

iProConference:
SAP HCM Best Practise
London, 8th November 2012

Managing approval processes in SAP HCM

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#HCMBP2012



Agenda



Does it have to be SAP workflow?

Designing approval workflows

User interface for approvers

- Universal Worklist(UWL)
- Personal Object Worklist(POWL)
- Mobile Applications

Managing substitutions

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What is workflow?



- **Workflow is an IT based automation and usually simplification of a business process**
- **Workflow comprises all aspects of a business process:**
 - ▶ the process flow
 - ▶ the people involved
 - ▶ the output

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When to use workflow?



To implement a process with SAP-Workflow, the process has to...

- ▶ proceed multiple steps
- ▶ Be processed the same way (or a similar way)
- ▶ involve multiple persons
- ▶ be based on a structural organisation

■ **Keep in mind: Workflow requires a workflow administrator**

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Where to use workflow?



Approval processes

- Leave- /Travel request
- Management by objectives

Information

- Status change information
- Routing slip
- Process support
- Due date tracking

Error- /Exception handling

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Agenda



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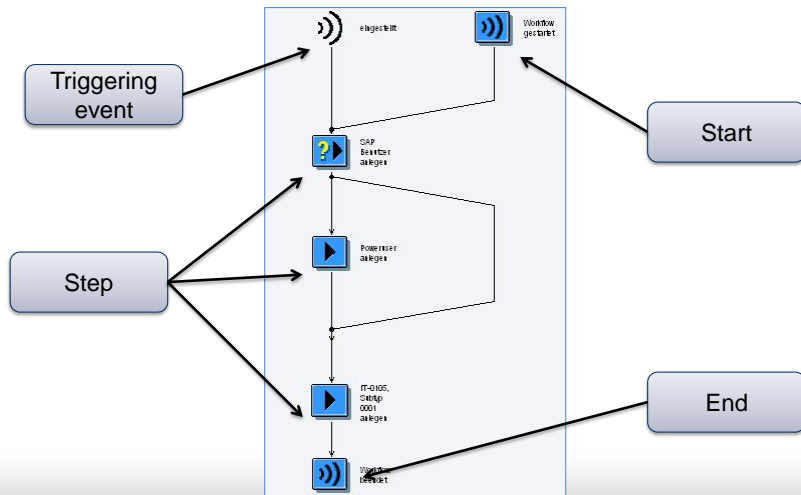
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Workflow builder I



Main tool: Workflow Builder (SWDD)



Workflow builder II



Workflow Builder - Change 'Appraiser b'

Information Area: Workflow: WWS12300110, Version: 0002 (0000) Definition

Navigation Area: Steps
- 000004 Info to Appraiser - Change
- 000011 Generate URL - Display Appraisal I

Step Types That Can Be Inserted:
- Activity
- Web activity
- Send Mail
- Form
- User Decision
- Document from Template
- Condition
- Multiple Condition
- Event creator
- Wait

Graphical Model: Appraiser - Change Request, Workflow started, Generate URL - Display Appraisal Document, Info to Appraiser - Change

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Step types



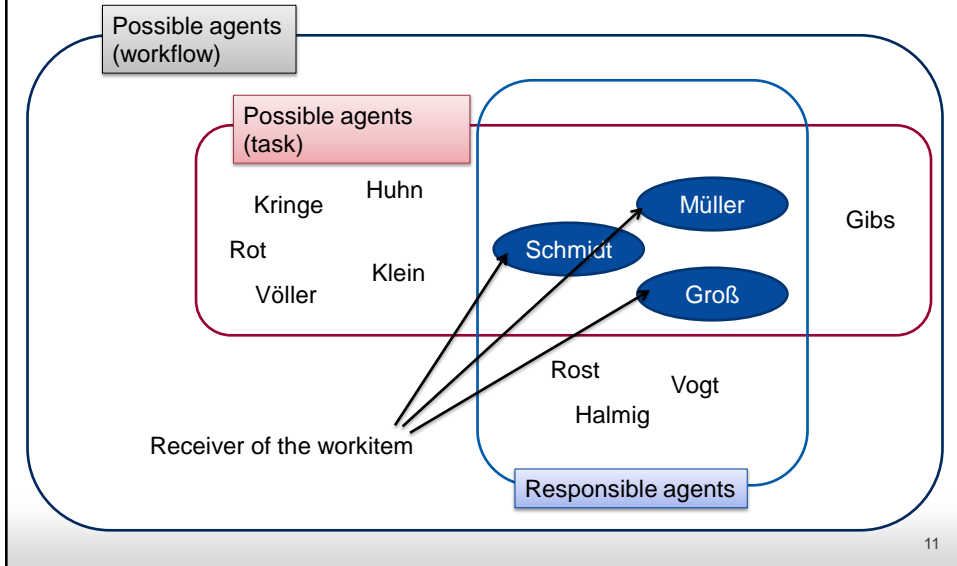
Activities

- ▶ Activity
- ▶ User decision
- ▶ Document generation
- ▶ Web activity

Flow control

- ▶ Condition
- ▶ Multiple condition
- ▶ Event creator
- ▶ Wait step
- ▶ Container Operation
- ▶ Loop (UNTIL)
- ▶ Loop (WHILE)
- ▶ Fork
- ▶ Send mail

Agent determination



Agent determination II



■ Determination of responsible Agents

- ▶ Expressions
- ▶ Organisational objects
- ▶ Rules
 - Responsibilities
 - Evaluation paths
 - Function Modules

■ Exclude agents by entering an expression

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User interfaces for approvers



Universal Worklist (UWL)



Navigation

Selection

Preview

Central entry point for handling tasks in SAP NetWeaver Enterprise Portal

Subject	From	Sent	Priority	Due	Status
Sendt IPHONE 5 einkaufen für 1.000,00 EUR [?]	Buckowitz, Christian	05-Oct-2012	Normal		New
Approve Travel Plan of Anja Müller [?]	IPROCOT_CS,	17-Sep-2012	Normal	2	New
Check trip of Anja Müller [?]	Marxsen, Anja	13-Sep-2012	Normal	1	New
Sabine Gutbro's Leave Request [?]	IPROCOT_TZ,	07-Sep-2012	Normal	1	In Progress

Sabine Gutbro's Leave Request

Sent: 07-Sep-2012 by IPROCOT_TZ, Priority: Normal
 Status: In Progress

Your worklist for approving leave requests contains a request that you have to process. For more information, see the worklist.
 To view the worklist, start the Web application for approving leave requests.
 Once you have processed the request, the work item will automatically be set to "completed."

Attachments

Type	Title
Document	Database: W_782BCB4F4FCE1ED1BE98B2CCB07ACACA

Launch WebDynpro | Resubmit | Forward | Cancel Assignment

You can also:
[Display Details in SAP GUI](#)
[Manage Attachments](#)
[Create Action Request](#)
[View History](#)

Universal Worklist (UWL)



Define tabs

Define views

Column order and sorting

Workitems to be displayed

Show additional columns / information

Multiple approval

Personalise (Filter)

Subject	From	Sent	Priority	Due	Status
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Personal Object Worklist (POWL)



Active Queries

E-Recruiting [My Expiring Postings \(0\)](#) [New Registered Candidates \(0\)](#) [My Planned Activities \(0\)](#) [My New Applications \(3\)](#)

E-Recruiting - My New Applications

View Praxistage [Reject](#) [Activities](#) [Assign](#) [Application Checked](#) [Print](#) [Filter](#) [Settings](#)

Full Name	Application Date	Employer	Requisition	Name
	12.07.2011		Abteilungsleiter Travelmanagement	Employee Referral
	20.06.2011	Porsche AG	Abteilungsleiter E-Recruiting	Employee Referral
	16.06.2011	SAP Deutschland AG & Co. KG - Düsseldorf	Abteilungsleiter E-Recruiting	Employee Referral

Last Refresh 19.10.2012 16:09:12 CET [Refresh](#)

Function oriented worklist for a specific topic, for example approvals

Folie: 17

POWL - Settings



Filter [Settings](#)

■ Create views using ALV-functionalities

■ Save view

- ▶ Administrator view for all user
- ▶ User specific view

View iProConference [Save](#) [Save as...](#) [Delete](#) [Properties...](#)

Save View as

Description: *

Assignment:

Initial View

[OK](#) [Cancel](#)

Folie: 18

UWL vs. POWL



UWL

- Portal necessary
- Integration of several backend systems
- Central point for approval activities
- Configuration of views by administrator
- Shows the user his workitems
- UI: Java

POWL

- No portal necessary
- No integration of third party systems
- Focus on function oriented lists
- Configuration of views by administrator and/or user
- Authorization concept for display of POWL list
- UI: Web Dynpro ABAP

Folie: 19

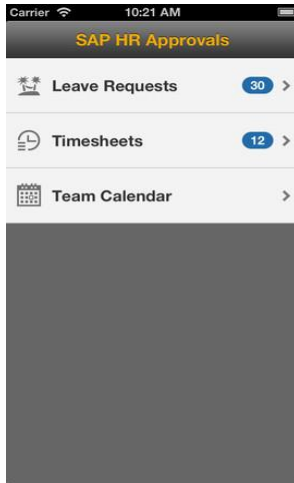
Mobile Applications



Access approval processes from your smartphone

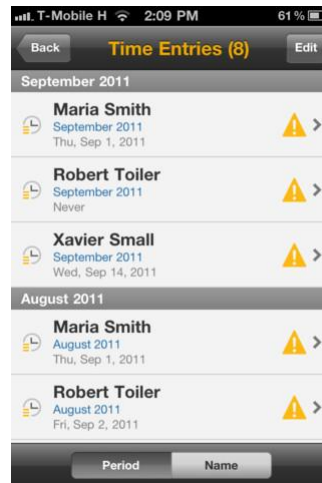
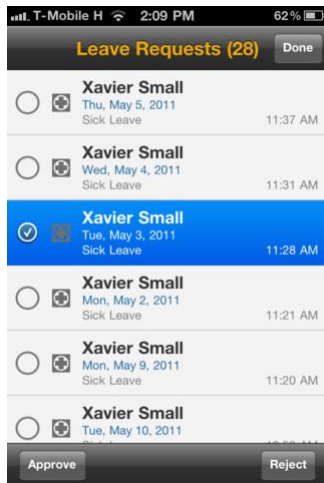
Folie: 20

Mobile Applications



Folie: 21

Mobile Applications



Folie: 22

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Substitution



Idea: Assign another user to manage your tasks in case of absence or unavailability

Active Substitution

- Substitute directly receives all my tasks
- Substitute can manage all tasks

Passive Substitution

- Substitute is allowed to fill in for me if am unexpected unavailable
- Substitute can access the tasks by clicking the „Take over“ button

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Manage substitution rules



Universal Worklist

Alerts: Tasks (3/3) / Notifications / Tracking

Show: (New and in Progress Tasks (3/3)) | Select a Subview: All | All

Create Task Show Filter Hide Review Refresh

Subject	From	Sent	Priority	Due	Dis
Subject: Travel Plan of Anja Müller	IPROCEN_CS	17-Sep-2012	Normal	2	
Check Trip of Anja Müller	Juhold, Anja	15-Sep-2012	Normal	1	
Subject: Subord's Leave Request	IPROCEN_TZ	07-Sep-2012	Normal	1	

Refresh Personalize View Manage Substitution Rules Display Connection Status New

Row 1 of 3

Manage Substitution Rules

null You can also see other users' substitution rules involving you and you can take over another user's tasks (if this user has allowed you to 'fill in' for them)

My Substitution Rules

Create Rule Delete Refresh

Tasks	Nominee	What To Do	Stage	Rule Activation	Turn On/Off
All	Juhold, Anja	Receives my tasks	Ongoing	Successful	Turn Off
All	Edinger, Jörg	Fills In For Me	Ongoing	Successful	Turn Off

Row 1 of 2

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Stage	Take Over

Row 0 of 0

iProPSM – Own substitution rules



Maintain substitution rules

Tab 'Substitution Rules' shows the employees substitution rules. You can create and delete rules.
 The Tab 'Other Users' Substitution Rules' shows all rules where the selected employee is substitute.
 Tab 'workitems' shows all active workitems. You can forward these items to other users.

Maintain substitutions for: 00001000 Anja Müller refresh

Substitution Rules Other users substitution rule Workitems

substitute

Create rule... delete Update

Tasks	Receiver	I Want the Nomine	from
All	Dr. Herbert Braunstein	Fill in for me	31.10

Create substitution role

You can define which tasks you want to assign to a nominee.

Create rule for: Anja Müller

Receiver: IPROCEN_JR

Set condition profile: Professional

Assign these tasks: Fill In For Me Receive My Tasks

set time period
 Create rule from: 31.10.2012 to: 31.12.9999

save Cancel

iProPSM – Other users substitution rules



Maintain substitution rules

Tab 'Substitution Rules' shows the employees substitution rules. You can create and delete rules.
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Maintain substitutions for: Anja Müller

substitutions				
Owner	Tasks	I Want the Nomine	active	overtaken
Dr. Herbert Braunstein	Alle	Receive tasks	X	

iProPSM - Workitems



Maintain substitution rules

Tab 'Substitution Rules' shows the employees substitution rules. You can create and delete rules.
 The Tab 'Other Users' Substitution Rules' shows all rules where the selected employee is substitute.
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Maintain substitutions for: Anja Müller

UWL items				
subject	status	priority		
Abwesenheitsmitteilung von Sabine Gutbrod	INPROGRESS	NORMAL	07.09.2012	
Check trip of Anja Müller	NEW	NORMAL	13.09.2012	
Approve trip of Anja Müller	NEW	NORMAL	13.09.2012	
Reiseplan von Anja Müller genehmigen	NEW	NORMAL	17.09.2012	
Gerät IPHONE 5 einkaufen für 1.000,00 EUR	NEW	NORMAL	05.10.2012	
Reise Nr. 0002600409 korrigieren	INPROGRESS	NORMAL	08.10.2012	
Correct trip no. 0002600403	NEW	NORMAL	08.10.2012	
Reise von Anja Müller prüfen	NEW	NORMAL	08.10.2012	
Reise von Anja Müller prüfen (Erweiterung)	NEW	NORMAL	08.10.2012	
Reise Nr. 0002600412 korrigieren	INPROGRESS	NORMAL	08.10.2012	
Begründungstext für Korrektur der Reise senden	INPROGRESS	NORMAL	08.10.2012	
Begründungstext für Korrektur der Reise senden	NEW	NORMAL	09.10.2012 09:50:29,7960000	

Forward workitems

Select receiver:

Selected workitems:

subject	status	priority	sent
Check trip of Anja Müller	NEW	NORMAL	13.09.2012 08:32:09,4660000

Questions?




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