

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Capital Expenditure Approval Process with 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 Capital Expenditure Approval (CAPEX) process. Process Operators, Approvers and Requestors are the target users of the user interfaces explained in this document.

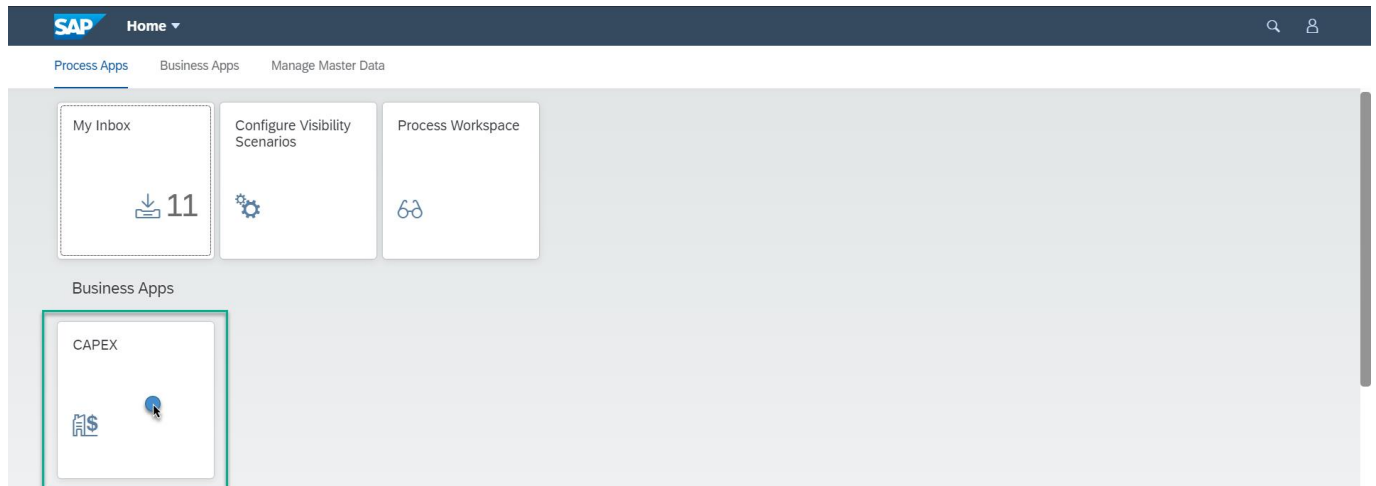
The CAPEX process enables customers to automate capital expenditure request approvals and provide automation across all steps. A request is created by the user and depending on the amount of investment and other related attributes, number of approval steps are determined. The following steps are included as a part of this CAPEX process:

- Business user creates a Capital Expenditure Approval Process request
- Approvers are determined using decisions
- Approvers are notified via email
- Approvers have three decision options (Approve, Reject, Request Rework), and based on the decision, the next approval step will be created or requested for a rework or the approval request will be terminated.
- Acceptance from all Approvers will send a notification to the requestor and complete the process.

Creating Capital Expenditure Approval Request

The applications that are part of Capital Expenditure Approval content package will be available in the SAP Business Technology platform Fiori Launchpad. Check with your administrator for the link to access the same.

This application, accessed from a tile in SAP Business Technology Platform Fiori Launchpad, can be used to submit a new capital expenditure request for approval.



Use the application to populate required fields in the *“Requester”*, *“Investment Details”*, *“Sustainability”* sections and, if necessary, attach one or more documents in the *“Attachments”* section.

Please note that fields *“Type”*, *“Country/Region”*, *“Business Unit”* and *“Currency”* cannot be populated with free text but should be selected from the list of values maintained by Administrator.

Capital Expenditure Request

[Requester](#) [Investment Details](#) [Sustainability](#) [Attachments](#)

First Name: *

Last Name: *

Email Address: *

User ID: *

Comment from Requester:

Investment Details

Request ID: *

Title: *

Type: *

Country/Region: *

Business Unit: *

Description:

CAPEX: *

OPEX: *

Total Cost: *

Currency: *

IRR:

ROI:

Sustainability

Energy Efficiency %:

CO2 Efficiency %:

Energy Cost Savings %:

Water Savings %:

Attachments

Attachments (3)		Upload
Document1.pdf	Uploaded By: [redacted] · Uploaded On: Sep 27, 2020, 12:48:19 PM · File Size: 0.1 kB	×
Document2.xlsx	Uploaded By: [redacted] · Uploaded On: Sep 27, 2020, 12:48:25 PM · File Size: 6.0 kB	×
Picture.jpg	Uploaded By: [redacted] · Uploaded On: Sep 27, 2020, 12:48:37 PM · File Size: 147.3 kB	×

Request Approval

My Inbox Tasks

Once the capital expenditure approval request is submitted, based on the business configuration respective users will receive tasks in My Inbox application.

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

Approving Capital Expenditure Request

Once Requester has submitted approval request, Approver is notified about this via email and accesses “My Inbox” app to process the request.

Approver reviews the data provided by Requester and the History of approval request, specifies a comment (optionally) and chooses one of three decision options:

- **Approve:** the approval request will continue with the next step, or complete if this was the last configured step. The decision data is stored in the history of the request. Requester is notified about the decision via email.
- **Reject:** the approval request will immediately be stopped. No further approval steps are executed. Requester is notified about the decision via email.
- **Rework:** the original approval requester is tasked to rework their request. For this, a new task will be created for the requester. Upon sending the updated request for re-approval, the approval task appears again for approval. Depending on the variant configuration, this will be given to the approver who required the rework, or it will start from the beginning with the first configured approver. The decision data is stored in the History of the request.

Approval for Capital Expenditure Request "Brand New Plant in Russia" in your role as Local Manager

[Requester](#) [Investment Details](#) [Sustainability](#) [Attachments](#) [Comments](#) [History](#)

First Name:

Last Name:

Comment from Requester:

Investment Details

Title:

Request ID:

Type:

Country/Region:

Business Unit:

Description:

CAPEX:

OPEX:

Total Cost:

IRR:

ROI:

Currency:

Sustainability

Energy Efficiency %:




CO2 Efficiency %:

Energy Cost Savings %:

Water Savings %:

Attachments

Attachments (3)

-  [Document2.xlsx](#)
Uploaded By: [redacted] · Uploaded On: Sep 29, 2020, 8:50:22 PM · File Size: 6.0 kB
-  [Picture.jpg](#)
Uploaded By: [redacted] · Uploaded On: Sep 29, 2020, 8:50:27 PM · File Size: 147.3 kB
-  [Document1.pdf](#)
Uploaded By: [redacted] · Uploaded On: Sep 29, 2020, 8:50:17 PM · File Size: 0.1 kB

Comments

Approval Comments:

History

User	Role	Decision	Comment
No data			

[Approve](#) [Reject](#) [Rework](#) [Show Log](#) [Claim](#) [↗](#)

Reworking Capital Expenditure Request

Once Approver has sent the approval request for rework, Requester is notified via email and access task in “My Inbox” app to rework the request.

Requester reviews Approver’s comment in the History section and can edit the request details: upload/delete attachments, add/edit comments, etc.

Once necessary changes are applied, requester sends reworked version of the request to Approver of the current step by selecting decision option “**Send for Approval**”. After that, Approver of the current step is once again notified about the request submission via email and can access task in “My Inbox” app to review reworked version of the request. Information that the request is reworked is stored in the History.

Process Visibility Workspace

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

Capital Expenditure Approval Process content package provide out of the box visibility on 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.

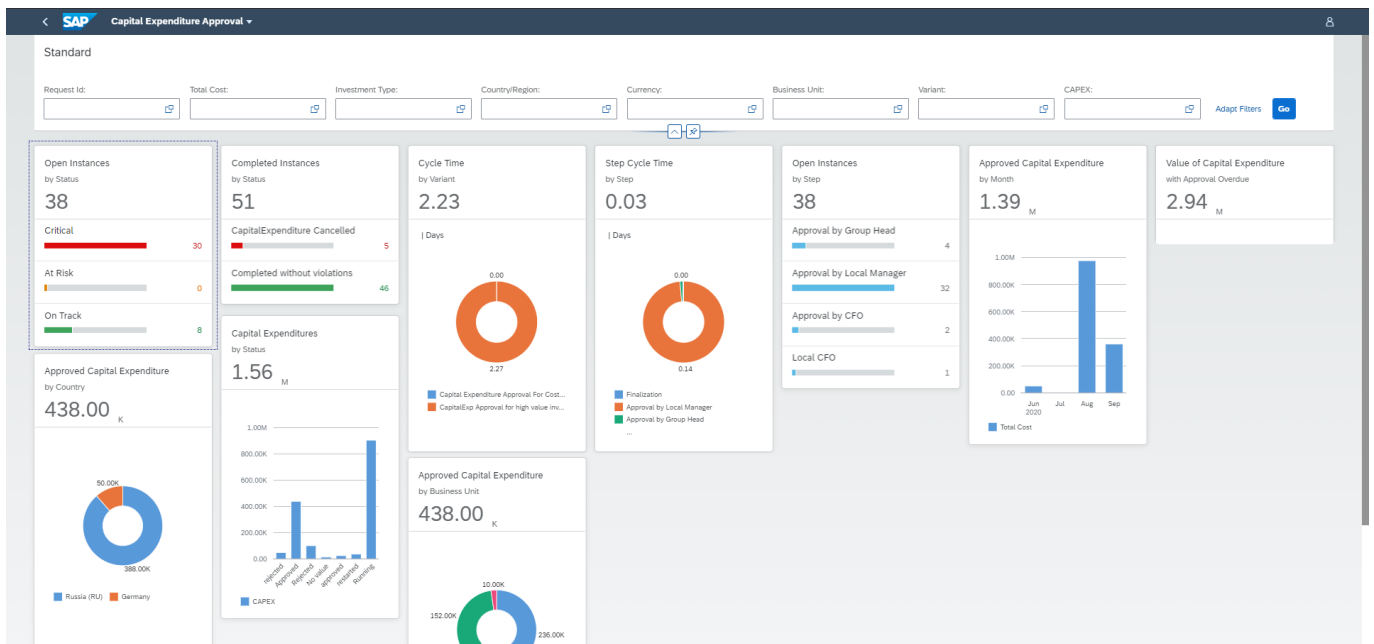
Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Capital Expenditure Approval Process”. 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 SAP Capital Expenditure Approval Process
3. Click Live Process Insights Capital Expenditure Approval

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



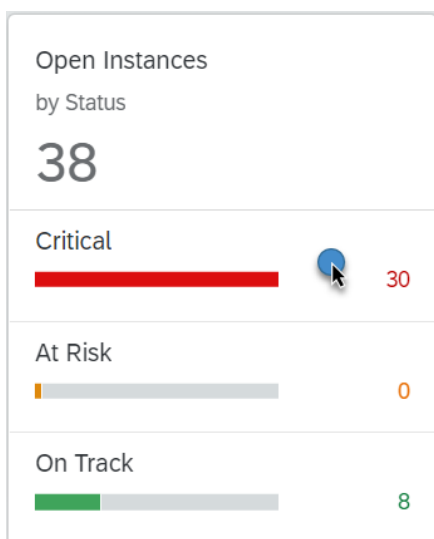
Insight to Actions

Restarting Approval Process

Type: User Triggered

The steps to restart approval process:

1. Go to Process Flexibility Cockpit
2. Select SAP Capital Expenditure Approval Process
3. Click Live Process Insights Capital Expenditure Approval
4. Select open instances with a "Critical" status



5. Select the instance you want to restart

SAP Capital Expenditure Approval

Request Id: Total Cost: Investment Type: Country/Region: Currency:

Business Unit: Variant: CAPEX: Status: State:

Adapt Filters (2) Go

Status	Request Id	Country/Region	Business Unit	Investment Type	Total Cost	CAPEX	Currency	Variant
Critical	1597954187	Russia (RU)	Purchasing (PCH)	Plant (PLNT)	120,000	12,000	EURO (EUR)	CapitalExp Approval for high value investment
Critical	1597954733	Russia (RU)	Purchasing (PCH)	Plant (PLNT)	120,001	12,000	EURO (EUR)	CapitalExp Approval for high value investment

6. Click on "Restart Approval" in a right bottom corner.

SAP Capital Expenditure Approval

Request

State: **Open** Cycle Time: 20 Days 21 Hrs 59 Min Start Date: Sep 11, 2020, 5:00:07 PM

Status: **Critical** Target Cycle Time: 10 Days End Date: —

Sub-Status: **Process Failed** Target Date: Sep 21, 2020, 5:00:07 PM

Information Path Action Logs

Request Id: 1597954187
 Total Cost: 120000.0
 Investment Type: Plant (PLNT)
 Country/Region: Russia (RU)
 Currency: EURO (EUR)
 Business Unit: Purchasing (PCH)
 Variant: CapitalExp Approval for high value investment
 CAPEX: 12000.0
 OPEX: 1200.0
 ROI: 0.0 %
 IRR: 0.0 %
 Energy Efficiency: 0.0 %
 CO2 Efficiency: 0.0 %
 Energy Cost Savings: 0.0 %
 Water Savings: 0.0 %

Restart Approval