|  |  |
| --- | --- |
|  |  |
| Test Script  SAP S/4HANA - 12-09-20 | public |
| Proposal of New Catalog Item (2XW\_DE) |

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# Purpose

During purchase requisition creation, free text item entry can be interpreted as a catalog item, due to recommendations from the Machine Learning algorithm.

# 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.

## Additional Manual Configuration

Before you can test this scope item, you must have completed the additional configuration steps that are described in the Set-Up Instructions for this scope item. These configuration steps are specific for your implementation and include mandatory settings that are not delivered by SAP and must be created by you. For more information, refer to the Set-Up Instructions for this scope item on [SAP Best Practices Explorer](https://rapid.sap.com/bp) (https://rapid.sap.com/bp/#/browse/scopeitems/<enter the scope item ID>).

## System Access

The test should be conducted with the following system:

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via the 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 |
| Employee - Procurement | SAP\_BR\_EMPLOYEE\_PROCUREMENT |  |  |  |
| Purchaser | SAP\_BR\_PURCHASER | Operational Purchasing | SAP\_BR\_PURCHASER |  |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT | Business Process Configuration | SAP\_BR\_BPC\_EXPERT |  |
| Administrator | SAP\_BR\_ADMINISTRATOR | Administration | SAP\_BR\_ADMINISTRATOR |  |

## Master Data and Organizational 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 vendors, for example, depending on the operational focus of your company.

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

|  |  |  |  |
| --- | --- | --- | --- |
| Data | Sample Value | Details | Comments |
| Material |  |  |  |
| Short text | For example: office supply |  |  |
| Plant | 1010 | Plant 1 DE |  |
| Supplier | 10300002 | Domestic 10 Supplier 2 |  |
| Company Code | 1010 | Company Code 1010 |  |
| Purchase Organization | 1010 | Purch. Org. 1010 |  |
| Purchase group | 002 | Group 002 |  |
| Cost Center | 10101101 |  |  |
| G/L Account | 65100000 | Purchased Services |  |

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) Scripts (MDS):

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| BNE | Create Supplier Master |
| BNG | Create G/L Account and Cost Element |
| BNM | Create Cost Center and Cost Center Group |

## Preliminary Steps

### Configure S/4 Cloud Edition integration

Please refer to the sections in the [Administration Guide for the Implementation of SAP Best Practices for SAP S/4HANA](https://help.sap.com/viewer/S4HANA_1809_AdminGuide)

[Admin Guide: Carrying out post-activation steps and activity](https://help.sap.com/viewer/S4HANA_1809_AdminGuide/5a3861e6e0a64295b8b436f1466cd4b7.html) .

### Activate Machine Learning Scenarios

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

1. Access the transaction using the following navigation path:

|  |  |
| --- | --- |
| IMG Menu | Material Management→Purchasing→Purchase Requisition→Self-Service Procurement→Define Machine Learning Scenarios |
| Transaction Code | SPRO |

1. On the Change View “Machine Learning Scenario Configuration”: Overview screen, choose New entries.
2. On the New Entries: Details of Added Entries screen, check or create the following settings and choose Save:

|  |  |
| --- | --- |
| Field Name | Entry Value |
| Scenario | Propose New Catalog Item |
| Threshold Hits for Free Text | 5 |
| Training data period - Last | 6 (Months) |
| Activate | X |

### Maintain the Default Setting for Users

Purpose

The default setting for an employee should be maintained by the Configuration Expert - Business Process Configuration mandatorily. A primary information of Plant and Company code need to be set in the user defaults screen．

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

For the steps of user configuration, please refer to the sections in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide)

This is a mandatory step if scope item Central Requisitioning (1XI) is activated, otherwise this step can be skipped.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Logon | Logon to SAP Fiori launchpad as Configuration Expert - Business Process Configuration. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Default Settings for Users - Purchase Requisitions (F1995). | TheDefault Settings for Users (Original) screen displays. |  |
| 3 | Enter the User ID | On the Default Settings for Users (Original) screen:  User ID : <user ID>.  Choose Enter. |  | Please use the Search Help to find the User ID for User Name Employee\_procurement. |
| 4 | Edit the Default Setting for User | On the Default Settings for Users (Original) screen, choose Edit on the lower right corner. Make the following entries:  Plant: 1010  Company Code: 1010  Currency: EUR  Source Determination: <Selected>  Purchasing Doc. Type : NB  Choose Save. | Default Settings are set for users. |  |

### Create and Active Situation Type from Standard Template

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log onto the SAP Fiori launchpad as a Configuration Expert. | The SAP Fiori Launchpad displays. |  |
| 2 | Access the Fiori App | Open Manage Situation Types (F2947). | The Manage Situation Types screen displays. |  |
| 3 | Copy standard situation template | Choose Situation Templates tab and choose Go to search the Situation Templates: PROC\_CATALOGITEMPROPOSAL .  Choose Standard Situation Template: PROC\_CATALOGITEMPROPOSAL and choose Copy. |  |  |
| 4 | Create Custom Situation Type | On the Situation Type screen, make the following entries:  ID: ZPROC\_CATALOGITEMPROPOSAL  Name: Catalog item proposal is ready to use  Go to section Recipients and make the following entries:  Team Category: Procurement  Member Function: Catalog Management  Go to section Situation Monitoring and select checkbox for Monitor Instances. | Maintain situation type. |  |
| 5 | Save situation | Choose Save. | The situation has been saved. |  |
| 6 | Enable situation | Choose Yes when Enable Situation Type dialog appears. |  |  |

To switch off notification, select the corresponding situation type and disable it from Ready-to-Use Situation Types tab.

### Create Manage Team and Responsibilities

Purpose

In this procedure, you create manage team and responsibilities for the supplier confirmation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log onto the SAP Fiori launchpad as a Configuration Expert . | The SAP Fiori Launchpad displays. |  |
| 2 | Access the Fiori App | Open Manage Teams and Responsibilities - Procurement (F2412).. | The Manage Teams and Responsibilities (Original) screen displays. |  |
| 3 | Create manage team and responsibilities | Choose Create and make following entries:  Name: ZPROC\_CATALOGITEMPROPOSAL\_TEAM  Description: Receive notification for a catalog item proposal  Status: Ready to Use  Type: STPUR  Only team types of ‘PROC’ team category will receive the notifications. Do not provide any value for Responsibility Definitions.  Go to the Team Members area, and choose Create, then make the following entries on the next screen:  Business Partner: <Select from F4 For example: search Last Name for \*Purchaser\*to get the user ID.>  Please check if the employee data has been maintained with the chapter [Maintain the Default Setting for Users](#unique_9) [page ] 7 for Users if you can’t find User for Business Partner.  Functions: Catalog Management |  |  |
| 4 | Save Team | Choose Save. | The team has been created. |  |

# Overview Table

This scope item consists of several process steps that are listed 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 |
| [Create Purchase Requisition](#unique_13) [page ] 12 | Employee - Procurement | Create Purchase Requisition (F1643) | Purchase Requisition is created. |
| [Convert Purchase Requisition to Purchase Order](#unique_14) [page ] 14 | Purchaser | Manage Purchase Requisitions (F1048) | Purchase Order created. |
| [Manage Catalog Item Recommendations](#unique_15) [page ] 15 | Purchaser | Manage Catalog Item Recommendations (F3293) | Proposed Catalog Item created. |

# Test Procedures

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

## Create Purchase Requisition

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

Employee create shopping cart for free text material, generate a purchase requisition.

Follow the steps below to create five purchase requisitions with same free text.

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 Pur chase Requisitions | Open Create Purchase Requisition (F1643). | The Create Purchase Requisition  screen displays. |  |
| 3 | Create Purchase item | On the Create Purchase Requisition screen, choose Create Own Item. |  |  |
| 4 | Enter General Data | In the General Data section, make the following entries:  Material: <Blank>  Short Text: office supply  Material Group: YBMM00  You will see the material group with rating if scope item 2XV implemented.  Valuation Price: 100  Currency: EUR  Price Unit: 10 EA  Quantity Requested : 100  Unit of Measure: EA  Delivery Date : <today +30> |  |  |
| 5 | Assign Source of Supply | In the Source of Supply section, choose Add.  In the Add a supplier dialog box:  Supplier: for example,10300002 , and then choose Add. |  |  |
| 6 | Add to Shopping Cart | Choose Add to Cart at the right bottom of the screen. |  |  |
| 7 | View Cart | Choose Purchase Requisition Overview at the top right of the screen to view the cart, and then choose View Cart.  Select the item created, and enter the following entries:  Purchasing Group : 002  Organization: 1010  Company Code : 1010  Plant: 1010  Acct Assignment Cat: K  In the Account Assignment section: choose serial no.acct.assgt 1.  On the Accounting Details screen, make the following entries:  GL Account: 65100000  Cost Center: 10101101  Choose Back.  Choose Save.  Choose Back. |  |  |
| 8 | Order | Choose Order. | Purchase Requisition 1000XXXX created. |  |

## Convert Purchase Requisition to Purchase Order

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, the purchaser converts the purchase requisition created employee procurement to purchase order.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad as Purchaser. | The SAP Fiori launchpad displays. |  |
| 2 | Open Manage Purchase Requisitions | Open Manage Purchase Requisitions (F1048).  To use the Save Draft feature in this app, you must use a personalized user. | A list of Requisitions displays. |  |
| 3 | Search for Purchase Requisition | Make the following entries:  Plant : 1010  Purchasing Organization: 1010  Material Group: YBMM00  Choose Go. | The Purchase Requisition list displays depending on material. |  |
| 4 | Prepare the Purchase Order | Select the Purchase Requisition where the as signed supplier is displayed and choose Create Purchase Order. | The Purchase Order Preview screen displays. |  |
| 5 | Create the Purchase Order | Select the Purchase Order Type with Standard PO and choose Save. | The purchase order is created. |  |
| 6 | Save | In the dialog box, choose OK. | Purchase Requisition list displays again. |  |

## Manage Catalog Item Recommendations

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad with the Purchaser. | The SAP Fiori launchpad displays. |  |
| 2 | Access Notification List | Choose the Manage Catalog Item Recommendations (F3293) on the right top of the launchpad screen, choose the tab By Date. | A list of Notifications displays. |  |
| 3 | Select Notification | Choose a notification to view the details. | The Manage Catalog Item Recommendations screen displays. |  |
| 4 | Maintain General Information of Catalog Item Recommendation | In the Basic Data tab, maintain the following details and then choose Convert ->to Catalog Item and Publish Catalog Item at the right bottom of the screen.  Recommended Item Description: <for example, office supply>  Recommended Supplier: 10300002 | The Catalog Item is created.  The Manage Catalog Item screen displays. |  |
| 5 | Maintain General Information of Catalog Item | In General Information tab, maintain the following details:  Base Unit of Measure: EA  Material Group: YBMM00  Catalog: S4H\_GLOBALCATALOG  In Supplier Information tab, maintain the following details:  Price per Unit: for example: 1  Order Unit: EA  Valid From: <Today>  Valid To: <Today +30>  In Text Translation section, choose + icon to add a new entry.  Language: EN  Item Description: office supply  Choose Save at the right bottom of the screen. | The Catalog Item is created. |  |
| 6 | Access to Create Purchase Requisitions (Optional) | Open Create Purchase Requisition. | The Create Purchase Requisition  screen displays. |  |
| 7 | Search Created Catalog Item (Optional) | You can follow test script 18J, in Search Bar, enter office supply and search. | The Catalog Item created above displays. |  |

# Appendix

## Process Integration

The process to be tested in this test script is part of a chain of integrated processes.

## Succeeding Processes

After completing the activities in this test script, you can continue testing the following business processes:

|  |  |
| --- | --- |
| Process | Business Description |
| Requisitioning(18J) | You can create purchase requisition with catalog item which created based on the propose catalog item form machine learning. |

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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