Version Management

Version Management

Use:

In the case of procurement transactions extending over a longer period of time (for example, in the procurement of capital goods), you may need to differentiate between various versions of the purchasing document. You may also need to refer to one particular version when corresponding with the vendor.

The Version Management facility enables you to generate and manage versions of purchase requisitions and external purchasing documents such as POs. A version groups together the change documents generated in the course of subsequent processing of the relevant document. A version thus indicates the revision level of a document (version 0 = original document, versions 1 += revisions) and provides the user with an overview of the various changes that may have been made in the course of time.

Version Management thus represents an extension to the hitherto existing change documentation functionality for internal and external purchasing documents.

Integration:

Version Management can be used in connection with purchase requisitions (ME51N, ME52N and ME53N only), RFQs, purchase orders, contracts, and scheduling agreements.

It is not possible to create different versions of quotations or scheduling agreement delivery schedules.

The system can also generate versions of externally generated purchase requisitions (from PS Project System or PM Plant Maintenance and Service Management, for example).

The system does not generate versions for requisitions created by MRP Material Requirements Planning.

Only if such a requisition is changed via Change Purchase Requisition (ME52N) does the system generate a version and fix (firm) this requisition. It cannot then be changed again through requirements planning.

Prerequisites

To be able to use Version Management, you must activate it in Customizing for Purchasing as follows:

? For purchase requisitions under Version Management® Set Up Version Management for Purchase Requisitions (for the relevant combination of document category and document type)

? For external purchasing documents under Version Management® Set Up Version Management for External Purchasing Documents (for the relevant combination of document category, document type, and purchasing organization)

If you deactivate Version Management in Customizing after purchasing documents with versions have been created, versions will continue to be generated for these documents.

Features

When you create a requisition or an external purchasing document (such as a PO), the system automatically creates an initial version (version 0). From this time on, changes and newly entered data are documented in the current version that is valid in each case.

In the case of requisitions, one version is generated per requisition item (at item level). In the case of external purchasing documents, one version is generated per document (at header level).

Once all necessary data has been entered for the purchase requisition, the version must be completed. Only then can:

? The purchase requisition be released or converted into a follow-on document

If a requisition is subject to an overall release procedure, the versions of all requisition items must be completed in order for the requisition to be released and converted.

? The external purchasing document be released or outputted (printed out or transmitted as a fax or EDI message etc.)

You complete a version by setting the Completed indicator in the version data. The processor of a purchase requisition or external purchasing document thereby explicitly indicates that he or she has now made all changes desired at the time.

You can specify that version 0 is to be completed automatically in Customizing for Purchasing. To do so, set the Version 0 OK indicator under Version Management® Set Up Version Management.

New Versions:
New change documents are always assigned to the current version, even if the Completed indicator has been set. This is done until such time as a new version is created.

**New Versions of Purchase Requisitions**

The system always creates a new version when the requisition has reached a final state. This means one of the following processing states:

- **Active**
  - If you do not use the document release functionality

- **Release completed**
  - If you use the document release functionality

Not every change to a requisition results in a new version. The following changes lead to a new version:

- **All version-relevant changes**
  - You define which changes are version-relevant in Customizing for Purchasing under Version Management ® Version-Relevant Fields of Purchase Requisitions.

- **Changes in document assignment**
- **Changes in address**
- **Changes in service items**

**New Versions of External Purchasing Documents**

The system always creates a new version when the purchasing document has reached a final state. This means one of the following processing states:

- **Active**
  - If you do not use the document release functionality

- **Release completed**
  - If you use the document release functionality

For a new version of a purchasing document to be created, all messages must have also been transmitted.

No new versions are generated for purchase orders that are on hold.

Not every change to an external purchasing document results in a new version. The following changes lead to a new version:

- **All print-relevant changes**
  - You define which changes are print-relevant in Customizing for Purchasing under Messages ® Fields Relevant to Printouts of Changes.

- **Changes in document assignment**
- **Changes in address**

Address changes result in a new version only if the field ADRC-NAME1 has been defined as a field that is relevant to printouts of changes.

- **Changes to master conditions**
  - Changes in master conditions result in a new version only if the field EKPO-NETPR has been defined as a field that is relevant to printouts of changes.

**Version Data**

You will find the version data:

- In the item details on the Versions tab page in Enjoy purchase requisitions (ME51N, ME52N, ME53N)
- In the header data on the Versions tab page of Enjoy purchase orders (ME21N, ME22N, ME23N)
- Under Header ® Versions in RFQs, conventional purchase orders (ME21, ME22, ME23), contracts, and scheduling agreements.

There you can maintain version data (e.g. reason for change) and complete the version. In addition, the Value change field shows you whether and to what extent the value of a requisition or external purchasing document item has changed in comparison with the previous version.
You can display the change documents for one or more versions by selecting the relevant versions and choosing Display Changes.

See also:

Texts for Versions in Requisitions and External Purchasing Documents

http://help.sap.com/erp2005_ehp_03/helpdata/EN/el/72b43b3d4a7958e100000000a114084/content.htm

Purchase Requisitions from the SAP Advanced Planner and Optimizer

The Version Management facility can also be active for purchase requisitions transferred from the SAP Advanced Planner and Optimizer (SAP APO). This depends on the document type defined in Customizing for Purchasing under Define Default Values for Document Type (ME51N).

In the SAP APO system, you have the option of automatically converting requisitions that have already been transferred to the ERP system into external purchasing documents. If Version Management is active for the document type of the purchase requisition, however, this is only possible if the version of the requisition was completed manually. Otherwise, you must manually convert the requisition into an external purchasing document in the ERP system.

You can deactivate the Version Management facility for purchase requisitions from SAP APO in Customizing for Purchasing under Version Management © Set Up Version Management for Purchase Requisitions.

User exit EXIT_SAPLMEPI_003 of enhancement CIFPUR02 enables you to influence the document type for purchase requisitions transferred from SAP APO and use a document type for which Version Management is not active.