

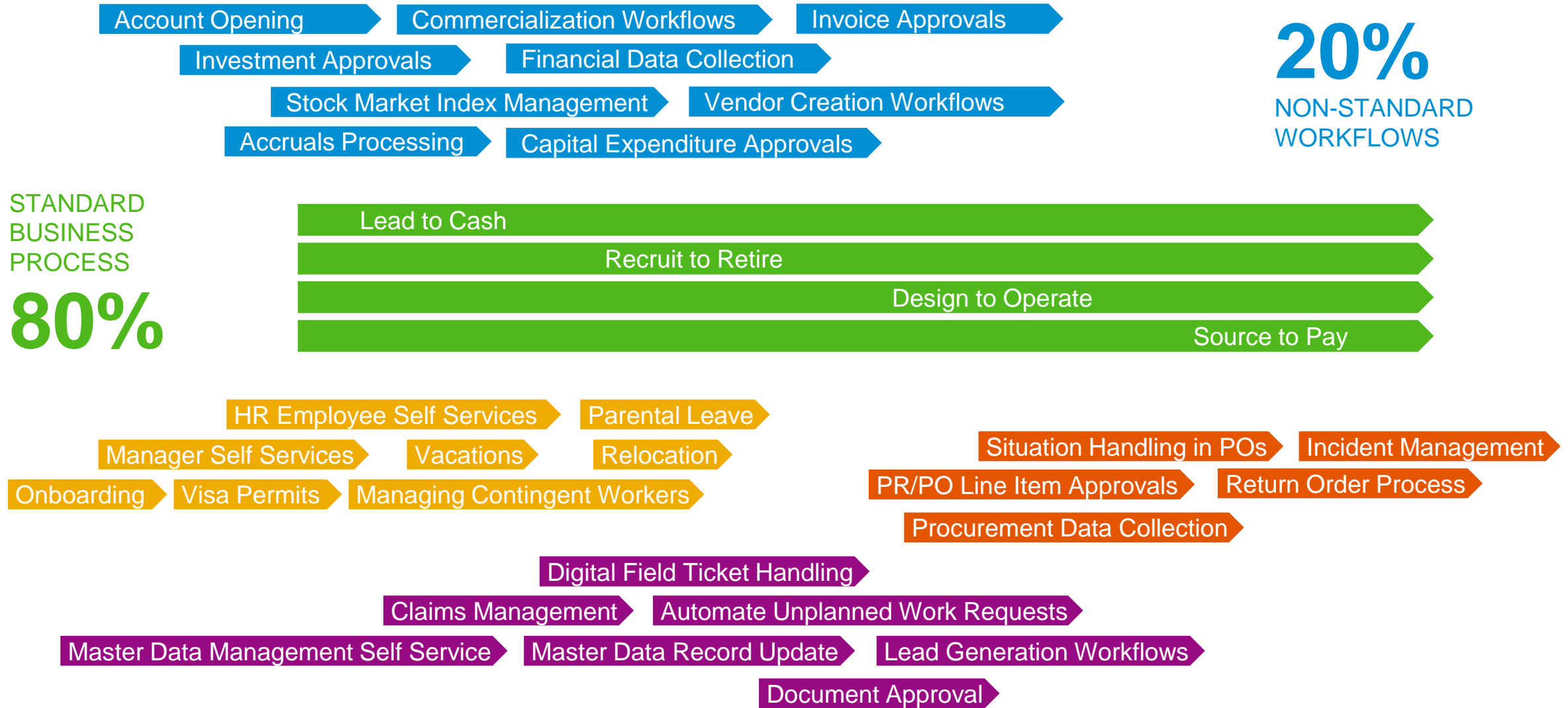


Week 1: Introduction and Workflows

Unit 1: SAP Workflow Management – An Introduction

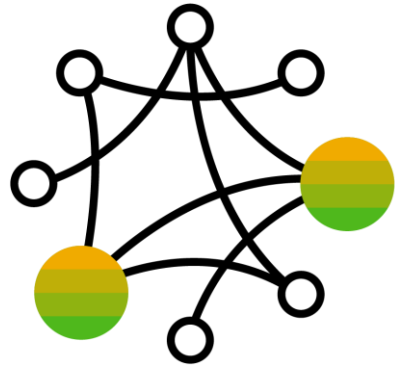
SAP Workflow Management – an introduction

Go the last mile with workflows



SAP Workflow Management – an introduction

Processes run the world



Processes today are
complex



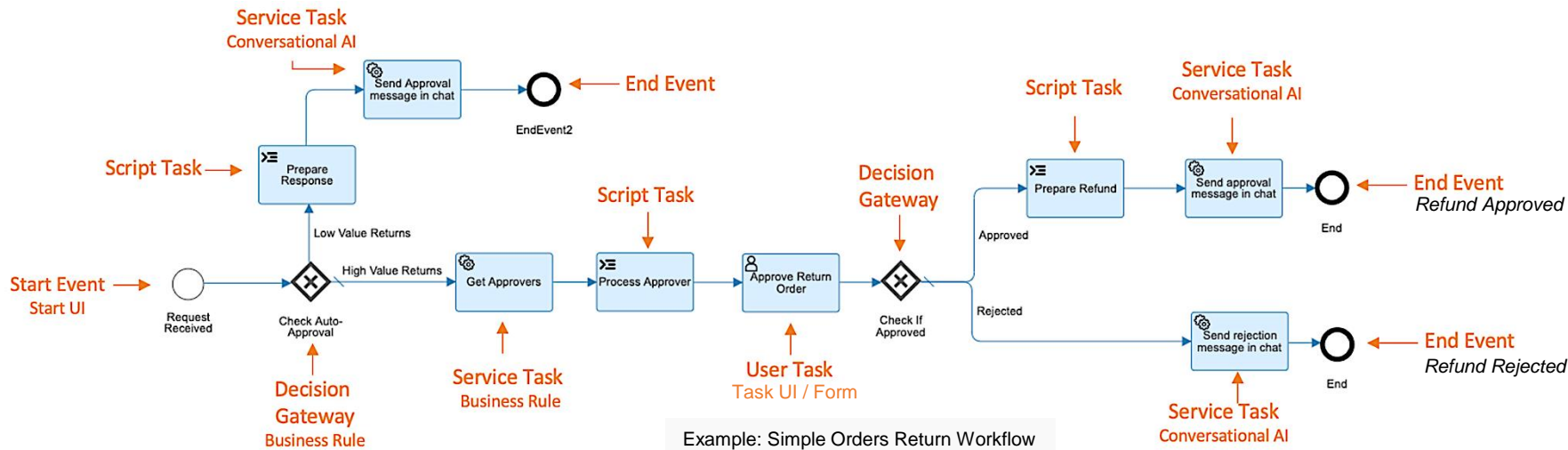
They are still too **manual**



This leads to **errors**,
inefficiencies, and **costs**

What is a workflow?

A **workflow** is an executable visual diagram of a structured, predefined set of activities that produce a desired result.



What else?

BPMN Shape		Meaning
✉	Task	Mail Task
✉	Event	Intermediate Message
⌚	Event	Intermediate Timer
●	Event	Terminal End
⬢	Gateway	Parallel Gateway

BPMN 2.0
(Business Process Model and Notation)

A **workflow** consists of

- **Activities / process steps**
- Decision **gateways**
- **Input**, triggered by human actors or automatically by applications or by software robots
- **Output**, the result of process steps (activities) or the workflow itself

Workflow types

Embedded

Extensions

Cross-LoB Orchestrations

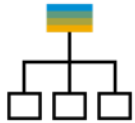
SAP Workflow Management – an introduction

SAP Workflow Management at a glance



A cloud service offering to digitize workflows, automate business processes, manage decision logic, and gain end-to-end process visibility with embedded intelligence

SAP Workflow Management



Workflow

Workflow
(Low/No-Code)
Manage Process
Variants



Decisions

Business Rules
Manage Decisions



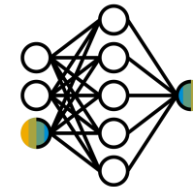
Process Visibility

Process Visibility
Live Process
Dashboards



Inbox

My Inbox
SAP Task Center



Workflow Intelligence

Predictions
Recommendations
Explanations
Rules Mining

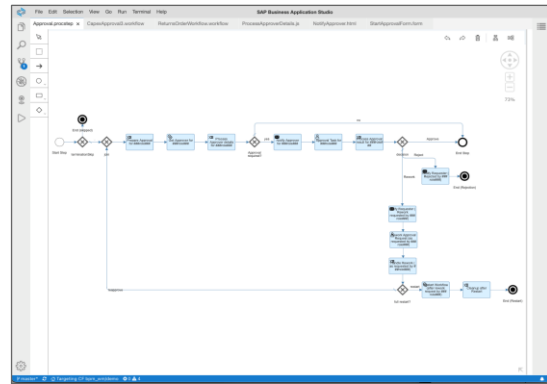


Tightly Integrated with:

SAP Intelligent RPA
SAP
Conversational AI

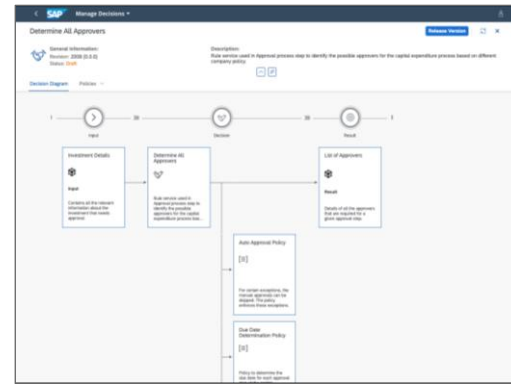
SAP Workflow Management – an introduction

Overview of key capabilities



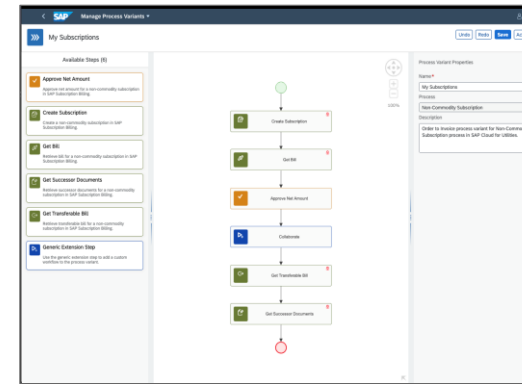
Workflow Editor
(Low Code)
Application Workflow

Application developer-
focused workflow modeling
and process automation



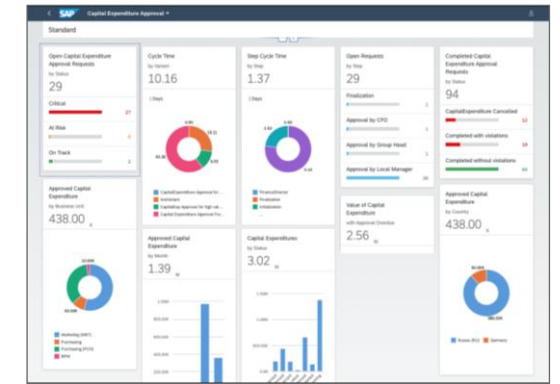
Business Rules (Low
Code)
Decision Management and
Enterprise Rules Model

Integrated Business Rules
Management to deploy
into hybrid landscapes



Process Variant (No
Code)
Configuration UI for
Business Experts

Process flexibility to
configure variants of
processes with pre-built
content



Process Visibility Plug &
Play
Real-Time Workflow Visibility
with XM Integration

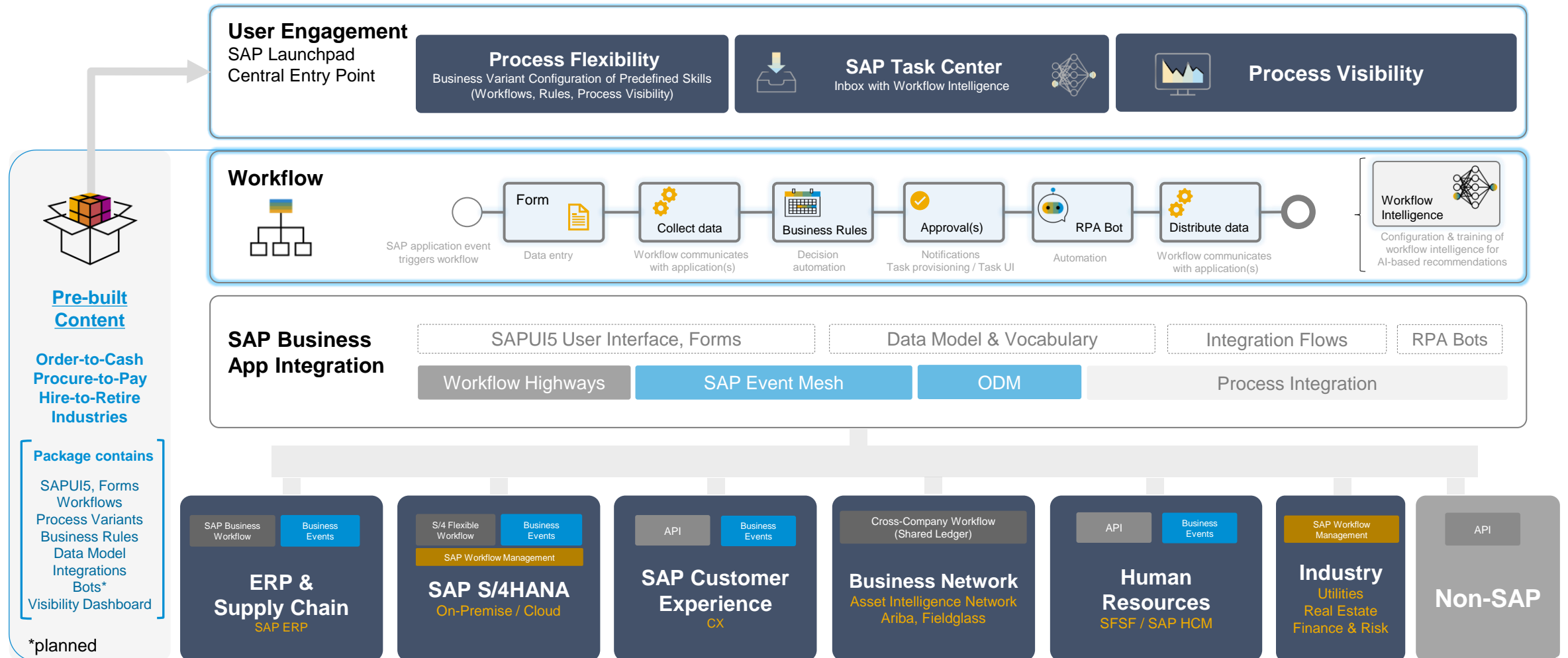
Plug & Play Process
Visibility with easy-to-
configure dashboards and
XM integration



SAP Workflow Management is a coherent cloud service offering combining **workflow**, **business rules**, **process visibility**, **process flexibility**, and **inbox**, complemented by **pre-built content packages**

SAP Workflow Management – an introduction

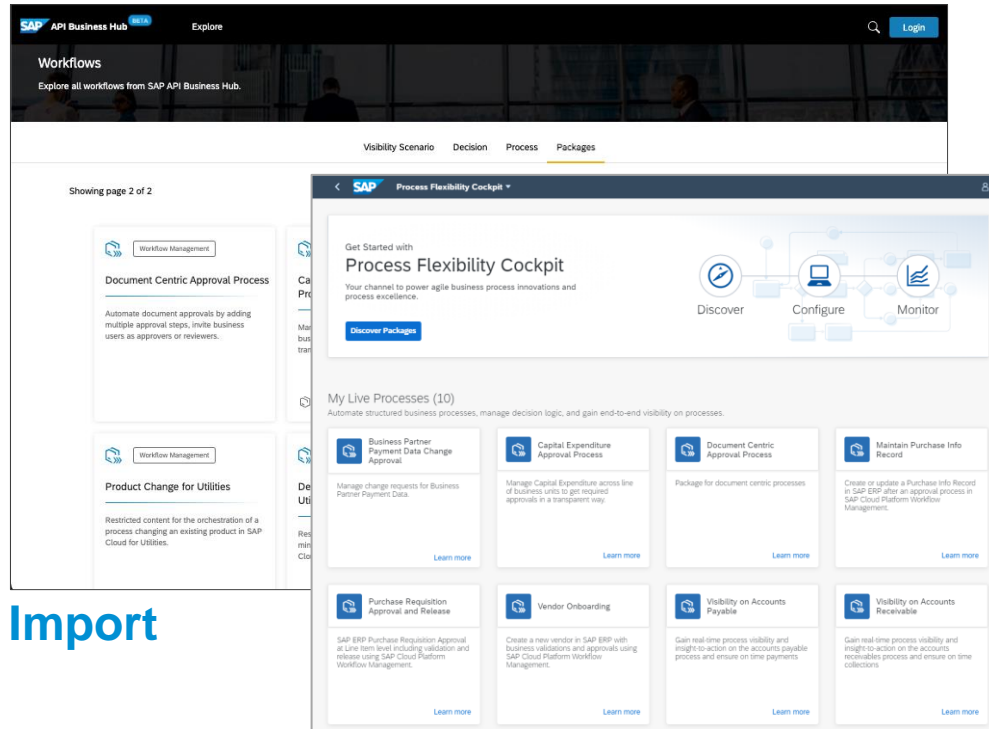
Creating E2E cross-LoB workflows



SAP Workflow Management – an introduction

Consuming workflow content for no-code business configuration

Discover

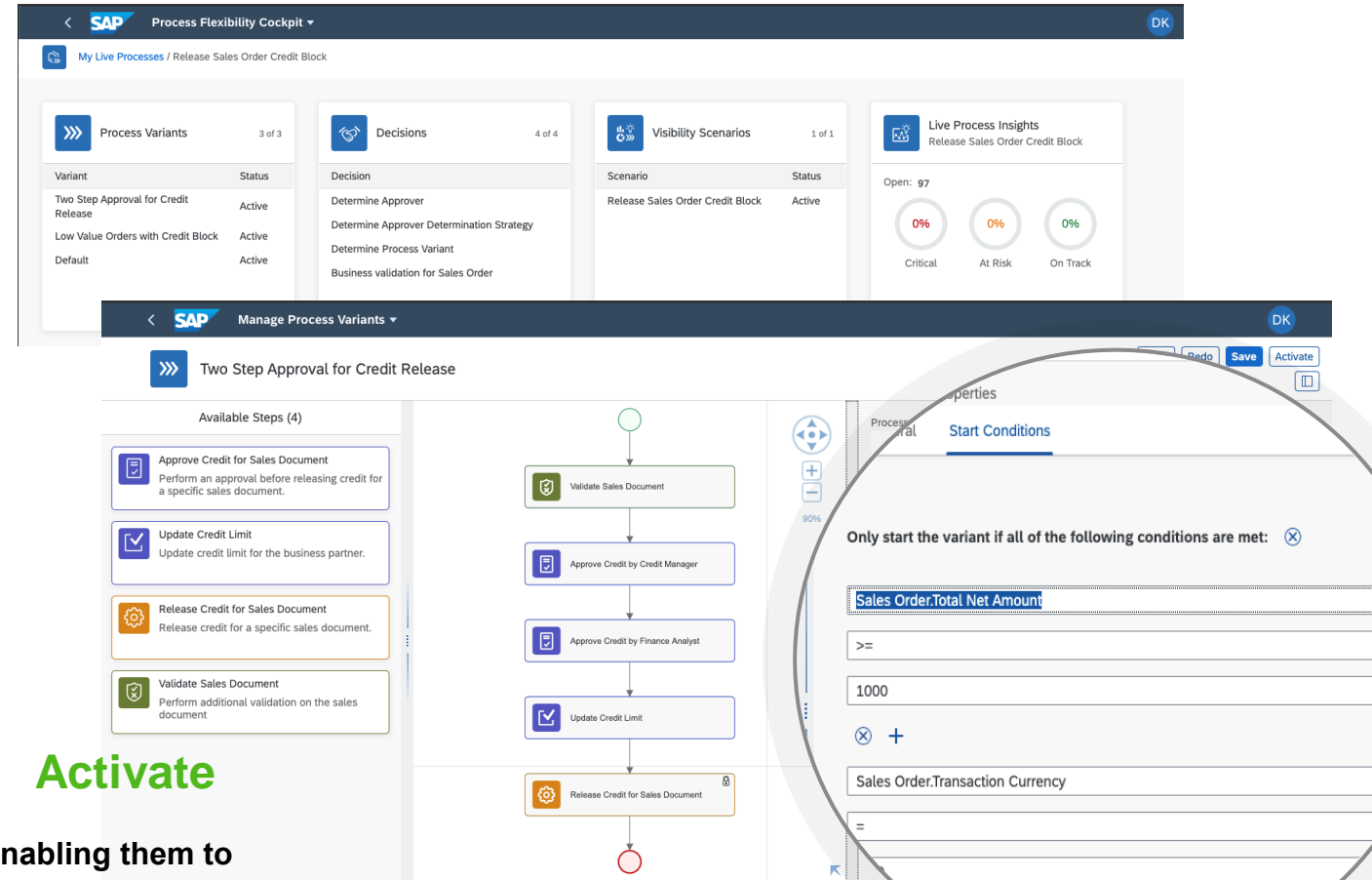


Import

Content packages accelerate customers' business transformation, enabling them to

- **Discover** pre-built content packages from process hub, [available on SAP API Business Hub](#)
- **Import** content packages: **workflows, business rules, SAPUI5, pre-configured dashboard**
- **Configure** process variants, decisions, and visibility models (in a no-code approach)
- **Activate** and deploy new process variants

Configure



Activate

Upgrade-safe workflow solution packages accelerate implementations by

- Pre-built integration with SAP application data model
- Out-of-the-box subscription to SAP S/4HANA Event Channels
- Event integration via SAP Event Mesh / CPI (iFlows)

SAP Workflow Management – an introduction

Some selected use cases



Manage Sales Orders

Automate and manage the approvals of sales orders in SAP S/4HANA with validations and approvals



Manage Credit Block on Sales Order

Review the sales orders which are credit blocked and decide about release or reject



Order Fulfillment for Utilities

Orchestration of order to provisioning sales processes in SAP Cloud for Utilities



Project Budget Approval

Automate project budget approval process and update budget in SAP S/4HANA



Insight to Action Workflows

Insight to action workflows to enable actions in Process Visibility scenarios



Business Partner Creation Approval Process

Automate business partner creation in a flexible and transparent way



Capital Expenditure Approval Process

Manage investment decisions in a transparent way



Purchase Requisition Approval and Release

Automate approval and release of line items



Business Partner Payment Data Change Approval

Manage payment data changes and approvals



Purchase Requisition Header Approval and Release

Automate approval and release at header level by including all line items



Document-Centric Approval

Automate document approvals.



Manage Invoices Without Purchase Orders

Manage the posting of invoices without purchase orders



Visibility on Order to Cash

Improve time to delivery



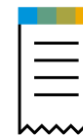
Visibility on Accounts Payable

Establish accuracy in invoice processing



Visibility on Accounts Receivable

Gain visibility into debt management practices



Maintain Purchase Info Record

Avoid any rework towards the end of the purchasing process



Visibility on Procure to Pay

Avoid delays in receiving goods



Vendor Onboarding

Automate with approvals from the respective departments

SAP Workflow Management – an introduction

Experience and make the difference

Why should you consider SAP Workflow Management?



1. Service offering to digitize and automate workflows, manage decisions, and gain end-to-end process visibility with embedded intelligence



2. Predefined live process content packages available to serve as accelerators to manage process variants



3. Pre-delivered integration in SAP and non-SAP applications



4. Support for hybrid workflow implementations with workflow extension points and APIs



5. Leveraging integrated digital bots or chatbots



6. Integration with experience management solutions from Qualtrics for contextual awareness

Key benefits



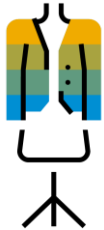
Do more with less

Empower employees through process automation, freeing up their time to do more meaningful work



Ensure compliance

Comply with policies and regulations via clear responsibilities and audit trails



Flexibly adapt to new requirements

Tailor business processes to business needs, support new business model innovations, and fix broken processes for business resilience

Key learnings

- Why processes are important
- Go the last mile of process automation with workflows
- Workflows and the different types
- Capabilities of SAP Workflow Management
- Introduction to some selected use cases
- Six reasons to consider SAP Workflow Management



What's next?

In the next unit, you'll learn:

- An example: capital expenditure approval process
- How this process has been implemented with SAP Workflow Management
- How the end user would experience this process now



SAP Workflow Management – an introduction

Further reading

EXPLORE

sap.com | [Video](#) | [Infographic](#) | [Solution Brief](#) | [Roadmap](#)

GET STARTED

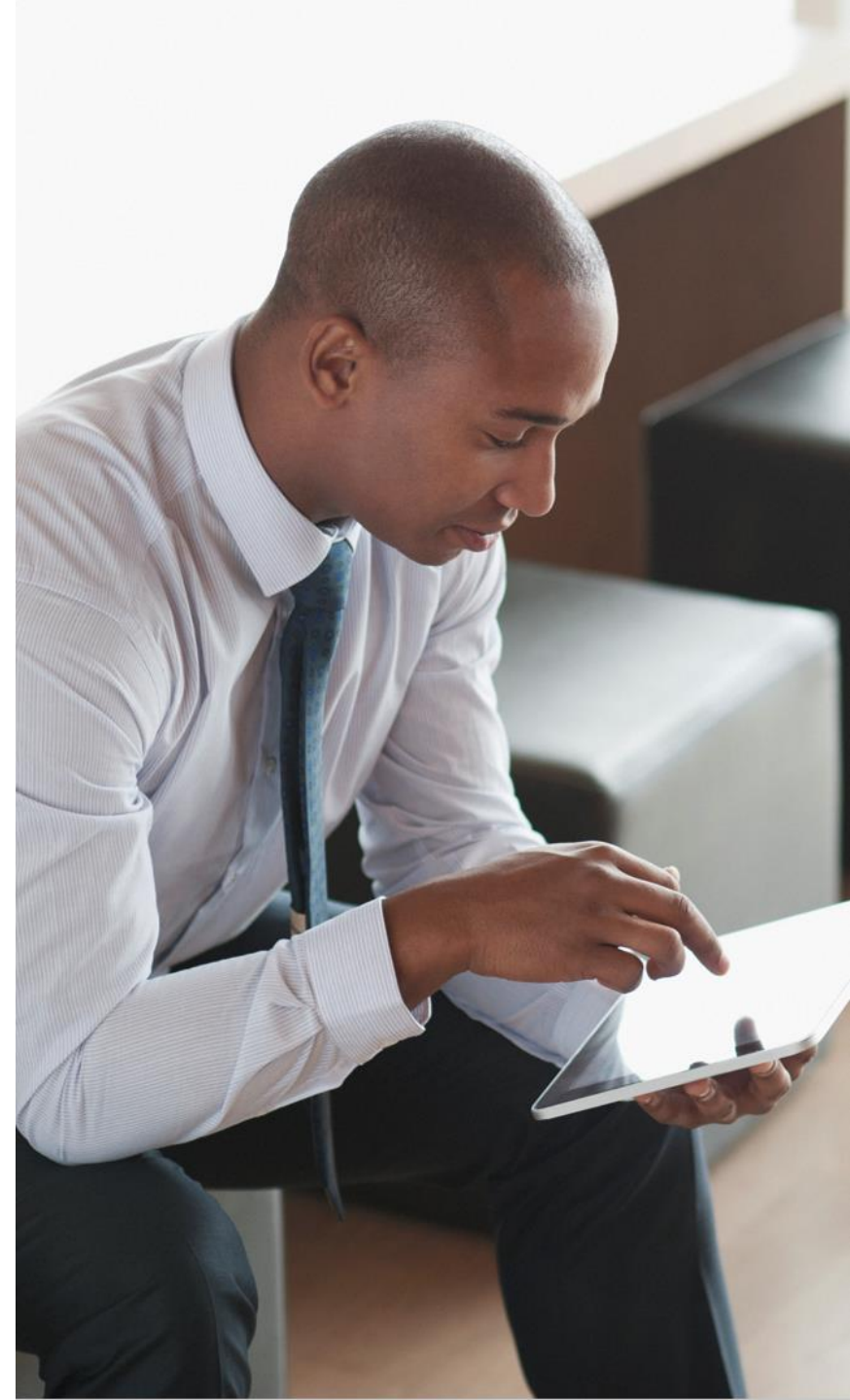
[SAP Discovery Center](#) | [Tutorial](#) | [Booster](#)

LEARN

[SAP Community](#) | [Blogs](#) | [SAP Help](#)

PRE-BUILT CONTENT

[Live Process Content Packages](#)



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Week 1: Introduction and Workflows

Unit 2: Managing Capital Expenditure Approvals

Managing capital expenditure approvals

Example: CAPEX (capital expenditure)

2019/20 → DANONE

2020 → Live Process Content

Accelerating Our Stewardship Of The Planet
Danone

“”
The new app helps us drive our investments and lease requests in line with our company goals.

Clément ARTAUD
Software Architecture Director.

Challenge
The CAPEX approval process was built 10 to 15 years ago and was based primarily on email. It was a poor user experience, had no tracking and reporting capabilities, and was difficult to adapt to evolving workflows and business requirements. Most important, the company's planet sustainability KPIs could not be implemented in the approval process. Further, executive approvals were cumbersome without a mobile front-end.

Solution
Danone created a new CAPEX approval process, named CAR, using SAP Cloud Platform, Machine Learning, and HANA. The company focused on creating the best user experience for each type of user including project managers, finance, and executives. The new solution included an easy-to-use mobile front-end, refocused KPIs on planet sustainability and impact, and included a set of Fiori applications for tracking and analytics.

Outcome
CAR launched in February 2020. The solution tracks 6 families of KPIs, 5 of which support the company's sustainability goals. CAR will ensure compliance with the company's values and stewardship of the planet while significantly speeding up the approval process and reducing task-oriented work for finance, program management, and executive support.

50%	The ability to achieve 50% reduction in CO2 and 100% renewable electricity by 2030
100%	Of CAPEX approval process users will use the new streamlined process
1000	1000 different employees will be more empowered in their roles

Workflow Management

Capital Expenditure Approval Process

Manage Capital Expenditure across line of business units to get required approvals in a transparent way.

3 Workflow Management Content

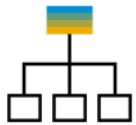
Capital investments are part of every enterprise as part of their business strategy. Capital investments could be acquisitions, purchase of new assets including software and services. **Capital Expenditures (CAPEX)** involve reviews and decisions across different levels of an organization depending on the type and nature of the investment. Companies are looking for **managing investment decisions** in a transparent way by **automating all the steps of this process**. This will not only enable them to track every step and decision, but also ensure the corporate policies are followed as part of an investment decision.

Digitize workflows, manage decisions, and gain end-to-end visibility

Capital expenditure (CAPEX)



SAP Workflow Management



Workflow

Workflow
(Low/No-Code)
Manage Process
Variants



Decisions

Business Rules
Manage Decisions



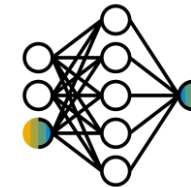
Process Visibility

Process Visibility
Live Process
Dashboards



Inbox

My Inbox
SAP Task Center



Workflow Intelligence

Predictions
Recommendations
Explanations
Rules Mining



Tightly Integrated with:

SAP Intelligent RPA
SAP
Conversational AI

Managing capital expenditure approvals

Demo



Managing capital expenditure approvals

Key learnings

- An example: capital expenditure approval process
- How this process has been implemented with SAP Workflow Management
- How the end user would experience this process now



What's next?

In the next unit, you'll learn:

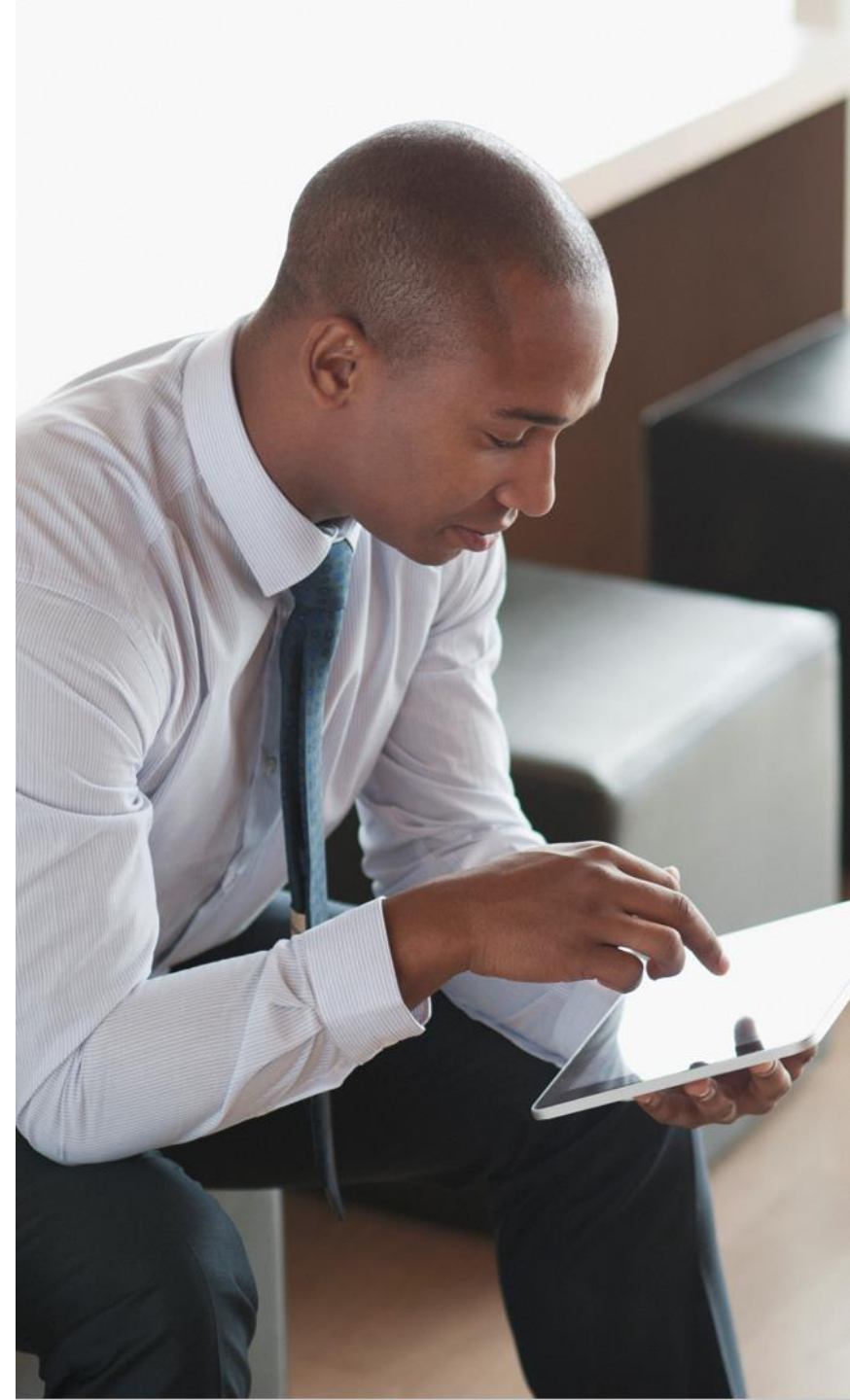
- How to use a booster to automatically set up your account for SAP Workflow Management



Managing capital expenditure approvals

Further reading

- Blog: [Automate your Capital Expenditure Approval Process using SAP Workflow Management](#)
- SAP Community: [Workflow Management](#)



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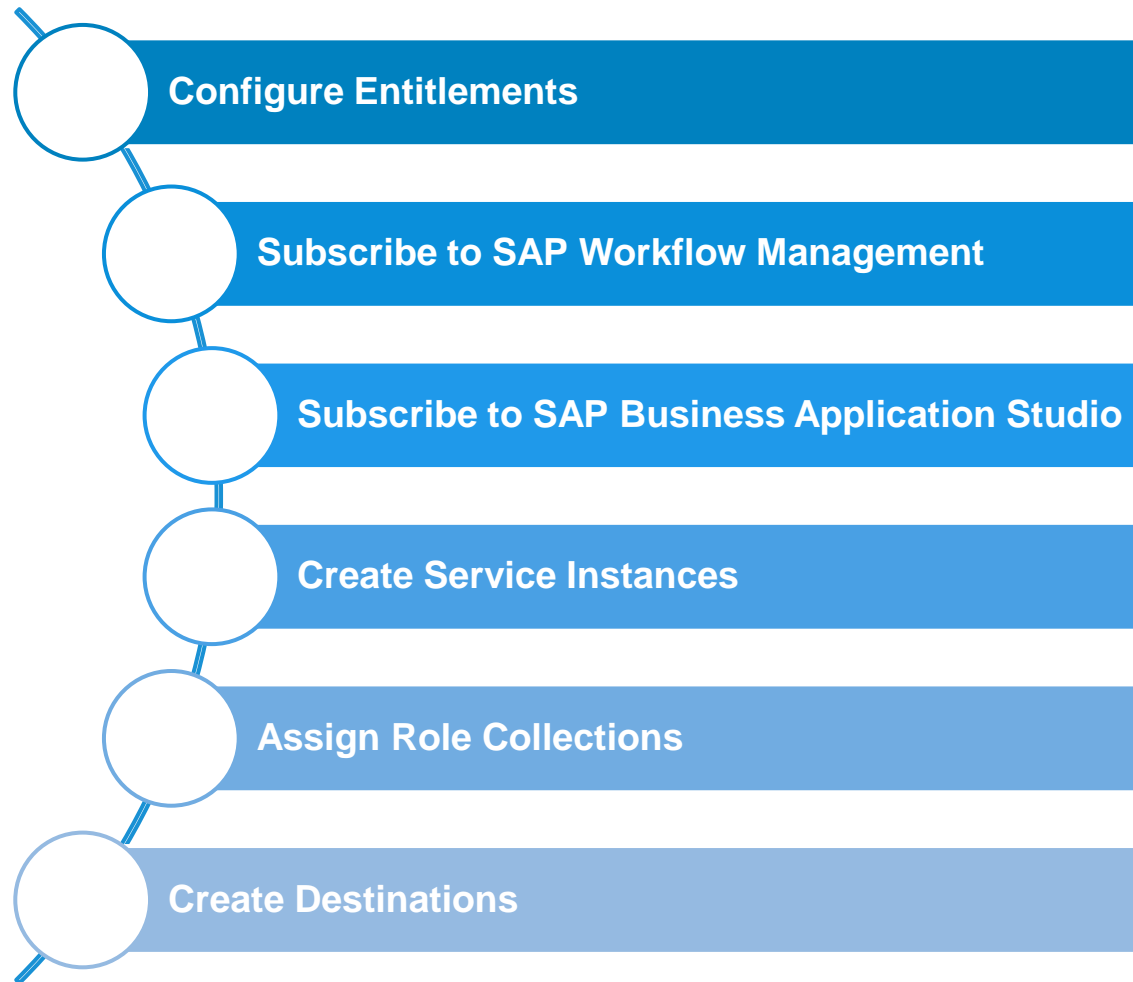


Week 1: Introduction and Workflows

Unit 3: Setting Up Your Development Landscape

Setting up your development landscape

Automatic setup using booster



Key learnings

- A booster is used to automatically set up your trial account for workflow management
- When the booster completes, you will have this setup done in your account:
 - SAP Workflow Management and other needed service entitlements are added.
 - SAP Workflow Management and SAP Business Application Studio subscriptions are enabled.
 - Service instances are created in your trial space.
 - SAP Workflow Management role collections are added to your user.
 - Default destinations are created.



Setting up your development landscape

What's next?

In the next unit, you'll learn:

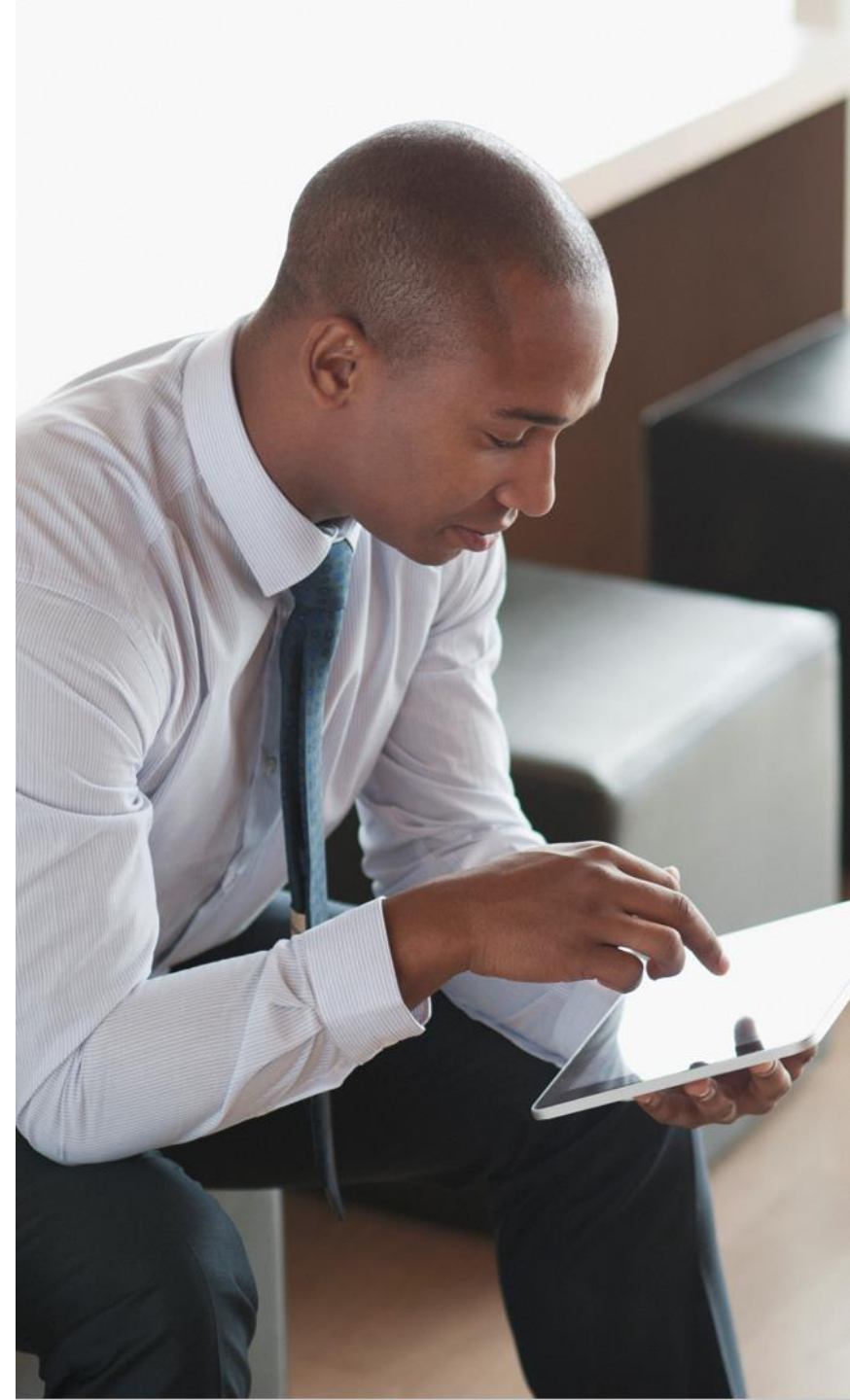
- How to build a workflow from scratch using SAP Business Application Studio



Setting up your development landscape

Further reading

- [Automatically Setup Workflow Management in SAP BTP Using Booster](#)
- [SAP Workflow Management – Initial Setup](#)



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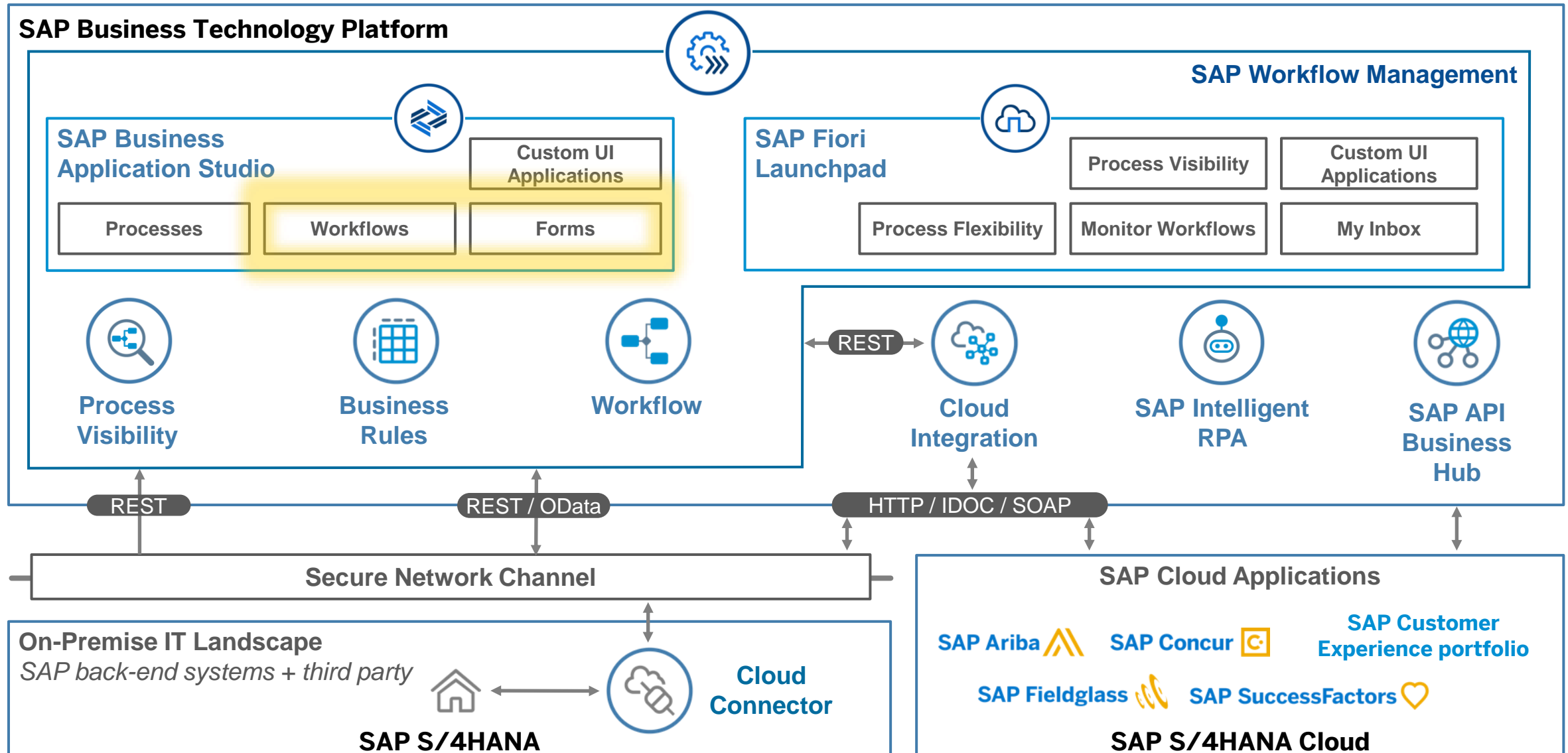
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Week 1: Introduction and Workflows

Unit 4: Building a Workflow from Scratch

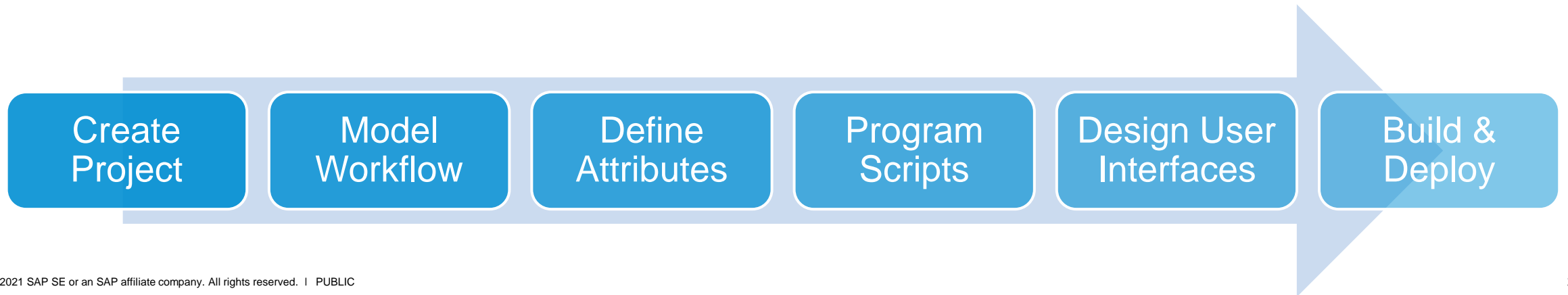
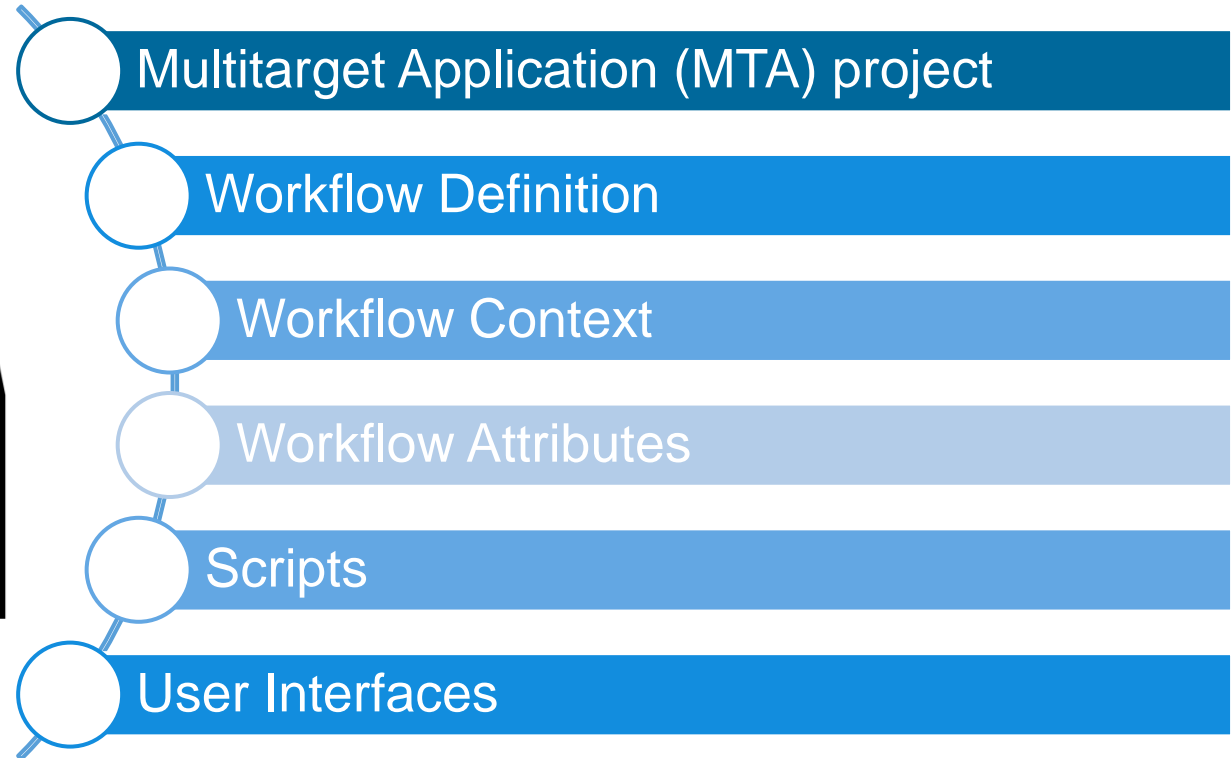
SAP Workflow Management – the bigger picture



Building a workflow from scratch

Modeling terms and concept

**Workflow
Developer**

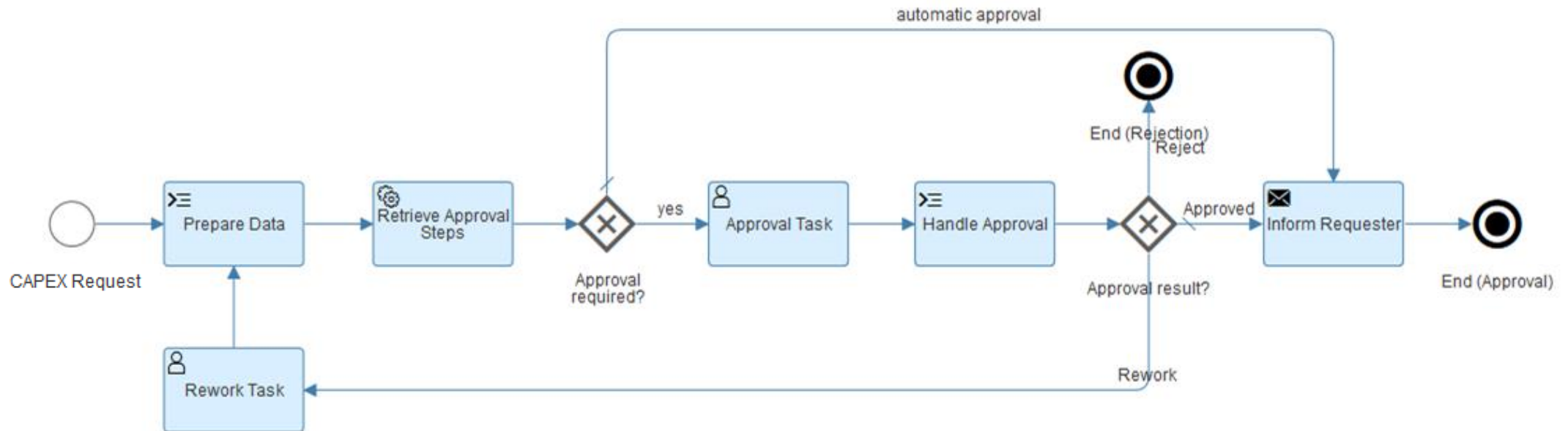


Business Process Model and Notation

Model workflows using industry-standard Business Process Model and Notation (**BPMN 2.0**)

The main components are

- **User tasks** – performed by end user and can be accessed in My Inbox
- **Service tasks** – establish outbound connectivity to external systems and services
- **Gateways & events** – to control the flow of the workflow



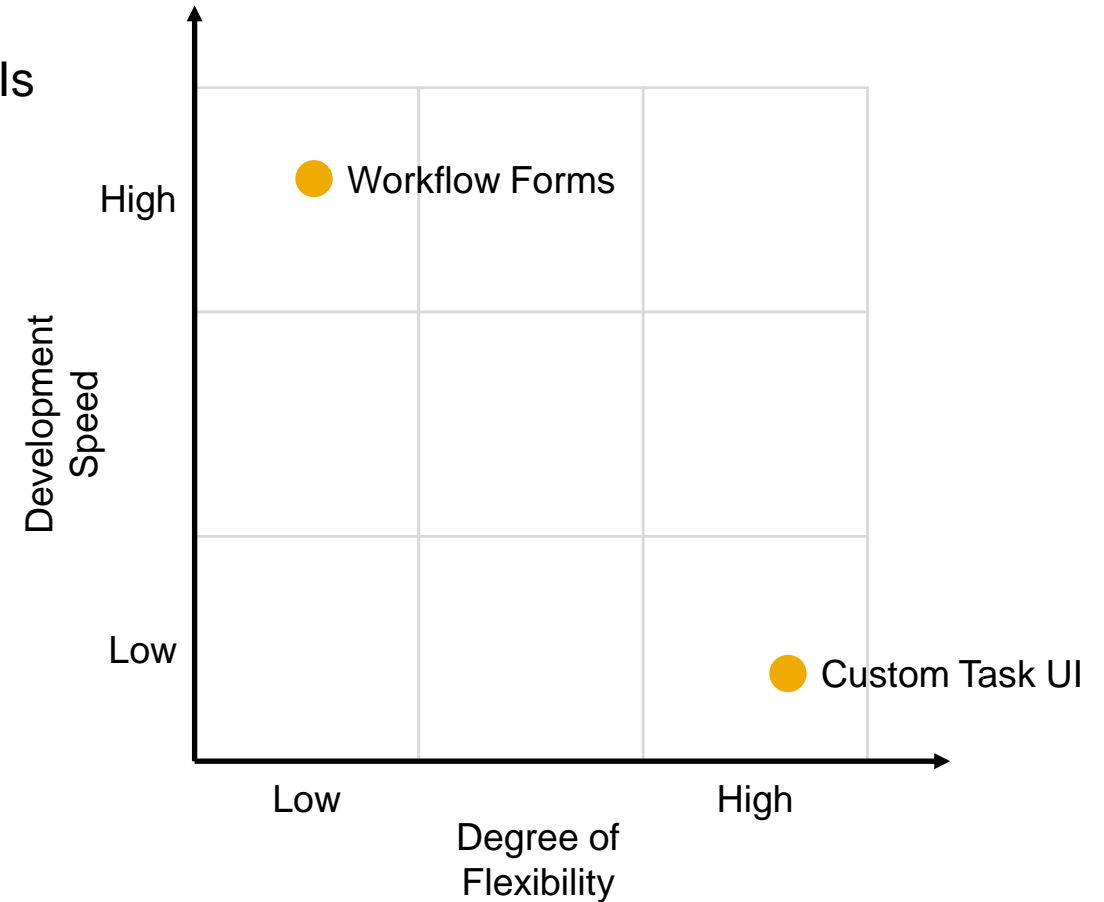
Task user interface (UI) technologies

Workflow Forms

- Declarative approach to model simple form and approval UIs
- Tool: Form Editor

Custom Task UI

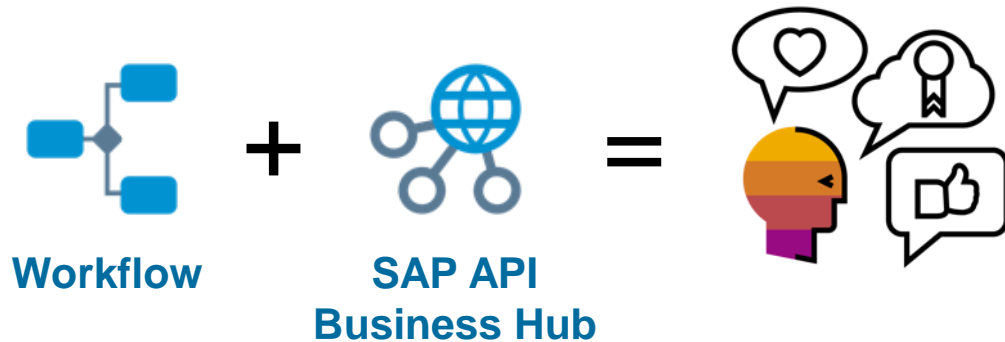
- SAPUI5 / SAP Fiori elements component
Views, Controller, Model, Bindings, My Inbox API...
- Built by developer from scratch
- Tools: Code and Layout Editor



Building a workflow from scratch

Flexible and agile access to workflows via APIs

Access workflow definitions, instances, task instance, and much more



SAP API Business Hub Getting Started API Cockpit BETA My Favorites Community Partner With Us Log On →

Workflow API for Cloud Foundry

Manage workflows and tasks in SAP Cloud Platform Workflow in the Cloud Foundry environment.

Show API Key Download SDK Add to API Cockpit

API References Details

API Environment Sandbox [Configure Environments](#)

User Task Instances
Forms
Task Definitions
Workflow Definitions
Workflow Instances
Data Export
Purge
Jobs
Messages

GET /v1/task-instances [Try out](#) [Code Snippet](#)

Retrieve instances by query parameters

Retrieves user task instances by parameters. If no parameters are specified, all instances with status READY, RESERVED, CANCELED, or COMPLETED are returned. Parameters for different attributes of the instance are evaluated using the logical 'and' operator. If a parameter is specified multiple times, results are matched using the logical 'or' operator, unless noted otherwise. Empty parameters are treated as if they were not specified. By default, returned tasks are sorted by creation time in ascending order.

Roles permitted to execute this operation:

- Global roles: WorkflowViewer, WorkflowAdmin
- Instance-specific roles: viewerUsers, viewerGroups, adminUsers, adminGroups [Prerequisite: You are assigned to the WorkflowParticipant global role.]
- Scope: TASK_GET

Parameters [Try out](#)

Name	Description
\$skip integer (query)	The number of records you want to skip from the beginning. You can skip at most 4000 records. To indicate a result range that starts, for example, at 1001, combine the \$skip with the \$top parameter. If not specified, no records are skipped. You can use this parameter only once.

Building a workflow from scratch

Demo: workflow development



Building a workflow from scratch

Key learnings

- Creating a project in SAP Business Application Studio
- Using the workflow editor
- Calling a remote system from a workflow
- Creating a form-based user interface
- Using gateways to base process flow on workflow context information



Building a workflow from scratch

What's next?

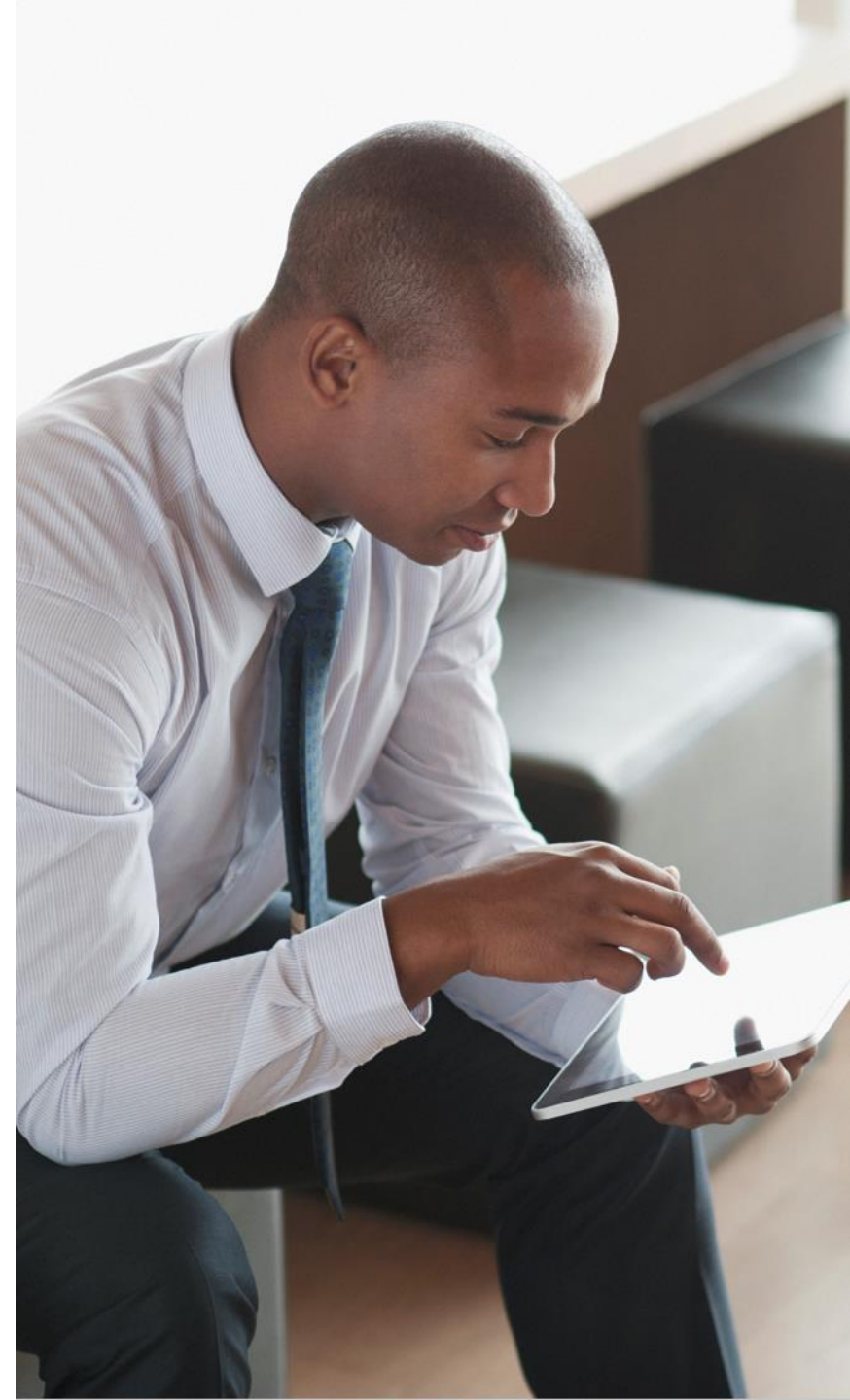
In the next unit, you'll learn:

- How to use and access the workflow as an end user
- How to administrate the workflow



Further reading

- [Business Process Model and Notation](#)
Official homepage of the OMG
- [Workflow](#)
in SAP Help Portal
- [Workflow Concepts](#)
in the Workflow documentation
- [Developing Applications with Workflow](#)
in the Workflow documentation
- [Workflow](#)
in Guided Answers
- [Using Workflow APIs](#)
in the Workflow documentation
- [Workflow](#)
in SAP API Business Hub



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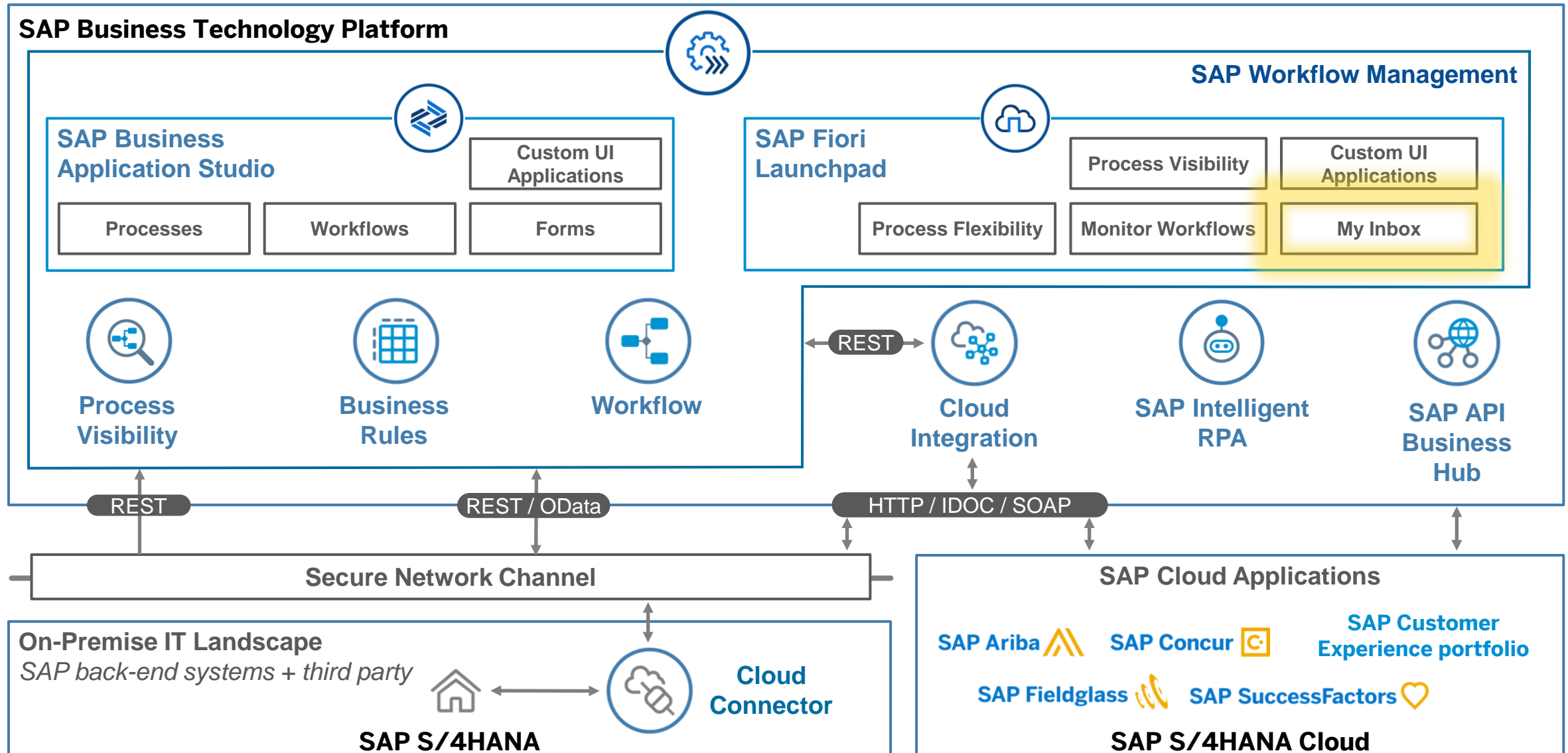
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Week 1: Introduction and Workflows

Unit 5: Executing and Monitoring Your Workflows

SAP Workflow Management – the bigger picture



Executing and monitoring your workflows

My Inbox

Manage tasks across different devices from different source systems

Key features

- Provided via standard SAP Fiori launchpad content
- **Show** list of assigned tasks
- **Search** for individual tasks
- Filter, sort, or group the tasks
- Open **task details**
- **Claim** tasks
- **Take action** on tasks
- Inspect **workflow log**
- Manage **substitutions**



The screenshot displays the SAP My Inbox interface. On the left, a sidebar shows a list of tasks under the heading 'All Tasks (8)'. The tasks are filtered by 'Medium' priority. The main area shows the details of an 'Approval Task (Purchasing Director)' for a CapEx Request titled '123 Building new mobile apps'. The task was created on May 25, 2020, by barry.best@demo.cloud.sap. The details include fields for Title, Request Id, Type, Country, Division, Description, CAPEX, OPEX, Total Cost, and IRR. On the right, a 'Workflow Log' shows the task's history, including creation by barry.best@demo.cloud.sap and completion by sb-clone-c825ab34-3f7a-4d... and marcus.hoff@demo.cloud.s....

My Inbox

All Tasks (8)

Search

Approval for CapEx Request "123 Building new mobile apps" in yo...
barry.best@demo.cl... Medium

Approval for CapEx Request "Building new mobile apps" in...
chinmaya.gorachan... Medium

Approval for CapEx Request "Building new mobile apps" in...
chinmaya.gorachan... Medium

Approval for CapEx Request "Building new mobile apps" in...
barry.best@demo.cl... Medium

Approval for CapEx Request "Building new mobile apps" in...
barry.best@demo.cl... Medium

Approval Task (Purchasing Director)

Approval for CapEx Request "123 Building new mobile apps" in your role as Purchasing Director

Created On: May 25, 2020
Created By: barry.best@demo.cloud.sap
Priority: Medium

Investment Details Sustainability Investment Requester History Comments

Title: 123 Building new mobile apps
Request Id: GFM-2020-173
Type: Software
Country: Germany
Division: BPM
Description: Provide a fresh experience for our customers by providing new apps for our services
CAPEX: 9000
OPEX: 2000
Total Cost: 11000
IRR: 5

Workflow Log

barry.best@demo.cloud.sap created the task
5/25/20 at 2:13 PM
Approval for CapEx Request "123 Building new mobile apps" in your role as Purchasing Director

sb-clone-c825ab34-3f7a-4d... completed the task
5/25/20 at 2:13 PM
Approval for CapEx Request "123 Building new mobile apps" in your role as Vice President

marcus.hoff@demo.cloud.s... completed the task
5/25/20 at 2:10 PM
Rework required for CapEx Request 123 Building new mobile apps

marcus.hoff@demo.cloud.s... completed the task
5/25/20 at 2:10 PM
Approval for CapEx Request "123 Building new mobile apps" in your role as Vice President

marcus.hoff@demo.cloud.s... completed the task
5/25/20 at 2:09 PM

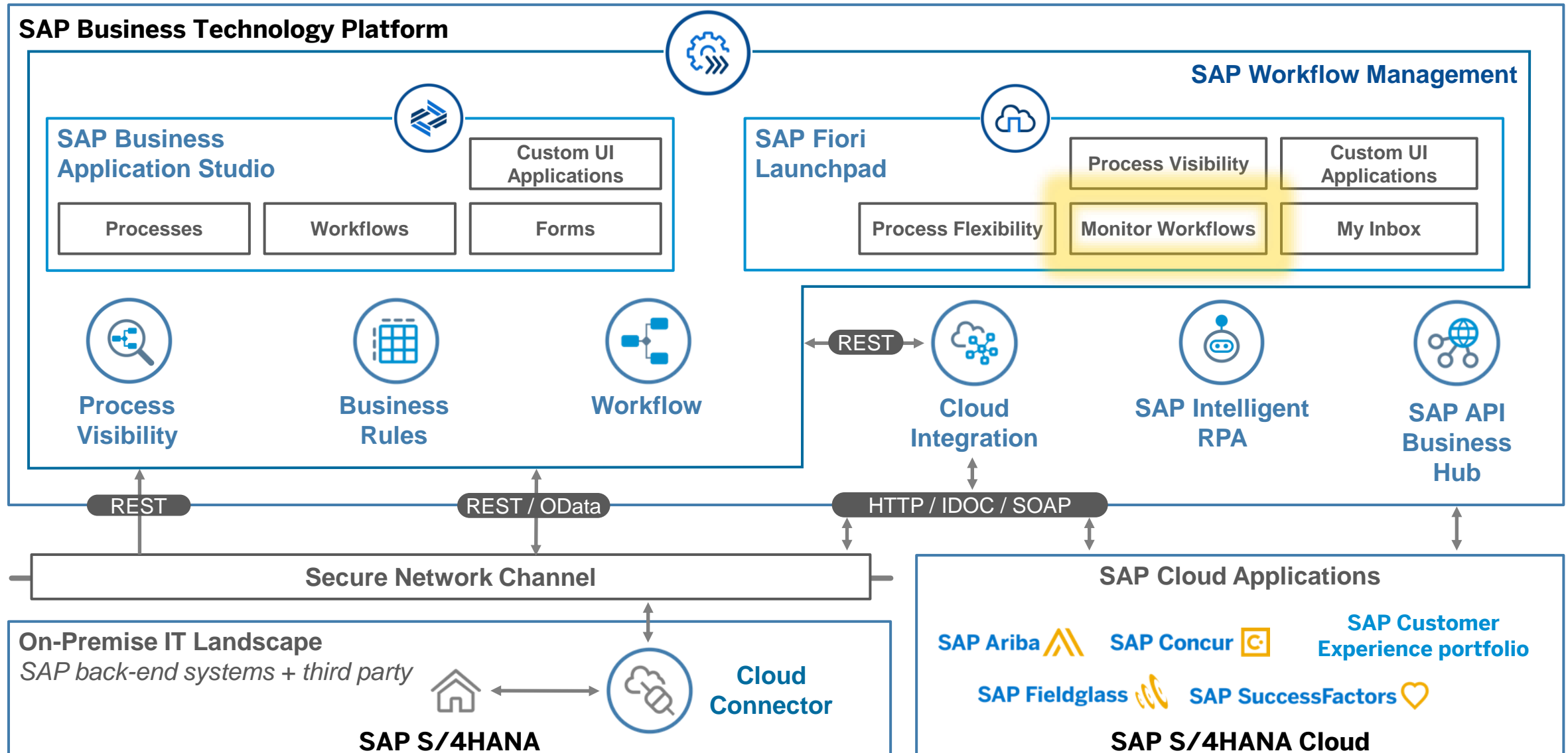
Approve Reject Rework Hide Log Claim

Executing and monitoring your workflows

Demo: My Inbox



SAP Workflow Management – the bigger picture



Monitor Workflows

SAP Fiori application to manage workflow definitions and instances

Key features

- **Start** workflow instances
- **Download workflow models** (JSON format)
- **Retry** execution of failed steps
- **Suspend, resume, and terminate** workflow instances
- **Search** workflow instances
- Investigate **error messages** of workflow instance
- Access the workflow context
- Follow the **execution log**
- **Show tasks** related to a workflow instance
- **Show subflow** instances
- List of running, erroneous, suspended, cancelled, or completed workflow instances (**apply needed filter**) or filter based on definitions

The screenshot displays the SAP Monitor Workflows application. The left sidebar shows a list of workflow instances for 'Capital Expenditure Approval' (Definition ID: capexapproval3, Instance ID: P000419), all marked as 'Running'. The main panel shows the details for a selected instance. The 'Workflow Information' tab is active, displaying instance details: Instance ID: b5ff7a24-87ed-11eb-98e1-eeee0a90045e, Definition ID: capexapproval3, Definition Version: 2, Started By: P000419, Started At: Mar 18, 2021, 2:27:39 PM, Completed At: (blank), Business Key: REQ456, Parent Instance ID: (blank), and Root Instance ID: b5ff7a24-87ed-11eb-98e1-eeee0a90045e. Below this, the 'Error Messages' tab shows 'No error messages.' The 'Workflow Context' tab displays a JSON object: { "approvalSteps": { "COO": true, "FinanceController": true, "SustainabilityDirector": true, "FinanceDirector": true, "VicePresident": true, ... } }. At the bottom of the main panel, there are buttons for 'Show Subflow Instances', 'Show Tasks', 'Suspend', and 'Terminate'.

Note: display of context data requires separate permissions

Executing and monitoring your workflows

Demo: Monitor Workflows application



Executing and monitoring your workflows

Key learnings

As an end user

- Use My Inbox to view and filter tasks
- Claim and complete a task
- View workflow log of a task
- Activate substitutions

As an administrator

- Start a workflow from the admin UI
- View deployed workflow definitions
- View and manage workflow instances



Executing and monitoring your workflows

What's next?

In the next unit, you'll learn:

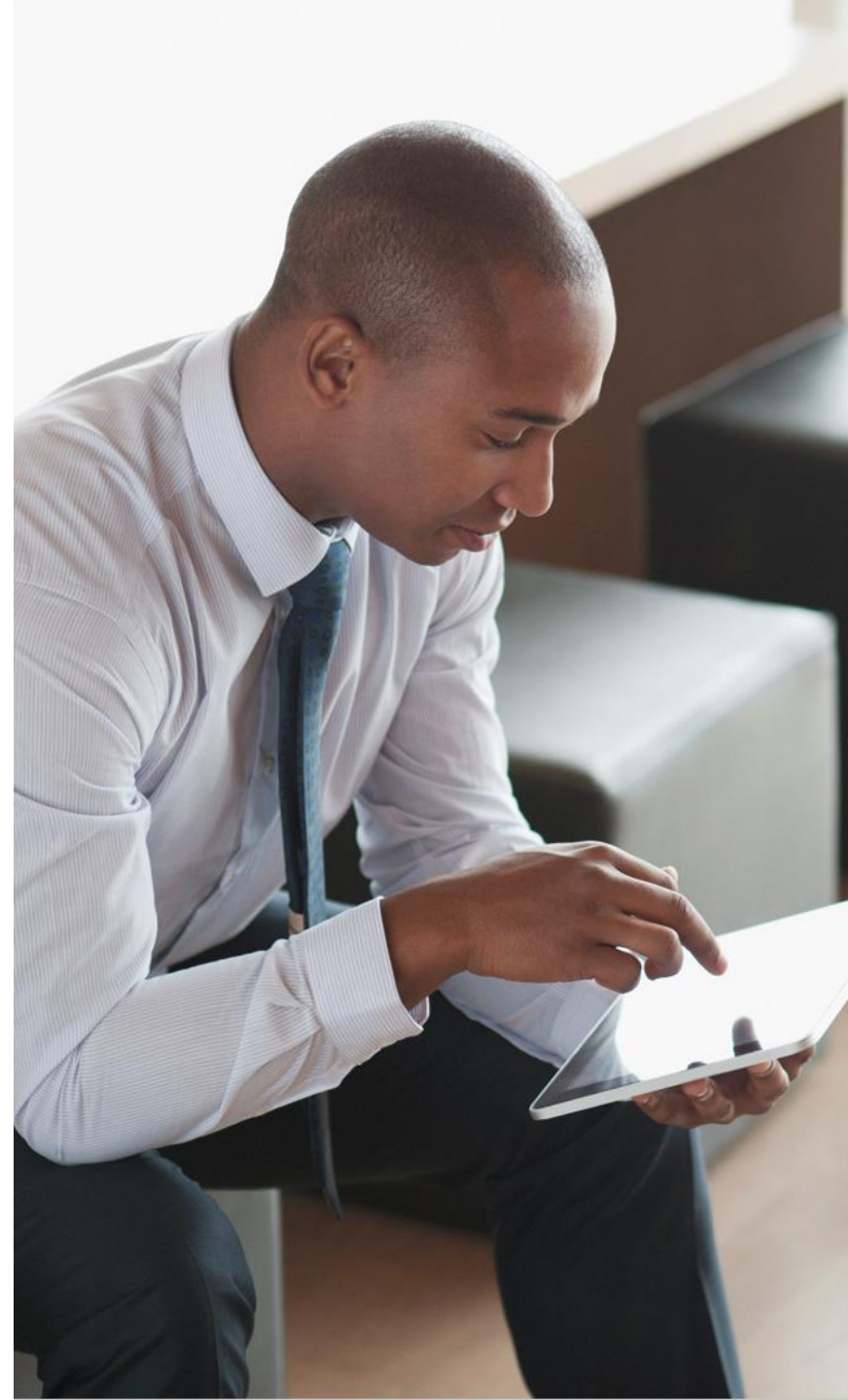
- How to create a process template



Executing and monitoring your workflows

Further reading

- [Working with Tasks in My Inbox](#)
- [Managing Workflows Using the Monitor Workflows App](#)



Thank you.

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open@sap.com

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