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| Test Script  SAP S/4HANA - 17-09-20 | public |
| Supplier Classification and Segmentation (19E\_DE) |

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# Purpose

This scope item helps you gain a portfolio-level view of your supplier relationships. It also gives you the transparency to continuously determine the right mix of suppliers, serve your business objectives optimally, and to reduce your overall supply risk. You can classify and segment your suppliers by multiple criteria. This enables you to identify suppliers in a flexible manner, as well as to define and monitor sourcing strategies.

This document provides a detailed procedure for testing this scope item after solution activation, reflecting the predefined scope of the solution. Each process step, report, or item is covered in its own section, providing the system interactions (test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly. Project-specific steps must be added.

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.

For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide) .

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Strategic Buyer | SAP\_BR\_BUYER | Purchasing Analytics and Supplier Evaluation | SAP\_BR\_BUYER |  |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company has been created in your system during activation. The organizational structure reflects the structure of your company. The master data represents materials, customers, and suppliers, for example, depending on the operational focus of your company.

Use your own master data to go through the test procedure.

|  |  |  |  |
| --- | --- | --- | --- |
| Data | Sample Value | Details | Comments |
| Supplier | 10300001 |  |  |
| Material Group | L001 |  |  |

For more information on creating master data objects, see the following [Master Data Scripts (MDS)](https://support.sap.com/content/dam/SAAP/Sol_Pack/BP_OP_ENTPR/BP_OP_ENTPR_S4HANA2020_7_Master_Data_EN_XX.htm)

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| BNE | Create Supplier Master |

## Preliminary Steps

### Define Qualification Levels (Optional)

In this Customizing activity, you define qualification levels for suppliers. Qualification levels indicate the level attained by a supplier in the supplier qualification process as implemented in your company.

|  |  |
| --- | --- |
| 1. SAP IMG Path | Materials Management → Purchasing→ Supplier and Category Management→ Supplier Portfolio Management →Supplier Attribute Settings→ Define Qualification Levels |
| Transaction Code | SPRO |

1. Choose New Entries, enter the data like below,

|  |  |
| --- | --- |
| Qualification Level | Qualification Level Description |
| 0001 | Prospect registered, approved |
| 0002 | Prospect classified |
| 0003 | Audit on site passed |
| 0004 | Released for Bidding |
| 0005 | Released for Purchasing |
| 0006 | Preferred Supplier |
| 0007 | Strategic Partner |
| 0008 | Blocked for Usage |
| 0009 | To be Phased Out |

You can also define your own data.

1. Choose Save.

### Enable Integration with D&B (Optional)

1. If your company has enabled the integration with D&B, you have to enable Integration with D&B.

|  |  |
| --- | --- |
| SAP IMG Path | Materials Management → Purchasing→Supplier and Category Management→Supplier Portfolio Management→D&B Integration→Enable Integration with D&B |
| Transaction Code | SPRO |

1. Choose New Entries, enter below data,

Switch Name: SLC\_SUPPL\_DNB\_INTEGRATION

Active: <check>

1. Choose Save.

### Enter Credentials for Downloading Data from D&B (Optional)

1. If your company has enabled the integration with D&B, you can display and request data of a supplier from D&B. To do this, a user ID and password needs to be maintained.

|  |  |
| --- | --- |
| SAP IMG Path | Materials Management → Purchasing →Supplier and Category Management →Supplier Portfolio Management →D&B Integration →Enter Credentials for Downloading Data from D&B |
| Transaction Code | SPRO |

1. Choose New Entries, make the following entries:

D&B User Name:

Password:

1. Choose Save.

Since requesting data from D&B is subject to charges, only the users who have been assigned the Role for Requesting Reports from D&B (/SRMSMC/DNB\_REQUESTOR) can Request Report from D&B. This also applies to requesting an update of D&B data.

# Overview Table

This scope item consists of several process steps provided in the table below.

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App Name | Expected Results |
| [Display Suppliers and Maintain Supplier Portfolio Information (Optional)](#unique_10) [page ] 8 | Strategic Buyer | Display Suppliers - Procurement (F3371) |  |
| [Create Purchasing Categories](#unique_11) [page ] 11 | Strategic Buyer | Manage Purchasing Categories (F0337) | Purchasing category is created. |
| [Manage Purchasing Categories](#unique_12) [page ] 13 | Strategic Buyer | Manage Purchasing Categories (F0337) | Purchasing category is maintained, including assigning Suppliers, Team Employees and Material Groups to it. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Display Suppliers and Maintain Supplier Portfolio Information (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  | | | | |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | Enter a duration. |

Purpose

In this activity, there are two APPs.

In App Display Suppliers - Procurement (F3371) , you can search for suppliers and display the key information of one supplier.

In App Supplier Portfolio(supplier details screen), you can classify suppliers with a set of classification attributes; attach, display, download, and delete different types of files including images to the supplier; if your company has enabled the integration with D&B, you can display the D&B data of a supplier.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Logon to the SAP Fiori launchpad as a Strategic Buyer | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Display Suppliers - Procurement (F3371) . | The Display Supplier List (Original) screen displays. |  |
| 3 | Search Suppliers | Enter some of the search data like below,  Country: For example, DE  Choose Go. | The suppliers display on the Display Suppliers screen. |  |
| 4 | Maintain supplier portfolio information in App Supplier Portfolio | Select one of the supplier, check the details.  On the Central Data tab, you can see Central data, address data and bank data.  On the D&B tab, if your company has enabled the integration with D&B, you can display the D&B data of a supplier. Otherwise you can't see this tab, this is optional. Depending on your contract with D&B, you can select the D&B products Quick Check and Vendor Management. The data provided by these products is grouped into the following areas:   * Risk * Corporate structure * Legal form * Indicators covering special events, social responsibility, and financial aspects * Financial data   On the Classification tab, Classification Data section, you can make the following entries:  Qualification Level: Ex., Prospect Classified  Strategic importance: Ex., High  ABC Classification: Ex., A  Preferred Supplier: <checked>  Strategic Partner: <blank>  Choose Save.  On the Classification tab, Classification Scorecard section, choose Create New Scorecard.  Create a supplier classification scorecard for a particular period:  Enter general information about the company, such as size, spend and revenue details.  Rate the supplier’s risk factors, labor policy, social responsibility and environmental practices.  Choose Save. | Supplier details displays and additional data is maintained. |  |
| 5 |  | You can create multiple scorecards for different periods and navigate between them to view the supplier’s compliance over a period of time.  On Attachments tab, you can attach, display, download, and delete attachments. Note that you cannot save your data if you assign an empty attachment.  You use the folder structure to organize the attachments, thus facilitating retrieval. The folders listed above are delivered as standard and cannot be deleted. You can add further folders to the folder structure as follows:  Choose New Folder, on the New Folder screen, enter below data,  Folder Name: Ex., Supplier01  Choose OK.  Choose Save.  Choose Add Attachment, on the Add Attachment screen, enter below data,  File Name: <select the file you want to attach by choose the file name on the right>.  File description: Ex., contract  Choose OK.  Choose Save. |  |  |

Result

The supplier is displayed and maintained.

* Displaying D&B data is only supported in English and in German.
* D&B data can only be displayed in Supplier and Category Management if the D&B number is available on the Central Data tab of the supplier.
* If no D&B data is displayed for a supplier, an initial data request must be performed. Since requesting data from D&B is subject to charges, the Request Report from D&B is only available to users who have been assigned the Role for Requesting Reports from D&B (/SRMSMC/DNB\_REQUESTOR). This also applies to requesting an update of D&B data.

## Create Purchasing Categories

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  | | | | |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | Enter a duration. |

Purpose

In this activity, a purchasing category is created and a purchaser responsible for the purchasing category is assigned. Suppliers, team employees, and material groups are also assigned to it.

To assign team employees, the employee must be an employee user, please refer to the sections Creating Aprovers in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide)

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to the SAP Fiori launchpad as a Strategic Buyer. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Purchasing Categories (F0337) . | The Manage Purchasing Categories (Original) screen displays. |  |
| 3 | Create Purchasing Category | Choose Create. | The Purchasing Category: New screen displays. |  |
| 4 | Enter Purchasing Category data | In the General section, make the following entries:  Name : <enter a name for the purchasing category, e.g. Test\_PurchasingCategory>  Purchaser Responsible : Buyer  (leave it as default value)  Choose Enter. | All data is entered, no error or warning messages exist. |  |
| 5 | Assign Suppliers | In the Suppliers section, choose Add Line, and enter following data :  ID: 10300001.  Choose Enter. | The assignment of suppliers to the purchasing category is done. |  |
| 6 | Assign Team Employees | In the Team section, Choose Add Employee,  In the search help Add Employee, choose Go.  In the search result list, select an employee and choose OK. | The assignment of team members to the purchasing category is done.  Check that the Role is Member. |  |
| 7 | Add Purchasing Category Description and Languages | In the Languages for Purchasing Category Description section, make the following entries:  Choose Add Language, enter following data:  Language: Choose a language for translation from the dropdown list  Status of Translation: To Be Translated  Choose Enter. | The assignment of description and available languages of the purchasing category is done. |  |
| 8 | Assign Material Groups | In the Material Groups section, choose Add Material Groups and enter following data in the dialogue box :  Material Group ID: L001  Choose GO button.  In the search resulst list select the entry of L001 and choose OK. | The material group is assigned to the purchasing category. |  |
| 9 | Save Purchasing Category | Choose Save. | A new Purchasing Category is created.  A message  Data saved successfully  displays. |  |

Result

The system generates a purchasing category.

## Manage Purchasing Categories

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  | | | | |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | Enter a duration. |

Purpose

This activity displays and edits the purchasing category created in the previous step.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to the SAP Fiori launchpad as a Strategic Buyer. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Purchasing Categories (F0337) . | The Manage Purchasing Categories (Original) screen displays. |  |
| 3 | Search Purchasing Category | In the Search field, enter a part of the purchasing category name entered in test step 4 of [Create Purchasing Categories](#unique_11) [page ] 11.  Choose Go. | The search result list is displayed. |  |
| 4 | Display Purchasing Category | Click on e.g. name of the requested Purchasing Category.  On the screen Purchasing Category, check the details of the purchasing category. | The Purchasing Category screen displays.  The details of the purchasing category is displayed correctly. |  |
| 5 | Edit Purchasing Category | Choose Back.  On the search result list, select the requested purchasing category by choosing the radio button.  Choose Edit. | The screen Purchasing Category: <name of purchasing category> displays. |  |
| 6 | Add Planned Spend | On section Planned Spend, choose Add Line and enter following data:  From: <select a start date>  To: <select an end date>  Amount: For example, 10  Currency: EUR  Choose Save. | The purchasing category is changed and saved. |  |

Result

The Purchasing Category displays and changes.

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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