

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

## End User Guide

# Plan Activity Prices Approval using SAP Build Process Automation or SAP Workflow Management

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# Overview

This document provides information about the user interface of **Plan Activity Prices Approval** Process. Approvers, Requestors and Process Operators are the target users of the user interfaces explained in this document.

This use case deals with updating Planned activity / Capacity and Price(fixed) and Variable, etc. as per a specific cost center and an activity type. Controller will initiate the approval process in BTP from start UI - Plan activity prices. Data can be entered through manual input or from excel upload

## Features

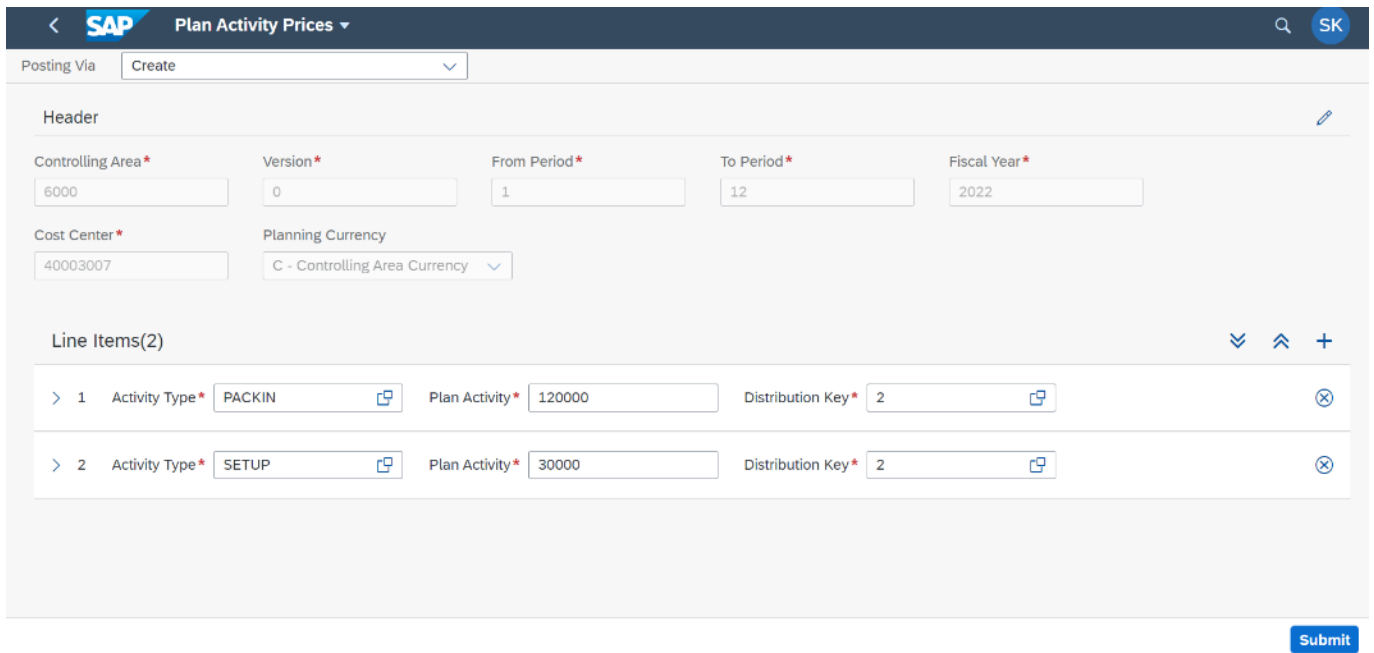
- Plug and Play with SAP S/4HANA without additional development.
- New Process variants can be configured in a no-code approach.
- Agent/approver determination using Business Rules or external service.
- Pre-built integration content to call SAP S/4HANA from SAP Workflow Management or SAP Build Process Automation.
- Out-of-the-box visibility into key process performance indicators.

# User Interface

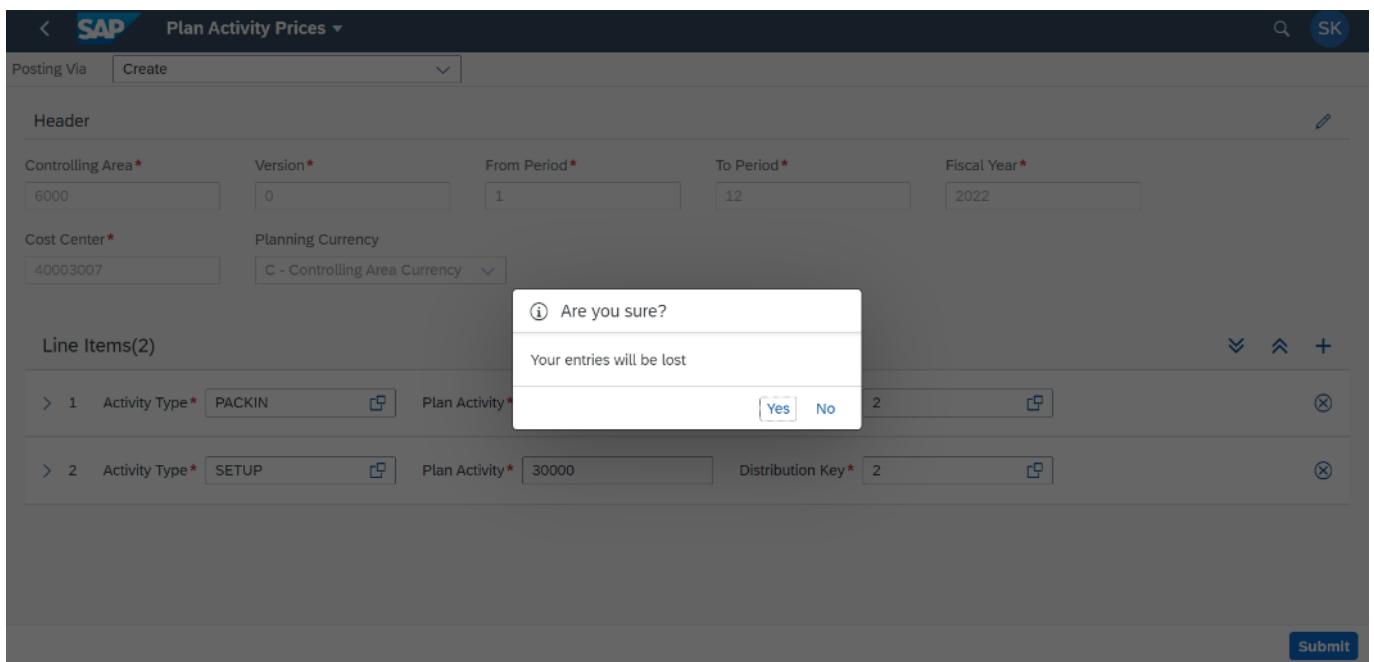
## Start UI

User can enter data manually by selecting 'Posting via – Create' from dropdown.

More items can be added with '+' button in the Line items toolbar. Item can be removed using 'Remove' button.



User can edit header section by clicking on Pencil icon. A warning will be shown as header fields are key fields which decides some of the item fields value help.



More details can be added using 'Expand/Collapse' icons.

The screenshot shows the SAP 'Plan Activity Prices' interface. At the top, there are fields for 'Cost Center\*' (40001000) and 'Planning Currency' (C - Controlling Area Currency). Below this is a section for 'Line Items(1)' with a collapse icon. The first line item is expanded, showing fields for 'Activity Type\*', 'Plan Activity\*', and 'Distribution Key\*' (2). Underneath, there are fields for 'Capacity', 'Distribution Key', 'Unit', and 'Activity Type category'. A 'Pricing Details' section follows, containing 'Price (Fixed)\*' (0), 'Distribution Key\*' (2), 'Variable Price\*' (0), 'Distribution Key\*' (2), and 'Price Unit\*' (00001). At the bottom of the pricing details, there are fields for 'Plan Price Indicator\*' (1), 'Allocation Cost Element', 'Plan Qty Set', and 'Average price', with the last two having red 'X' icons. A 'Submit' button is located at the bottom right of the interface.

If the user chooses 'Posting via – Upload' the data can be uploaded using 'Browse' button through an Excel template which can be downloaded using 'Download Template' button in the toolbar.

Clicking on 'Submit' button will send the documents for approval. Each document will be grouped based on cost centers and has a separate workflow instance for the approval process.

The screenshot shows the SAP 'Plan Activity Prices' interface with the 'Posting Via' dropdown set to 'Upload'. The 'Header' section contains fields for 'Controlling Area\*' (6000), 'Version\*' (0), 'From Period\*' (1), 'To Period\*' (12), and 'Fiscal Year\*' (2022). Below the header is the 'Planning Currency' (C - Controlling Area Currency). The 'Line Items(2)' section is expanded, showing two line items. The first line item (40003006) has 'Activity Type\*' (LAB001), 'Plan Activity\*' (3000), and 'Distribution Key\*' (2). The second line item (40003007) has 'Activity Type\*' (PACKIN), 'Plan Activity\*' (2500), and 'Distribution Key\*' (2). A toolbar at the top right of the line items section includes 'Download Template', an expand icon, and a 'Browse...' button. A 'Submit' button is located at the bottom right of the interface.

## My Inbox Task

Once data is submitted by the requestor the Approval Workflow will begin. A mail notification along with work item will be sent to Approver to validate & post data entered by Requestor.

“My Inbox” application enables line of business users to claim and complete their task. Please go through [SAP My Inbox documentation](#) for more details.

### Approval UI

#### First Level Approver

The ‘Cost Center Owner’ can Approve/Reject at the item level with the appropriate rejection comments.

If all items are approved, then clicking on Submit will lead to the next step in Workflow process. If any item is rejected, then the rejected items will go back to the requestor for Rework.

The screenshot displays the SAP My Inbox interface. On the left, there is a list of tasks under the heading 'All Tasks (49)'. The first task is 'Approval of Plan Activity Pricing for 6000 - 40003007 for role Co...' with a status of 'Medium' and 'Overdue' (Due on Mar 4, 2022). Below it, another task is listed with the same title and status. The main view shows the details for the selected task: 'Approval of Plan Activity Pricing for 6000 - 40003007 for role Cost Center Owner'. It includes fields for 'Created By', 'Email', and 'Created On: 2022/03/03 17:18:25'. The status is 'Ready' and the priority is 'Medium'. Below this, there are tabs for 'Header', 'Item Data', 'History Details', and 'Comments'. The 'Item Data' section shows 'Controlling Area: 6000', 'Version: 0', 'From Period: 1', 'To Period: 12', 'Fiscal Year: 2022', 'Cost Center: 40003007', and 'Planning Currency: C (Controlling Area Currency)'. The 'Items Approval' section shows a table with one item: '1' with 'Activity Type' 'PACKIN' and 'Plan Activity' '2500'. The status is 'Approve'. There is a 'Comment' field with 'Rejection Reason...' and a 'Submit' button. Other buttons include 'Show Log', 'Claim', and 'Close'.

#### Second Level Approver

The ‘Controlling Area Manager’ can Approve/Reject at the item level with the appropriate rejection comments. There can be 0-n approvers at this level.

If all items are approved, then clicking on Submit will lead to the next step in Workflow process. If any item is rejected, then the rejected items will go back to the requestor for Rework.

**SAP My Inbox**

All Tasks (49)

Approval of Plan Activity Pricing for 6000 - 40003007 for role Co...  
 [Redacted] Medium  
 Due on Mar 4, 2022 **Overdue**

Reserved by You

Approval of Plan Activity Pricing for 6000 - 40003007 for role...  
 [Redacted] Medium  
 Due on Mar 4, 2022 **Overdue**

Reserved by You

Task Owner not defined for Approval of Plan Activity Pricing...  
 [Redacted] Medium

**Approval of Plan Activity Pricing**

Approval of Plan Activity Pricing for 6000 - 40003007 for role Controller Area Manager

Header | Item Data | History Details | Comments

Controlling Area: 6000  
 Version: 0  
 From Period: 1  
 To Period: 12  
 Fiscal Year: 2022  
 Cost Center: 40003007  
 Planning Currency: C (Controlling Area Currency)

Item Data

Items Approval

Item	Activity Type	Plan Activity	Comment
1	PACKIN	2500	Rejection Reason...

Submit Show Log Release

## Rework UI

At the Requestors 'My Inbox', the data can be updated for the rejected document based on approver comments.

The persona can make one of the following decisions:

1. Submit – To start the whole approval process again for the reworked items with updated data.
2. Terminate - To terminate the workflow.

SAP My Inbox

All Tasks (49)

Search

Rework of Plan Activity Pricing for 6000 - 40003007 Medium

Approval of Plan Activity Pricing for 6000 - 40003007 for role Co... Medium  
Due on Mar 4, 2022 Overdue

Reserved by You

Task Owner not defined for Approval of Plan Activity Pricing... Medium

Reserved by You

Approval for RE Contract

Rework of Plan Activity Pricing

Rework of Plan Activity Pricing for 6000 - 40003007

Created By: [Redacted]  
Email: [Redacted]  
Created On: 2022/03/08 10:26:39

Status: Ready  
Priority: Medium

Header Item Data History Details Comments

Controlling Area: 6000  
Version: 0  
From Period: 1  
To Period: 12  
Fiscal Year: 2022  
Cost Center: 40003007  
Planning Currency: C (Controlling Area Currency)

Item Data

Items Approval

1 Activity Type\* PACKIN Plan Activity\* 2500

Comment rejecting SK

Submit Terminate Show Log Claim

SAP My Inbox

All Tasks (49)

Search

Rework of Plan Activity Pricing for 6000 - 40003007 Medium

Approval of Plan Activity Pricing for 6000 - 40003007 for role Co... Medium  
Due on Mar 4, 2022 Overdue

Reserved by You

Task Owner not defined for Approval of Plan Activity Pricing... Medium

Rework of Plan Activity Pricing

Rework of Plan Activity Pricing for 6000 - 40003007

Header Item Data History Details Comments

History Details

User ID	Role	Comment	Time Stamp
[Redacted]	Cost Center Owner	OK 3.03 14:12	2022/03/03 08:42:15
[Redacted]	Controller Area Manager	correction required	2022/03/08 04:56:36

Comments

Approval comment:\*

Submit Terminate Show Log Claim

## Retry UI

If posting failed in system, the 'Retry' button will also be visible to try posting again.

'Update Errors' section will show the errors occurred while posting the document.



SAP My Inbox

All Tasks (50)

Search

Reserved by You

Retry of Plan Activity Pricing for 6000 - 40013004  
Medium

Reserved by You

Task Owner not defined for Approval of Plan Activity Pricing...  
Medium

Rework of Plan Activity Pricing for 6000 - 40003005  
Medium

Plan Activity Pricing Retry UI

Retry of Plan Activity Pricing for 6000 - 40013004

Created By: [Redacted]  
Email: [Redacted]  
Created On: 2022/03/01 17:34:31

Status: Reserved  
Priority: Medium

Update Errors Header Item Data History Details Comments

Error Code	Error Message	Error Type
210	Cost center None does not exist	E

Header

Controlling Area: 6000  
Version: 0  
From Period: 1  
To Period: 1  
Fiscal Year: 2022  
Cost Center: 40013004

Submit Retry Terminate Show Log Release

## Admin UI

If the approver is not determined the admin can assign the task to the relevant user.

SAP My Inbox

All Tasks (49)

Search

Reserved by You

Task Owner not defined for Approval of Plan Activity Pricing...  
Medium

Rework of Plan Activity Pricing for 40003005 - 6000  
Medium

Approval of Plan Activity Pricing for JVA400104 - 6000 for role...  
Medium  
Due on Feb 26, 2022  
Overdue

Approval of Plan Activity Pricing for 9430200 - 6000 for role Cost...

Administrator Action

Task Owner not defined for Approval of Plan Activity Pricing for 6000 - 40012006 for role Cost Center Owner

Created On: Mar 1, 2022  
Created By: [Redacted]  
Priority: Medium

Error Description Plan Activity Pricing Details Task Owner Assignment

Error Description: Approver Details not maintained for Approval of Plan Activity Pricing in role 'C...

Plan Activity Pricing Details

Cost Center: 40012006  
Cost Center Category:  
Controlling Area: 6000  
Fiscal Year: 2022  
Version:

Assign Processor Retry Show Log Release

Click on Assign processor will assign the task to the entered users.

- All Tasks (49)
- Search
- Reserved by You
- Task Owner not defined for Approval of Plan Activity Pricing... [Redacted] Medium
  - Rework of Plan Activity Pricing for 40003005 - 6000 [Redacted] Medium
  - Approval of Plan Activity Pricing for JVA400104 - 6000 for role... [Redacted] Medium  
Due on Feb 26, 2022 Overdue

Administrator Action

Task Owner not defined for Approval of Plan Activity Pricing for 6000 - 40012006 for role Cost Center Owner

Error Description | Plan Activity Pricing Details | Task Owner Assignment

Fiscal Year: 2022  
Version:

Task Owner Assignment

Role: Cost Center Owner  
Users: [Redacted]  
Groups:  
Emails: [Redacted]

# Process Visibility Workspace

Process Visibility capability in SAP Build Process Automation or SAP Workflow Management enables Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. It also enables customers gain out of the box process visibility into their deployed processes. Please refer [help documentation](#) for more details.

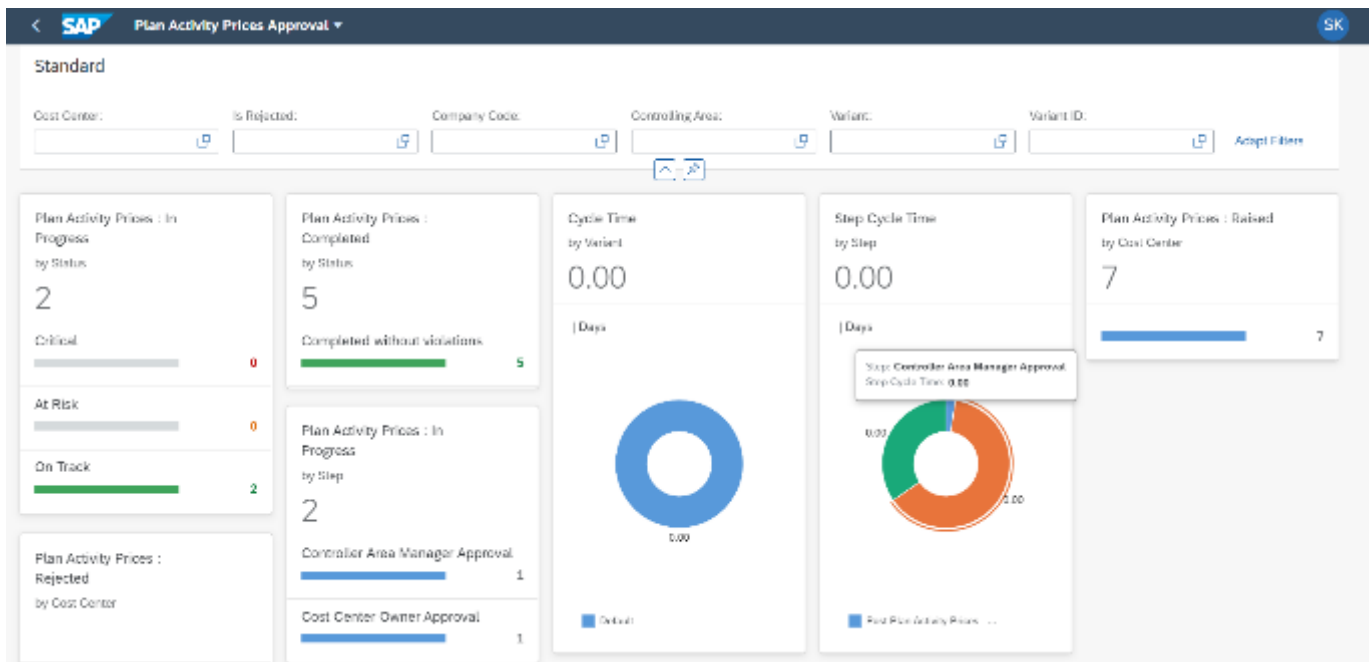
**Plan Activity Prices Approval** process content package provide out of the box visibility on all the process variants in SAP Build Process Automation or SAP Workflow Management. Line of business expert will be able to enhance the visibility scenario to their requirements.

## Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario "Plan Activity Prices Approval". For more information on how to add scenario-specific tiles, refer to the [help documentation](#).
2. Click the scenario-specific tile in the Fiori Launchpad.
3. User will see the below detailed process visibility dashboard.

## Access Process Workspace with SAP Workflow Management

1. Go to Process Flexibility Cockpit
2. Select **Plan Activity Prices Approval** tile
3. Click Live Process Insights - **Plan Activity Prices Approval**
4. User will get the following screen.



Please go through [help documentation](#) on how to access process workspace.

