

Reading Sample

This chapter covers different use cases related to procurement-based reporting and analytics. You'll learn how to adapt SAP Fiori analytics for various reporting scenarios, including general purchase orders, purchase variance, operational analysis, and custom scenarios. The chapter will start by explaining key requirements for this type of reporting, including master data, SAP Fiori apps and roles, and CDS views. From there, this chapter explains how to set up general purchase order reporting and analytics using SAP Fiori apps. Finally, the chapter concludes by covering additional operational activities in procurement, including off-contract spend analysis, non-managed spend analysis, supplier performance monitoring, and spend variance analysis.

 "Procurement Use Cases"

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Chapter 8

Procurement Use Cases

This chapter focuses on meeting key financial procurement reporting requirements by showing you how to adapt SAP Fiori analytics for reporting scenarios related to general purchase orders, purchase variance, operational analysis, and custom scenarios. For each group of scenarios, we'll discuss the relevant reporting dimension, master data, SAP Fiori apps, SAP Fiori roles, and CDS views so that business users can get the most out of their procurement solution.

In this chapter, we'll cover three key aspects associated with procurement-based reporting and analytics. In the beginning, we'll explain key reporting requirements to support various procurement operations. This includes requirements related to real-time insights, dashboarding, and key performance indicators (KPIs) to provide end-to-end visibility of procurement operations to purchasers, managers, and strategic buyers. In the middle, we'll highlight key prerequisites associated with master data, organizational structure elements, SAP Fiori roles, business catalogs, and several core data services (CDS) views that can be used to support additional reporting requirements. The third aspect is focused on several reporting and analytics use cases to support real-time reporting, dashboarding, purchasing spend analytics, spend variance reporting, supplier performance, off-contract and non-managed purchases, and many more requirements across various activities associated with purchasing operations.

8.1 Procurement-Based Reporting Requirements

With increasing need to support ongoing operations of a business globally, it's common to have many ongoing procurement activities that need to be managed by the procurement department of an organization. Due to high demand and a wide variety of procurement activities across the organization, business users often need flexibility to monitor the status of different procurement activities. To support end-to-end supply chain operations and processes, it's always critical to be on top of procurement needs and their delivery from different suppliers to support the supply chain process for smoother operations.

In a typical enterprise resource planning (ERP) world, business users need to rely on multiple reports to verify and validate the status of various procurement activities

across the enterprise. For example, business users need to be on top of procurement contracts that are due to expire very soon, any purchase requisition that needs immediate attention, purchase orders that are overdue, and, most importantly, how to get insights into various KPIs that are associated with the performance of procurement operations with minimum efforts.

To perform daily activities quickly and efficiently, monitoring and performing real-time reporting of all the procurement activities across the organization is a critical need for business users. In addition, business users must fulfill KPIs such as determining the performance of various suppliers, quickly identifying trends and potential areas of improvement, controlling purchasing spend and non-manage spend activities, and so on. Therefore, a dashboard that can provide key insights into procurement activities and can provide a way to drill down to action capabilities is the need of the hour.

With SAP S/4HANA and SAP Fiori, business users can benefit from the real-time reporting and monitoring capabilities in the procurement area, which enables them to complete their daily activities in a highly efficient manner. You'll learn about these capabilities in the next section.

8.2 General Purchase Order Reporting and Analytics

This section starts by highlighting the minimum setup requirements related to master data, SAP Fiori apps, SAP Fiori roles, business catalogs, and several CDS views that can be used to support customized reporting requirements.

In the latter part of this section, purchase order reporting aspects are covered such as real-time reporting of several procurement activities using cards and dashboard-based reports. You'll see examples of purchasing spend KPIs, purchase order-based reporting and analytics, purchase requisition analytics, and many more scenarios associated with procurement activities.

8.2.1 Minimum Setup Requirements in SAP S/4HANA

For end-to-end reporting of various procurement activities, the minimum organization structure and master data associated with the company codes must be created in your SAP S/4HANA system. The minimum master data represents materials, material groups, material types, suppliers, supplier groups, and system configuration associated with these master data objects. You also need to create purchasing info records, Incoterms, conditions, purchase requisitions, purchasing contracts, purchase orders, and associated configuration data to support end-to-end operations.

In addition to the master data objects, key organization structure elements such as purchase organization, purchasing group, plants, storage location, and so on must be created as well.

SAP Fiori apps, SAP Fiori roles, and business catalogs that must be activated in the SAP S/4HANA system to support procurement-based reporting scenarios are highlighted in Table 8.1.

SAP Fiori App (App ID)	SAP Fiori Role (Role ID)	Business Catalog (Catalog ID)
Procurement Overview (F1990)	Purchaser (SAP_BR_PURCHASER), Strategic Buyer (SAP_BR_BUYER)	Purchasing - Procurement Overview Page (SAP_PRC_BC_PRC_OVP)
Manage Purchase Contracts (F1600)	Purchaser	Purchasing - Contract Management (SAP_PRC_BC_PURCHASER_PUC)
Monitor Purchase Order Items (F2358)	Purchaser	Purchasing - Purchase Order Processing (SAP_PRC_BC_PURCHASER_PO)
Monitor Purchase Requisition Items (F2424)	Purchaser	Purchase Requisition Processing (SAP_PRC_BCG_PURCHASER_PR)
Monitor Supplier Confirmations (F2359)	Purchaser	Purchasing - Purchase Order Processing
Purchasing Spend (F0683)	Purchaser, Strategic Buyer	Purchasing Analytics (SAP_PRC_BC_PURCH_ANALYTICS)
Purchasing Spend Dashboard (F4517)	Purchaser	Materials Management - Purchasing Dashboards (SAP_MM_BC_PUR_SAC_ANA_PC)
Purchasing Spend Dashboard (F4517)	Purchaser, Strategic Buyer	
Off-Contract Spend (F0572)	Purchaser, Strategic Buyer	Purchasing Analytics
Non-Managed Spend (F0571)	Purchaser, Strategic Buyer	Purchasing Analytics
Purchase Requisition No Touch Rate (F2018)	Purchaser, Strategic Buyer	Purchasing Analytics for Purchase Requisitions
Purchase Requisition Item Types (F2016)	Purchaser, Strategic Buyer	Purchasing Analytics for Purchase Requisitions

Table 8.1 SAP Fiori Apps for Procurement-Based Reporting

Once all the SAP Fiori apps for procurement reporting and analytics are activated, you can group them together under a **Procurement-Based Reporting** tab to support several use cases as shown in the example Figure 8.1.



Figure 8.1 Grouping of SAP Fiori Apps for Procurement-Based Reporting

To get an overview of different CDS views that are used by some of these SAP Fiori apps, see Table 8.2. To find the complete list of CDS views used in procurement, use the View Browser app and search for purchasing-relevant CDS views.

CDS View Name	CDS View Overview
C_PURGSPENDOFFCONTRACT	This CDS view is used for evaluating and analyzing the off-contract spend during procurement activities for the purpose of reducing the overall procurement cost.
C_PURCHASEORDERVALUEQUERY	This CDS view is used for evaluating and analyzing the spend incurred for purchase orders during procurement activities for the purpose of reducing the overall procurement cost.
C_PURORDSERVICEPENDQUERY	This CDS view is used for evaluating and analyzing the status and spend incurred for service purchase orders during the procurement activities for the purpose of reducing the overall service procurement cost.
C_OPERATIONALSUPPLREVALQRY	This CDS view is used for evaluating and analyzing suppliers based on the weighted average of quantity variance, price variance, quality score, and time variance.
C_PURCHASECONTRACTEXPIRY	This CDS View is used to analyze and identify purchase contracts that expire within a specific time frame.

Table 8.2 List of CDS Views Used by Procurement-Based Reporting SAP Fiori Apps

CDS View Name	CDS View Overview
C_REQUISITIONNOTOUCHRATE	This CDS view is used to see what percentage of purchase requisition items were processed automatically from the shopping cart (no touch items).
C_SUPPLIEREVALOVERALLQRY	This CDS view is used to determine the overall supplier evaluation score based on the operational score and questionnaire score.

Table 8.2 List of CDS Views Used by Procurement-Based Reporting SAP Fiori Apps (Cont.)

In the next section, we'll use these apps to explain several use cases for procurement-based reporting.

8.2.2 Real-Time Reporting and Monitoring for Procurement

In this use case, we'll use the Procurement Overview Page app with which you can get insights into several procurement activities using a set of actionable cards. With these cards, you can remain on top of the most relevant information associated with your procurement activities. You can customize the **Procurement Overview** page by keeping the cards that are most relevant to you and hiding others that aren't via the **User Profile Menu • Manage Cards • Show/Hide Card**.

Let's look at the Procurement Overview Page app and learn about the capabilities it offers. You can apply several filter fields such as supplier, material, material group or purchasing group, and so on to monitor and analyze the data relevant for you and get insights into procurement-related activities.

Table 8.3 lists all the cards that are available on the Procurement Overview Page app (see Figure 8.2).

Card Name
Monitor Purchase Contracts
Monitor Purchase Requisition Items
Monitor Purchase Order Items
Supplier Performance Monitoring
Purchase Requisition Touch Rate
Purchase Requisition Item Types
Purchasing Spend

Table 8.3 List of Cards on the Procurement Overview Page App

Card Name
Off-Contract Spend
Non-Managed Spend

Table 8.3 List of Cards on the Procurement Overview Page App (Cont.)

You can also get quick insights into different procurement activities from the app (see Figure 8.2).

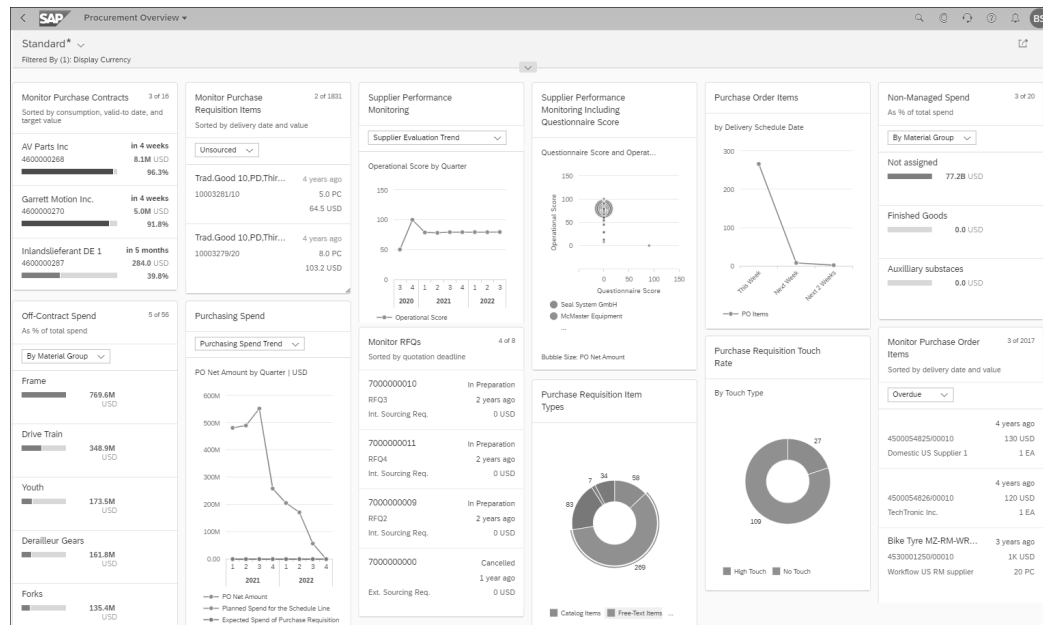


Figure 8.2 Procurement Overview Page App

Let's look at the **Monitor Purchase Contracts** card, which gives you insights into expiring and nearly consumed procurement contracts by showing the results sorted by time remaining, target value, and consumption. You can select either the header section of the card to navigate to the Manage Purchase Contracts app, which shows the complete list of purchase contracts, and then drill down to a specific purchase contract, or you can use the item section to navigate directly to the purchase contract.

As illustrated in Figure 8.3, by selecting the header section on this card, you can navigate to the Manage Purchase Contracts app and analyze other details as needed. The **Monitor Purchase Contracts** card shows that purchasing contract **460000268** for supplier **AV Parts Inc** is expiring in four weeks, and when you drill down from the header section of this card to the Manage Purchase Contracts app, you can see that the **Validity Status** is shown as **Expiring**, which is based on the **Valid To** date. As this is a quantity contract, the **Consumption Percentage** calculation will be based on a formula that is

used for quantity contracts involving the release order quantity and purchase value of each of those items. You can monitor the consumption percentage either at the purchase contract level using the header section or at each item level using the **Contract Consumption and Leakage** tab.

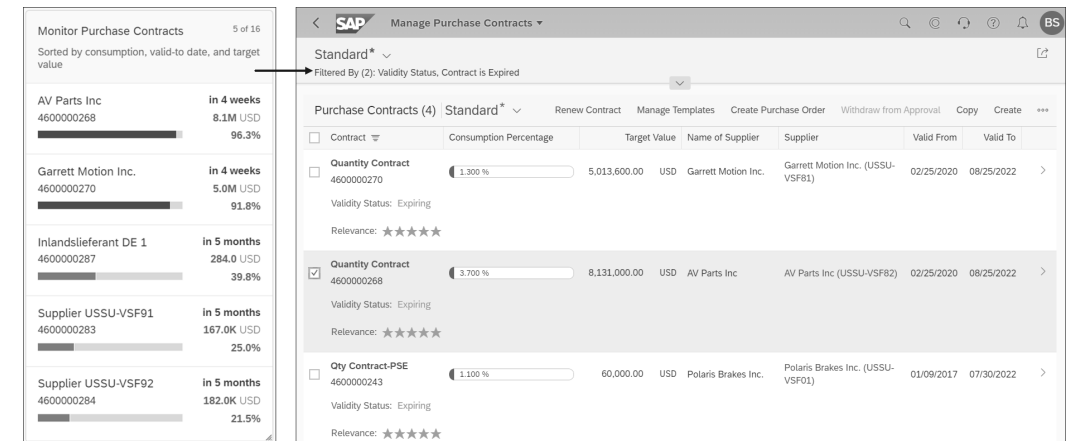


Figure 8.3 Drill Down to Manage Purchase Contracts App Using the Header Section of the Monitor Purchase Contracts Card

As shown in Figure 8.4, by selecting the item section on the **Monitor Purchase Contracts** card, you can navigate directly to the specific purchase contract. Here you access and analyze all the details associated with this purchasing contract. As shown in the figure, purchase contract **460000268** for supplier **AV Parts Inc** also shows many tabs such as **General Information**, **Items**, **Release Order Documents**, **Leakage**, and so on, which can be used to analyze very specific activities associated with the contract.



Figure 8.4 Drilling Down to the Purchase Contract App Using the Item Section of the Monitor Purchase Contracts Card

You can get insights into release order items and their amounts under the **Release Order Documents** tab. For example, you can see **Release Order Item Net Amount** and **Number of Items** over a period of 12 months using this tab (see Figure 8.5).

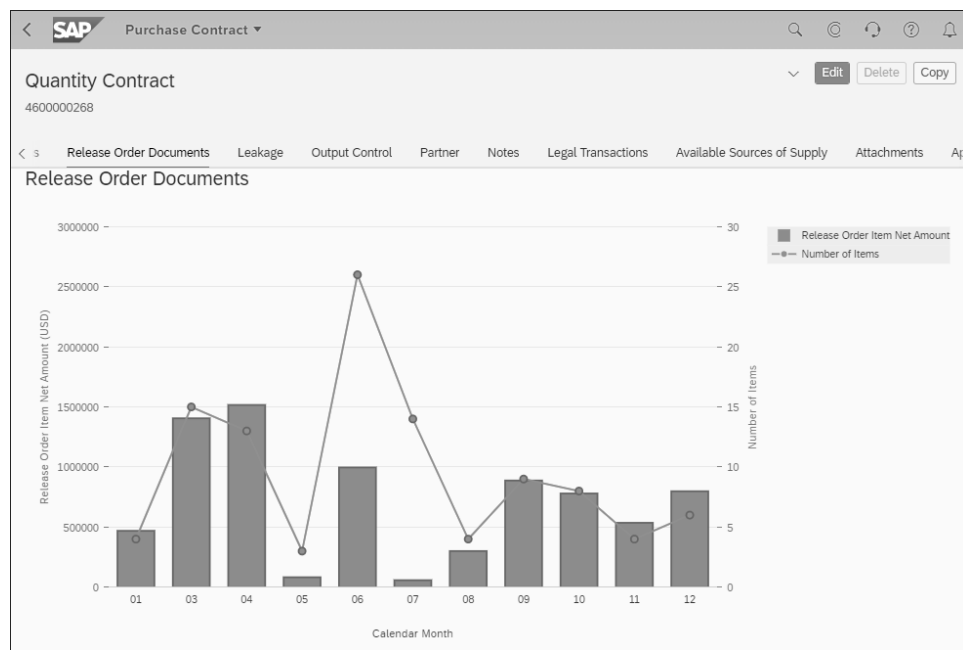


Figure 8.5 Manage Purchase Contracts App: Release Order Documents

By using the **Monitor Purchase Requisition Items** card, you can get insights into sourced and unsourced purchase requisition items. These items are sorted by their value and time to delivery date. Selecting the header section of the **Monitor Requisition Items** card brings you to the Process Purchase Requisitions app. While selecting the item section of this card, you can analyze the individual requisition item and create a contract, a purchase order, or a request for quotation directly.

To get insights into open and unsourced requisition items, you can use the dropdown to choose the **Open** or **Unsourced** option (see Figure 8.6). It's recommended to filter the results by combinations of purchasing organization, purchasing group, and purchasing category. For illustration purposes, we've filtered the results by purchasing organization.

Similarly, you can get insights into several purchasing-relevant activities within procurement and drill down to action using the cards on the Purchasing Overview app.

In the upcoming sections, we'll explain several commonly used use cases with which you can benefit and meet reporting and analytics requirements in the end-to-end procurement process.

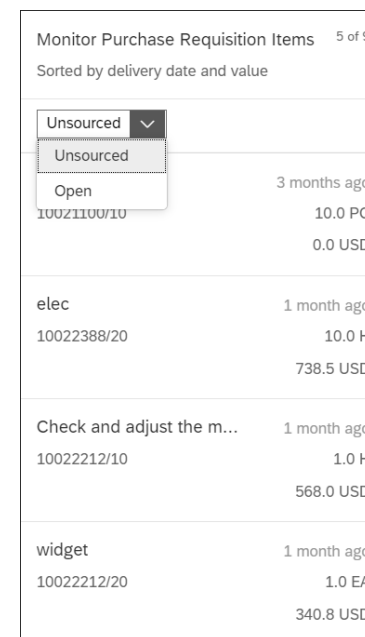


Figure 8.6 Monitor Purchase Requisition Items Card

8.2.3 Analyze Purchasing Spend Key Performance Indicators

In this use case, we'll use the **Purchasing Spend** card to get insights into the purchasing spend by each quarter and compare the amounts between the current and previous year. This card shows the overall purchasing spend by aggregating the purchase order values in the currency you've specified in the filter. As shown in Figure 8.7, the **Purchasing Spend Trend** view is used to display the purchasing trend between the current and previous fiscal year. You can also choose other parameters such as supplier or material group from the dropdown menu to analyze the purchasing spend per your needs. You can see that the purchasing spend trend was higher in 2021 and declining in 2022 over the four quarters.

Similarly, you can also choose **By Material Group** from the dropdown to display purchase spend by material group. The graphical chart shows the aggregated purchase order values in the currency entered as the filter criteria on the Procurement Overview app (see Figure 8.8).

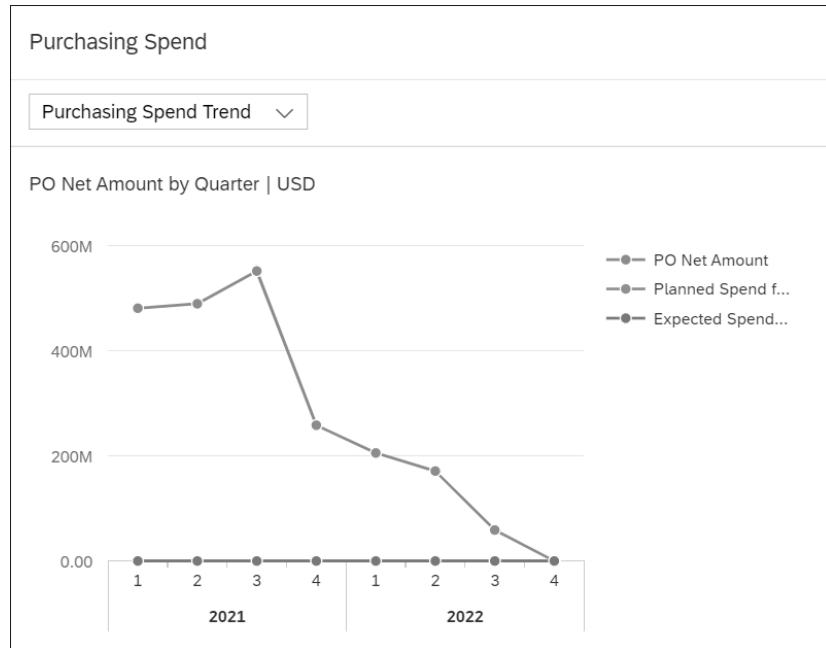


Figure 8.7 Purchasing Spend by Purchasing Spend Trend

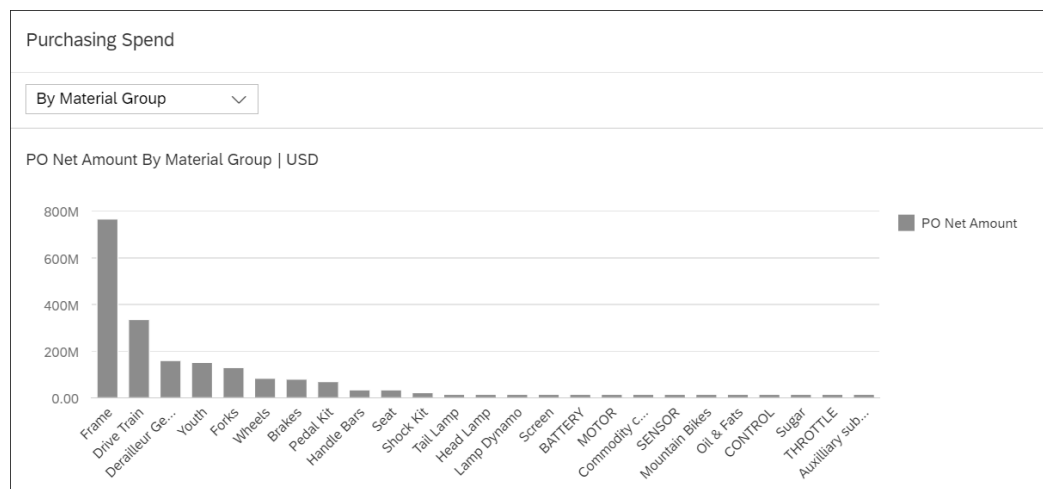


Figure 8.8 Purchasing Spend by Material Group

By selecting the header section of the **Purchasing Spend** card, you can navigate to the **Actual/Planned Purchasing Spend** screen, which allows you to analyze the **PO and Scheduling Agreement Value** KPI with many flexible dimensions (see Figure 8.9). From the example shown, you can see that the **PO Net Amount** is displayed by material group

to compare values between the previous year and the current year. You can also use the **Jump To** function to further drill down from this app to other apps such as the **Manage Purchase Orders** app or **Manage Scheduling Agreements** app.

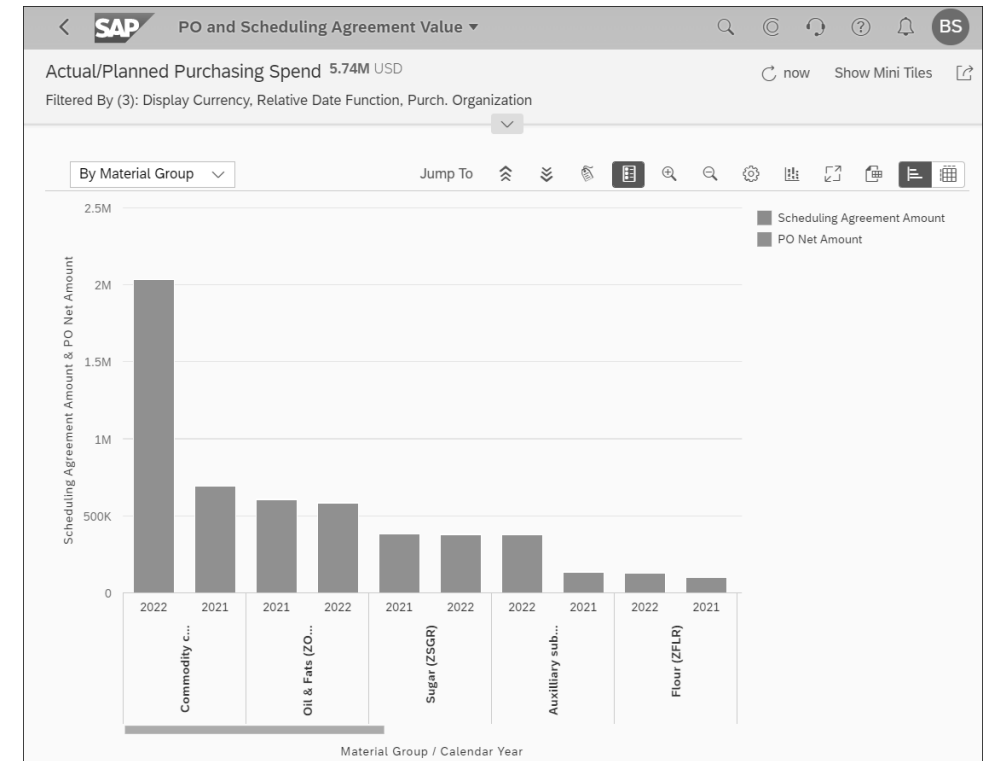


Figure 8.9 Actual/Planned Purchasing Spend App

On the purchasing spend KPI screen, you can use many flexible dimensions via the dropdown (see Figure 8.10), such as supplier, trend, trend by supplier, trend by purchasing category, purchasing group, and so on, in addition to further analyze the purchasing spend associated with your purchasing organization. By using the combination of the **Trend** view and relative date function value **PREVIOUSYEARTODATE**, you can see the trend from the previous year until the current period as well. In this app, you can use the **Data Label Visibility** icon to see the planned spend for the schedule line, purchase order net amount, and expected spend for the upcoming months to get additional insights.

In addition, you can use the **Relative Date Function** filter to choose a pre-delivered value to analyze the purchasing spend. As illustrated in Figure 8.11, you can use **Previous month**, **Previous quarter**, **Previous quarter to date**, **Previous year**, **Previous year to date**, and many more options for your analysis.

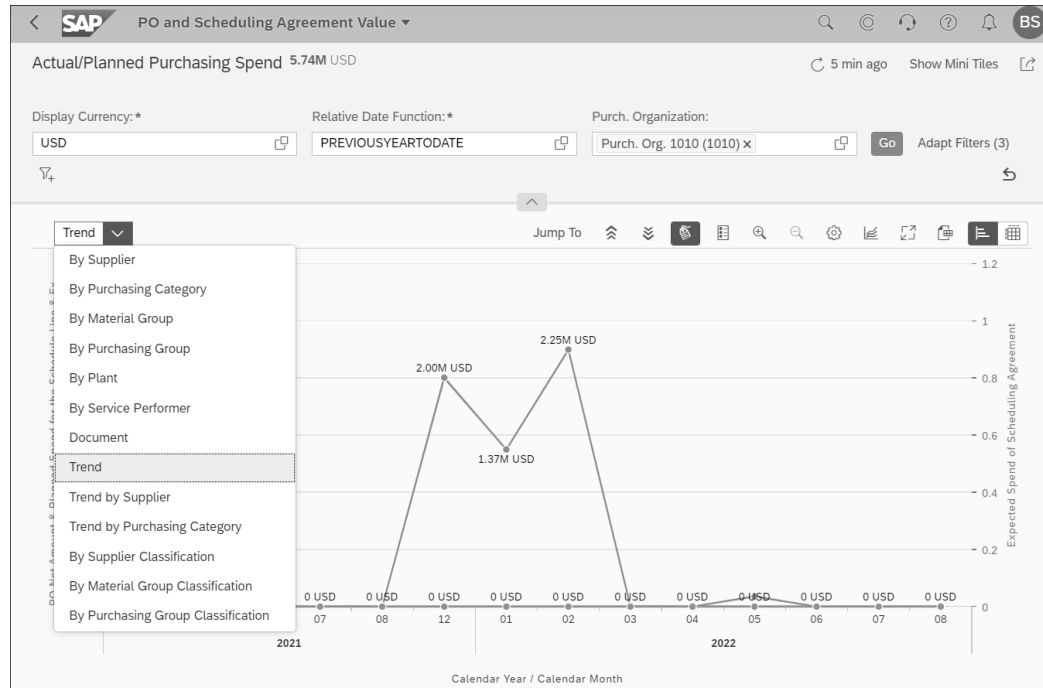


Figure 8.10 Purchasing Spend KPI by Flexible Dimensions

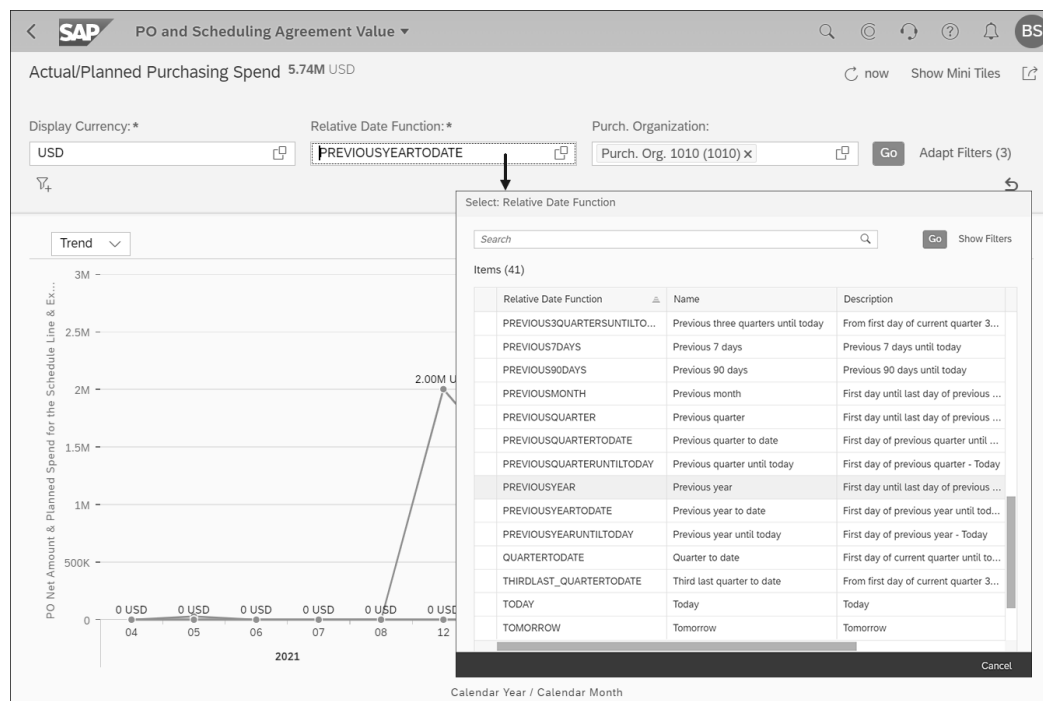


Figure 8.11 Purchasing Spend KPI with Flexible Relative Date Function

This way, you can use different dimensions and different relative date functions to analyze purchase spend in a more efficient manner.

8.2.4 Purchase Order-Based Analytics Using Delivery Status

In this use case, we'll use the **Monitor Purchase Order Items** card to get insights into the overdue items and the items in approval using the dropdown. The items on this card are sorted by overdue days and item value. By selecting the header section of this card, you can navigate to the Monitor Purchase Order Items app to analyze the status of the purchase order items.

While navigating from the header section of the card to the SAP Fiori app, filter values are automatically passed by using the intent-based navigation functionality offered by the SAP Fiori framework, so you don't need to set the filters again. As shown in Figure 8.12, five purchase order items are displayed for the same supplier, **Seal System GmbH**.

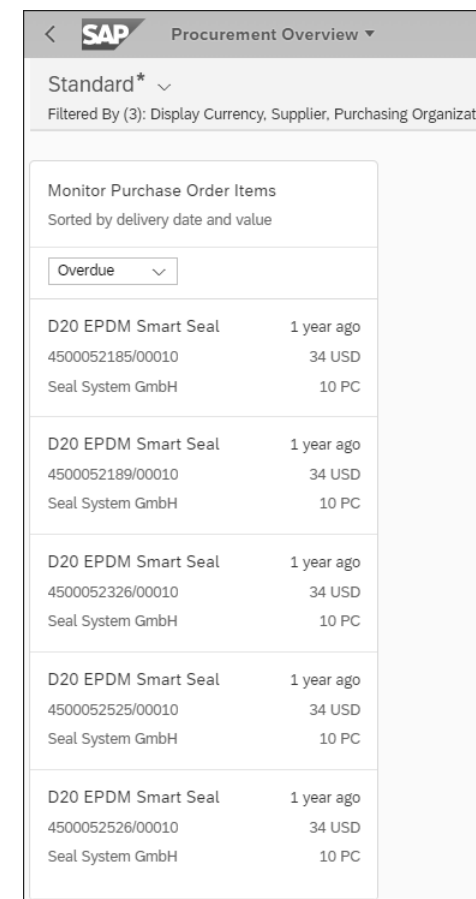


Figure 8.12 Monitor Purchase Order Items Card

By selecting the header section of this card, you're taken to Monitor Purchase Order Items app, which offers many flexible options to monitor and analyze your purchase order items.

As illustrated in Figure 8.13, the details of the purchase order items are displayed in the lower section of this app, and several columns such as supplier, purchase order, item, next delivery date, value to be invoiced, and so on can be used to analyze them further. As illustrated, the aggregated value of the purchase orders that needs to be invoiced can be displayed by hovering the mouse over the **Value to be Invoiced** legend in green in the top section of this app showing charts. The value to be invoiced for the material group **L002 (Raw Materials)** is shown as **171.9 USD**, which is the same value after aggregating all the values from the purchase orders in the lower section of the app. You can use the navigation icon > to drilldown further for a specific purchase order item for further analysis.

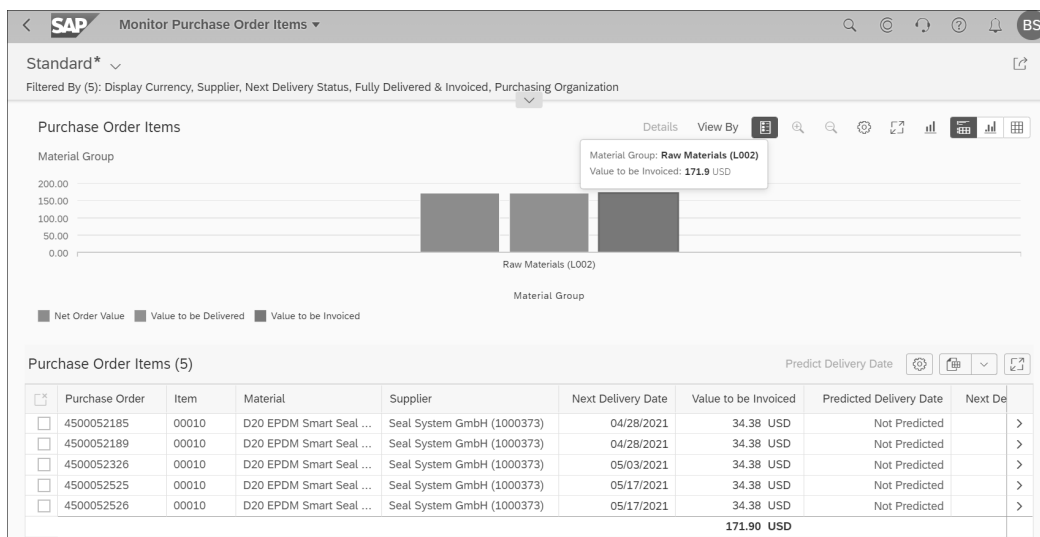






Figure 8.13 Monitor Purchase Order Items App

In addition, to perform purchase order-based analytics using other dimensions, you can use the **View By** function to run your analysis and meet several KPIs (see Figure 8.14). For illustration purposes, we've used the **Next Delivery Status** dimension, and all purchase order items are displayed in **Overdue** status.

More than 40 dimensions are available in this app, which gives you the flexibility to perform flexible reporting and analytics based on purchase orders and their statuses. You can also use the other functions such as **Table View** , **Chart View** , **Chart Type** , and **Settings**  to tailor the look and feel of the layout and meet your reporting and analytics requirements.

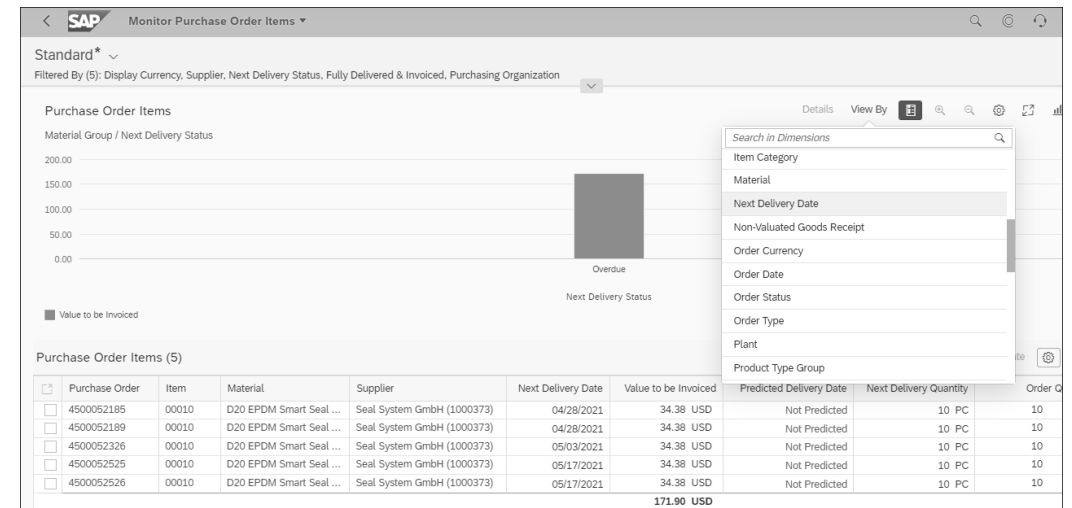


Figure 8.14 Purchase Order Analytics Using Delivery Status

8.2.5 Purchase Requisition-Based Analytics

In this use case, we'll use the cards which are relevant for monitoring of purchase requisition activities such as **Monitor Purchase Requisition Items**, **Purchase Requisition Item Types**, and **Purchase Requisition Touch Rate**.

With the **Monitor Purchase Requisition Items** card, you can get insights into the requisition items that are open or unsourced using the dropdown menu (see Figure 8.15). These requisition items are sorted by their value and delivery date.

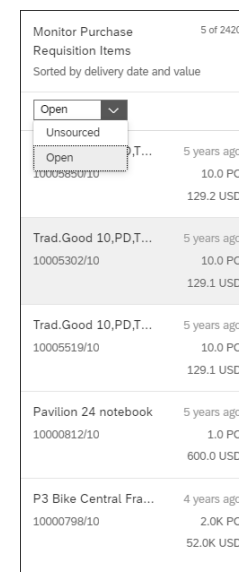


Figure 8.15 Monitor Purchase Requisition Items Card

By selecting the header section of this card, you can navigate to the Process Purchase Requisitions app to get the details of all the purchase requisitions that are open and assign sources of supply to create follow-on documents. You can also navigate directly to the purchase requisition item by selecting the item from the list. We've selected the requisition item 10005302/10, which is highlighted in the figure for illustration purposes, and checked the list of follow-on documents that are created using the **Process Flow** tab (see Figure 8.16). Using different tabs of the purchase requisition item, you can create purchase orders, purchasing contacts, and requests for quotations. You can also use the **Source of Supply** option to use a fixed supplier for this requisition item. Once these activities are completed, you can navigate back to the procurement overview page to analyze other requisition items that need to be addressed.

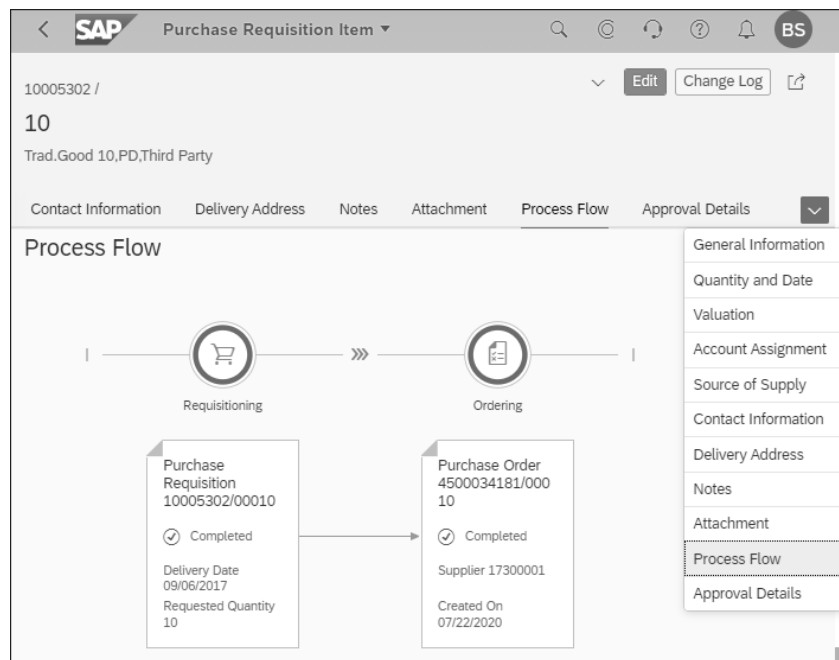


Figure 8.16 Purchase Requisition Item: Process Flow

The **Purchase Requisition Item Types** card is used to get insights into different types of purchase requisition items such as **Catalog Items**, **Free-Text Items**, **Material Items**, **Free-Text Items (GUI)**, and **Material Items (GUI)** from the previous year to date (see Figure 8.17). **Free-Text Items** and **Material Items** represent the total number of such items that were created from the self-service purchase requisitions, and **Free-Text Items (GUI)** and **Material Items (GUI)** show the total number of such items that were created manually using SAP GUI.

By choosing **Free-Text Items** on this card, you can drill down to the KPI-based Purchase Requisition Item Types app, which gives you the flexibility to use different dimensions from the dropdown list for thorough analysis.

You can see that the count of requisition items of type **Free-Text Items** is **271** on this card and the drilldown to the **Purchase Requisition Item Types** card also shows the count of **271 Free-Text Items** (see Figure 8.18).

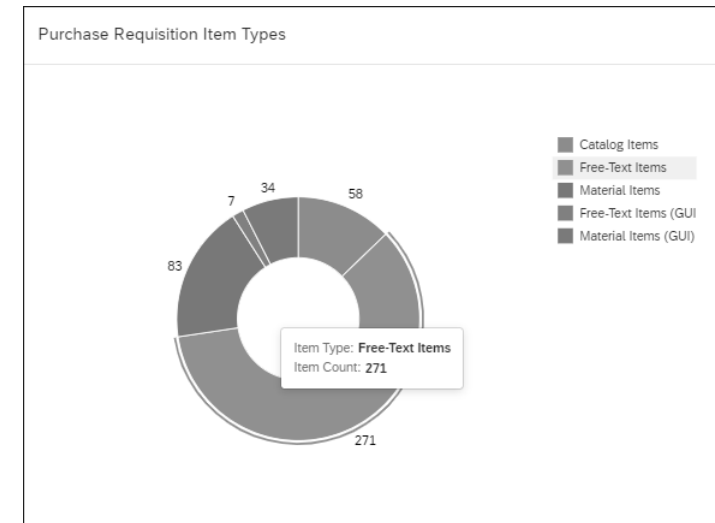


Figure 8.17 Purchase Requisition Items Card Showing the Count of Purchase Requisition Items per Type

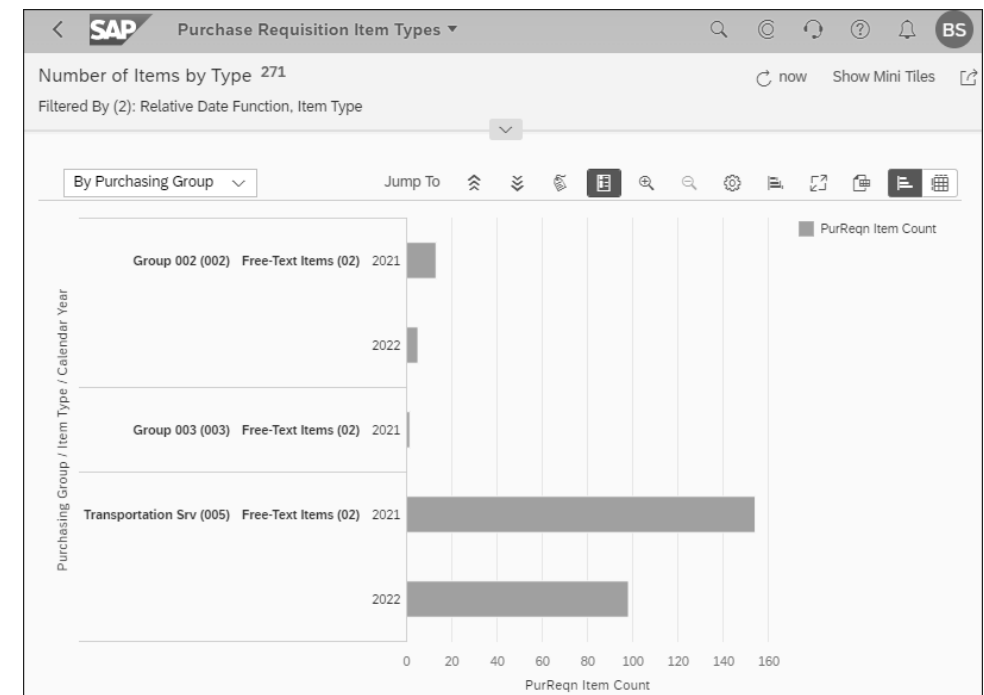


Figure 8.18 Purchase Requisition Item Types App

In the Purchase Requisition Item Types app, you can also select **Purchasing Group** from the dropdown menu to see the breakdown of the **Free-Text Items** by purchasing groups from the preceding year to date. By using different dimensions from the dropdown menu, you can also tailor your analysis to suit your reporting and analytics requirements.

To drill down further, you can either choose any horizontal bar on the chart representing the **Purchasing Group/Item Type/Calendar Year** or use the **Jump To** function, which gives you additional options via a popup that allows you to navigate to other reports.

In the **Purchase Requisition Touch Rate** card, you can see the proportion of purchase requisition items that are processed automatically and that require manual intervention during processing. In other words, from this card, you can see purchase requisition items with high touch, low touch, and no touch rate.

Table 8.4 highlights the key differences between the three touch rate categories.

Touch Rate	Percentage Calculation Logic	Change in Purchase Order Items	Automatic Workflow
No Touch	Calculation is based on the automatic creation of purchase orders from purchase requisitions.	No	Yes
Low Touch	Calculation is based on the manual creation of purchase orders from purchase requisitions.	No	No
High Touch	Calculation is based on the manual creation of purchase orders from purchase requisitions.	Yes	No

Table 8.4 Key Differences between No Touch Rate, Low Touch Rate, and High Touch Rate

In our example, 27 **High Touch** and 109 **No Touch** purchase requisition items are displayed on this card (see Figure 8.19). Selecting the header section or the chart on this card takes you to the Purchase Requisition No Touch Rate app for flexible analysis of purchase requisition items.

This app allows you to analyze purchase requisition touch rates for a given set of filters and drill down to analyze touch rates based on a range of dimensions using the dropdown menu. This app uses the CDS view `C_RequisitionNoTouchRate`. As illustrated in Figure 8.20, the counts of high touch, low touch, and no touch items are displayed by item type and calendar quarter. The **By Item Type** dimension is selected from the dropdown menu, and the **Calendar Quarter** dimension is selected using the settings function.

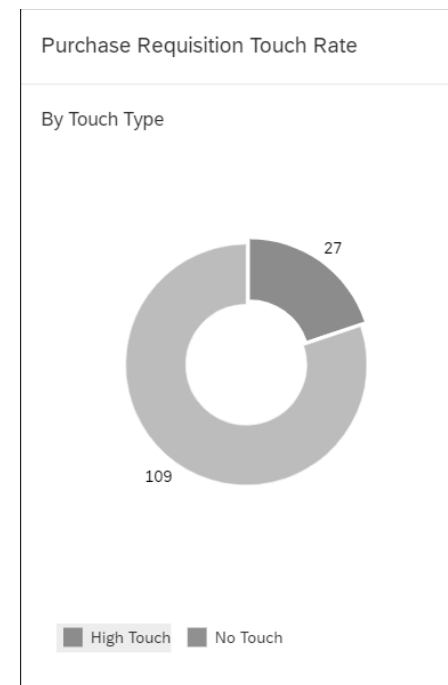


Figure 8.19 Purchase Requisition Touch Rate Card

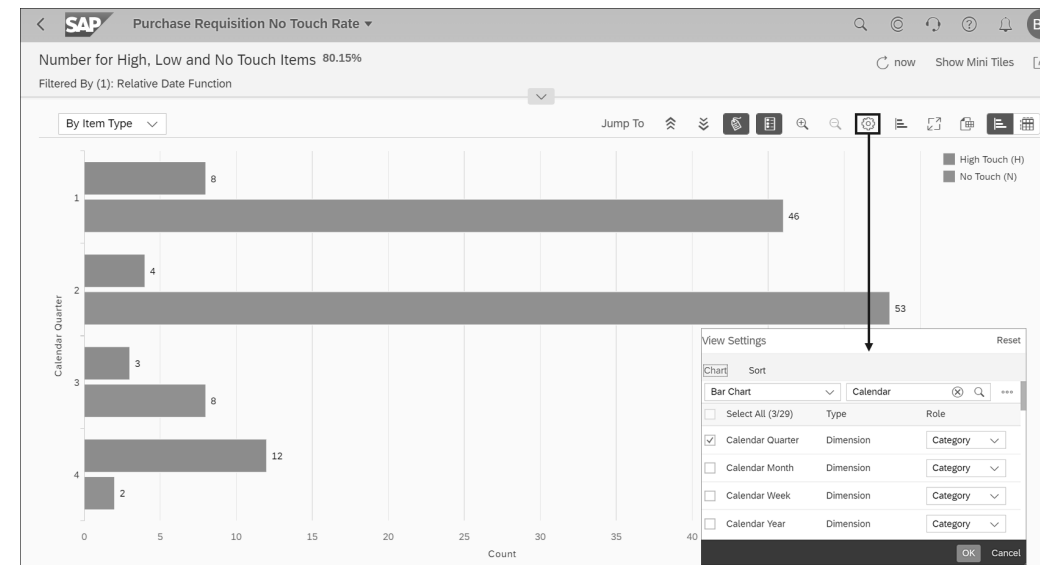


Figure 8.20 Purchase Requisition No Touch Rate App

You can choose other settings such as **Calendar Month** instead of calendar quarter to perform no touch rate and high touch rate analysis per your needs.

8.3 Operational Purchasing Analysis Using Dashboards and Measures

In this section, we'll talk about additional operational activities in procurement and analyze them using analytical list pages and relevant SAP Fiori apps. These apps provide insights into actions about supplier performance, purchasing spend, and variance for purchasing contract-based, purchasing order-based, and off-contract scenarios.

8.3.1 Off-Contract Spend Analysis

In this use case, we'll explain the use of the **Off-Contract Spend** card and the Off-Contract Spend app to analyze the total spend amount in relation to purchase orders where no purchase contract has been created.

With the **Off-Contract Spend** card, you can get insights into the total spend without a purchasing contract in place and get the displayed percentage of the total spend. As shown in Figure 8.21, the bar chart on the card shows the spend amount as a percentage of the invoiced spend by supplier. You can choose either the supplier or material group from the dropdown menu on this card and get insights into the total spend as a percentage.

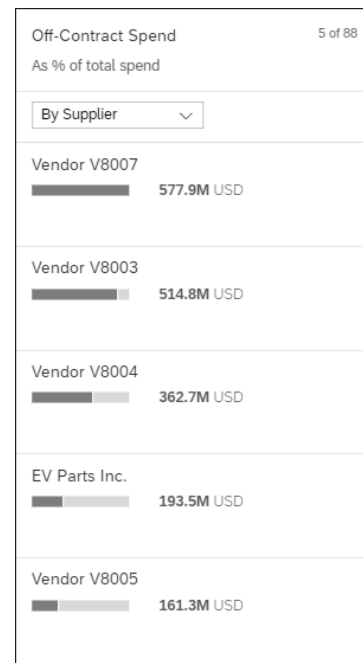


Figure 8.21 Off-Contract Spend Card

By selecting the header section or choosing an individual item on the card, you can navigate to the Off-Contract Spend app, which is a KPI-based analytical app that allows

you to use flexible dimensions to meet purchasing spend-based reporting and analytics.

For illustration purposes, we've set global filters for display currency as USD and relative date function as **YEARTODATE**, and we've used the **Trend** view from the dropdown to display **Off Contract Spend %** (i.e., sum of the purchase order amount in percent to which no contract is assigned) and **Off Contr. Spend Amt** (i.e., sum of the purchase order amount to which no contract is assigned) for the current year across two axes (see Figure 8.22).

The values displayed in blue show the purchase orders spend percentage over several months, and the values in orange show the total amount for which the invoices have been received in the current year. You can also use the **Settings** icon to select other dimensions and measures, and you can choose different chart types using to tailor your layout and save it as a view for quick use in the future.

In addition, when you click on the header section of the card, you can see the average percentage of purchase orders created without contracts displayed on the header section of the SAP Fiori app. As shown, **Purchase Orders Without Contracts** is showing **92.15%** for the current selection.

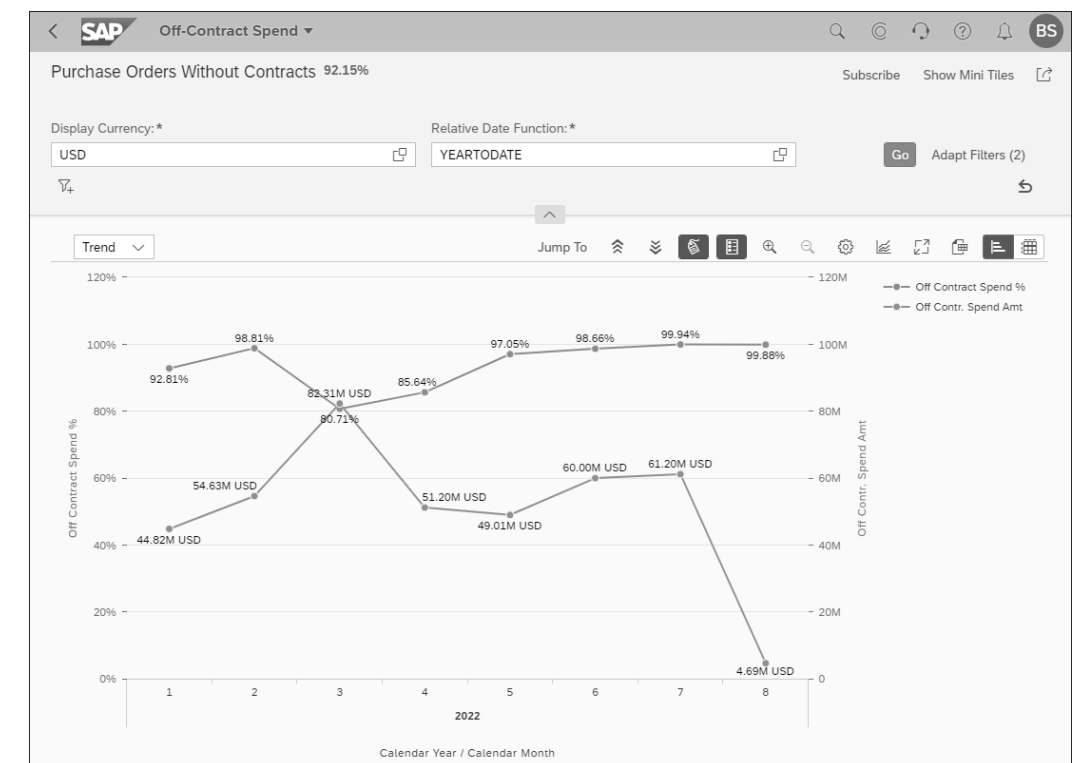




Figure 8.22 Off-Contract Spend App Showing the Trend of Off-Contract Purchase Orders



Calculation Formula for the Off-Contract Spend

The calculation of the percentage in this analytical app uses your purchasing spend that has no contract assignment within a specific time frame, and then the total amount of purchase order items without the purchasing contract is compared against the total net amount of purchase order items. The actual calculation for the off-contract spend percentage is as follows:

$$(Purchase\ order\ amount\ without\ contract\ assignment \times 100) \div Purchase\ order\ net\ amount$$

In addition, you can also use the drill up and drill down functions on this app to conduct thorough analysis if required (see Figure 8.23). As illustrated, the **Drill Down** icon  shows a lot of additional data such as cost center, document type, item category, purchasing group, supplier, work breakdown structure (WBS) element, and so on, which can be used per your reporting needs. Similarly, the **Drill Up** icon  can be used to go back to the original selection.

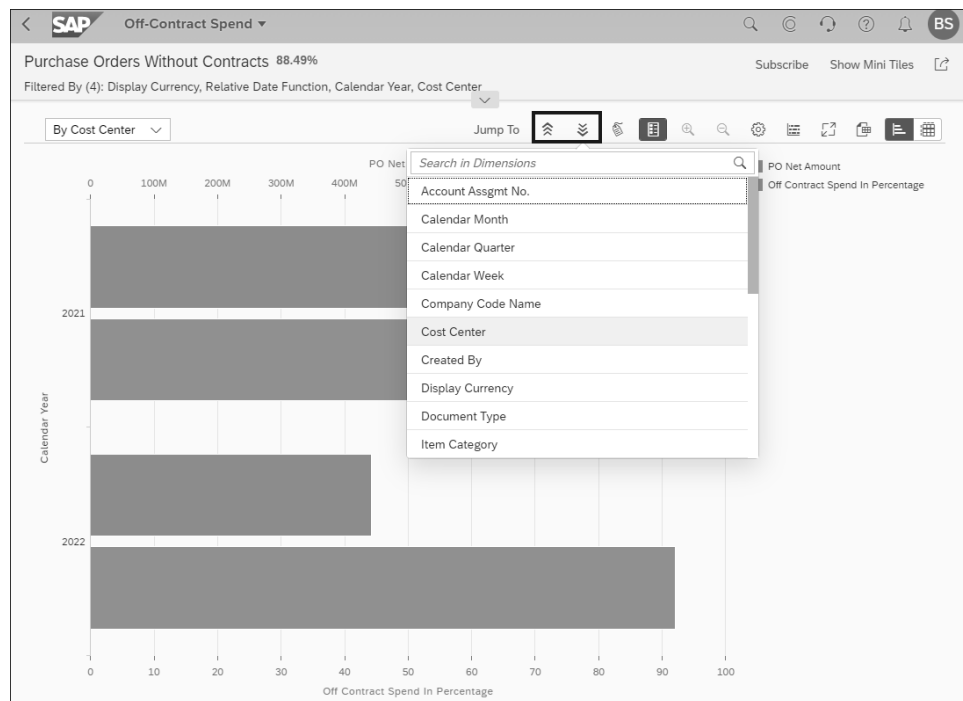


Figure 8.23 Off-Contract Spend: Use of Drill Up and Drill Down Icons

In addition, you can use the **Jump To** function to drill down to the following list of SAP Fiori apps:

- Purchase Order Factsheet, Purchasing Category Factsheet
- Manage Purchase Order, Manage Purchasing Category
- My Purchasing Document Items
- Supplier Factsheet

You must ensure that these SAP Fiori apps are activated and added to your role before accessing them.

8.3.2 Non-Managed Spend Analysis

In this use case, we'll explain the use of the **Non-Managed Spend** card and the Non-Managed Spend app to analyze the total spend amount that isn't associated with a purchase order. With the **Non-Managed Spend** card, you can get insights into the total spend with no reference to purchase orders and displayed as a percentage of total spend. As shown in Figure 8.24, the bar chart on the card shows the spend amount as a percentage of the invoiced spend by supplier, and the number shows the value of the non-managed spend. You can choose either the supplier or material group from the dropdown menu on this card and get insights into the total spend as a percentage on the bar chart. Suppliers or material groups with the highest non-managed spend will be displayed at the top. As shown on the card, non-managed spend for supplier **Garrett Motion Inc.** is displayed on the top followed by **ABS Labs**.

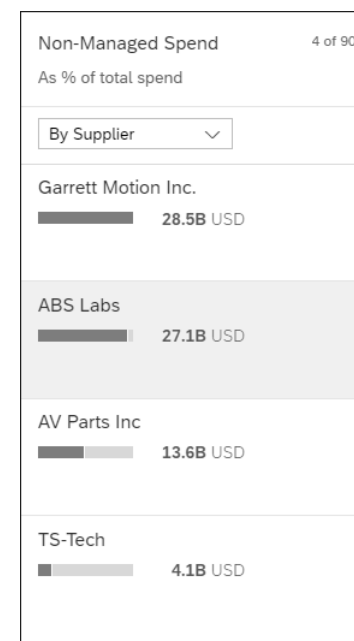


Figure 8.24 Non-Managed Spend Card

By selecting the header section or choosing an individual item on the card, you can navigate to the Non-Managed Spend app, which is a KPI-based analytical app and allows you to use flexible dimensions to meet non-managed purchasing spend-based reporting and analytics.

For illustration purposes, we've set global filters for display currency as USD, set the relative date function as PREVIOUS365DAYS, and used the By Supplier view from the dropdown to display Non-Managed Spend and Total Spend for the past 365 days (see Figure 8.25).

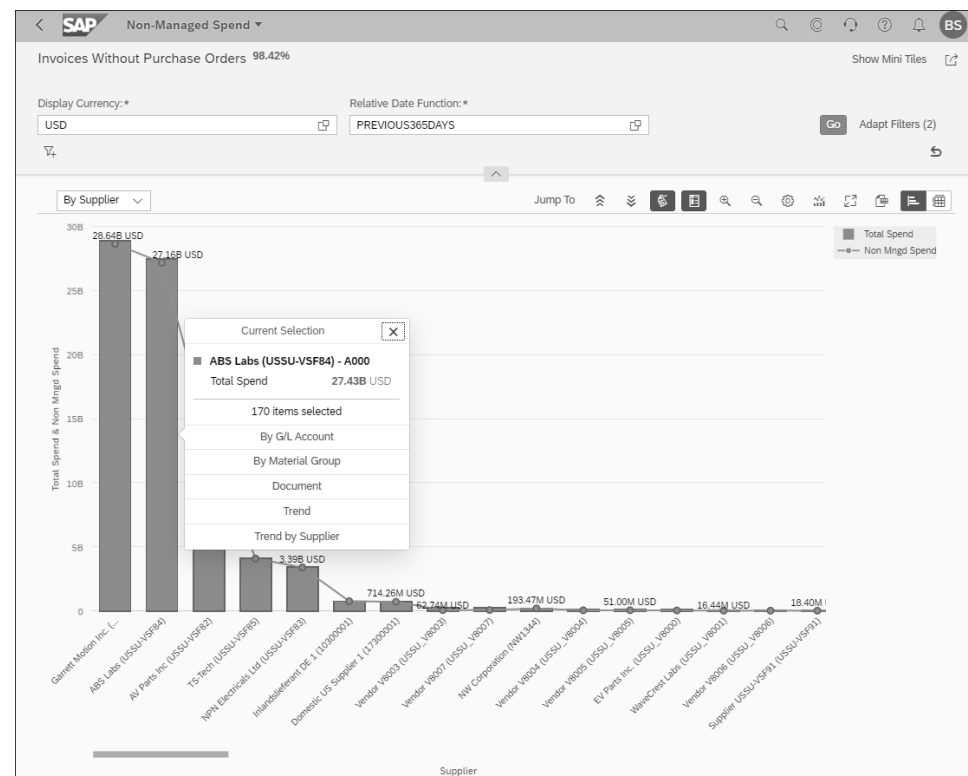


Figure 8.25 Non-Managed Spend KPI App Showing Total Spend and Non-Managed Spend Amounts

This KPI app determines the net amount paid to suppliers without a purchase order assignment in relation to the total spend for suppliers. The **Invoices Without Purchase Orders** shows that **98.42%** of the spend is not based on purchase orders. The **Total Spend** amount is the total net amount per supplier, and the **Non Mngd Spend** amount is the non-managed net amount per supplier.

The values displayed in blue show the total spend for each supplier, and the data points in orange show the non-managed spend amount for the same supplier in the past 365 days. As illustrated in the app, **ABS Labs** shows 26.16B USD of non-managed spend and

27.43B USD of total spend, and if you need to change the current view to a different view, you can use additional dimensions such as **By G/L Amount**, **By Material Group**, **Document**, **Trend**, and **Trend by Supplier**, which will be available to choose after selecting the blue bar for any supplier.

You can also use the **Settings** icon to select other dimensions and measures and choose different chart types using to tailor your layout. In addition, you can use **Drill Up** and **Drill Down** functions to perform drill-through analysis to meet your reporting needs.

8.3.3 Analyze Supplier Performance Scenarios

In this use case, we'll explain the use of the **Supplier Performance Monitoring** card and Operational Supplier Evaluation app to analyze supplier performance using different scores.

You can choose either **Supplier Evaluation Trend** or **Supplier Performance Monitoring** from the dropdown menu on the **Supplier Performance Monitoring** card to get insights into the operational score by quarter. By selecting the **Supplier Evaluation Trend** from the dropdown menu, the trend of supplier performance aggregated for all the suppliers is displayed over several quarters (see Figure 8.26). As illustrated, you can see that the overall supplier performance is stable across calendar years 2021 and 2022 and shows an **Operational Score of 78.3** for calendar quarter 2 of calendar year 2021.

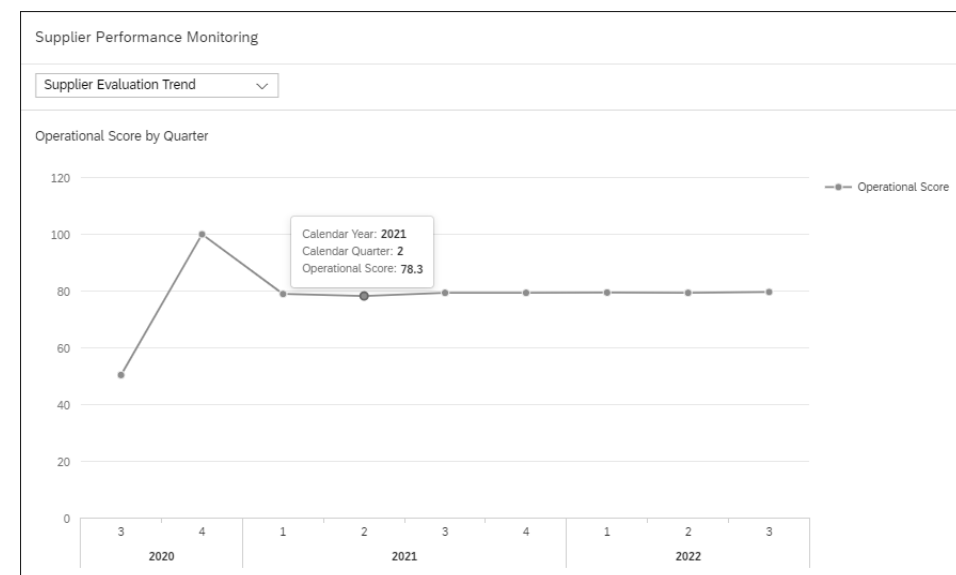


Figure 8.26 Supplier Performance by Supplier Evaluation Trend View

With the **Supplier Performance Monitoring** card, you can analyze the supplier performance by using a combination of operational score and purchasing spend per supplier.

This card uses the bubble chart to show represent the purchasing spend and the score for each supplier. As you can see, supplier names are displayed on the right side of the bubble chart, and hovering the mouse on a specific bubble gives you insight into the operational score and purchasing spend details associated with that supplier. As illustrated, supplier **Vendor V8004** shows an **Operational Score** of **79.1** along with a **PO Net Amount** of **309,978,910.2** in million dollars (see Figure 8.27).

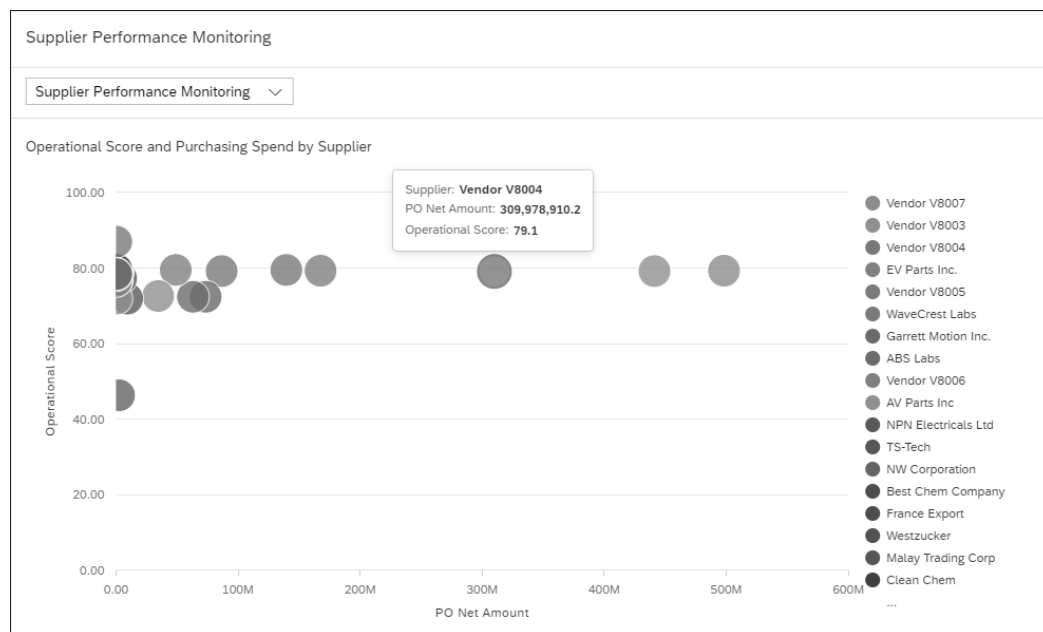


Figure 8.27 Supplier Performance by Supplier Performance Monitoring View

By selecting the header on this card or the trend or bubble chart, you can navigate to the KPI-based Operational Supplier Evaluation app that shows the results grouped by suppliers.

For illustration purposes, we've selected supplier **Vendor V0084**, which is highlighted in the preceding figure, and navigated to the Operational Supplier Evaluation app, which is a KPI-based app that can be used to perform analytics using flexible dimensions and other functions (see Figure 8.28).

This app allows you to measure the performance of the supplier Vendor V0084 across multiple KPI figures as follows:

- **Operational Score**

This score is based on the weighted average of price variance, time variance, quantity variance, and quality score of every supplier and calculated by using the

weighted average of price variance score, time variance score, quantity variance score, and quality score, which includes notification score and inspection lot score.

- **Price Variance Score**

This score is based on the variance in the price of the ordered items and delivered items. You can also use Supplier Evaluation by Price app to determine this score. This score is calculated over a period of one year and uses the difference in the purchase order amount and supplier invoice amount.

- **Time Variance Score**

This score is based on the variance in the statistical delivery mentioned in the ordered date of items and the final delivered date of items. You can also use the Supplier Evaluation by Time app to determine this score. This score is calculated from the previous year to date and uses the statistical delivery date on the purchase order and the actual delivery date recorded using the posting date of the goods receipt.

- **Quantity Variance Score**

This score is based on the variance between the ordered quantity and delivered quantity of items. You can also use the Supplier Evaluation by Quantity app to determine this score. This score is calculated from the previous year to date, and any difference in the quantities are considered for the calculation.


- **Inspection Lot Score**

This score is calculated based on the inspection scores assigned to the inspection lot that is associated with each purchase order and purchase order item. This KPI is also calculated from the previous year to date, and you can use the Supplier Evaluation by Quality app to determine this score.

- **Notification Score**

This score is based on the quality complaints received for a supplier. You can also use the Supplier Evaluation by Quality Notifications app to determine this score. A supplier with fewer received complaint notifications results in a higher quality notification score. Therefore, this score is a key KPI to determine the performance of the suppliers with better reliability.

The operational score on the header section of this app includes weighted average scores of **Time, Price, Quantity and Quality** for the **Supplier Vendor V8004**. This means the operational scores for the calendar year 2021 and 2022 are considered and then the weightage average is calculated.

To analyze supplier evaluation scores in a table format, you can change the chart view to tabular view using the  icon in the app (see Figure 8.29). By using the tabular view, the supplier evaluation scores across different KPIs are displayed in rows representing different calendar year values.

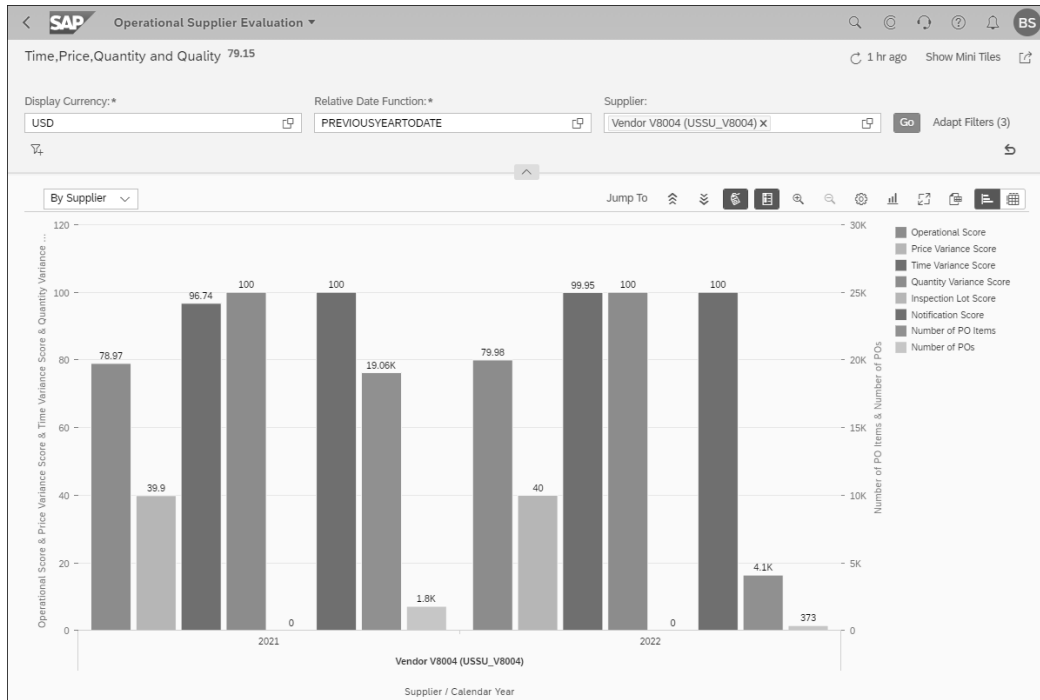


Figure 8.28 Operational Supplier Evaluation App

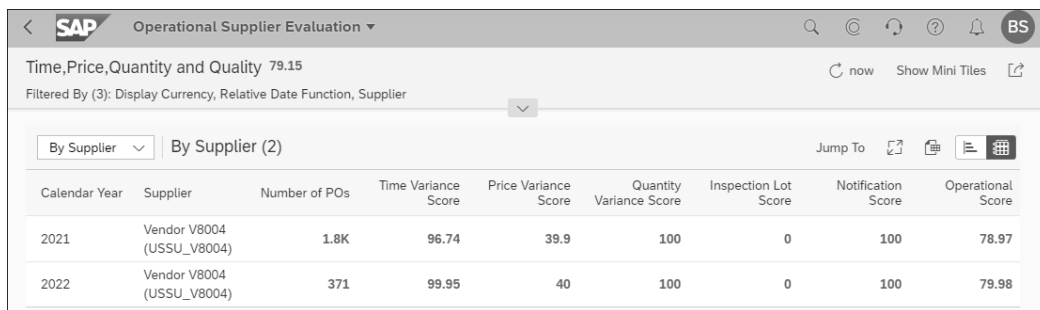



Figure 8.29 Operational Supplier Evaluation app: Tabular View

Using the **Jump To** function on this app allows you to drill down to many other SAP Fiori apps such as Supplier Evaluation Score Output, Adjust Operational Supplier Evaluation Score, and so on. As illustrated, you can see that additional apps can be accessed for further analysis and reporting (see Figure 8.30).

Using the **Jump To • Adjust Operational Supplier Evaluation Score** menu, you can navigate to the Adjust Operational Supplier Evaluation Score app where you can adjust the operational supplier evaluation score by changing the individual scores of several factors that are contributing to the calculation of the operational score. As illustrated in

Figure 8.31, you can use the **Edit** icon  for a specific purchase order and purchase order item and then change the values as needed.

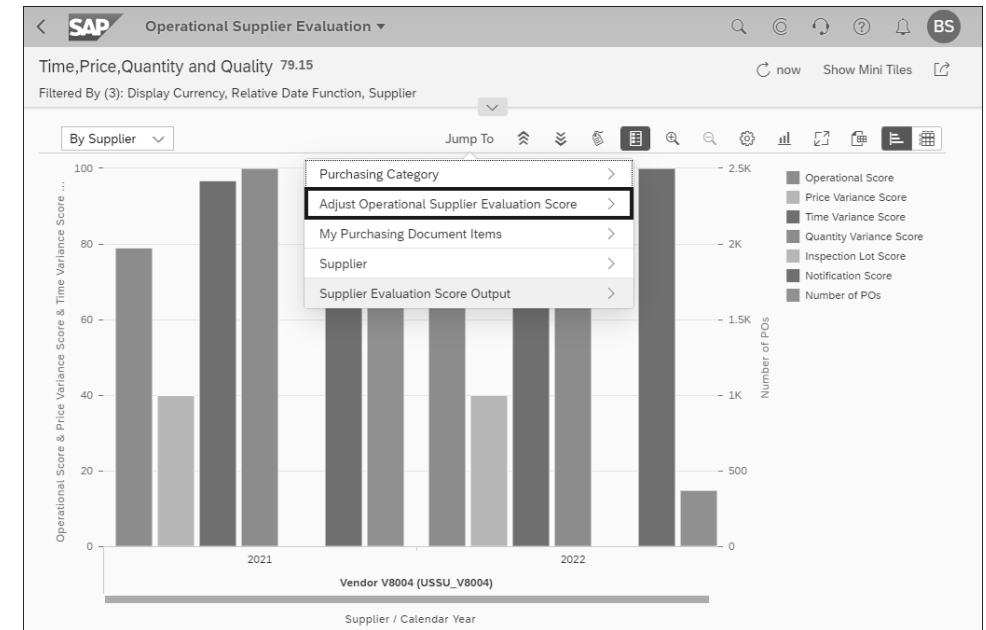


Figure 8.30 Operational Supplier Evaluation App: Use of “Jump To” Function

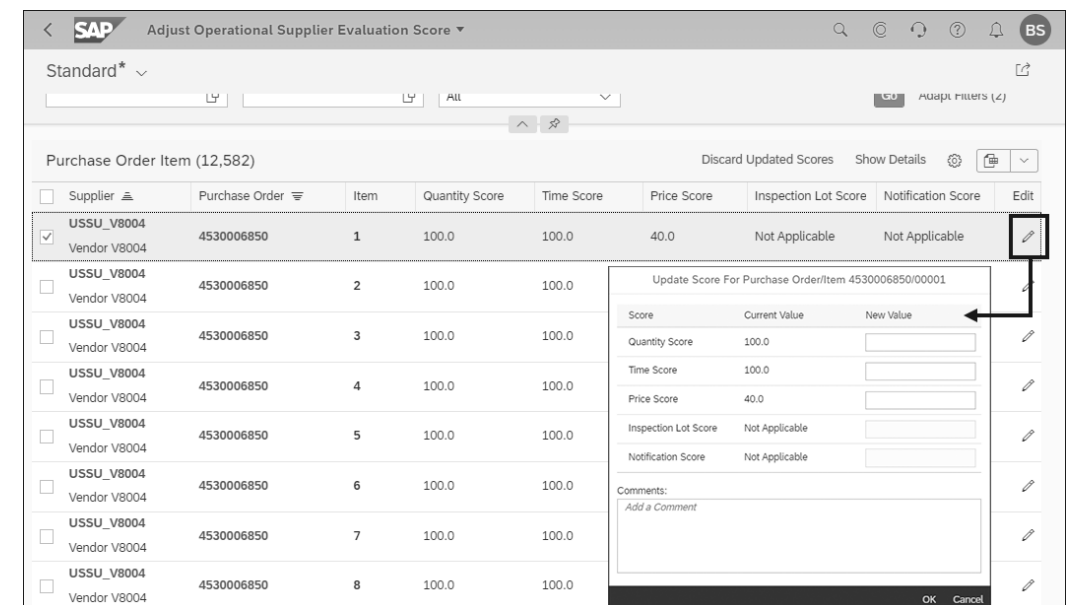


Figure 8.31 Adjust Operational Supplier Evaluation Score App

In addition to the operational supplier evaluation score, you can also get insights into the overall supplier evaluation scope using the Overall Supplier Evaluation app. This app determines the score of a supplier in an organization using operational scores and questionnaire scores. By default, the score is calculated using the relative date function as “previous year to date.” The formula used for the calculation of the overall supplier evaluation score considers the weighted average of the different operational supplier evaluation criteria such as price, quantity, quality, time, and the scores based on the supplier evaluation questionnaires, active user-defined criteria, and/or parts per million (PPM). You can use the Parts Per Million app to view the number of defective or rejected materials per million. This way, you can prefer a supplier with a lower PPM value and make strategic decisions before selecting a supplier for sourcing and procurement for your organization.

For illustration purposes, Figure 8.32 shows the overall supplier evaluation score along with operational score and questionnaire score for all the suppliers. You can also see that the **Relative Date Function** used for the calculation is set to **PREVIOUSYEARTODATE**, and a score of **81.36** is being calculated across all evaluations that includes operational score as well as questionnaire score.

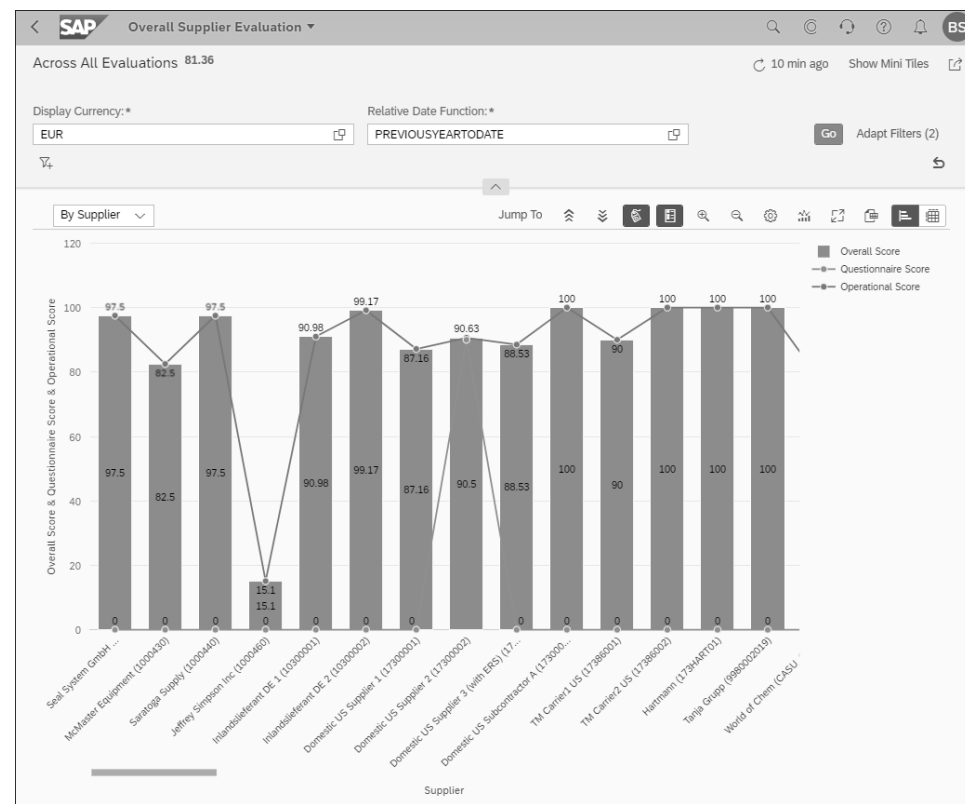


Figure 8.32 Overall Supplier Evaluation App

Choosing a different view from the dropdown allows you to analyze the overall supplier evaluation score by using additional dimensions and predefined measures. By selecting any data point related to the overall score, operational score, or questionnaire score, you can analyze these scores for that specific supplier. As illustrated in Figure 8.33, dropdown menu options and data point drilldown options allows you to choose the predefined measures, such as **Score In Relation To Spend**, **Trend by Supplier**, **By Top 10 Suppliers**, **By Bottom 10 Suppliers**, and so on, and perform additional analysis.

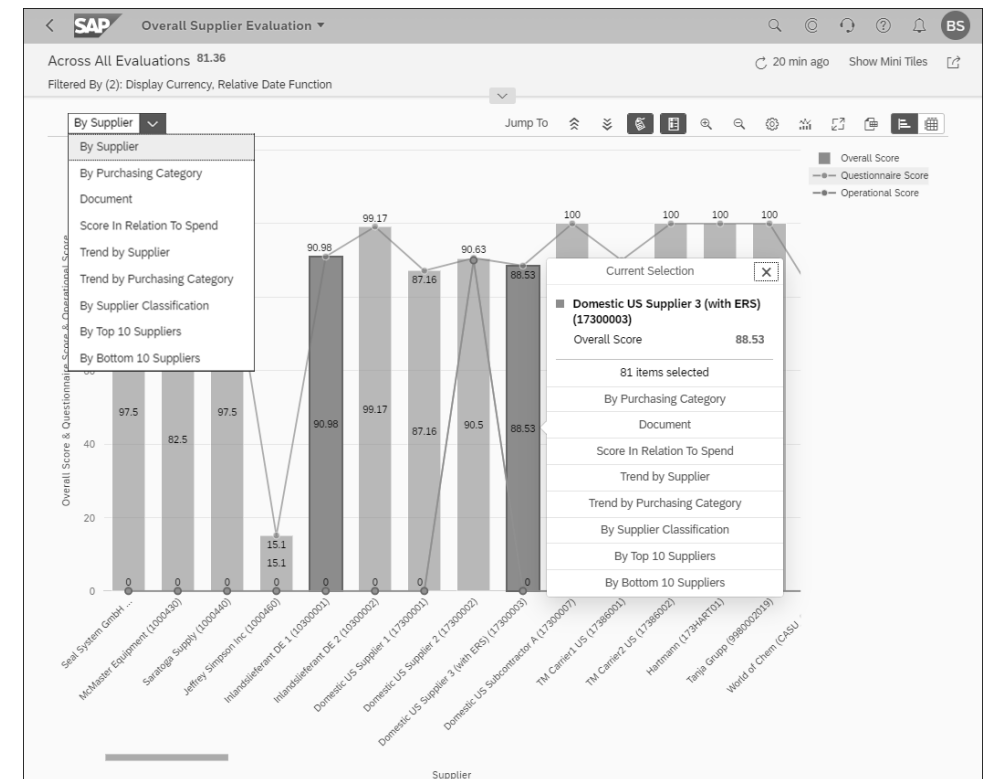


Figure 8.33 Overall Supplier Evaluation Using Drill-Through Options

For illustration purposes, we’ve used the measure **By Top 10 Suppliers** and displayed the **Total Spend** and **Overall Score** using **Combined Column Line Chart with 2 Y-Axes**. **Total Spend** is displayed on axis 1 and **Overall Score** is displayed on axis 2. You can choose a chart type of your choice that suits your reporting needs by using the **Chart Type** function or , which is available next to the **Settings** icon (see Figure 8.34). As you can see, 8 out of 10 suppliers have a score of 100, and supplier **USSUGRIR (USSUGRIR)** with the maximum spend has an overall score of 98.3. You can also see that we’ve selected the toggle **Data Label Visibility** icon , which allows you to see the values associated with the spend and score of every supplier on the app.

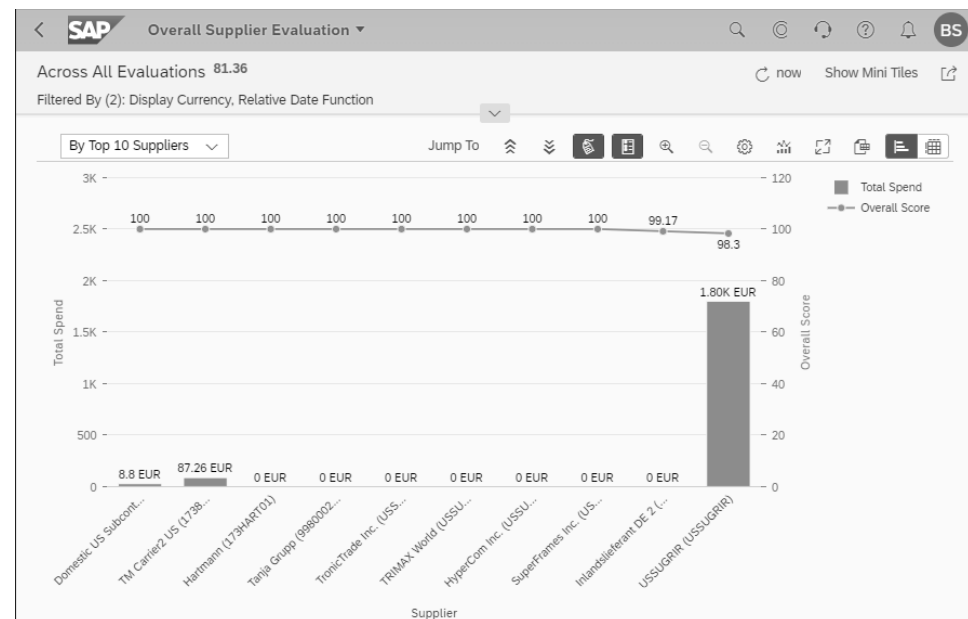


Figure 8.34 Overall Supplier Evaluation App Displaying Overall Score “By Top 10 Suppliers”

8.3.4 Spend Variance Analysis

In this use case, we’ll use the Spend Variance app to determine the sum of the purchase order value, good receipt value, and invoice value, and then analyze the variance for every supplier during the entire procurement process. With this app, you can also analyze the relation of the purchasing order value, goods receipt value, and invoice value in percentages.

As shown in Figure 8.35, you can see that the percentage share of purchasing spend value, good receipt value, and invoice value are displayed for every supplier. The calculations used for these percentages is as follows:

$$\text{Purchasing spend \%} = \text{Sum of purchase order net amount} \div \text{Sum of the total spend}$$

$$\text{Good receipt \%} = \text{Sum of total purchase order values for which goods are received/delivered} \div \text{Sum of total spend}$$

$$\text{Invoice \%} = \text{Sum of total purchase order values with received invoices} \div \text{sum of total spend}$$

For example, supplier **Seal System GmbH** shows a purchasing spend of **77.78%**, good receipt of **22.22%**, and invoice value of **0%**, totaling to 100% of the total spend. Similarly, supplier **Jeffrey Simpson Inc** shows a purchasing spend of **66.67%**, good receipt of **21.48%**, and invoice value of **11.85%**, totaling to 100% of the total spend.

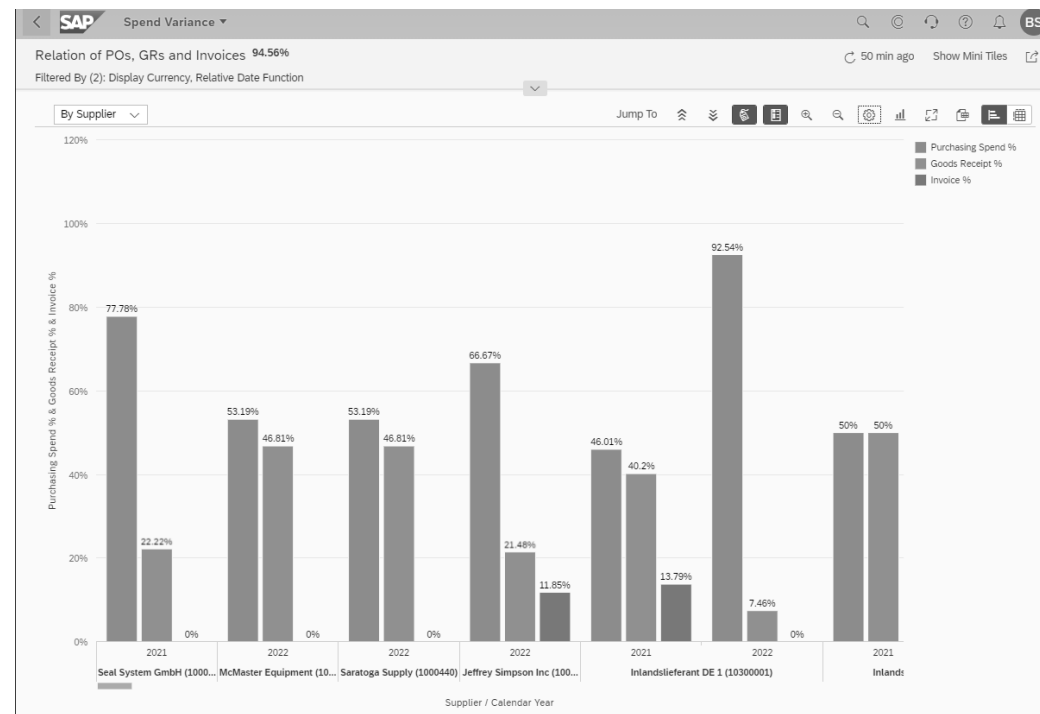


Figure 8.35 Spend Variance App Showing the Relation between Purchase Orders, Goods Receipts, and Invoices per Supplier

In summary, the current state of the total spend with respect to their move from purchase orders to good receipts to invoices can be monitored for every supplier or material with this KPI app.

8.3.5 Purchasing Spend Analytics Using the SAP Analytics Cloud-Based Dashboard

In this use case, we’ll use the Purchasing Spend Dashboard app, which allows you to compare the spend for a given set of comparison filters such as supplier, purchasing group, supplier country, material group, plant, or purchasing organization with respect to the total spend. With this app, you can also compare the purchasing spend between the two sets of comparison filters such as current year and previous year.

As a purchaser or a strategic buyer, you can also use this dashboard to monitor and analyze various aspects of purchasing spends via bar charts, column charts, and tables in several tabs such as **Overview**, **Details**, **Context**, **Compliance**, **Off Contract Overview**, and **Off Contract Details**. Let’s take a quick look at these tabs to understand their key capabilities:

■ Overview

This tab gives you a quick overview of the purchase order net amount by comparing their values and variance between current year and previous year. You can also get insights into the purchase order net amount by different quarters and their trend from the previous year to the current year (see Figure 8.36). As illustrated, the drop-down menu shows the **Overview**, **Details**, **Context**, **Compliance**, **Off Contract Overview**, and **Off Contract Details** tabs that can be used to perform flexible analysis using the Purchasing Spend Dashboard app.

You can see that purchase order variance values between the previous year and the current year are displayed in a comparison chart in the **Purchase Order Net Amount Overview** section. In addition, the amounts are displayed **by Quarter** and **by Trend** in the second chart section and by additional dimensions such as **by Supplier**, **by Material Group**, **by Purchasing Group**, and so on in the third chart section.

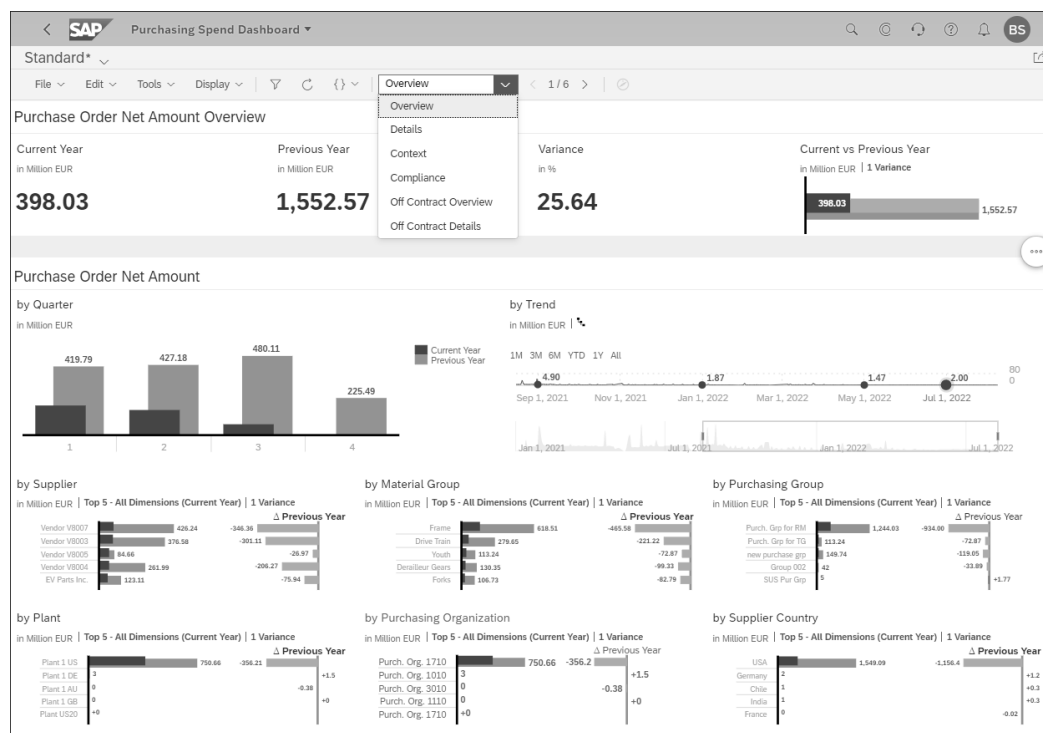


Figure 8.36 Purchasing Spend Dashboard App: Overview Tab

■ Details

This tab gives you detailed insights into the purchasing spend by displaying summarized KPIs associated with suppliers and purchase orders in the current year and previous year (see Figure 8.37). The **Summary KPI** values for suppliers and purchase

orders are displayed for all company codes, and you can apply required filters to analyze the purchasing spend for thorough analysis using the filter fields.

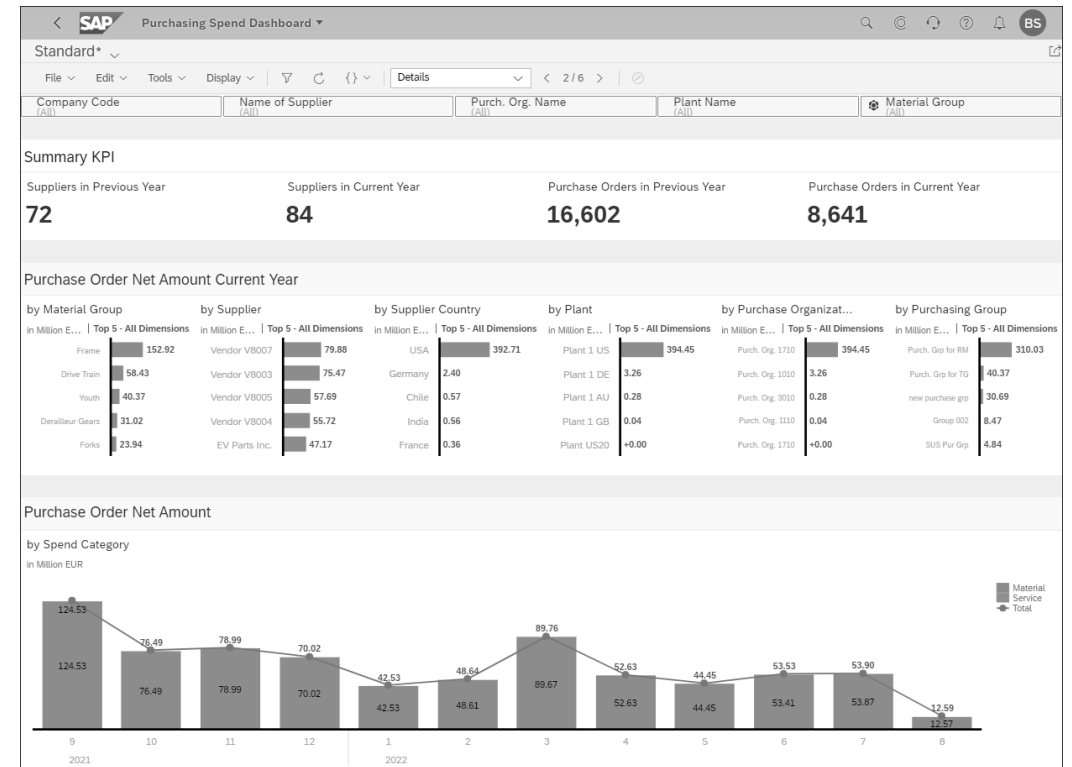


Figure 8.37 Purchasing Spend Dashboard App: Details Tab

■ Context

This tab allows you to perform pricing-based analysis in the preceding 12 months and by using cost objects such as cost center or WBS element (see Figure 8.38). For illustration purposes, the purchase order net amount values are displayed over a period of 12 months for all the cost centers. You can also use the **WBS Element** option to analyze your purchasing spend trend to meet reporting requirements across WBS elements.

■ Compliance

This tab allows you to get insights into the purchase orders with noncompliant payment terms by purchasing organization, purchasing group, material group, company code, supplier, or plant (see Figure 8.39). As shown in the app, a total of seven noncompliant purchase orders were created in the current year while the count of noncompliant purchase orders remain zero. You can also see that the percentage of purchase orders with noncompliant payment terms is at **1.94%**.

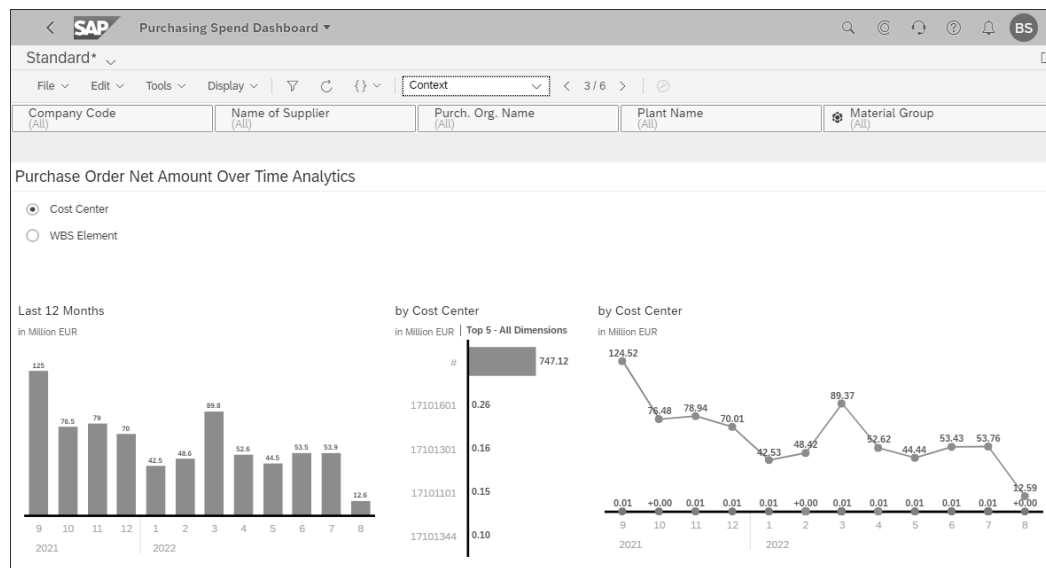


Figure 8.38 Purchasing Spend Dashboard App: Context Tab

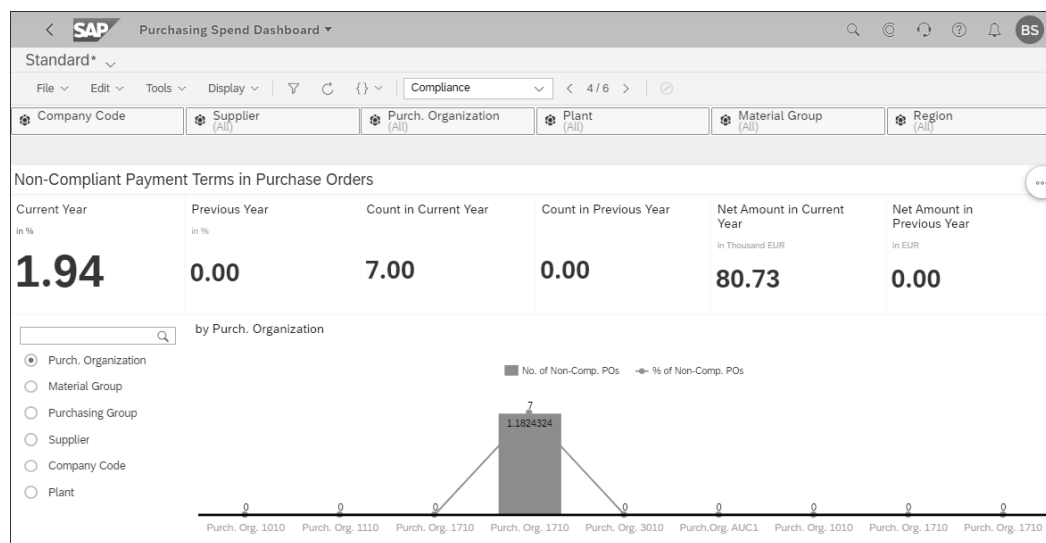


Figure 8.39 Purchasing Spend Dashboard App: Compliance Tab

■ Off Contract Overview

This tab gives you the overview of total spend on the purchase orders with no reference to any purchase contract (see Figure 8.40).

The first chart displays the off contract spend for the current year and for the previous year along with their ratio for the previous year and for the current year, and the

second chart displays the off contract spend in individual quarters of the current and previous year along with a trendline for the spend.

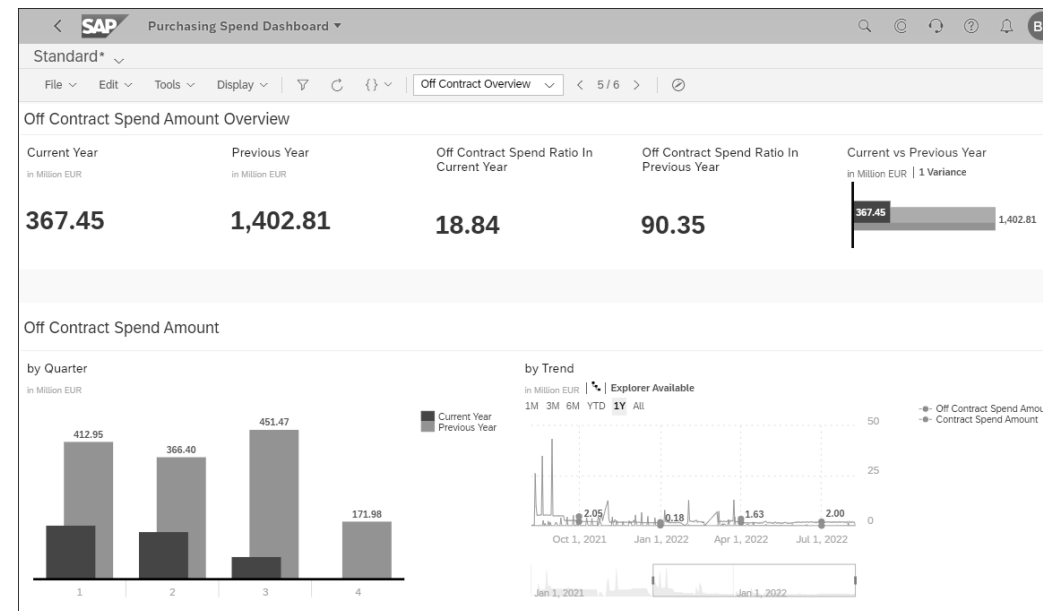


Figure 8.40 Purchasing Spend Dashboard app: Off Contract Overview Tab

Similarly, you can use the **Off Contract Details** tab to get detailed insights into the total spend on the purchase orders with no reference to any purchase contract and analyze them differently using different charts available in the app.

Purchasing Scenarios Using CDS Views and KPIs

To create additional analytical and KPI-based scenarios, you can leverage existing CDS views and analytical queries that are behind the existing analytical and KPI-based SAP Fiori apps within procurement. Via SAP Fiori-based key user tools such as the View Browser app and the Custom Analytical Queries tool, you can copy and create customized views and queries to meet additional reporting and KPI-based analytical requirements. To understand how to use several SAP Fiori-based key user tools to meet customized reporting and analytical requirements, you can refer to several use cases highlighted in Chapter 11.

8.4 Summary

The use cases provided in this chapter will help you meet the majority of your procurement-based reporting and analytical requirements using SAP Fiori apps in SAP

S/4HANA. Using existing CDS views and analytical queries, you can also meet customized requirements by copying them into the customer namespace and customizing them later to meet additional requirements. You can also leverage additional analytical reports provided by the SAP Analytics Cloud component integrated with SAP S/4HANA and SAP Fiori for additional reporting needs in the procurement process area.

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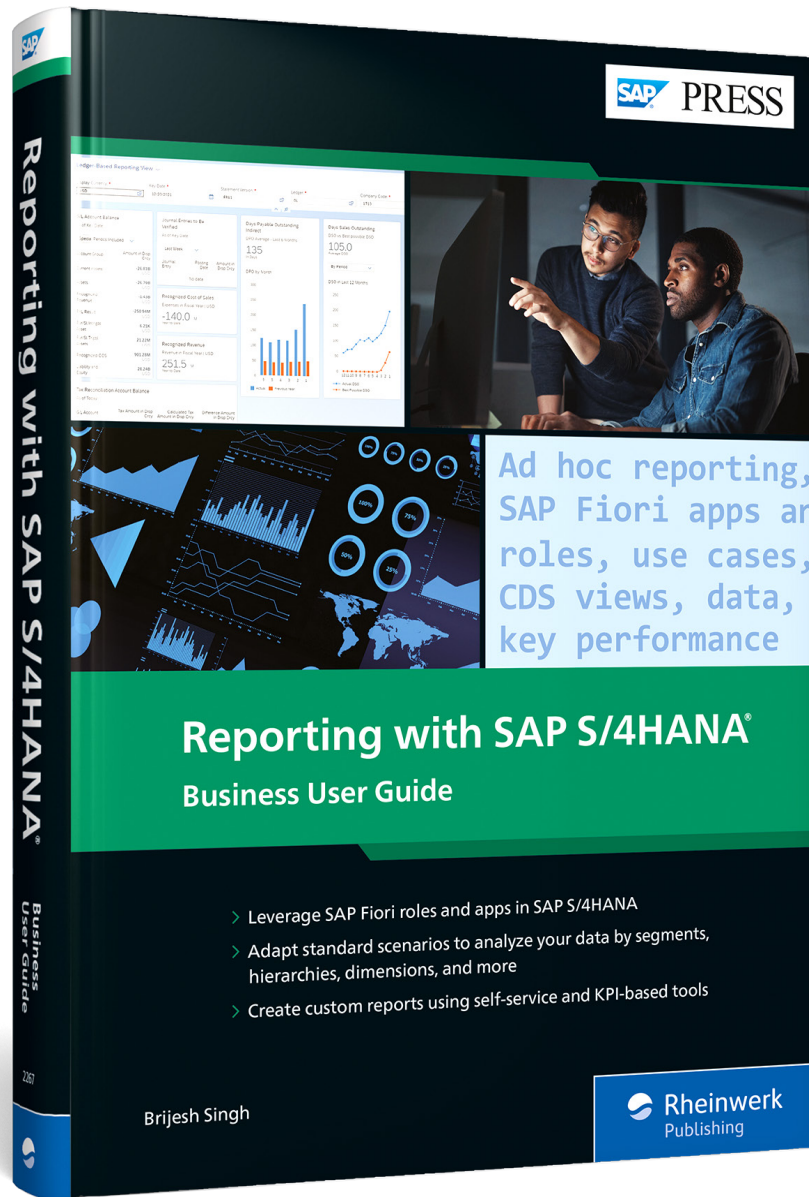
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