

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

## End User Guide

SAP S/4HANA Enterprise Portfolio and Project Management -  
Project Approval and Release 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>SAP Portfolio and Project Management Project Creation</b> .....	<b>4</b>
<b>My Inbox Task</b> .....	<b>5</b>
Approver / Controller Project Approval.....	5
Project Controller confirm manual activity.....	6
<b>Process Visibility Workspace</b> .....	<b>7</b>
Access Process Workspace with SAP Build Process Automation .....	7
Access Process Workspace with SAP Workflow Management .....	7

## Overview

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

The scenario enables communication between project managers (using SAP Portfolio and Project Management) and controllers (using SAP Controlling and Project System) allowing review and confirmation of project creation. A project manager creates a project in SAP Portfolio and Project Management with appropriate structures and triggers transfer to SAP Project Systems by changing status “flag for transfer”. The project needs to be reviewed in SAP Project Systems, approved by the controllers and other required approvers and release in SAP Project Systems.

- Configurable project controller / approver 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

## SAP Portfolio and Project Management Project Creation

When creating a project in SAP Portfolio and Project Management, make sure to add either the user that is used in the connection between the SAP Business Technology Platform and SAP Portfolio and Project Management or a role that is assigned to this user in the authorizations tab of the project with at least READ permission, otherwise the workflow won't be able to read all data of the SAP Portfolio and Project Management project.

# My Inbox Task

The scenario S/4HANA Enterprise Portfolio and Project Management - Project Approval and Release enables the Project Approver (optional) or Project Controller to view the approval tasks in My Inbox for release of project in SAP Project System. They could also make a decision to reject project or request a rework of project details from the Project Manager.

## 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 Portfolio and Project Management and saves it a custom SubSystem is used to automatically trigger a new workflow instance. This workflow instance determines if additional approval steps are required or not and informs the Project Controller about a new project. Both approval UIs look the same.

The approval user interface to approve a project has 1 section.

### 1. Section 1 – Project Details.

The screenshot displays the SAP My Inbox interface for a project approval task. The task is titled "Review Project W1109" and is due on Sep 7, 2021. The main content area shows the following details:

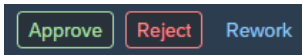
- Project: PPM Name**
  - Project Definition: W1109
  - Name: PPM Name
  - Description: PPM Description
  - Project Type: Y00000000000001 - BTP Prototyp Workflows
  - Start Date: 06.09.2021
  - End Date: 00.00.0000
  - Created By (E-Mail): firstname.lastname@sap.com
  - Currency: EUR
- Project Details**
  - Responsible Org. Unit: Maintenance Stream
  - Priority: High
  - Version:
  - Reason:
  - Fixed Finish Constraint: 1 - No constraint
  - Plant: DE01
  - System Status: PREL
  - Master Language: DE
  - Period Type: Bi-Monthly
  - Category: Development Project
  - Fixed Start Constraint: 2 - Must start on
  - Company Code: DE00
  - Func Area: 0300
- More Project Details: Profiles**
  - Project Profile: ZPPM001
  - Status Profile: ZPS00002
  - WBS Status Profile: ZPS00002
  - Budget Profile: ZCBN01
  - Interest Profile: 0000001
  - Partner Profile: ZPSS
  - Result Analysis Key: ZDE006
  - WBS Sched. Profile: ZPSS00000003
  - Network Profile: ZPSS002
- Created**
  - Created On: 06.09.2021
  - Created by: LASTNAME
- Last Change**
  - Date: 07.09.2021
  - Changed by: LASTNAME
  - Time: 08:03:53
- Status**

Status Text (long)	Status Key	Status Text (short)	System Status
Created	I1700	CRTE	<input checked="" type="checkbox"/>

At the bottom of the interface, there are buttons for "Approve", "Reject", "Rework", "Show Log", and "Claim".

The Project Approver / Controller can make one of the following decisions:

1. Approve - Click **Approve** to approve the project.
2. Reject - Click **Reject** to reject the project.
3. Request for Rework – Click 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 PPM and as soon updates are made a new workflow instance will be triggered.



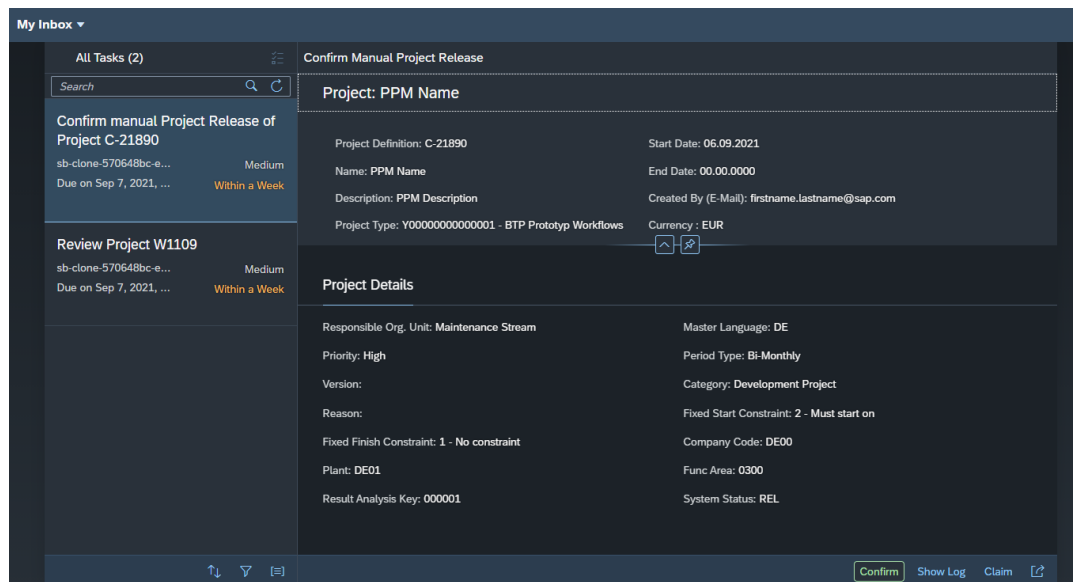
## Project Controller confirm manual activity

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

It is possible to configure the workflow to automate the release of a project in SAP Project System, but in case this is not wanted by the customer, it is necessary to confirm that the project was released manually after full approval. For this task, the project controller receives a notification and as soon as manual activities are done, the Project Controller can confirm this. The Project Manager receives a notification, that the project was fully approved and updated in SAP PS.

The approval user interface to approve a project has 1 section.

1. Section 1 – Project Details.



The Project Approver can make one decision:

1. Confirm manual activity - Click **Confirm** to confirm that the manual activity has been successfully processed.

## 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.

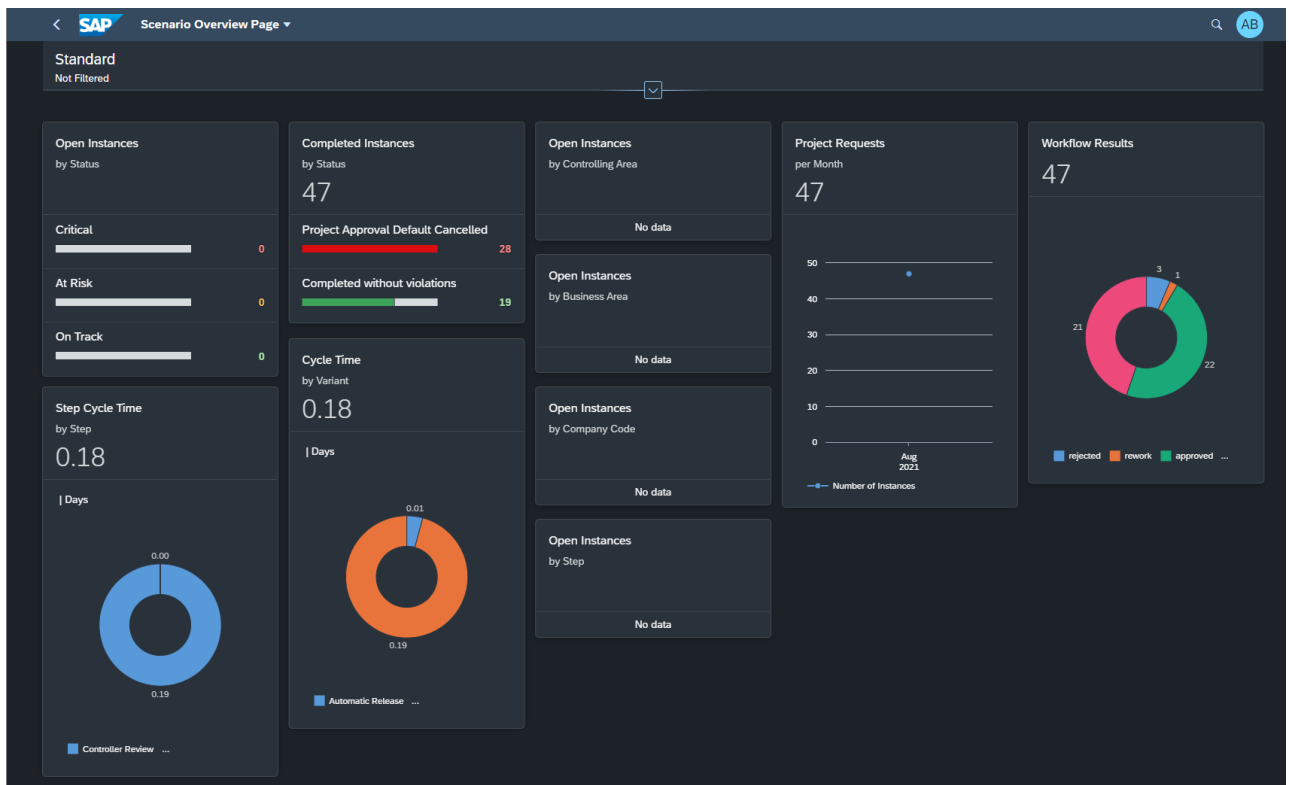
The Project Approval package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Workflow Management or SAP Build Process Automation. A process owner or line of business expert will be able to enhance the visibility scenario.

### 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 Approval and Release”. 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 Approval tile.
3. Click Live Process Insights **Project Approval**
4. User will see the below detailed process visibility screen.



5. Beside 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. Project Requests per Month
  - e. Workflow Results (which indicates the number of decisions that were taken).
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.