

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Manage Posting Period Approval using SAP Workflow Management or SAP Build Process Automation

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Overview

This document provides information about how to use the user interfaces of **Manage Posting Period Approval** Process content package. Approvers, Requestors and Process Operators are the target users of the user interfaces explained in this document.

Manage Posting Period Approval content package for SAP S/4HANA enables to automate the Posting of Adjusted Periods in a flexible and transparent way. It provides flexibility in executing a specific variant of the process depending on attributes. When a user submits a request to update the adjusted period details, a pre-configured process variant is triggered in SAP Workflow Management or SAP Build Process Automation based on configurable business conditions. On approval, Adjusted Period detail is updated in SAP S/4HANA system.

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

The solution contains the following user interfaces

1. Start UI
2. My Inbox tasks

Start UI

The process starts from the custom Fiori app that fulfils the role of Start UI. The users can enter the Posting Period Variant detail to get the respective periods details for that Posting Period Variant. Then the users can edit and select the adjusted period details that must be posted based on their business scenarios.

The Start User Interface has two sections.

- 1) Header - Header Details for the Selected Posting Period Variant is shown. In Header level, an Attachment option is given for user to attach documents.
- 2) Items – Periods for the Selected Posting Period Variant is shown. User can edit it and submit.

Screen shots are as given below:

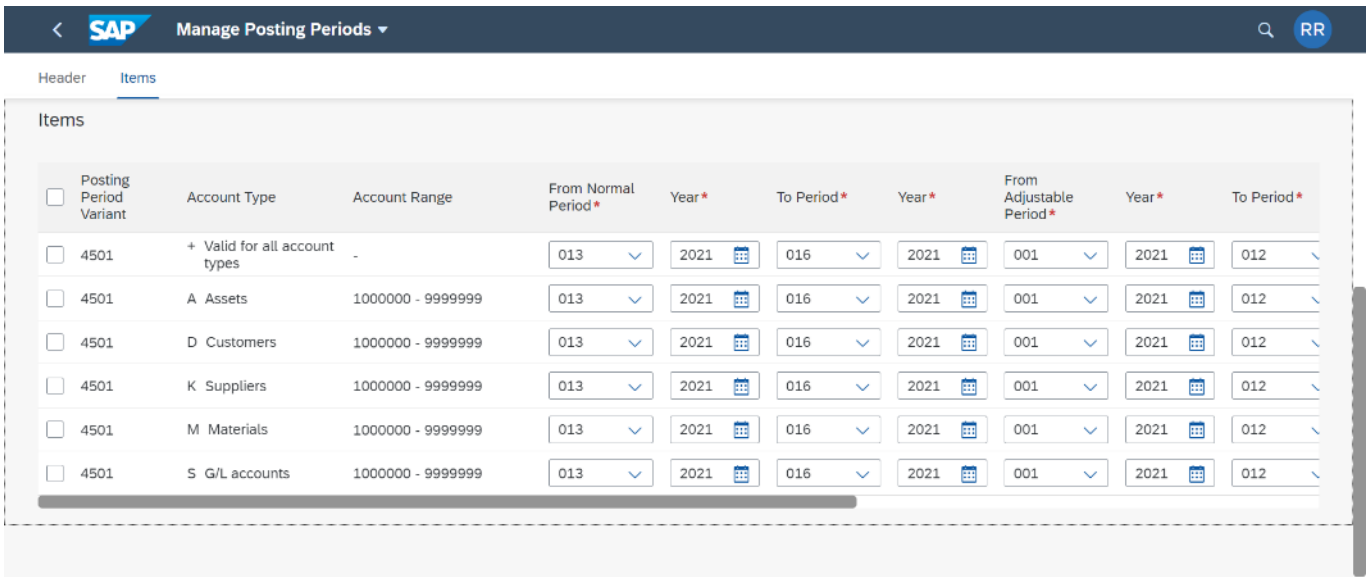
Header Screen

The screenshot displays the 'Manage Posting Periods' Fiori app interface. At the top, the SAP logo and the title 'Manage Posting Periods' are visible. A search bar contains the value '4501'. Below this, the 'Header' section is active, showing the following details:

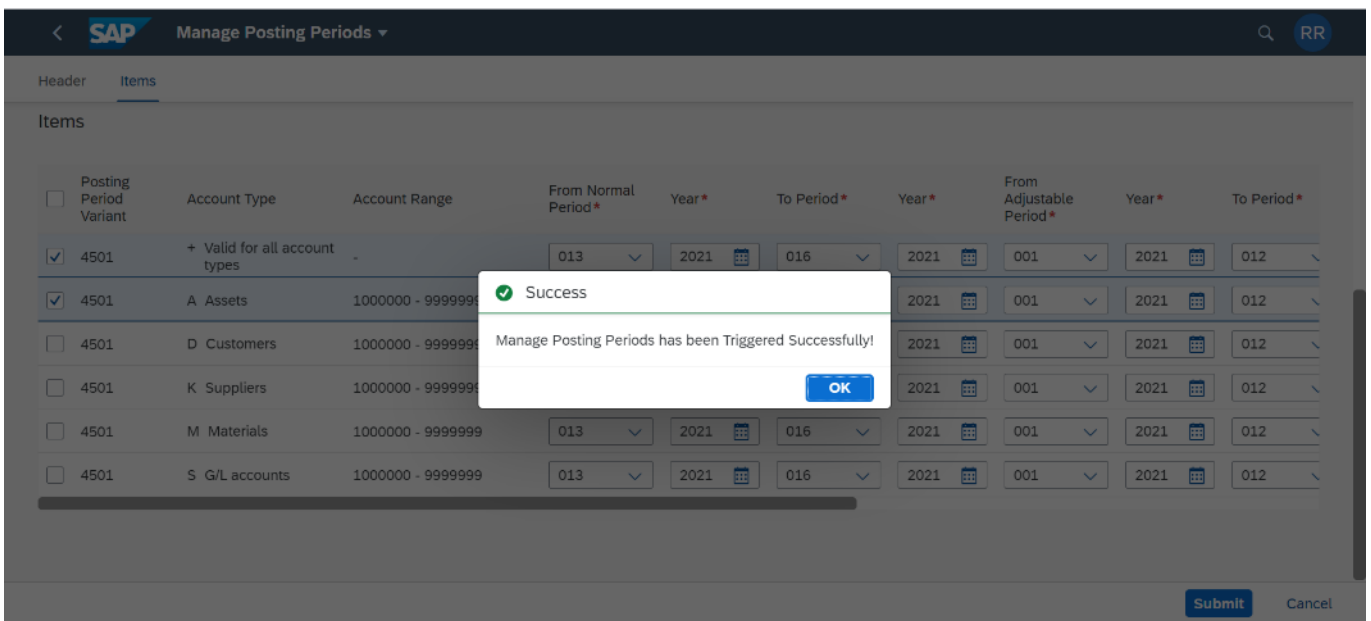
- Posting Period Variant Name: LP Posting Period Var NL
- Company Code: 4501
- Company Code Name: LP Company Code NL
- Fiscal Year Variant: K4 (Cal. Year, 4 Special Periods)

To the right of these details, there is a 'Comment' field with the text 'Testing'. Below the comment, the 'Attachments' section shows one attached file: 'Attachmentcode.txt'. An 'Upload' button is present next to the attachment list. At the bottom right of the screen, there are 'Submit' and 'Cancel' buttons.

Items Screen



Submit Cancel



My Inbox Task

The **Manage Posting Period Approval** process allows the Approvers to Approve or Reject the Adjusted Periods that are selected by the Requestor for Posting.

“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 –

The Manage Posting Period approval workflow content enables the business user to view the adjusted Period details which are updated by the requestor in the start UI application and to decide Approve or Reject the adjusted Period which in turn will update it in SAP S/4HANA.

Once a period details updated in start UI application and submitted, a process variant will be triggered, and users will receive tasks in My Inbox application.

The Approver is determined by a business rule or external service as configured in the scenario. The task can either be approved or rejected. The Approval User Interface has five sections.

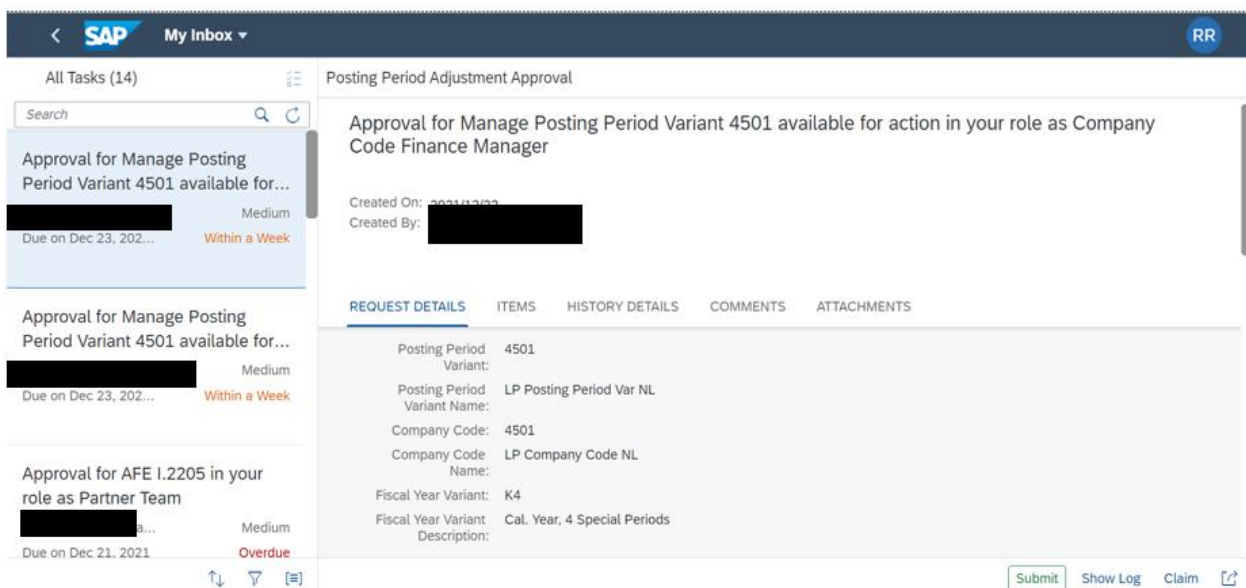
- 1) Request Details - It contains the Header Level Details of the Posting Period Variant.
- 2) Items - It contains the Adjusted Period Details of the Posting Period Variant.
- 3) History details - Record of the previous approval, if any.
- 4) Comments - Comments from Approvers.
- 5) Attachments – It contains the Attachments provided by the requestor.

The Approver can make one of the following decisions:

1. Item level approve/reject - Click the **tick** icon to approve or click the Cross icon to reject a Period at item level
2. Submit - Click **Submit** to update approved Periods to SAP S/4 HANA

Approval Levels: 1 : N

Screen shots are as given below:



SAP My Inbox RR

All Tasks (14) Posting Period Adjustment Approval

Search

Approval for Manage Posting Period Variant 4501 available for...
Medium
 Due on Dec 23, 202... Within a Week

Approval for Manage Posting Period Variant 4501 available for...
Medium
 Due on Dec 23, 202... Within a Week

Approval for AFE I.2205 in your role as Partner Team
Medium
 Due on Dec 21, 2021 Overdue

Approval for Manage Posting Period Variant 4501 available for action in your role as Company Code Finance Manager

Created On: 2021/12/22
 Created By: [Redacted]

REQUEST DETAILS **ITEMS** HISTORY DETAILS COMMENTS ATTACHMENTS

Posting Period Item Details (1) ✓ X

| Posting Period Variant | Account Type | Account Range | Old Normal Open Periods | Old Adjustable Open Periods | Old CO Open Periods | New Normal Open Periods | New Adjustable Open Periods | N | P |
|-------------------------------|---------------------------------|---------------|-------------------------|-----------------------------|---------------------|-------------------------|-----------------------------|----|----|
| <input type="checkbox"/> 4501 | + (Valid for all account types) | | 013.2021 016.2021 | 001.2021 012.2021 | : | 013.2021 016.2021 | 001.2021 012.2021 | 0C | 0C |

History Details

Submit Show Log Claim ↗

SAP My Inbox RR

All Tasks (14) Posting Period Adjustment Approval

Search

Approval for Manage Posting Period Variant 4501 available for...
Medium
 Due on Dec 23, 202... Within a Week

Approval for Manage Posting Period Variant 4501 available for...
Medium
 Due on Dec 23, 202... Within a Week

Approval for AFE I.2205 in your role as Partner Team
Medium
 Due on Dec 21, 2021 Overdue

Approval for Manage Posting Period Variant 4501 available for action in your role as Company Code Finance Manager

Created On: 2021/12/22
 Created By: [Redacted]

REQUEST DETAILS ITEMS **HISTORY DETAILS** COMMENTS ATTACHMENTS

History Details

| UserID | Role | Action | Comments | TimeStamp |
|---------|------|--------|----------|-----------|
| No data | | | | |

Comments

Submit Show Log Claim ↗

The screenshot shows the SAP My Inbox interface. On the left, there is a list of tasks under 'All Tasks (14)'. The main area displays a task titled 'Posting Period Adjustment Approval' with the subtitle 'Approval for Manage Posting Period Variant 4501 available for action in your role as Company Code Finance Manager'. The task was created on 2021/12/22. The 'COMMENTS' tab is selected, showing an 'Approval Comment' field with the text 'Testing'. Other tabs include 'REQUEST DETAILS', 'ITEMS', 'HISTORY DETAILS', and 'ATTACHMENTS'. At the bottom right, there are buttons for 'Submit', 'Show Log', 'Claim', and a share icon.

This screenshot shows the same SAP My Inbox task, but with the 'ATTACHMENTS' tab selected. It displays one attachment: 'TestEmpty.txt', which was uploaded by a user (redacted) on Dec 22, 2021, at 8:10:12 PM, with a file size of 0.1 kB. The 'Upload' button is visible at the top right of the attachment area. The 'COMMENTS' tab is now unselected. The rest of the interface, including the task details and left sidebar, remains the same as in the previous screenshot.

Process Admin Flow

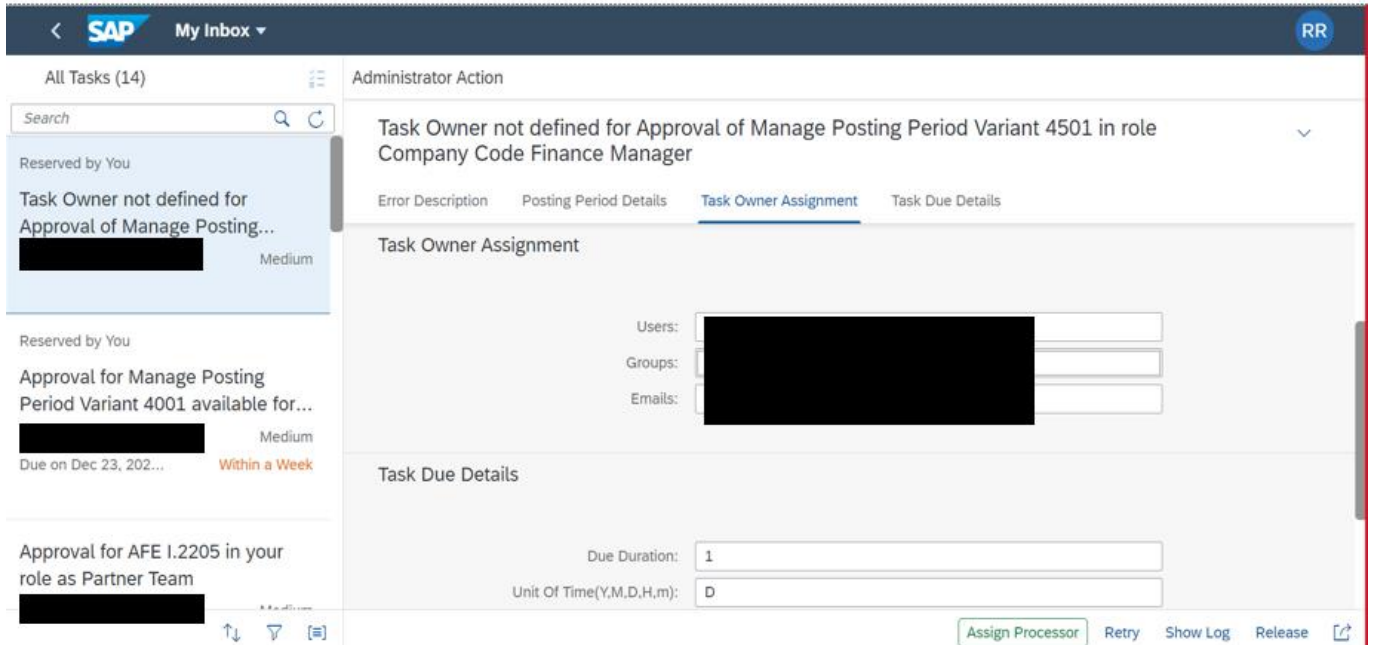
If by any case, the approvers do not get determined by the approver determination policies, the issue will be brought to the notice of the process administrator and a task shall be created for the process admin with options to either 'Assign Processor' manually or 'Retry' after updating the policies.

Assign Processor: This option is to assign the users and/or groups and the email addresses in the section 'Task Owner Assignment', (Note: all email address(es) must be given), and click 'Assign Processor'. The assigned processors will receive the approval task which can be accessed from the My Inbox application.

Retry: This option implies that the process admin can first fix the issue in the business rule and then

access this task again in the My Inbox, and trigger Retry. If the issue is fixed correctly, then upon retry the normal approval flow will resume.

Screen shots are as given below:



Rework in this use case is not relevant for this use case as there is no business exception that is generated at the backend. Technical exceptions will be handled on the Retry UI.

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.

Manage Posting Period Approval process content 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 to their requirements.

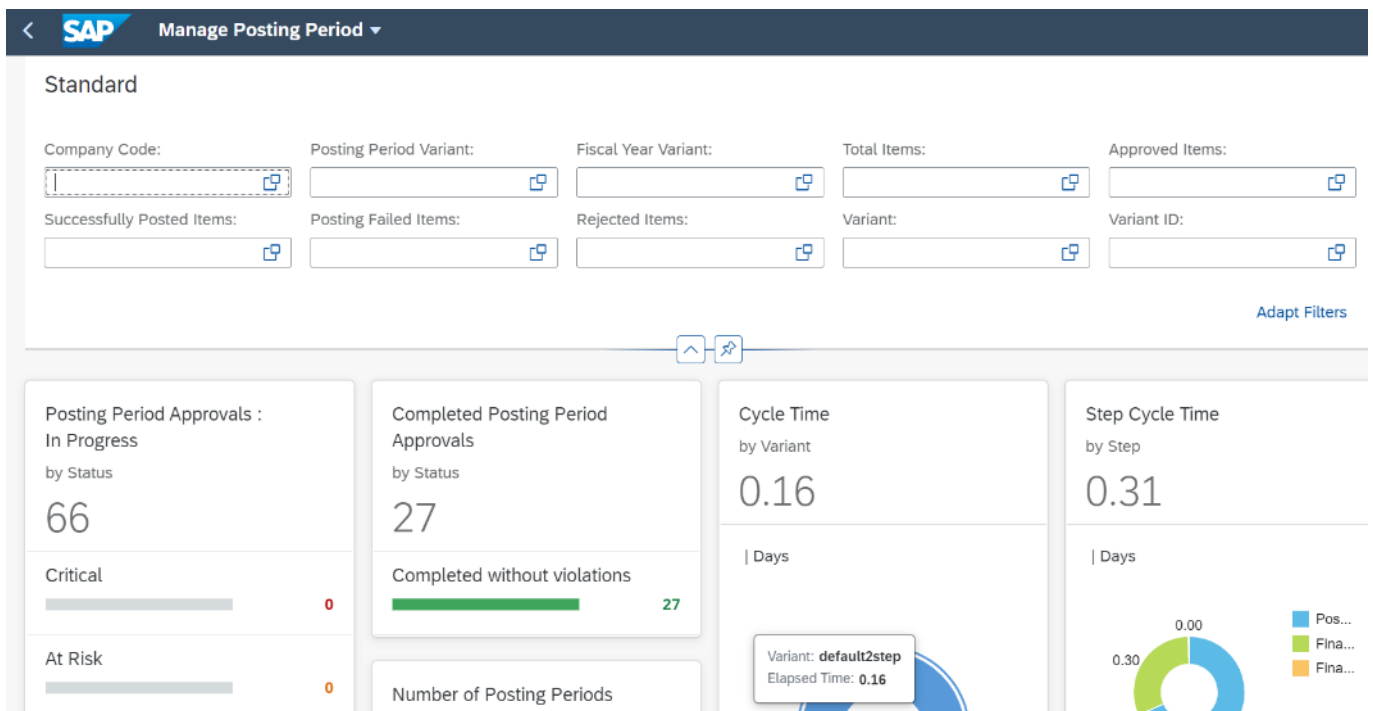
Access Process Workspace with SAP Build Process Automation

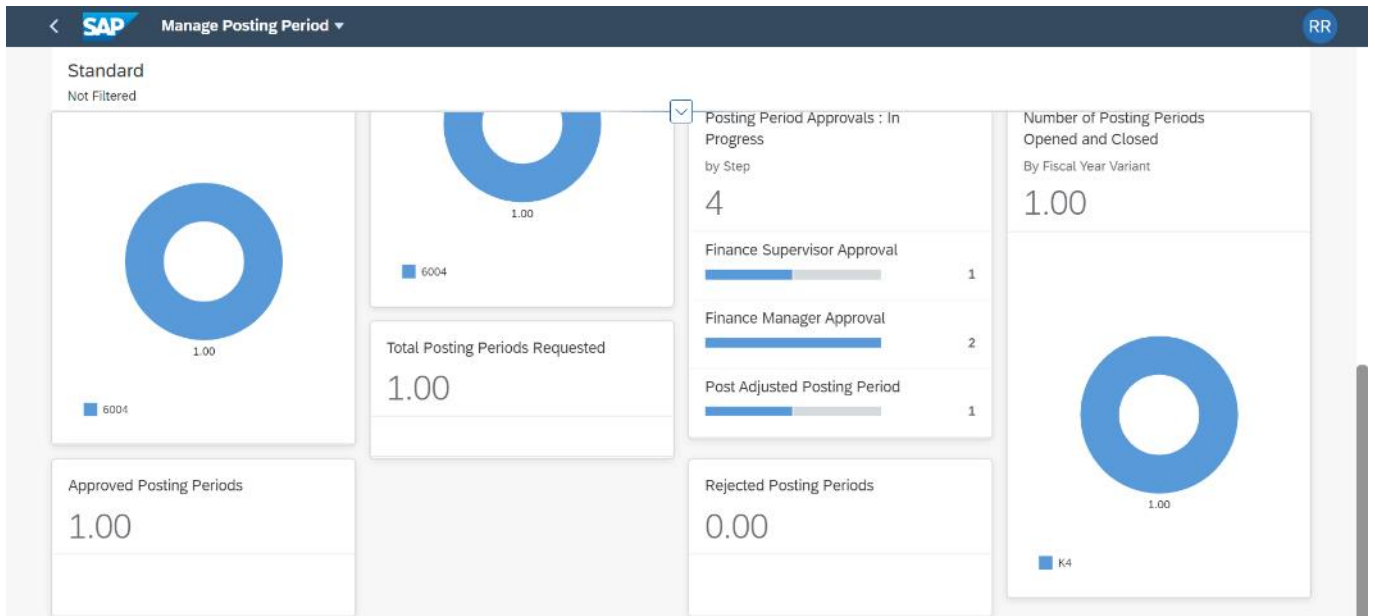
1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario "Manage Posting period Approval". For more information on how to add scenario-specific tiles, refer to the [help documentation](#).
2. Click the scenario-specific tile in the Fiori Launchpad.
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 **Manage Posting Period Approval** tile.
3. Click Live Process Insights **Manage Posting Period**.

User will see the below detailed process visibility screen.





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