

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

Configuration Guide

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

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Overview

This document provides information about configuration steps to consume the package **Project Manager Project Creation**. The main audience of this document are Project Managers, Project Controllers, Project Management Office users, Developers and Product Owners.

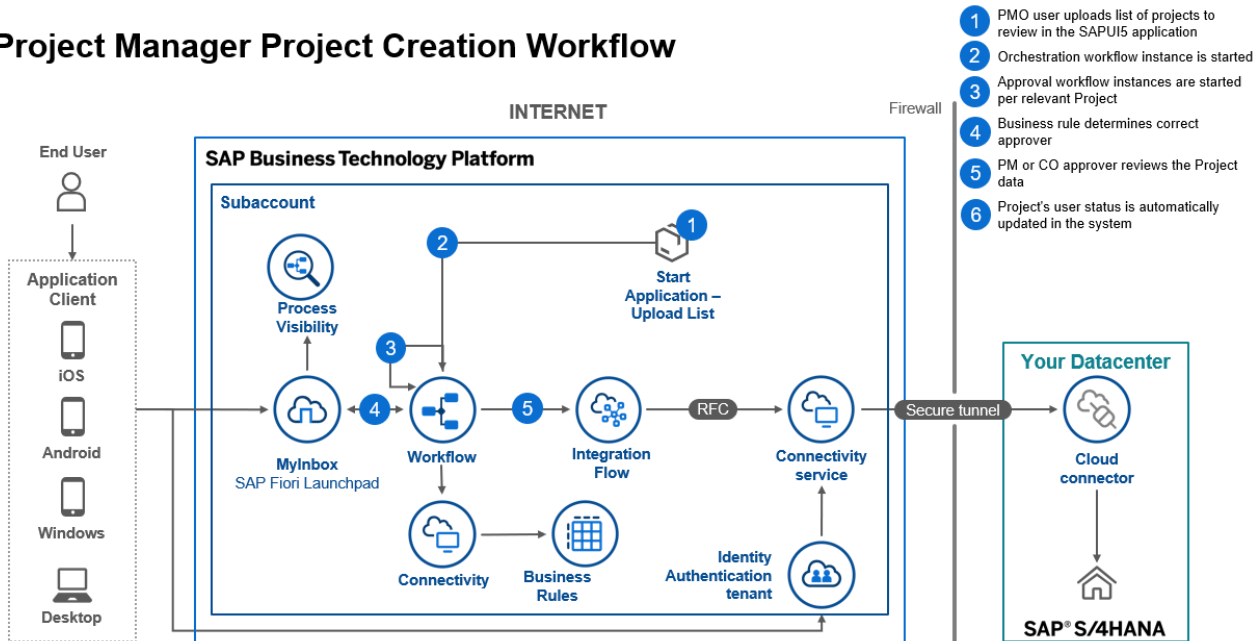
The scenario enables a Project Management Office (PMO) to inform the Project Controller about required reviews to a list of manually created projects in SAP Project System (SAP PS). As soon as the Project Controller is finished, the Project Management Office and Project Manager will be informed about the approved projects or about missing project information.

The scenario immensely supports the communication and active interaction between the Project Management Office and the Project Controlling in the project approval process. Closer cooperation is encouraged.

This package contains the following features:

- Automatically update project status to reflect the current approval status in the Workflow
- Orchestrate communication between project management and project controlling

Project Manager Project Creation Workflow



Artifacts

A package consists of process templates, process steps, process variants, decisions, and process visibility models. Please refer [help documentation](#) about these artifacts.

Process

A process template is a set of business activities and tasks that, once completed, fulfills an organization goal. The **Project Manager Project Creation** package contains the following process template:

Project Manager Project Creation – Contains the steps needed for the scenario.

A business process can be broken down logically into smaller parts or steps. Each process step is a collection of activities to perform a specific task. For example, an approval process step can contain activity to determine the approvers, approval task, notifications, and handle the approval result. **Table 1** represents the list of process steps/sub flows available to be used in **Project Manager Project Creation**.

Table 1. Process Steps

Process Steps	Cardinality	Detailed Description
Approve Project	1..1	Mandatory step that has to be placed at the start of the variant. It will automatically determine the correct approver for the project approval and will create a user task in the inbox of the determined approver. If no approver can be automatically determined, a user task is created for the respective process admin to handle the issue with the rule and to trigger a retry or to assign the approver manually.
Update Project in the system	1..1	Mandatory step that has to be placed after the "Approve Project" step. It will update the status of the project in the system send notification mails to the project manager and project management office

The process has attributes, and these attributes are available in process visibility to search approval process instances and to define process performance indicators. Please see Table 3 for more details.

Table 2. Process Attributes.

Process Attributes	Detailed Description
Company Code	Company Code of the project
Business Area	Business Area of the project
Controlling Area	Controlling Area of the project
Decision	Decision that was taken by the approver
Plant	Plant of the project
Currency	Currency of the project
Profit Center	Profit Center of the project
Sales Organization	Sales Organization of the project
Start Date	Start Date of the project
End Date	End Date of the project

Division	Division of the project
System Status	System status of the project

Sample Conditions to directly start a variant workflow

```
{
  "projectDetails": {
    "ProjectID": "C-10051",
    "pmo": {
      "email": "sampleMailbox@sap.com"
    },
    "projectManager": {
      "email": "project.manager@company.com",
      "userId": "project.manager@company.com",
      "groupId": ""
    }
  }
}
```

Process Variants

A process variant consists of multiple process steps configured by a line of business expert. It is possible to create multiple variants of the same process.

Please refer [help documentation](#) about how to import content packages and configure a process variant.

The screenshot displays a process configuration interface for a process named "Default Project Creation". At the top right, there are buttons for "Undo", "Redo", "Save", and "Activate".

On the left, a panel titled "Available Steps (4)" lists four steps:

- Approval**: Subflow to determine an approver for a project via Business Rules...
- LeadingWorkflow**: The leading workflow is used to determine a correct process variant...
- TerminateInstances**: TerminateInstances
- UpdateProject**: After successful approval of a project, the corresponding status...

The central workspace shows a workflow diagram starting with a green start circle, followed by two task steps: "Approve Project" (with a lock icon) and "Update Project in the system" (with a lock icon), ending at a red end circle.

On the right, the "Step Properties" panel is open for the "Approve Project" step:

- Name ***: Approve Project
- Type**: Approval
- Description**: Subflow to determine an approver for a project via Business Rules Service and assign corresponding user task to the approver.

Navigation and zoom controls are visible on the left side of the diagram area, including a 100% zoom level.

Import Project Manager Project Creation and Configure Process Variants with SAP Build Process Automation

1. In the [SAP Build Process Automation Store](#), search for live process package Project Manager Project Creation and import the same. This content package has one process template and process variant(s) for that template.
2. In the Application Development [Lobby](#), click to open the package with name Project Manager Project Creation. This opens the package in a new tab/window.
3. Click the + icon next to the process template to create a new process variant.
4. Enter Name of the new Process Variant (ex, Two Step Approval).
5. Click the newly created Process Variant tile to save and activate the process variant.
6. The process variant has a default implementation with two steps and at least one level of approval.
7. It is possible to remove steps like “Approval for Project Manager Project Creation” from a process variant only if there are multiple approvals. Please note that whether a step is mandatory or optional, and how many a times any step can be used within a variant, are dependent on the constraints defined on the process steps.
8. Save and activate the variant. A successful activation will create a new workflow definition in the account that can be viewed in the [Monitor Processes and Workflows app](#).

Import Project Manager Project Creation and Configure Process Variants with SAP Workflow Management

1. In Process Flexibility Cockpit app, search for content package Project Manager Project Creation. and import the same. Please refer the standard help document about [how to import a content package](#). This content package has one process template and process variant(s) for that template are required.
2. Open content package in Flexibility Cockpit and click Process Variants tile.
3. Click New Process Variant.
4. Enter Name of the new Process Variant (ex, default) and select “Project Manager Project Creation” as Process.
5. Click the newly created Process Variant tile to save and activate the process variant.
6. The process variant has a default implementation with two steps.
7. Save and activate the variant. A successful activation will create a new workflow definition in the account that can be viewed in the Monitor Workflows – Workflow Definition app in SAP Fiori Launchpad.
8. Update the Determine Process Variant Policy and include the newly created workflow definition ID in the rule

Approve Project

Mandatory step that has to be placed at the start of the variant. It will automatically determine the correct approver for the project approval and will create a user task in the inbox of the determined approver. If no approver can be automatically determined, a user task is created for the respective process admin to handle the issue with the rule and to trigger a retry or to assign the approver manually.

1. Drag the step into the variant. Place it at the beginning. Place it exactly once

Update Project in the system

Mandatory step that has to be placed after the "Approve Project" step. It will update the status of the project in the system send notification mails to the project manager and project management office

1. Drag the step into the variant. Place it at the end. Place it exactly once

Decisions & Policies

Decisions allow to encapsulate the business logic from core applications and supports the reuse of business rules across different business processes. Decisions enable customers to adopt changes in processes without changing the underlying workflows or application logic. SAP Build Process Automation or SAP Workflow Management has business rules capabilities that enables customers to centrally manage all decisions. Please go through the [business rules capabilities](#) in SAP Build Process Automation or SAP Workflow Management.

Project Manager Project Creation enables customers to flexibly configure decisions to gain flexibility to

1. Determine the Project Controller
2. Determine the Process Variant
3. Determine the Start Conditions

Determine Project Controller

Determines the project controller based on data from the project.

Rule Service Name: Determine Project Controller

Input: Project (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
Company Code	String	Company Code of the project
Business Area	String	Business Area of the project
Controlling Area	String	Controlling Area of the project
Functional Area	String	Functional Area of the project
Plant	String	Plant of the project
Location	String	Location of the project

Output: User (Structure data type)

User data.

ATTRIBUTE	TYPE	DESCRIPTION
User ID	String	User ID
Group ID	String	Group ID

Email	String	Email
-------	--------	-------

Rule Definition

Determines the project controller based on data from the project.

Where used

Step: Approve Project

Determine Start Conditions

Determines the start conditions of the process

Rule Service Name: Determine Start Conditions

Input: Project (Structure data type)

ATTRIBUTE	TYPE	DESCRIPTION
Company Code	String	Company Code of the project
Business Area	String	Business Area of the project
Controlling Area	String	Controlling Area of the project
Functional Area	String	Functional Area of the project
Plant	String	Plant of the project
Location	String	Location of the project

Output: Start Condition (Structure data type)

User data.

ATTRIBUTE	TYPE	DESCRIPTION
Variant ID	String	Variant ID that should be started
User ID	String	User ID of the process admin
Group ID	String	Group ID of the process admin
Email	String	Email of the process admin
Escalation Time	String	Time an approver has to process the task

Rule Definition

Determines the project controller based on data from the project.

Determine Process Varian

Determine Start Conditions

Where used

Step: Leading Workflow

Process Visibility

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

Project Manager Project Creation process content package provide out of the box visibility on all the process variants in SAP Build Process Automation or SAP Workflow Management. Line of business expert will be able to enhance the visibility scenario to their requirements.

Configure Visibility Scenarios in SAP Build Process Automation

1. Go to the Application Development Lobby.
2. Select Project Manager Project Creation Project.
3. Click to open **Project Manager Project Creation** scenario.
4. Click Activate button.

Please go through the [help documentation](#) on how to configure the visibility scenario.

Configure Visibility Scenarios in SAP Workflow Management

1. Go to Process Flexibility Cockpit.
2. Select **Project Manager Project Creation** tile.
3. Click Visibility Scenarios tile.
4. Select Project Creation scenario

Please go through [help documentation](#) on how to model a visibility scenario.

Access Process Workspace in SAP Build Process Automation

1. The process visibility scenario can be accessed using SAP Launchpad Service. Refer to the help document for [creating UI applications on central SAP Fiori Launchpad](#) for SAP Build Process Automation.
2. Once you have added the applications process Visibility Scenario Instances (with app ID com.sap.spa.pv.instances) and Visibility Scenario Dashboard (with app ID com.sap.spa.pv.ovp), follow the below steps to add a tile to access the Project Manager Project Creation dashboard.
 - a. Navigate into “Visibility Scenario Dashboard”.
 - b. On the screen that opens, choose Create a Local Copy.
 - c. To use custom texts, choose Edit and adapt the texts in the General section.
 - d. You can use a custom title, description, and subtitle for the tile.
 - e. Choose the Navigation tab.
 - f. Under the Intent section, ensure that the value in the Action tab is unique for every application.

g. Under the Parameters section, provide the following:

Parameter Name	Parameter Value
Name	scenariold
Default Value	com.sap.content.projectcreation
Required	Toggle to Yes

h. Choose Save.

i. Assign the local copy to a group and make sure that they're visible to users. For more information, see [Assign Apps to a Group and to a Catalog](#) and [Assign Content to a Role](#).

3. Once created, select app that corresponds to "Project Manager Project Creation".

4. User will see the process visibility dashboard.

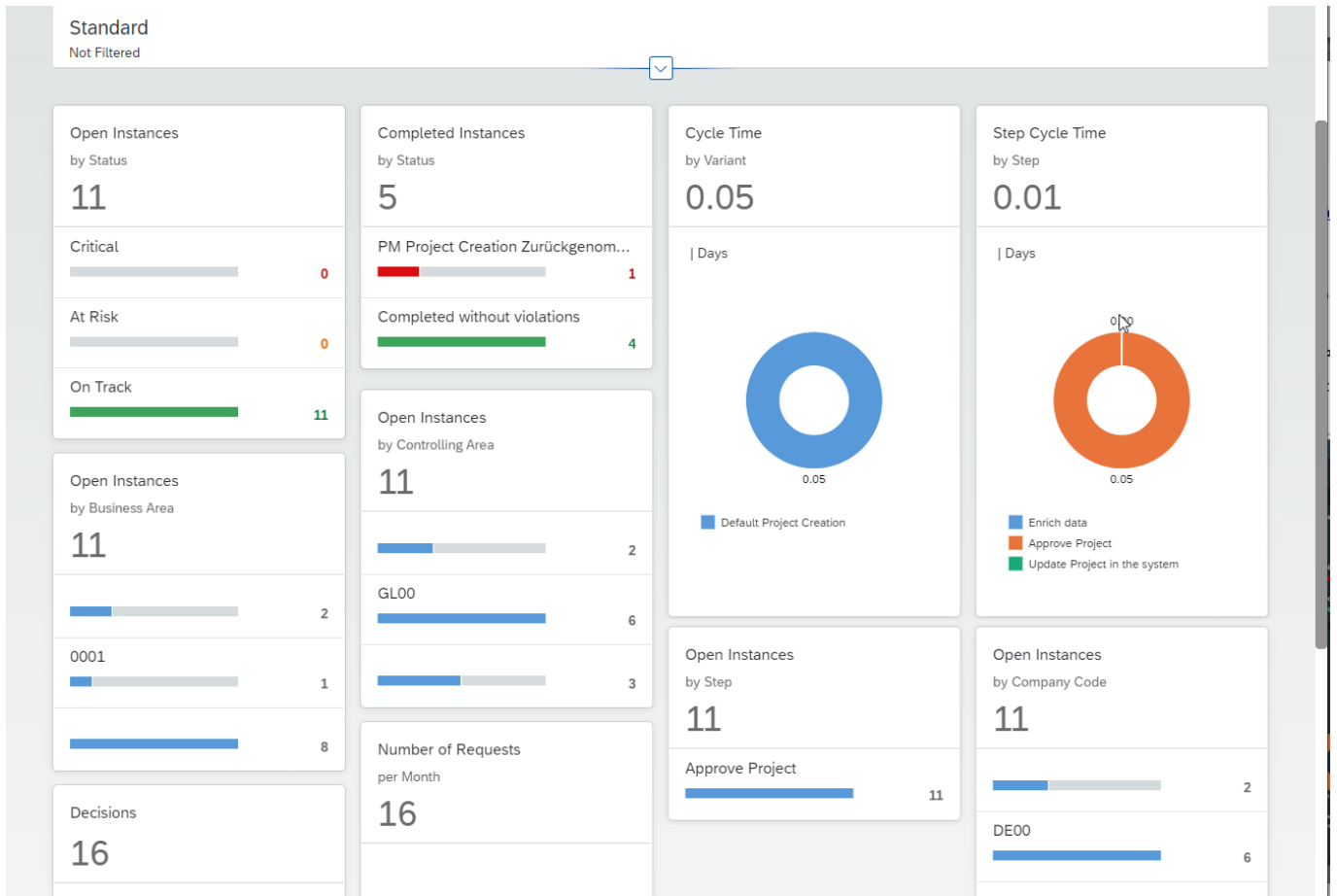
Access Process Workspace in SAP Workflow Management

1. Go to Process Flexibility Cockpit

2. Select **Project Manager Project Creation**

3. Click Live Process Insights **Project Creation**

4. User will see the below detailed process visibility dashboard.



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