strategy → Procedure with Classification → Set up Procedure with Classification.



Follow the system steps to create the Release Strategy.



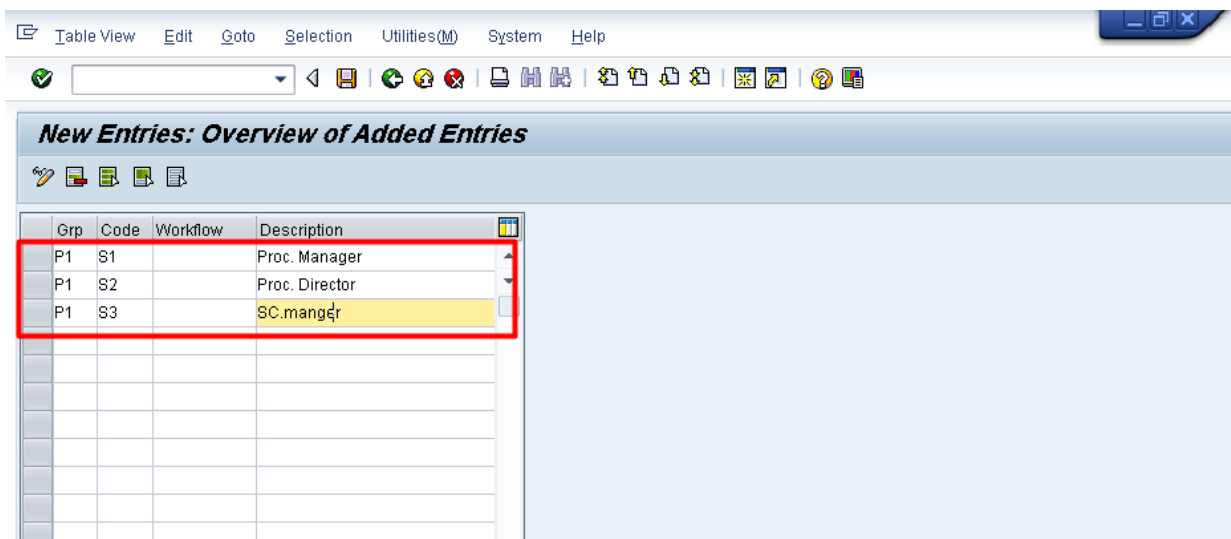
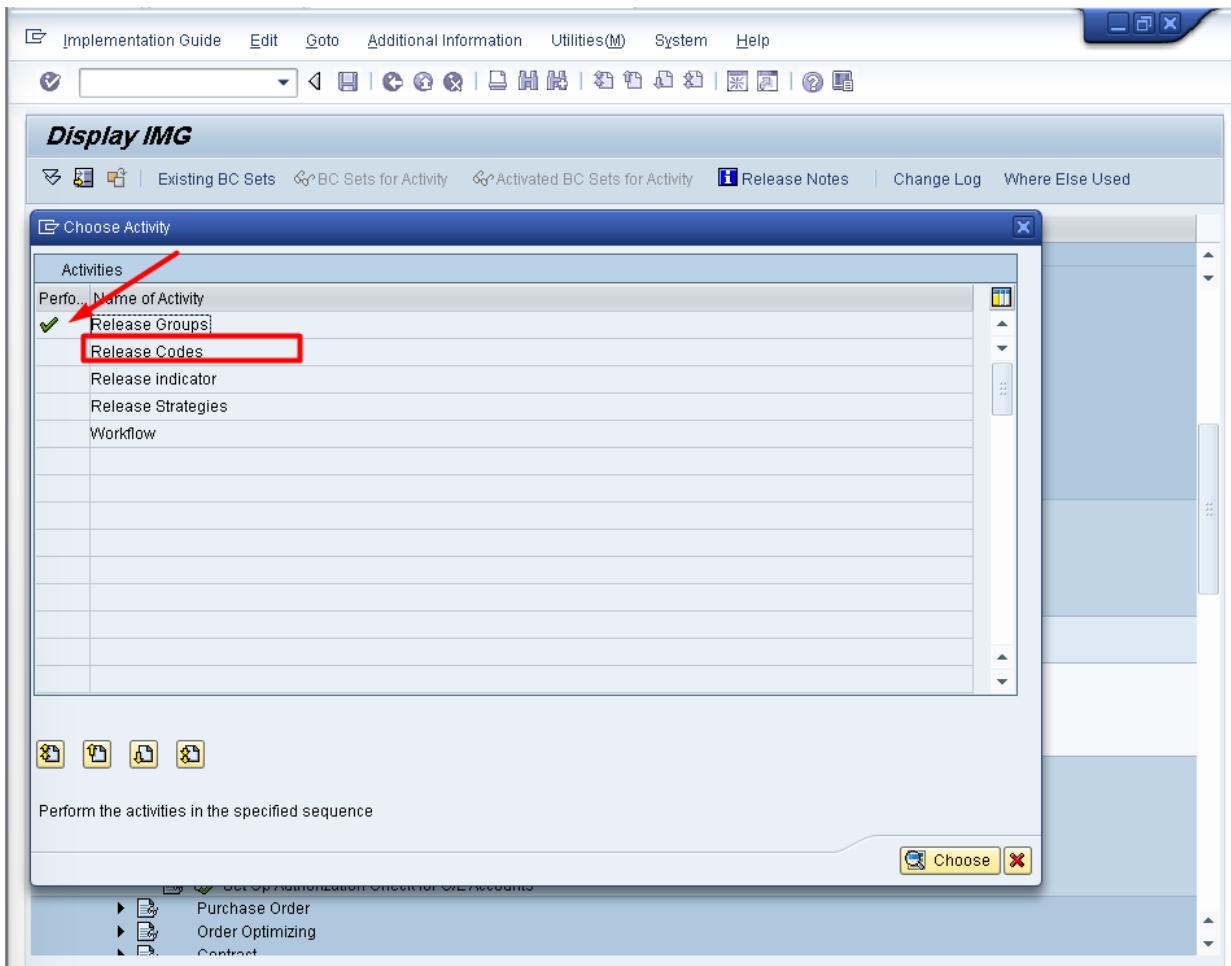
Release Group:



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



Release Codes:



The screenshot shows the SAP 'Release Codes: Purchase Requisition' Overview screen. The table contains the following data:

Grp	Code	Description
P1	S1	Proc. Manager
P1	S2	Proc. Director
P1	S3	SC.manger
RG	1	ewaes1
RG	2	ewaes2
RG	3	ewaes3

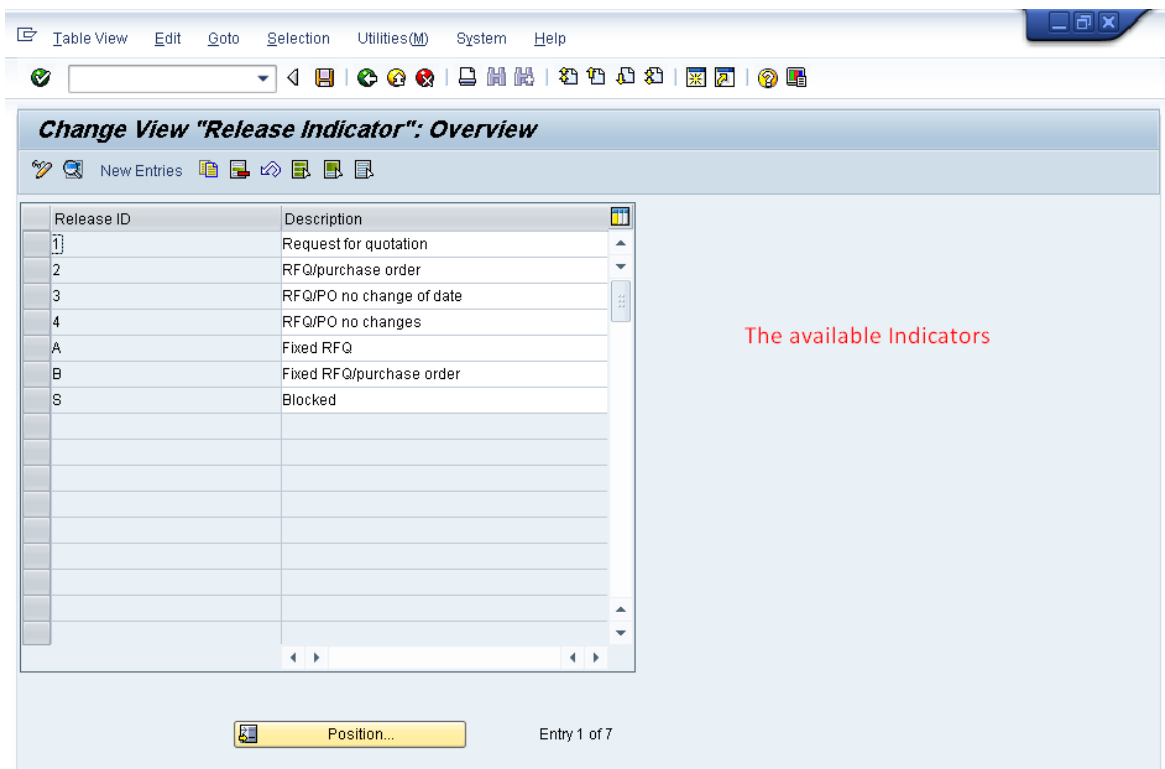
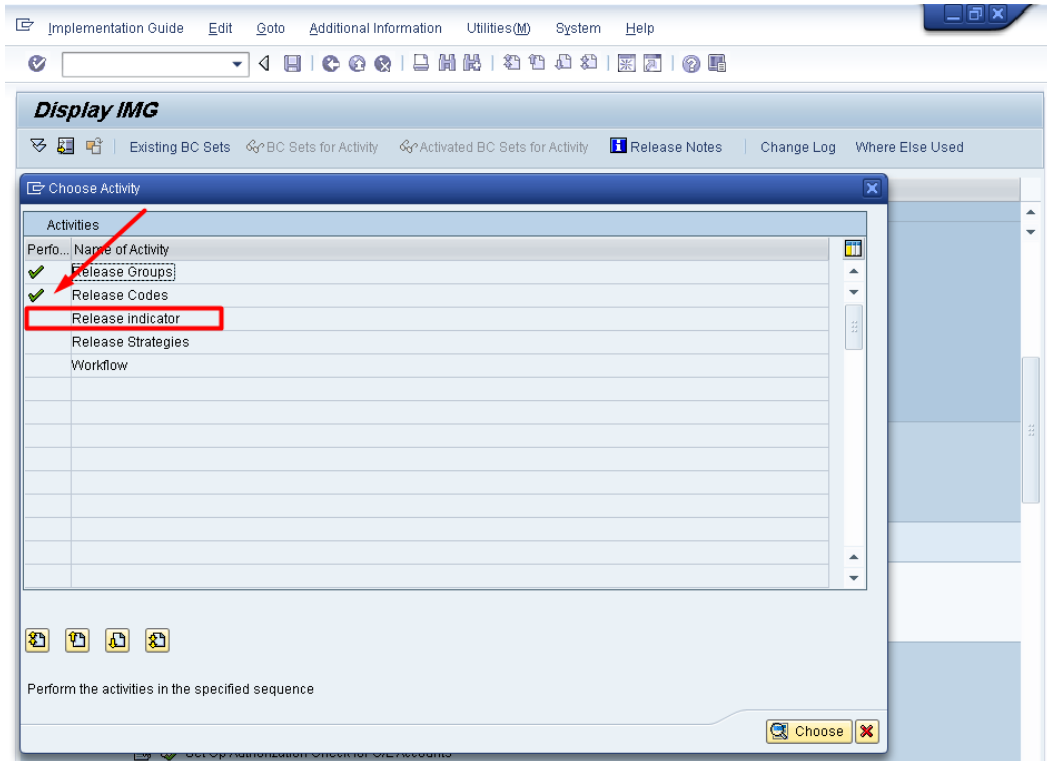
A red box highlights the first three rows (P1 S1, P1 S2, P1 S3). A red arrow points to the table with the text 'Release Codes are added to the list'.



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

Details

☐ Firmed for Req. Planning

☒ Released for Quotation

☒ Released for issue of PO

Field Selection Key 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

Indicator is added

Position... Entry 1 of 8



Release Strategy:

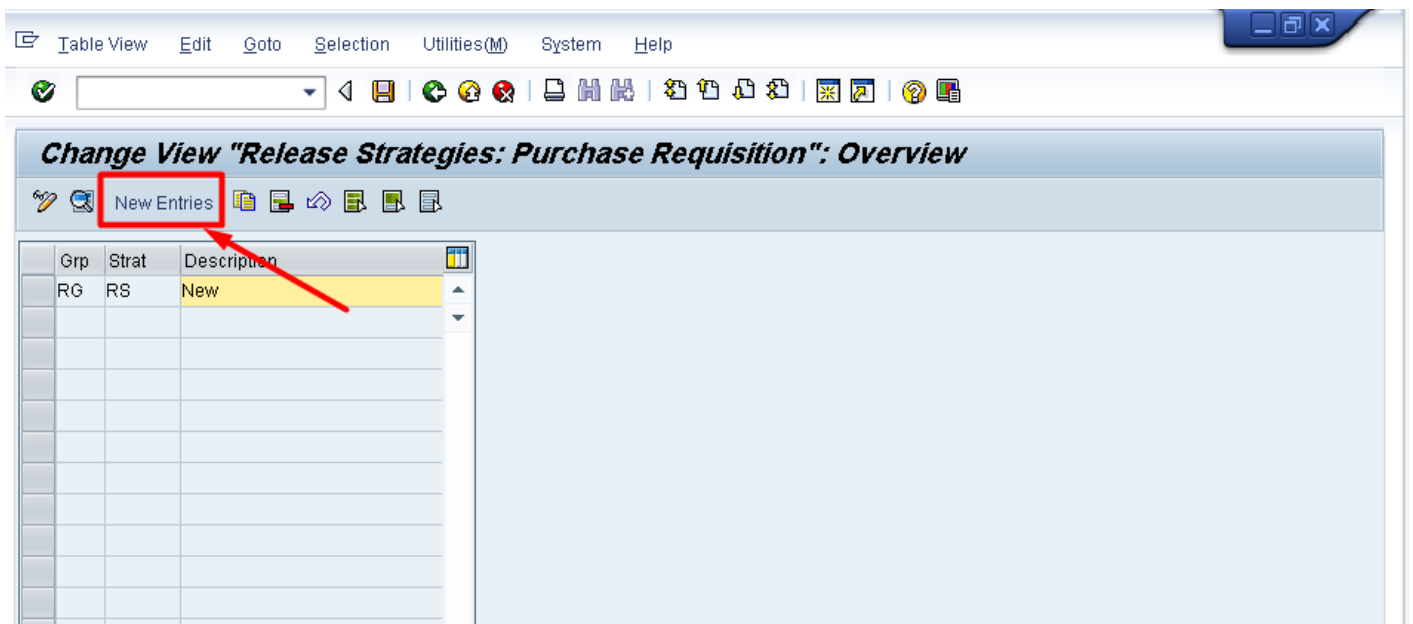
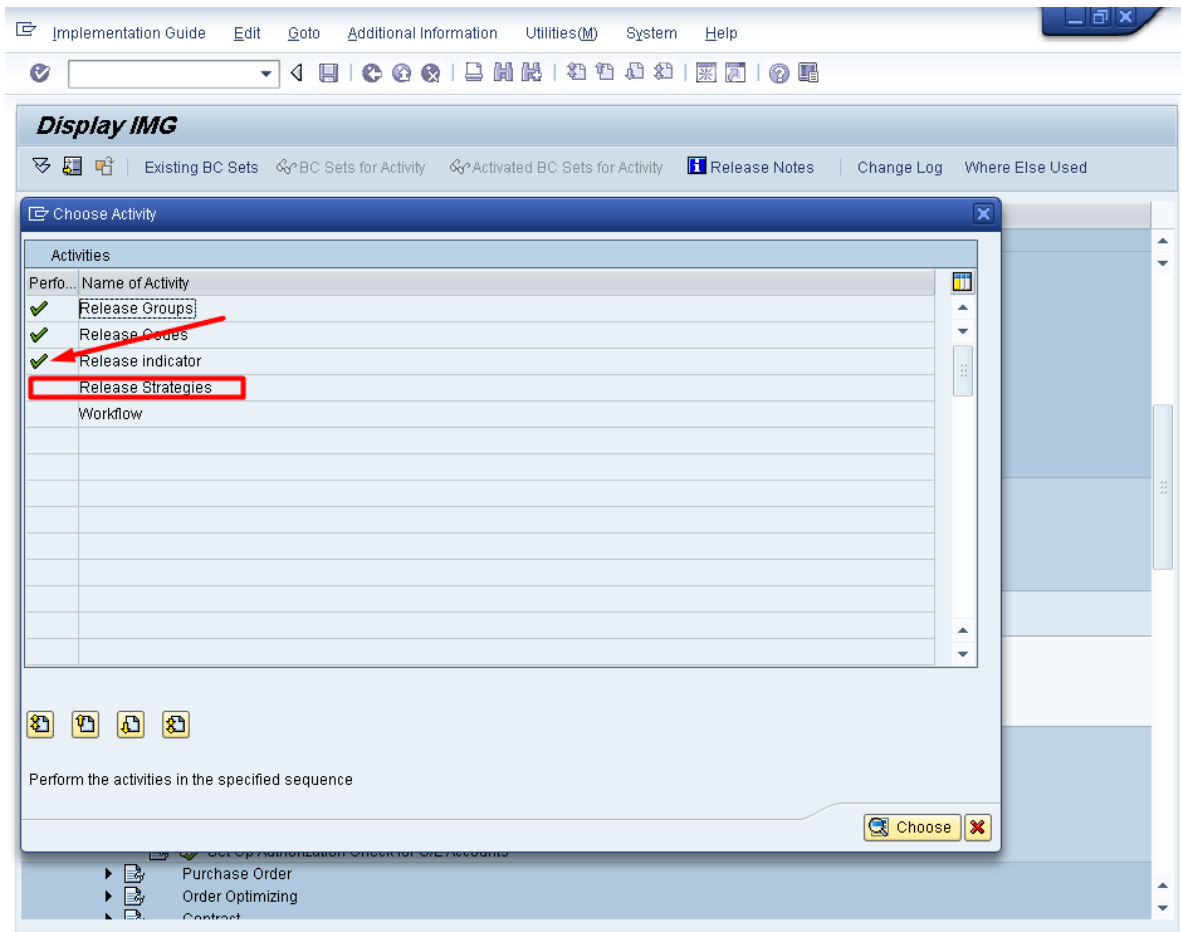




Table View Edit Goto Selection Utilities(M) System Help

Release Group PI

Release Strategy

Release codes

Release prerequisites

Release group (3) 8 Entries found

Restrictions

Grp	Description
02	Release of PO
04	Rel. >250.000 dem
10	rel st sen
P1	PR Release Strategy
PI	
RG	
Z1	Release of PO
ZG	Release of PO

Table View Edit Goto Selection Utilities(M) System Help

Release Group P1 PR Release Strategy

Release Strategy SH SH. Rls.Strategy

Release codes

S1	Proc. Manager
S2	Proc. Director
S3	SC.manger



Release Prerequisites:

Table View Edit Goto Selection Utilities(M) System Help

New Entries: Details of Added Entries

Release Group: P1 PR Release Strategy
Release Strategy: SH SH. Rls.Strategy

Release codes

S1	Proc. Manager
S2	Proc. Director
S3	SC.manger

1 Release prerequisites 2 Release statuses 3 Classification 4 Release simulation

Home Win_PC1 Clone of Windows Server 20...

Table View Edit Goto Selection Utilities(M) System Help

New Entries: Details of Added Entries

Release Group: P1 PR Release Strategy
Release Strategy: SH SH. Rls.Strategy

Release codes

S1	Proc. Manager
S2	Proc. Director
S3	SC.manger

Release prerequisites

Prerequisites

Code\release prerequisite	S1	S2	S3
S1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Continue Cancel



Release Status:

Home Win_PC1 Clone of Windows Server 20...

Table View Edit Goto Selection Utilities(M) System Help

New Entries: Details of Added Entries

Release Group **P1** Release Strategy

Release Strategy **SH** SH. Rls.Strategy

Release codes

S1	Proc. Manager
S2	Proc. Director
S3	SC.manger

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 Strategy

Release Strategy: Release Strategies

Release codes:

Release code	Proc. Manager	Proc. Director	SC.manger
S1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Release prerequisites

Release status

Release Indicator Description

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

Table View Edit Goto Selection Utilities(M) System Help

Change View "Release Strategies: Purchase Requisition": Details

Release Group: P1 PR Release Strategy

Release Strategy: Release Strategies

Release codes:

Release code	Proc. Manager	Proc. Director	SC.manger
S1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Release prerequisites

Release status

Release Indicator Description

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. Rls.Strategy

Release codes

- S1 Proc. Manager
- S2 Proc. Director
- S3 SC.manger

Release Strategy

Release group P1 PR Release Startegy
Release Strategy SH SH. Rls.Strategy

Release codes

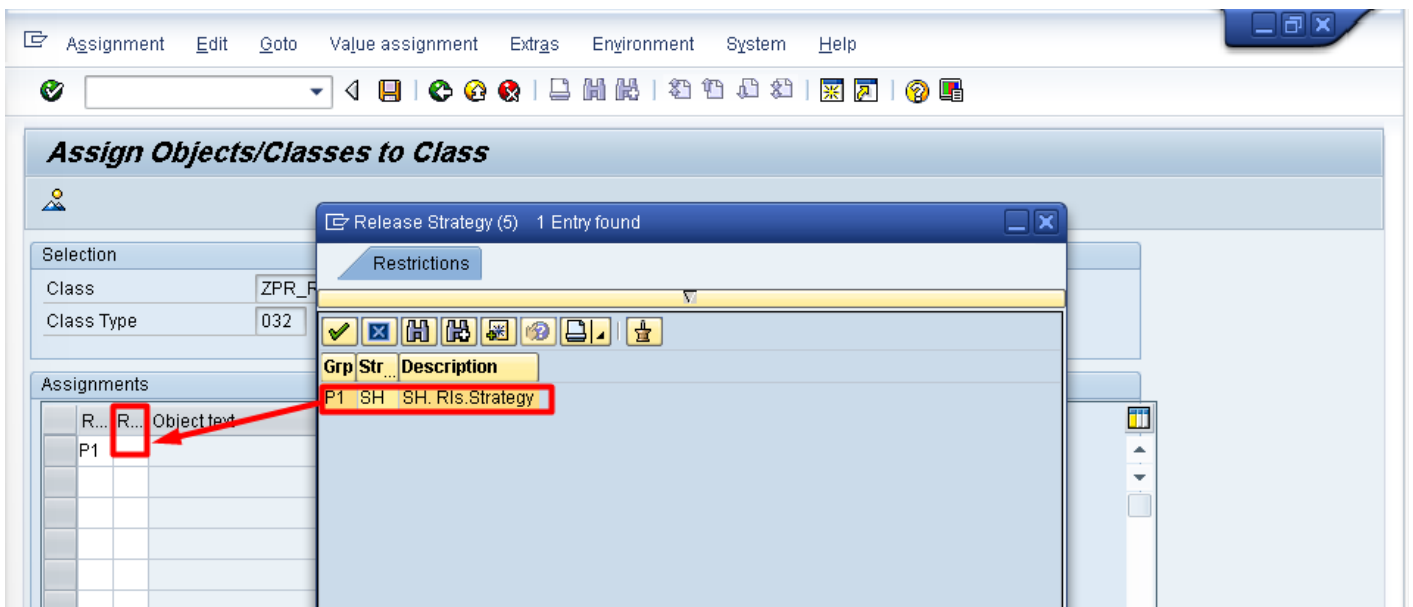
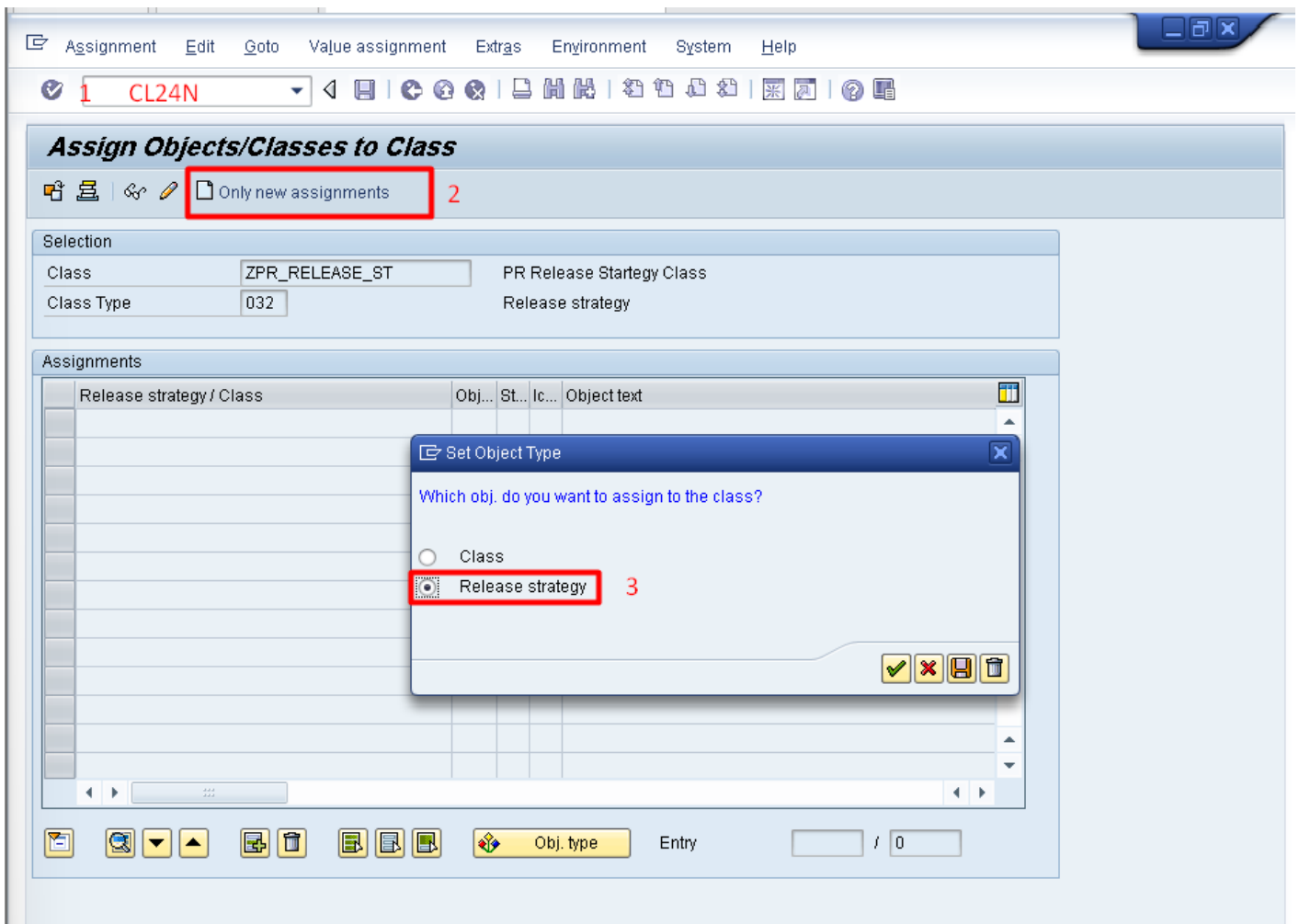
Releases to Date
Final release S1 S2 S3

Release ID C Change

Release simulation

Simulate release

3rd Assign the Release Strategy to the Class:



[illegible]

Enter.

The screenshot shows the SAP configuration screen for PR Release Strategy Class. The title bar includes menus: Assignment, Edit, Goto, Value assignment, Extras, Environment, System, and Help. Below the title bar is a toolbar with various icons. The main content area is titled "Assign Objects/Classes to Class". Under the "Selection" section, the "Class" field is set to "ZPR_RELEASE_ST" (PR Release Strategy Class) and the "Class Type" field is set to "032" (Release strategy). The "Assignments" table below shows a single entry with a red box highlighting the first row:

R...	R...	Object text	S..Icon
P1	SH	SH. Rls.Strategy	1 ✓

Save.



CL24N

Assign Objects/Classes to Class

Only new assignments

Selection

Class: ZPR_RELEASE_ST PR Release Strategy Class
Class Type: 032 Release strategy

Assignments

Release strategy / Class	Obj...	St...	ic...	Object text
P1 SH	Rel	1	✓	SH. Rls.Strategy

Assign Objects/Classes to Class

Only new assignments

Selection

Class: ZPR_RELEASE_ST PR Release Strategy Class
Class Type: 032 Release strategy

Assignments

Release strategy / Class	Obj...	St...	ic...	Object text
P1 SH	Rel	1	✓	SH. Rls.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.

Assign Objects/Classes to Class

Class: ZPR_RELEASE_ST PR Release Strategy Class
Class Type: 032 Release strategy

Assignments

Release strategy / Class	Obj...	St...	lc...	Object text
P1 SH	Rel	1	✓	SH. Rls.Strategy

Purchasing Group

Fi...	Ch...	F...	Description	D	Doc.	Doc	ObDe	Expl	Inco
<input checked="" type="checkbox"/>	000		Chef,H.						
<input checked="" type="checkbox"/>	001		Dietl,B.						
<input type="checkbox"/>	007		Lux,L.						

Values for Class ZPR_RELEASE_ST

General

Characteristic Description	Value
Purchasing Group	



Configuration Check

4th: Let's run the business cycle.

Create PR → ME51N → ME54N

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

The screenshot shows the SAP ME54N 'Release Purchase Req. 10013694' interface. The 'Document overview' on the left shows the hierarchy: Purchase Req. 10013694 > Item 10013694. The main table lists two line items:

St	Item	Material	Short Text	Quantity	Unit	C	Delivery Date	Mat Group	Plant	Stor. Loc.	POR	Requisnr.	Tracking	Des. Vendor	Fixed Vendor	SPit	PORG	Agreement	Item	Info Record	MPN M.
10	SH-06	RES		200	PC	D	29.01.2024	0001	Werk Hamburg			000									
20	SH-06	RES		300	PC	D	29.01.2024	0001	Werk Hamburg			002									

Below the table, the 'Item' [10] SH-06, RES is selected. The 'Release strategy' tab is active, showing a table of release strategies:

Code	Description	Stat.	Rel.
S1	Proc. Manager		
S2	Proc. Director		
S3	SC manger		

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

The screenshot shows the same SAP ME54N 'Release Purchase Req. 10013694' interface. The 'Document overview' on the left shows the hierarchy: Purchase Req. 10013694 > Item 10013694. The main table lists two line items:

St	Item	Material	Short Text	Quantity	Unit	C	Delivery Date	Mat Group	Plant	Stor. Loc.	POR	Requisnr.	Tracking	Des. Vendor	Fixed Vendor	SPit	PORG	Agreement	Item	Info Record	MPN M.
10	SH-06	RES		200	PC	D	29.01.2024	0001	Werk Hamburg			000									
20	SH-06	RES		300	PC	D	29.01.2024	0001	Werk Hamburg			002									

Below the table, the 'Item' [20] SH-06, RES is selected. The 'Material Data' tab is active, showing details for the selected item:

Created by: HEBB, Changed on: 28.01.2024
 Crea. Ind.: Realtime (manual)
 Requisitioner: [blank], Tracking Number: [blank]
 Purch. Group: 002, Hamisch/H, Telephone: 0401001
 MRP Controller: [blank]

PR no. 10013694

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