

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

## End User Guide

# Project Manager Project Creation using SAP Workflow Management or SAP Build Process Automation

# Table of Contents

<b>Table of Contents</b> .....	<b>2</b>
<b>Overview</b> .....	<b>3</b>
<b>My Inbox Task</b> .....	<b>4</b>
Approver / Controller Project Approval .....	4
<b>Process Visibility Workspace</b> .....	<b>6</b>
Access Process Workspace with SAP Build Process Automation .....	6
Access Process Workspace with SAP Workflow Management .....	6

## Overview

This document provides information about how to use the **Project Manager Project Creation** using SAP Workflow Management or SAP Build Process Automation. Project Manager, Project Controller & other approvers are the target users of this document.

The scenario enabling communication between project managers (using SAP Project System) and controllers (using CO/PS) allowing review and confirmation of project creation. A project manager creates a project in Project System with appropriate structures and triggers a workflow instance via BAdIs. The project needs to be reviewed in Project Systems, approved by the controllers and other required approvers and release in Project systems.

- Configurable project controller determination
- Approval for creation of projects by approvers using My Inbox
- Gain visibility on project creation flow using SAP BTP Workflow Management's Visibility capability

# My Inbox Task

The scenario Project Manager Project Creation enables the Project Controller to view the approval tasks in My Inbox for release of project in SAP Project System. They could also decide to reject project or request a rework of project details from the Project Controller.

## Approver / Controller Project Approval

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

As soon as a Project Manager creates a project in SAP Project System and saves it will trigger one or more workflow instances. This workflow instance determines the additional approval steps required.

The approval user interface to approve a project has 4 sections: Project Header, List of WBS elements, Rejection/Rework Remarks, and Review History.

The screenshot shows the SAP My Inbox approval interface for Project W1011. The interface is divided into several sections:

- Task Card:** Located in the top left, it displays "Approve Project W1011" with a search bar, a refresh icon, and a status indicator "High" with a sub-status "Within a Week".
- Project Header:** The top section of the main content area, containing project details such as Project ID (W1011), Profit Center (DUMMY), Plant (DE01), Controlling Area (GL00), Company Code (DE00), Project Currency (EUR), Business Area, and Start/Finish dates (0000-00-00).
- List of WBS Elements:** A table with columns for WBS Element, Responsible, Start Date, Finish Date, and Duration. It currently shows "No data".
- Rejection / Rework remarks:** A section with a text input field for providing feedback.
- Review History:** A section with a table for tracking previous reviews, currently showing "No data".
- Footer:** A row of action buttons including "Approve" (green), "Reject" (red), "Request Rework", "Show Log", "Claim", and a share icon.

The Project Controller can make one of the following decisions:

1. Approve - Click **Approve** to approve and release the project in SAP S/4HANA Project System. The Project Manager receives a notification, that the project was fully approved and updated in SAP PS.
2. Reject - Click **Reject** to reject the project.
3. Request for Rework – Click **Request Rework** to request a rework of the project details from the Project Manager. The Project Manager will receive a notification and can change properties of the Project in SAP Project System and as soon updates are made a new workflow instance will be triggered.

---

[Approve](#) [Reject](#) [Request Rework](#)

# Process Visibility Workspace

Process Visibility capability in SAP Workflow Management or SAP Build Process Automation 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.

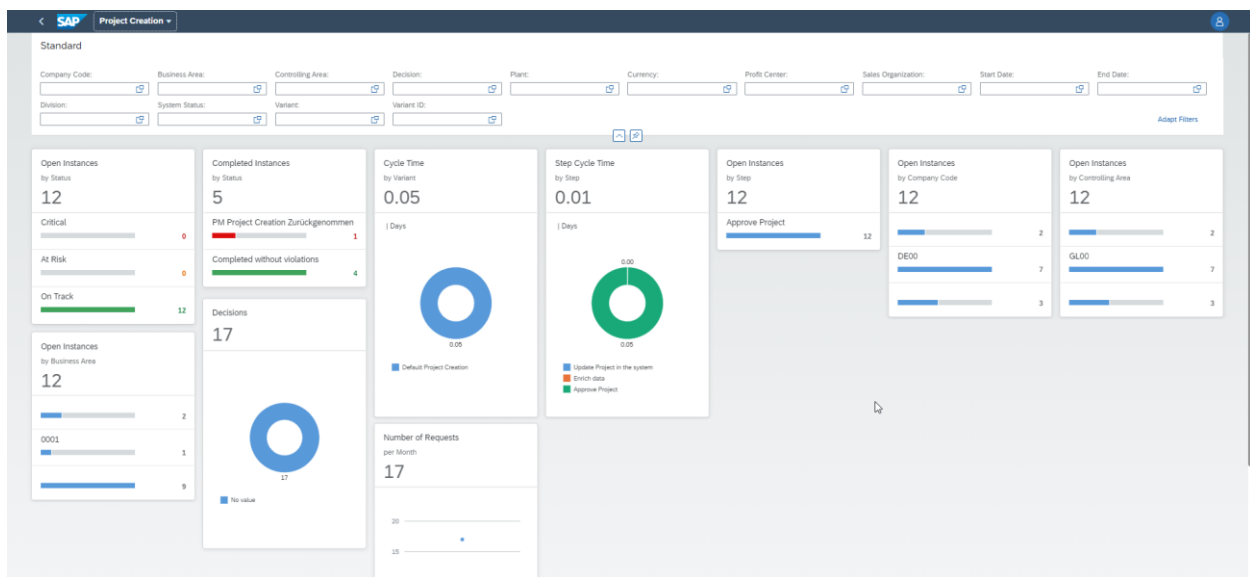
The **Project Manager Project Creation** package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Workflow Management or SAP Build Process Automation. A process owner or line of business expert will be able to enhance the visibility scenario.

## 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 "Project Manager Project Creation". 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 detailed process visibility dashboard.

## Access Process Workspace with SAP Workflow Management

1. Go to Process Flexibility Cockpit.
2. Select **Project Manager Project Creation** tile.
3. Click Live Process Insights **Project Creation**
4. User will see the below detailed process visibility screen.



5. Besides the standard process performance indicators which are delivered with all SAP workflows,

this scenario contains a few additional predefined indicators:

- a. Open Instances by Controlling Area
  - b. Open Instances by Business Area
  - c. Open Instances by Company Code
  - d. Number of Requests per Month
  - e. Requests by Decision.
6. The scenario exposes additional attributes which can be used to define more performance indicators. Please contact your administrator for further information.

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