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| Test Script  SAP S/4HANA - 18-09-20 | public |
| Central Requisitioning (1XI) |

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# Purpose

Central Processing of Purchase Requisitions offers a centralized requisitioning processes across industries with a deep integration into the customer's landscape. It is connected to the customer’s ERP systems, and exchanges master data and business documents to ensure end-to-end business processes into Finance and Logistics that run in the connected Systems.

This scope item offers one platform where a procurement specialist can work centrally on requisitions from different organizations. Operational procurement processes are not the only tasks to profit from the hub approach. Strategic procurement tasks including Supplier Management benefit from the transparency and the possibility to initiate strategic activities from a central digital procurement control center.

In Central Requisition scenario, it is also required to create central requisition with item categories like Subcontracting, Limit etc.,

As the requisitions in ERP system can have different item categories, now we have an option to create / replicate / adjust the requisitions in connected system with all type of item categories.

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 prerequisites needed to conduct the test in terms of system, users, master data, organizational data, and other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| SAP S/4HANA HUB system | Identifies the SAP S/4HANA system releases 1808 CE. The SAP S/4HANA system acts as a hub system when it is connected to multiple connected systems.  Accessible via the SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |
| Connected System | Any ERP system from release ERP6.06 releases and above, with add-on HUBERPI is considered as the connected system.  Any S/4HANA 1709 and higher, with add-on HUBS4IC is considered as connected system.  Any S/4HANA Cloud 1808 is considered as connected system. |

## 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 |
| Purchaser | SAP\_BR\_PURCHASER | Operational Purchasing | SAP\_BR\_PURCHASER |  |
| Employee - Procurement | SAP\_BR\_EMPLOYEE\_PROCUREMENT |  |  |  |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT | Business Process Configuration | SAP\_BR\_BPC\_EXPERT |  |
| Manager - Inbox | SAP\_BR\_MANAGER |  |  |  |
| Accounts Payable Accountant - Procurement | SAP\_BR\_AP\_ACCOUNTANT\_PROCUREMT |  |  |  |

## Preliminary Steps

To run through this test script, the S/4HANA system needs to be set up as a HUB system for Central Purchase Requisitions.

### Define Company Code, Plant, Purchasing Organization for Connected system

Context

In this activity, you specify a unique combination of a plant and company code from a connected system to a local plant and logical system.

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Material Management > Purchasing > Central Procurement > Settings in Hub System > Define Company Code, Plant, Purchasing Organization for Connected system |
| Transaction Code | SPRO |

1. On the change view "Connected Systems": Overview screen, in screen, choose New Entries and then make the following entries:
   * Connected System ID: Your Connected system ID
   * Connected System Name: Your Connected system Name
   * Logical system: The communication system ID defined in the step <#unique_7>
2. Choose Save.
3. Choose the Connected System you created and double click Connected Company Codes in Dialog Structure.
4. On the change view "Connected Company Codes": Overview screen, choose New Entries and then make the following entries:
   * Connected Company Code: Your Connected Company Code
   * Company Code ID: Your Company Code Unique ID
   * Company Name: Your Company Name
   * Register: check

The Company Code ID is a unique ID that represents the combination of Connected Company Code and Connected System.

1. Choose Save.
2. Choose the Connected System you created and double click Connected Plants in Dialog Structure.
3. On the change view "Connected Plants": Overview screen, choose New Entries and then make the following entries:
   * Connected Plant: Your Connected Plant
   * Plant Name: Your Plant Name
   * Plant Unique ID: Your Plant Unique ID
   * Register: check

The Plant Unique ID is a unique ID that represents the combination of Connected Plant and Connected System.

1. Choose Save.
2. Go Back and choose Connected Purchasing Organization.
3. On the change view "Connected Purchasing Organization": Overview screen, choose New Entries and then make the following entries:
   * Connected Purch Org: Your Connected Purchasing Organization
   * Connected Purch Org: Your Purchasing Organization Unique ID
   * Connected Purch Org N: Your Purchasing Organizaiton Name
   * Register: check

The Connected Purch Org ID is a unique ID that represents the combination of Connected Purchasing Organization and Connected System.

1. Choose Save.

### Define Material Groups from Respective Connected System into the HUB system

Context

In this activity, you harmonize the Material Group which exists in the Connected System to the Hub system.

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Logistics > General > Material Master > Settings for Key Fields > Define Material Groups |
| Transaction Code | OMSF |

1. On the Material Groups screen, choose Add.
2. Make the following entries and choose Save:
   * Material Group: Your material group in the Connected system
   * Description
   * Default Unit of Measure
3. Choose Save.

### Define Purchasing Groups from Respective Connected System into the HUB system

Context

In this activity, you harmonize the Purchasing Group which exists in the Connected System to the Hub system.

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Material Management > Purchasing > Create Purchasing Groups |
| Transaction Code | SPRO |

1. On the Purchasing Groups screen, choose Add.
2. Make the following entries, and choose Save.
   * Purchasing group: <Your purchasing group in the Connected System>
   * Description
   * Email
   * Telephone No.
   * Fax number
   * Extension

### Define Account Assignment Category and Purchasing Requisition Document Type from Respective Connected System into the HUB system

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Material Management > Purchasing > Account Assignment > Maintain Account Assignment Categories |
| Transaction Code | SPRO |

1. On the Change view “Account Assignment Categories” screen, choose New Entries. Make the following entries, and choose Save:
   * Account Assignment Category
   * Description
   * Other Detailed Information
2. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Material Management > Purchasing > Purchase Requisition > Define Document Types |
| Transaction Code | SPRO |

1. On the Document Type Purchase requisition Change screen, choose New Entries. Make the following entries, and choose Save:
   * Document Types
   * Document Type Description
   * Other Detailed Information

### Maintain Requisitioning Groups

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Materials Management > Purchasing > Purchase Requisition > Self-Service Procurement > Maintain Requisitioning Groups |
| Transaction Code | SPRO |

1. Choose New Entries, then make the following entries:

|  |  |
| --- | --- |
| RequisitioningGrpID | Z001 |
| Validity Start Date | <current data> |
| Validity End Date | <current data + 6 months> |
| RequisitionGrpName | for example, SOB testing |

1. Choose Save.

### Maintain the Default Setting for Users

Context

The default setting for an employee should be maintained by the Configuration Expert mandatorily. Plant and Company code needs to be presented a primary information in the user defaults screen．

The user must be an employee user, because this scope item is focused on employee procurement.

The user for Purchase Requisition approval also must be an employee user.

For user configuration, refer to the Creating Approvers section 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 SAP Fiori launchpad as a Configuration Expert - Business Process Configuration . | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Default Settings for Users - Purchase Requisitions (F1995). | The Default Settings for Users screen displays. |  |
| 3 | Enter the User ID | On the Default Settings for Users screen, select the User ID via typing ahead with Employee\_procurement. |  |  |
| 4 | Edit the Default Setting for User | On the Default Settings for Users screen, choose Edit in the lower right corner.  Make the following entries:  Shop on Behalf Type: Select the type according to your requirement.  Requisitioning Group (Optional): If you select Shop on Behalf Type "Group Based", you must select the group you define in chapter Maintain Requistioning Group. For example, Z001  Please make sure to select Plant, Company Code and Purchaser Organization through F4 help.   * Plant: Connected Plant Employee belongs to * Company Code:Connected Company Code Employee belongs to * Purchasing Doc. Type: Your Purchasing Documentation Type．For example, NB. * Source Determination: <Select>   The following field is not mandatory for Configuration Expert; Employee can update before create Purchase Requisition:   * Currency: Your Currency * Purchasing Group:Your Purchasing Group * Purchasing Organization:Your Purchasing Organization * Account Assignment Category: Your Account Assignment Category   If you use account assignment category K, please make the following entries:   * Cost Center:Your Connected Cost Center   Choose Save. | Default Settings are set for users. |  |

### Set up Source of Supply Extraction

Context

To create a Purchase Requisition, the source of supplies from the Connected system needs to be extracted to the S/4HANA HUB system.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as a Configuration Expert - Business Process Configuration . | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Schedule Import of Catalog Data (F1240). | The Application Jobs screen displays. |  |
| 3 | Create a New Job | On the Application Jobs screen, choose New. |  |  |
| 4 | Enter the General Information | On the New Job screen, enter the following entries:   * Job Template: Import Catalog Data * Job Name:Your Job Name, by default is Import Catalog Data |  |  |
| 5 | Enter the Catalog Data | Under Catalog Data, enter the following entries:   * Web Service: Multi\_Backend * Connected system: Your connected system * Company Code: Your Connected Company Code * Plant: Your Connected Plant * Import Type: Select either Full Import or Delta Import.   If you choose Full Import, select either Material Group or Material  If you select Material Group:   * Material Group From: Your Material Group From * Material Group to: Your Material Group To   If you select Material:   * Material: Optional, Your Special Material |  |  |
| 7 | Schedule the Job | Choose Schedule. | The Job status change to Finished. |  |

### Configure Flexible Workflow for Central Purchase Requisition(Optional)

#### Check Flexible Workflow for Purchase Requisition Approval

Purpose

In this procedure, you can active or deactive Flexible Workflow for Purchase Requisition Approval.

The following section is ONLY relevant for the on-premise version of SAP S/4HANA.

Procedure

1. Access the activity using the following navigation option:

|  |  |
| --- | --- |
| SAP IMG Path | Material Management > Purchasing > Purchase Requisition > Flexible Workflow for Purchase Requisitions > Activate Flexible Workflow for Purchase Requisitions |
| Transaction Code | SPRO |

1. On the Document Types Purchase requisition Change screen, choose the checkbox under Scenario based workflow for Document Type: NB or NBS.
2. Choose Save.

#### Configure Flexible Workflow for Purchase Requisition

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad as a Configuration Expert . | The Fiori launchpad is displayed. |  |
| 2 | Open Manage Workflow for Purchase Requisition | Open Manage Workflow for Purchase Requisitions (F2705)  Before release 1911, please use App Manage Workflows for Purchase Requisitions - New. | The Manage Workflows screen is displayed. |  |
| 3 | Create Manage Workflow | Select Release of Central PR Item then choose Add and make following entries:  Name: Test Workflow for Central Purchase Requisition  Preconditions：<Net amount of central purchase requisition item is greater than> <your value, for example 100> <your currency, for example, EUR>  Step Sequence: Add  Type: Release of Central Purchase Requisition Item  Recipients: Assignment By: <User>  Please check if the employee data has been maintained with the chapter [Maintain the Default Setting for Users](#unique_16) [page ] 16 for Users if you can’t find User for approval.  Select User with Manager\_procurement from F4 help  Choose Add.  Choose Save. | The Workflow for Central Purchase Requisition is configured. |  |
| 4 | Activate Workflow Item | Select the just created Workflow Item and choose Activate. | The Workflow Item is activated. |  |
| 5 | Define Order | Choose Define Order.  On the Define Order screen, then choose Test Workflow for Central Purchase Requisition then move the selected workflow one level up. | Define the priority for workflow. |  |

# Overview Table

The scope item consists of several process steps provided in the following table.

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 .

Table 1: Scenario 1: Central Requisitioning with Standard Item Category

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| [Maintain the Default Setting for Users](#unique_16) [page ] 16 | Configuration Expert - Business Process Configuration | Default Settings for Users - Purchase Requisitions (F1995) |  |
| [Create Purchase Requisition – In HUB System](#unique_18) [page ] 17 | Employee - Procurement | Create Purchase Requisition (F1643) | Purchase Requisition is created. |
| [Approve Purchase Requisition (Optional) – In HUB System](#unique_19) [page ] 20 | Manager - Procurement | My Inbox - All Items (F0862) | Purchase Requisition is approved. |
| [Check My Purchase Requisition – In HUB System](#unique_20) [page ] 21 | Employee - Procurement | My Purchase Requisitions (F1639) | Purchase Requisition is checked. |
| [Process Purchase Requisition (Optional) - In Connected System](#unique_21) [page ] 23 | Purchaser | ME57 |  |
| [Check Change Log of Purchase Requisition (Optional) – In HUB System](#unique_22) [page ] 26 | Purchaser | ME52N/ Manage Purchase Requisitions (F1048) |  |
| [Convert Purchase Requisition to Purchaser Order Manually (Optional) – In Connected System](#unique_23) [page ] 28 | Purchaser | ME21N/ Manage Purchase Requisitions (F1048) |  |
| [Create Confirmation for HUB Purchase Requisition - In HUB System](#unique_24) [page ] 29 | Employee - Procurement | My Purchase Requisitions (F1639) | Goods Receipt post in Connected system. |
| [Create a Return Delivery for HUB Purchase Requisition (Optional) - In HUB System](#unique_25) [page ] 32 | Employee - Procurement | My Purchase Requisitions (F1639) | Return delivery post in Connected system. |
| [Create Service Entry Sheet for HUB Lean Service Purchase Requisition - In Connected System](#unique_26) [page ] 33 | Purchaser | ML81N/ Manage Service Entry Sheets - Lean Services (F2027) | Service Entry Sheet is created. |
| [Create Supplier Invoice - In Connected System](#unique_27) [page ] 34 | Accounts Payable Accountant | MIRO/ Create Supplier Invoice (F0859) | Invoice is created. |
| [Create Credit Memo (Optional) - In Connected System](#unique_28)  [page ] 36 | Accounts Payable Accountant | MIRO/ Create Supplier Invoice (F0859) | Credit Memo is created. |

Table 2: Scenario 2: Central Requisitioning with Different Item Category

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| [Maintain the Default Setting for Expert Users](#unique_29) [page ] 39 | Configuration Expert - Business Process Configuration | Default Settings for Users - Purchase Requisitions (F1995) |  |
| [Create Expert Purchase Requisition– In HUB System](#unique_30) [page ] 40 | Employee - Procurement | Create Purchase Requisition (F1643) |  |
| [Check Expert Purchase Requisition (Optional) – In HUB System](#unique_31) [page ] 44 | Employee - Procurement | My Purchase Requisitions (F1639) |  |
| [Navigate and Edit the Expert Hub Purchase Requisitions – In Connected System](#unique_32)  [page ] 45 | Employee - Procurement | My Purchase Requisitions (F1639) |  |
| [Process Purchase Requisition (Optional) - In Connected System](#unique_33) [page ] 46 | Purchaser | ME53N/ME52N |  |
| [Release Purchase Requisition– In Connected System (Optional)](#unique_34) [page ] 47 | Approval | ME54N/ME55 |  |
| [Convert Purchase Requisition to Purchaser Order Manually – In Connected System](#unique_35) [page ] 48 | Purchaser | ME21N |  |
| [Post Goods Receipt for Purchase Order - In Connected System](#unique_36) [page ] 49 | Warehouse Clerk | MIGO |  |
| [Create Supplier Invoice - In Connected System](#unique_37) [page ] 50 | Accounts Payable Accountant | MIRO |  |

# Test Procedures

## Scenario 1: Central Requisitioning with Standard Item Category

We can create central purchase requisition with standard item category, and the same would be replicated to connected ERP systems (or other SAP S/4HANA systems). As the connected system is ERP many times it is required to create Central PRs with different item category.

### Maintain the Default Setting for Users

Context

The default setting for an employee should be maintained by the Configuration Expert mandatorily. Plant and Company code needs to be presented a primary information in the user defaults screen．

The user must be an employee user, because this scope item is focused on employee procurement.

The user for Purchase Requisition approval also must be an employee user.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as a Configuration Expert - Business Process Configuration . | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Default Settings for Users - Purchase Requisitions (F1995). | The Default Settings for Users screen displays. |  |
| 3 | Enter the User ID | On the Default Settings for Users screen, select the User ID via typing ahead with Employee\_procurement. |  |  |
| 4 | Edit the Default Setting for User | On the Default Settings for Users screen, choose Edit in the lower right corner.  Make the following entries:  Shop on Behalf Type: Select the type according to your requirement.  Requisitioning Group (Optional): If you select Shop on Behalf Type "Group Based", you must select the group you define in chapter Maintain Requistioning Group. For example, Z001  Please make sure to select Plant, Company Code and Purchaser Organization through F4 help.   * Plant: Connected Plant Employee belongs to * Company Code:Connected Company Code Employee belongs to * Purchasing Doc. Type: Your Purchasing Documentation Type．For example, NB. * Source Determination: <Select>   The following field is not mandatory for Configuration Expert; Employee can update before create Purchase Requisition:   * Currency: Your Currency * Purchasing Group:Your Purchasing Group * Purchasing Organization:Your Purchasing Organization * Account Assignment Category: Your Account Assignment Category   If you use account assignment category K, please make the following entries:   * Cost Center:Your Connected Cost Center   Choose Save. | Default Settings are set for users. |  |

### Create Purchase Requisition – In HUB System

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. |

Context

Employee create shopping cart, and generate a purchase requisition in hub system.

Prerequisite

The default setting for an employee should be maintained by the Configuration Expert mandatorily. Plant and Company code needs to be presented as a primary information in the user defaults screen． The user must be an employee user because this scope item is focused on employee procurement.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access to Create Purchase Requisitions | Open Create Purchase Requisition (F1643). | The Create Purchase Requisition screen displays. |  |
| 3 | Check Default Setting for User | On the Create Purchase Requisition screen, choose the User account at the upper left corner and select Default Settings for User.  Check the following entries:   * Currency: <Your Currency> * Purchasing Group:<Your Purchasing Group> * Purchasing Organization:<Your Connected Purchasing Organization> * Purchasing Doc. Type: <NB> * Account Assignment Category: <Your Account Assignment Category>   If you use account assignment category K, please also make the following entry:   * Cost Center:<Your Connected Cost Center>   Choose Save. | Default Settings are set for users. |  |
| 4 | Case 1: Search for the extracted material | On the Create Purchase Requisition screen, enter the material number in the Search bar and choose Enter.  Search: <Your Extracted Material Number which is extracted though chapter Setting up Source of Supplier Extraction in Preliminary Steps>  The material without source of supply can also be searched. The valuation price of the material will be extracted. | Only material with the same default company code and plant will display. |  |
| Case 2: Purchase Product/Material or Service without material number | On the Create Purchase Requisition screen, choose Create Own Item.  On the Create Own Item screen, make the following entries:  Type:Choose Product/Material or Service from the drop-down box  Short Text:<Short text for your purchase>  Material Group:<Material Group>  Valuation Price:<Valuation Price, for example 10 EUR>  Price Unit:<Valuation Price, for example 1 EA>  Quantity Requested: <Number of items you want to purchase, for example, 100 EA>  Delivery Date: <Delivery Date> |  |  |
| 5 | Add to Shopping Cart | Choose Add to Cart at the right bottom of the screen. |  |  |
| 6 | View Shopping Cart and Update Delivery Date | Choose Purchase Requisition Overview at the top right of the screen to view the cart and then choose View Cart.  Choose the item to check the details:  You can change plant and company code that belongs to same logical system (logical system of the default plant and Company code combination assigned).  Once the company code and plant is changed, other data including purchase organization, G/L account, cost center also need to be manually changed accordingly.  Once there is any issue for field Country Key or Region, please change manually from F4 help.  You can add attachment.  Note If you want to replicate the attachment to ERP connected system, please make sure to maintain the document type in connected system.  You can also enter the Notes for the Item text, Item node or other value if it is necessary.  Choose Save.  Choose Back.  Requestor(Optional): you can select the employee you are going to shop on behalf. |  |  |
| 7 | Create Purchase Requisition | Choose Order.  If you use account assignment U when create PR, please make sure to follow the steps in chapter Process Purchase Requisition(Optional) to change account assignment from U to K to trigger the PO creation process.  If you create service purchase requisition, please make sure to follow the steps in Create Service Entry Sheet for Service Purchasing. |  |  |

### Approve Purchase Requisition (Optional) – In HUB System

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. |

Procedure

Note Please ignore this chapter if you didn't perform the steps in chapter Configure Flexible Workflow for Purchase Requisition(Optional) in Preliminary Steps.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Log on to SAP Fiori launchpad as Manager - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Open My Inbox | Open My Inbox - All Items (F0862) . | A list of already created Purchase Requisition is displayed. |  |
| 3 | Select Purchase Requisition | Select the Purchase Requisition from the left screen and choose Approve at the bottom right of the screen. | The Submit Decision dialog box displays. |  |
| 4 | Enter Release Reason | Enter the approval reason if needed, then choose Submit. | The Purchase Requisition is approved. |  |
| 5 | Back to SAP Fiori launchpad | Choose Home to go back to the SAP Fiori launchpad. | The SAP Fiori launchpad displays. |  |

### Check My Purchase Requisition – In HUB System

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. |

Context

After Hub Purchase Requisition is created and approved, the Hub Purchaes Requisition will be replicated to connected system and a new Purchase Requisition will be created in connected system.

In this activity, you can check your Hub Purchase Requisition and the Purcahse Requisition number created in connected system. And the follow-on documentation number including Purchase Order, Goods Receipt and Supplier invoice.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access My Purchase Requisition | Choose My Purchase Requisitions (F1639). | The My Purchase Requistions screen displays. |  |
| 3 | Check item details | Search your Requisition number in the Purchase Requisition list.  In case you want to search for the Purchase Requisition which is created as "Shop of Behalf", please choose checkbox Shop on Behalf in Filter Bar, and choose Go.  The central purchase requisition may have the following status:   * Awaiting Approved: If workflow is activated and the status is Awaiting Approve, go to step [Approve Purchase Requisition (Optional) – In HUB System](#unique_19) [page ] 20to approve the Purchase Requisition.　You can go to PR item detail to check Approval Process Overview. * Approved: If the status is Approved and no purchase order is created in connected system, please go to chapter [Process Purchase Requisition (Optional) - In Connected System](#unique_21) [page ] 23 to check whether source of supply needs to be assigned, or if the PR needs to be approved in connected system. If the Purchase Order still can't be created automatically even though all prerequisites are met, you can go to chapter Convert Purchaser Requisition to Purchaser Order Manually(Optional)-In Connected System to manually convert PR to PO. * Follow on Document Created: If the Hub Purchase Requisition is replicated to Connected system and covert to Purchase Order successfully, the status should be Follow on Document Created.   Note If you want to make the material purchase requisition convert to purchase order automatically, please make sure to check Automatic Purchase Order in supplier master data, and execute Chapter Automatic Generation of Purchase Orders for the PR Replicated from Hub System under the sections of Configure the Connected System-ERP or S/4HANA On-premise and Configure the Connected System- S/4HANA Cloud in Setting Up Central Requisitioning (1XI).  A new Purchase Requisition will be replicated into connected system if the status is Approved or Follow on Document Created.  In the dialog box Purchased Items, choose the item.  Choose Zoom in button to check the follow on documentation number including PR or PO number in connected system  If the status of the PO is In external Approval, please go to connected system to release the PO before perform chapter Create Confirmation for HUB Purchase Requisition - In HUB System.  Note For service PR, if connected system is S/4HANA Cloud, you must go to chapter Process Purchaser Requisition(Optional)-In HUB System to maintain all necessary value manually in service PR and then convert it to PO. | Detail information of the Purchase Requisition item displays.  Note down:   * Purchase Requisition number * Purchase Order number (if have). |  |

### Process Purchase Requisition (Optional) - In Connected System

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. |

Context

In this activity, you can check your purchase requisition replicate from hub system and process in connected system.

Procedure

Case 1: ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Purchaser . |  |  |
| 2 | Change Account Assignment or assign source of supply | Change the account assignment or assign source of supply with Transaction Code ME57.  After assign source of supply and change account assignment, the PO creation process is triggered and PO should be created automatically. If the PO still can not be created, you can go to chapter Convert Purchaser Requisition to Purchase Order Manually(Optional)-In Connected System to manually convert PR to PO in connected system.you can go to chapter Convert Purchaser Requisition to Purchase Order Manually(Optional)-In Connected System to manually convert PR to PO in connected system. |  |  |

Case 2: S/4 HANA as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as a Purchaser . | The SAP Fiori launchpad displays. |  |
| 2 | Find your Purchase Requisition | In area Purchase Requisition Processing, open Assign and Process Purchase Requisitions.  On the screen Assign and Process Purchase Requisitions, make the following entries:  Purchase Requisition: Your purchase requisition number replicate from hub system (checked in step [Check My Purchase Requisition – In HUB System](#unique_20) [page ] 21).  Assigned Purchase Requisitions: Check  Choose Execute. |  |  |
| 3 | Change Account Assignment or Assign Source of Supply | On the screen Assign and Process Purchase Requisitions, choose your purchase requisition and choose Edit Items and maintain the following value according to your requirement.  AcctAssCat: change from U to K  Open Item Detail, choose Account Assignment and make the following entries:  Cost Center: your cost center  Open item Detail, choose tab Source of Supply and make the following entries:  Fixed Supplier: your supplier  Choose Save. |  |  |
| 4 | Maintain mandatory value for Service Purchase Requisition(only for service PR in S/4HANA Cloud system) | Open Manager Purchaser Requisitions-Professional.  Search you purchase requisition.and choose it.  On the screen Purchaser Requisition, choose Edit.  Choose tab Item and choose the item.  On the screen Purchaser Requisition Item, choose tab Quantity and Data. Maintain the Start Date and End Date.  Choose tab Source of Supplier, then choose Assign Source of Supplier, on the popup screen Source of supplier, select the source of supplier.  Choose Apply. Then you need to manually convert service PR to PO.  After you have maintained mandatory information in the Purchase Requisition, please go to chapter Convert Purchase Requisition to Purchaser Order Manually (Optional) – In Connected System to convert service PR to PO. |  |  |

### Check Change Log of Purchase Requisition (Optional) – In HUB System

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. |

Context

Once the purchase requisition which is replicated from hub system is changed in connected system, you can check the change log in related Hub Purchase Requisition.

Currently, only if the following 5 fields of purchase requisition are changed in connected system, the change log can be displayed in related Hub Purchase Requisition.

* Quantity
* Delivery Date
* Price
* Item Deletion Indicator
* Material

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon connected system | Access the respective Connected system to which employee belongs as a Purchaser. |  |  |
| 2 | Change purchaser requisition in connected system | Case 1: ERP as connected system  The purchase requisition replicate from hub system can be changed in connected system with Transaction Code ME52N.  Case 2: S/4HANA Cloud as connected system  Logon to SAP Fiori Launchpad as a Purchaser.  Choose Manager Purchase Requisitions.  Enter you purchase requisition in search bar and choose Go.  Choose your purchase requisition.  On Purchase Requisition screen, choose Edit.  Change your Purchaser Requisition replicate from hub system and choose Save. |  |  |
| 3 | Logon Hub system | Logon to SAP Fiori launchpad as an Employee - Procurement. |  |  |
| 4 | Check change log in Hub system | Choose My Purchase Requisitions (F1643)  Search your Requisition number in the Purchase Requisition list.  Choose the hub purchase requisition number to go to screen Purchase Requisition.  On the following screen, go to Item Areas and choose Settings. Search item modified and choose OK. Then you can check if the item is modified in connected system.  If yes, then choose the item number and go to Purchase Requisition Item. Go to area Connected System Changes, you can check the difference between Hub system and connected system.  Once the value of any one of the 5 fields in the purchaser requisition is changed in connected system, the status of the Hub PR will be marked as PR Modified. |  |  |

### Convert Purchase Requisition to Purchaser Order Manually (Optional) – In Connected System

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. |

Case 1: ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Purchaser . |  |  |
| 2 | Assign Source of Supply | You can convert purchaser requisition to purchaser order manually with Transaction Code ME21N. |  |  |

Case 2: S/4 HANA as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Logon to SAP Fiori launchpad as a Purchaser . | The SAP Fiori launchpad displays. |  |
| 2 | Access to Manage Purchase Requisitions | Please refer to step Convert Purchase Requisitions to Purchase Orders in Test Script J45. |  |  |
| 3 | Convert Purchaser Requisition to Purchaser Order | On Manage Purchase Requisitions screen, search your PR.  Then choose your PR and choose Create Purchase Order.  Note Please make sure to maintain all necessary information to enable converting PR to PO. for example, Supplier. |  |  |

### Create Confirmation for HUB Purchase Requisition - In HUB System

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. |

Context

Employee can confirm the Good receipt quantity against the respective Purchase Requisition.

This step does not apply to service purchasing.

Procedure

There are two options to confirm the good receipt.

Option A:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access My Purchase Requisition | Open My Purchase Requisitions (F1639). | My Purchase Requisition initial screen appears. |  |
| 3 | Confirm goods receipt quantity | On My Purchase Requisition screen. Search your Requisition number in the Purchase Requisition list.  On the screen Confirm Requisitions, choose your PR item.  On the following screen, choose Edit at top right of the screen.  Now you can check or change the following entries:  In General Information section:   * Document Date: <Date of creation of document> * Posting Date: <Date of posting the document> * Delivery Note: <Reference of the delivery note> * Header Text: <Description of material document>   In Items section:  Check or change the quantity in filed Delivered Quantity. | Confirm goods receipt and follow on goods receipt post in Connected system. |  |
| 4 | Finalize the delivery (Optional) | If the Delivered Quantity is less than Purchase Requistion quantity, and you need to close the Purchase Requisition, choose Final Delivery. |  |  |
| 5 | Confirm the Goods Receipt | Choose the checkbox for the item and choose Confirm.  If release strategy is activated and you didn't release your Purchase Order in ECC connected system, there will be error message: Purchasing document 4XXXXXXXXX not yet released. | Confirm goods receipt and follow on goods receipt post in Connected system. |  |
| 6 | Check the follow on Goods Receipt document | Choose Back to go back My Purchase Requisition screen . Choose 1 Item under the column Number for Items.  On the dialog screen Purchased Items, choose the item.  On the Business Process Flow screen, there will be one more material document for Good Receipt.  Choose Zoom In to check the follow-on documentation number. | Business Process Flow display. |  |

Option B:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access Confirm Receipt of Goods | Choose Confirm Receipt of Goods - New (F4489). | Confirm Requisitions initial screen appears. |  |
| 3 | Confirm goods receipt quantity | On the Confirm Requisitions screen , enter your PR number and choose Go.  Choose your PR item in the list.  On the right screen, choose Edit.  Now you can make the following entries:  In General Information part:   * Document Date: <Date of creation of document> * Posting Date: <Date of posting the document> * Delivery Note: <Reference of the delivery note> * Header Text: <Description of material document>   In Items part:  Check or change the quantity in filed Delivered Quantity. |  |  |
| 4 | Finalize the delivery (Optional) | If the Delivered Quantity is less than Purchase Requistion quantity, and you need to close the Purchase Requisition, choose Final Delivery. |  |  |
| 5 | Confirm the Goods Receipt | Choose the checkbox for the item and choose Confirm. | Confirm goods receipt and follow on goods receipt post in Connected system. |  |
| 6 | Check the follow on Goods Receipt document | Choose My Purchase Requisition screen .  Choose 1 item under the column Number for Items.  On the dialog screen Purchased Items, choose the item.  On the Business Process Flow screen, there will be one more material document for Good Receipt.  Choose Zoom In to check the follow-on documentation number. | Business Process Flow display. |  |

### Create a Return Delivery for HUB Purchase Requisition (Optional) - In HUB System

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. |

Context

In case goods received is of poor quality or damaged, employee can initiate the Return Delivery Process against the respective Purchase Requisition once the Good receipt is carried out.

Note This step does not apply to service purchasing.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement . | The SAP Fiori launchpad displays. |  |
| 2 | Access My Purchase Requisition | Choose My Purchase Requisitions (F1639). | My Purchase Requisition initial screen appears. |  |
| 3 | Return Delivery | On My Purchase Requisition screen. Choose your Requisition that contains the item(s) to be returned in the Purchase Requisition list.  Choose Return.  On the Return Delivery screen, make the following entries:   * Document Date: <Your document date> * Posting Date: <Your posting date> * Return Quantity: < The number of items you want to return> * Reason for Return: < Description of reason for returning the items>   Choose the checkbox for the return item and choose Return. | Returun delivery and follow on goods return post in Connected system. |  |
| 5 | Check the follow on Goods Receipt document | Choose Back to go back My Purchase Requisition screen . Choose the item under the column Number for Items.  On the dialog screen Purchased Items, choose the item.  On the Business Process Flow screen, there will be one more material document for Return Delivery.  Choose Zoom In to check the follow-on documentation number. |  |  |

### Create Service Entry Sheet for HUB Lean Service Purchase Requisition - In Connected System

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. |

Context

In this activity, you maintain the Service Entry sheet for the service purchase order in Connected system.

This step only applies for service purchasing.

Procedure

Case 1: ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system. |  |  |
| 2 | Maintain Service Entry Sheet | Create service entry sheet with Transaction Code ML81N.  Maintain for your service purchase order. | Service entry sheet is created. |  |

Case 2: S/4 HANA as Connected System

Refer to Step Maintain Service Entry Sheet in Test Script 22Z -Procurement of Services.

### Create Supplier Invoice - In Connected System

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. |

Context

In this activity, you perform the invoice verification.

Procedure

Case 1: ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system to which employee belongs as Accounts Payable Accountant. |  |  |
| 2 | Create Invoice Verification | Create supplier invoice with Transaction Code MIRO.  Choose Invoice. | Invoice is created in the Connected system. |  |

Case 2: S/4 HANA as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad with the Accounts Payable Accountant role. | The SAP Fiori launchpad is displayed. |  |
| 2 | Open Create Supplier Invoice App | Open Create Supplier Invoice (F0859) . | The Create Supplier Invoices screen is dis played. |  |
| 3 | Enter General Data | In case of purchase orders created with local currency in your system, make the following entries:  Transaction: <Invoice>  Company Code: <your company>  Invoice Date: <Today>  Posting Date: <Today>  Gross Invoice Amount : <Value in PO Calculate Tax>  Invoice Party: <your supplier number>  Reference: <reference invoice number from invoicing party> | The Create Supplier Invoices screen displays. |  |
| 4 | Enter Purchase Order References | In Purchase Order References, make the following entries (use a PO you created previously).  References Document Category: Purchase Order/ Scheduling Agreement  Purchase Order: PO number |  |  |
| 5 | Check the Purchase Order Items data | Check the Amount, the Quantity, the Tax Code  Note If the amount is more than 5.5% of the initial amount, it will trigger supplier invoice workflow, which means you need to do next step – Release Blocked Supplier Invoice and amount changes only work for single account assignment. |  |  |
| 6 | Post invoice | Choose Post. | The invoice is created. |  |

### Create Credit Memo (Optional) - In Connected System

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. |

Context

If you need to return delivery after create supply invoice, you can create the credit memo.

Procedure

Case 1: ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system to which employee belongs as Accounts Payable Accountant. |  |  |
| 2 | Create Credit Memo | Create Credit Memo with Transaction Code MIRO.  Choose Credit Memo. | Credit Memo is created in the Connected system. |  |

Case 2: S/4 HANA as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad with the Accounts Payable Accountant role. | The SAP Fiori launchpad is displayed. |  |
| 2 | Open Create Supplier Invoice app | Open Create Supplier Invoice (F0859) . | The Create Supplier Invoice screen is displayed. |  |
| 3 | Enter General Data | In section General Data, make the following entries:  Transaction: Credit Memo  Company Code: your company  Gross Invoice Amount: Invoice amount  Currency: your currency  Invoice Date: Today  Posting Date: Today  Reference: xxx  Invoicing Party: 10300001 |  |  |
| 4 | Enter Purchase Order References | In Purchase Order References section, add the references.  Make the following entries (use a PO you created previously).  Reference: Purchase Order  Purchase Order: xxx | All items of the referenced Purchase Order are added to the Invoice Items section. |  |
| 5 | Select Invoice Items | Select the Invoice Items you want to create credit memo for. | You should see material items and delivery costs items, which refer to the entered purchase order document. Check if items for planned delivery costs have an item text. |  |
| 6 | Add Amount and Quantity | Check the Items that you want to post, and enter the following field entries.  Amount: xxx  Quantity: xxx  Then choose the Check button at the bottom right of the screen. | The Amount, the Quantity, the Tax Code are consistent. |  |
| 7 | Check Tax | In the section Tax, check if the Tax Amount equals the sum of Amount multiplied by Tax Code value of the selected items in Step 6 | The section tax is displayed. |  |
| 8 | Simulate Credit memo and Check Messages | Choose the Simulate button.  If there are no differences(or if the value is within the defined tolerance), the Supplier Invoice is complete to post.  Check the Gross Invoice Amount against the items plus tax amount  (if tax code is,V0 you do not have any tax amount) | Invoice is consistent.  In case that an error message is displayed, a correction of the entries is necessary |  |
| 9 | Post Credit Memo | Select the Post button to post the Credit Memo | The Invoice is posted. The system displays the message Invoice xxx posted. |  |

Result

The credit memo is created.

## Scenario 2: Central Requisitioning with different Item Category

When the connected system is ERP, we can create Central purchase requisition with different item category.

### Maintain the Default Setting for Expert Users

Context

The default setting for an employee should be maintained by the Configuration Expert mandatorily. Plant and Company code needs to be presented a primary information in the user defaults screen．

The user must be an employee user, because this scope item is focused on employee procurement.

The user for Purchase Requisition approval also must be an employee user.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as a Configuration Expert - Business Process Configuration . | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Default Settings for Users - Purchase Requisitions (F1995). | The Default Settings for Users screen displays. |  |
| 3 | Enter the User ID | On the Default Settings for Users screen, select the User ID via typing ahead with Employee\_procurement. |  |  |
| 4 | Edit the Default Setting for User | On the Default Settings for Users screen, choose Edit in the lower right corner.  Make the following entries:   * Plant: Connected Plant Employee belongs to * Company Code:Connected Company Code Employee belongs to * Purchasing Doc. Type: Your Purchasing Documentation Type．For example, NB. * Source Determination: <Select>   The Expert mode checkbox will be visible when the user is set with the plant and company code referring to a connected system.  ● Expert Mode: Select  After select checkbox Expert Mode, the purchase document type of the connected system appears with an F4 value help, users can search with the doc type in connected system.  ● Purchasing Doc Type: Purchase Document Type of the connected system  The following field is not mandatory for Configuration Expert; Employee can update before create Purchase Requisition:   * Currency: Your Currency * Purchasing Group:Your Purchasing Group * Purchasing Organization:Your Purchasing Organization   Choose Save. | Default Settings are set for users. |  |

### Create Expert Purchase Requisition– In HUB System

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. |

Prerequisite

The default setting for an employee should be maintained to Expert Mode in chapter Maintain the Default Setting for Expert Users by Configuration Expert. Plant and Company code needs to be presented as a primary information in the user defaults screen． The user must be an employee user because this scope item is focused on employee procurement.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access to Create Purchase Requisitions | Open Create Purchase Requisition (F1643). | The Create Purchase Requisition screen displays. |  |
| 3 | Check Default Setting for User | On the Create Purchase Requisition screen, choose the User account at the upper left corner and select Default Settings for User.  Check the following entries:   * Currency: <Your Currency> * Purchasing Group:<Your Purchasing Group> * Purchasing Organization:<Your Connected Purchasing Organization> * Purchasing Doc. Type: <NB> * Account Assignment Category: <Your Account Assignment Category>   If you use account assignment category K, please also make the following entry:   * Cost Center:<Your Connected Cost Center>   Choose Save. | Default Settings are set for professional users. |  |
| 4 | Case 1: Search for the extracted material | On the Create Purchase Requisition screen, enter the material number in the Search bar and choose Enter.  Search: <Your Extracted Material Number which is extracted though chapter Setting up Source of Supplier Extraction in Preliminary Steps>  The material without source of supply can also be searched. The valuation price of the material will be extracted. | Only material with the same default company code and plant will display. |  |
| Case 2: Purchase Product/Material without material number | On the Create Purchase Requisition screen, choose Create Own Item.  On the Create Own Item screen, make the following entries:  Type:Choose Product/Material from the drop-down box  Short Text:<Short text for your purchase>  Material Group:<Material Group>  Valuation Price:<Valuation Price, for example 10 EUR>  Price Unit:<Valuation Price, for example 1 EA>  Quantity Requested: <Number of items you want to purchase, for example, 100 EA>  Delivery Date: <Delivery Date> |  |  |
| 5 | Add to Shopping Cart | Choose Add to Cart at the right bottom of the screen. |  |  |
| 6 | View Shopping Cart and Edit the Purchase Requisition | Choose Purchase Requisition Overview at the top right of the screen to view the cart and then choose View Cart.  Choose the item to check the details:  You can change plant and company code that belongs to same logical system (logical system of the default plant and Company code combination assigned).  Once the company code and plant is changed, other data including purchase organization, G/L account, cost center also need to be manually changed accordingly.  Once there is any issue for field Country Key or Region, please change manually from F4 help.  You can add attachment for this PR.  You can also enter the Notes for the Item text, Item node or other value if it is necessary.  Choose Save.  Choose Back. |  |  |
| 7 | Create Purchase Requisition | Choose Order in Expert Mode.  On the popup window Order in Expert Mode, you can change the connected System Purchase Requisition Document Type and choose OK.  If you leave the document type blank, then the system will defaultly use the document type in your user default setting. |  |  |
| 8 | Navigate and Edit the Purchase Requisition in Connected System (Optional) | On the popup window Order Confirmed, the Purchase requisition created in expert mode and Purchase requisition in connected system with the hyperlink will get generated successfully.  On click of the Purchaser requisition number created in expert mode, user is navigated to the factsheet in the Hub systems itself.  On click of Purchase Requisition number in the connected system , user is allowed to navigate to the connected system PR which is displayed in transaction ME53N screen.  And edit of the Connected system PR from the Hub systems is allowed from transaction ME52N screen as the user can complete and save the PR in the connected system.  On close of the connected system transaction ME52N/ME53N screen, the navi-gation goes back to the Fiori screen.  Note Here the flexible workflow configuration setting rules are skipped for the Expert PR and hence the Expert PR will not be considered for the approval/rejection process in the Hub System once the Expert PR is ordered successfully. |  |  |

### Check Expert Purchase Requisition (Optional) – In HUB System

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. |

Context

After Expert Hub Purchase Requisition is created, the Expert Hub Purchaes Requisition will be replicated to connected system and a new Purchase Requisition will be created in connected system.

In this activity, you can check your Hub Purchase Requisition and the Purcahse Requisition number created in connected system. And the follow-on documentation number including Purchase Order, Goods Receipt and Supplier invoice.

In this activity, you can check your Expert Purchase Requisition Status.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access My Purchase Requisition | Choose My Purchase Requisitions (F1639). | The My Purchase Requistions screen displays. |  |
| 3 | Check Expert Central PR status | The Expert Central Purchase Requisition may have the following status:   * In Process: The Expert Central PR listed in the My PR list page will initially be In Process status only. * Approved: If Release Strategy is configured for PR in connected system and the PR is approved, or Release Strategy is not configured for PR in connected system, the Expert Central PR’s status will be changed to Approved as well.   Note If the HELD function is activated in connected system, please make sure to change the PR in connected system to enable the status change from HELD for related Expert Central PR.   * Follow on Document Created: If the PR is converted to PO in connected systsem, the status should be Follow on Document Created.   Choose 1 item of this expert purchaser requisition number and check the part Status Details. You can check the purchase requisition number in connected system. |  |  |

### Navigate and Edit the Expert Hub Purchase Requisitions – In Connected System

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. |

Context

In this activity, you can navigate your expert PR in connected system.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Access the SAP Fiori launchpad | Logon to SAP Fiori launchpad as an Employee - Procurement. | The SAP Fiori launchpad displays. |  |
| 2 | Access My Purchase Requisition | Choose My Purchase Requisitions (F1639). | The My Purchase Requistions screen displays. |  |
| 3 | Check item details | Search your Expert Hub Purchase Requisition number in the Purchase Requisition list.  When you click on the > of the Expert PR, the system navigates to the connected system and opens the Replicated PR in the connected system in ME53N GUI screen.  Then you can edit the purchase requisition in connected system. | System will navigate to the PR in connected system. |  |

### Process Purchase Requisition (Optional) - In Connected System

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. |

Context

In this activity, you can check or change your Expert Purchase Requisition which is replicated from hub system.

Procedure

ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Purchaser . |  |  |
| 2 | Change Purchase Requisition | Access the Expert PR with transaction ME52N.  If the HELD function is activated in connected system, the status of the Expert PR in the connected system will initially be in HELD Status.   * You can change PR in Connected system, for example, you can make the following change: change Item Category to K. After change, the status of the Expert PR in Hub System is changed to In Process.   The user will not be allowed to add a new item in the PR in the connected system. |  |  |

### Release Purchase Requisition– In Connected System (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. |

Context

If the release strategy is activated in connected system, you need to release the PR.

ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is an Approver(base on the release strategy in your system). |  |  |
| 2 | Assign Source of Supply | You can release the purchaser requisition Transaction ME54N or ME55.  Once the PR is released in the connected system, the status of the Expert PR created in chapter Create Expert Purchase Requisition changes from In process to Approved.  If you activate HELD function in connected system, you can't release the PR with status HELD. So please make sure to change the PR before you release it. |  |  |

### Convert Purchase Requisition to Purchaser Order Manually – In Connected System

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. |

ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Purchaser . |  |  |
| 2 | Assign Source of Supply | You can convert purchaser requisition to purchaser order manually with Transaction Code ME21N.  If the status of the purchase requisition is HELD, then you can't convert the PR to PO. |  |  |

### Post Goods Receipt for Purchase Order - In Connected System

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. |

Context

Warehouse Clerk post goods receipt in connected system.

ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Warehouse Clerk . |  |  |
| 2 | Assign Source of Supply | You can post goods receipt with translation MIGO. |  |  |

### Create Supplier Invoice - In Connected System

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. |

Context

In this activity, you perform the invoice verification.

ERP as Connected System

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Access the respective Connected system as an employee who is a Accounts Payable Accountant . |  |  |
| 2 | Create Invoice Verification | Create supplier invoice with Transaction Code MIRO.  Choose Invoice. | Invoice is created in the Con-nected system. |  |

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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