Week 1: Organizational, Access, and Task Management

Unit 1: Introduction and Overview
Introduction and overview

Overview

Unit 1: Introduction and overview

Unit 2: Organizational setup

Unit 3: Work center concept

Unit 4: User and access management

Unit 5: Business task management

Unit 6: Approval management
Introduction and overview

Intelligent suite in the cloud

Mainframe & PCs
1960s – 1980s

Industrial Automation

Client Server & Internet
1990s – 2000s

Business Process Automation

Cloud, Mobile, & Big Data
2000s – 2010s

Digital Transformation

Intelligent Technologies
2010s – 2020s

Intelligent Enterprise
Introduction and overview

The Intelligent Enterprise – SAP’s strategy

BUSINESS PROCESS

BUSINESS NETWORK

ACROSS ALL FUNCTIONS

BUSINESS PROCESS INTELLIGENCE

APPLICATIONS

INTELLIGNET SUITE

INDUSTRY CLOUD

SUSTAINABILITY MANAGEMENT

TECHNOLOGY

SAP BUSINESS TECHNOLOGY PLATFORM

INFRASTRUCTURE

SAP DATA CENTER OR HYPERSCALER
Introduction and overview
The Intelligent Enterprise – SAP’s strategy

BUSINESS NETWORK
ACROSS ALL FUNCTIONS
BUSINESS PROCESS INTELLIGENCE

APPLICATIONS
CUSTOMER EXPERIENCE
DIGITAL SUPPLY CHAIN

INTELLIGENT SUITE
ERP
FINANCE
HUMAN RESOURCES
SPEND MANAGEMENT

TECHNOLOGY
SAP BUSINESS TECHNOLOGY PLATFORM

INFRASTRUCTURE
SAP DATA CENTER
OR
HYPERSCALER

INDUSTRY CLOUD
ANALYTICS
EXPERIENCE MANAGEMENT
SUSTAINABILITY MANAGEMENT

BUSINESS PROCESS
ACROSS ALL FUNCTIONS
BUSINESS PROCESS INTELLIGENCE
Introduction and overview

SAP Business ByDesign – proven public cloud ERP suite

Integrated Cloud Suite

- Human Resources
- Financials
- CRM
- Supplier
- Supply Chain
- Project Management
- Built-in Analytics, Cross Topics & Solution Extensions

Suite in a Box
Experience a single end-to-end cloud solution

Insightful
Get transparency to make informed decisions

Built for Growth
Leverage a dynamic, configurable solution

Continuous Innovation
Be constantly up to date with automatic product updates
Introduction and overview

Proven intelligent suite in the cloud – by numbers as of April 2021

9,742 (+36% YoY) companies with unique tax-id
142,000 (+42%) learners on open.sap.com

200+ software solution partners with 8,035 (+24%) add-on solutions

Able to fully process 35,000 invoices @ 20 line items per hour

149 countries where ByD is used

21 SAP delivered countries with 13 languages

1B (+29%) FIN Documents
46M (+24%) Sales Orders
2.2M (+37%) Projects
9.2M (+26%) Production Orders
83.2M (+34%) Customer Invoices
83M (+33%) Time Recordings

5 to 10,000 users per single ByD system

250 value added partners worldwide
SAP Business ByDesign – supports end-to-end business scenarios

- 39 comprehensive, pre-built, end-to-end business scenarios
- Supported out-of-the-box
- Connecting every function across your company, for example
  - Cash and liquidity management
  - Field service and repair
  - Order to cash
  - Project management

Detailed visualizations of all business scenarios with their included processes and process steps are provided in the Business Scenario Explorer.
Introduction and overview
SAP Business ByDesign – adapt and extend the solution

Administrators

Developers
Introduction and overview
openSAP course – SAP Business ByDesign Administration

Week 1: Organizational, Access, and Task Management

Week 2: Input and Output Management

Week 3: Business Flexibility

Week 4: Data Protection and Privacy

Week 5: Information Management
Thank you.

Contact information:

open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 2: Organizational Setup – Part 1
Organizational setup – Part 1
Overview

Unit 1: Introduction and overview

Unit 2: Organizational setup

Unit 3: Work center concept

Unit 4: User & access management

Unit 5: Business task management

Unit 6: Approval management
Organizational setup - Part 1

Organizational structure – one country
Organizational setup - Part 1

Organizational structure – one country

1. Sales
2. Development
3. Headquarter
4. Subsidiary
5. Service
Organizational setup - Part 1
Organizational structure – two countries (+ local representation in second country)
Organizational setup - Part 1

Organizational structure – multiple countries

1. Subsidiary in Europe
2. Subsidiary in Asia
3. Development center in North America
4. Sales office in Latin America
5. Service center in Europe
6. Headquarter in North America
Organizational setup - Part 1

Organizational structure – graphical representation

Organizational Unit Definitions
→ reflect what org unit does

Legal definitions / hierarchy
- Company
- Business residence

Reporting definitions / hierarchy
- Reporting line unit
- Program

Financial definitions / hierarchy
- Segment
- Cost center
- Profit center

Organizational Unit Functions
→ integrate an org unit into a business process, e.g.

- Financial and Management Accounting function
- Sales function
- Human Resources function
- Strategic Purchasing function
- User Management function
Organizational setup - Part 1

Organizational structure – graphical representation

Company

Head-quarter

Subsidiary A

Subsidiary B

Administration

Sales/Serv.

Development

Sales/Serv.

Business Residence

Legal hierarchy
Organizational setup - Part 1
Organizational structure – graphical representation

- Company
  - Subsidiary A
    - Administration
    - Sales/Serv. A
  - Subsidiary B
    - Development
    - Sales/Serv. B

Legal hierarchy

Reporting hierarchy
Organizational setup - Part 1

Organizational structure – graphical representation

1. Business Residence
   1. Head-quarter
   2. Administration
   3. Sales/Serv. A
   4. Development
   5. Sales/Serv. B

- Legal hierarchy
- Reporting hierarchy

Financial hierarchy:
- Segment
  - Profit Center
  - Cost Center
Thank you.

Contact information:

open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 2: Organizational Setup – Part 2
Organizational setup - Part 2

System demo
Organizational setup - Part 2

Setting up your organizational structure

Define Your Org Structure
- Gather relevant information
- Sketch your org structure

Timelines
- Start date
- Effective-from date

Assign Employees
- Manager assignment
- Employee assignment
Organizational setup - Part 2

Summary

- Central component for process behavior
- All sizes of organizations can be managed
- Graphical environment for organizational setup
Thank you.

Contact information:

open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 3: Work Center Concept
Work center concept

Overview

Unit 1: Introduction and overview
Unit 2: Organizational setup
Unit 3: Work center concept
Unit 4: User and access management
Unit 5: Business task management
Unit 6: Approval management

Week 1
Work center concept

User-specific content access

Company user with individual responsibilities

User-specific work center assignment

Access to specific content

- Financial Management content
- Customer Relationship Management content
- Supply Chain Management content

Company user with individual responsibilities

User-specific work center assignment

Access to specific content

- Financial Management content
- Customer Relationship Management content
- Supply Chain Management content
Working with business roles – part 1

Company users with common tasks

Company-specific business roles

Access to specific content

- Financial Management content
- Customer Relationship Management content
- Supply Chain Management content
Work center concept

User-specific content access

SAP Business ByDesign screenshot

Navigation area with assigned work center

Work center views

Common work center views

Work center specific views

Area with work center specific tasks
Work center concept

User-specific content access
Work center concept

System demo
Work center concept

Summary

- Work center is central access point
- Individual access rights for users
- No predefined user roles
- Consistent structure
Thank you.

Contact information:
open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 4: User and Access Management – Part 1
User and access management - Part 1

Overview

Week 1

Unit 1: Introduction and overview

Unit 2: Organizational setup

Unit 3: Work center concept

Unit 4: User and access management

Unit 5: Business task management

Unit 6: Approval management
User and access management - Part 1
Working with business roles – part 2

Self Service Overview
Business Role A

Self Service Overview
Business Role B
System demo
Thank you.

Contact information:
open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 4: User and Access Management – Part 2
User and access management– Part 2

Working with substitutions

- **Employee Substitution**
  - Long employee absence
  - All access rights granted
  - Employees must be assigned to business role

- **Task Substitution**
  - Related to business task management items
  - Multiple substitutes possible
  - Ensure access rights compatibility
User and access management - Part 2

System demo
Summary

- Access rights assignment
- Usage of business roles
- Working with substitutions
Thank you.

Contact information:

open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 5: Business Task Management
Task types
- Task
- Alert
- Notification
- Clarification

Dates and Deadlines
- Multiple dates
- Deadline reactions

Automated vs manual tasks
- Different access
- Work distribution
Business task management

Work distribution (WD)

- Organizational work distribution
- Employee work distribution
Business task management

**BTM process example**

- **User A**
  - Automated task based on WD
  - Task access: Work inbox, Work center
  - Task update

- **User B**
  - Task access: Work inbox, Work center
  - Task fulfilled
  - Process continues

- **User C**
  - Manual task based on AR
  - Task access: Work inbox
  - Task update

  - Process continues
Business task management
BTM configuration

- Activation & Deactivation
- Dates
- Configurable Attributes
- Default Priority
- Deadline Reactions
Business task management

System demo
Business task management

Summary

- Central concept to ensure process continuity
- Automated and manual tasks
- Configurable attributes
- Work distribution
Thank you.

Contact information:

open@sap.com
Week 1: Organizational, Access, and Task Management

Unit 6: Approval Management
Approval management

Overview

Unit 1: Introduction and overview
Unit 2: Organizational setup
Unit 3: Work center concept
Unit 4: User and access management
Unit 5: Business task management
Unit 6: Approval management

Week 1
Approval management

Overview

Types of Approvals
- Departmental
- Financial
- Purchasing
- Sales

Approval Process
- 1 Step *(default)*
- 2 Steps
- Multiple steps

Approvers
- Direct manager
- Next level manager
- Cost center manager
- Specific person

Approval Conditions
- Value
- Field

Validity Periods
- Time-dependent
- Active or scheduled status
Approval management

Approval process example

1 Step

Team lead

Cost center manager

2 Steps

1st approval

2nd approval

>2 Steps

1st approval

2nd approval

Additional approvers

1st approval

2nd approval

3rd … approval
Approval management

Managing my area

Approval process triggered

Responsible manager

Information push

Access approval requests

Results

- Process continues
- Employee informed

- Process paused
- Employee informed

- Process stopped
- Employee informed
Approval management

Important boundary condition

Organizational structure

Work center assignment

Work Distribution
Approval management

Set up approval processes

Business configuration
- Identify document
- Activate approval process

Define parameters
- Steps
- Conditions
- Approver(s)

Create approval process
- Create new approval process
- Enter parameters
- Define validity
Summary

- Multiple step approval process possible
- Wide range of conditions and approvers
- Organizational structure and work distribution are important
- Central access point for manager
Thank you.

Contact information:

open@sap.com