

SAP Business Workflow reporting is scattered across various technical transactions and there is a lack of one specific reporting tool which gives *role based* information. Importantly, none of the existing tools depict the *financial impact* on the business due to pending decisions & the ability to send reminder emails for *multiple work items on need-to basis*.

This solution is applicable to organizations having a lot of *custom built* workflows which can be enhanced to support this tool and which need a lot of *Management Visibility*. This is a *cross-industry solution* aimed at the *management roles (in this design challenge)*. The need of the hour is to create a tool which brings the following *values and benefits*:

- Can report on financial value of pending approvals – the financial value has to be calculated and stored in the Workflow (out of scope of this challenge) and will be read in the Fiori App
- Can report on delayed decisions - with financial impact (value stored as above)
- Enable the management to expedite delayed approvals (By sending emails)

This Study focuses on the “Management Role” only – However, the larger Intent is to create three tiles for the following three roles:

- Manager (My design challenge focuses on this aspect only)
- User (Future Enhancement)
- Workflow Administrator (Future Enhancement)
- Graphical Representation of data (Future Enhancement)

The name given is Custom Workflow Monitor.

The backend implementation and coding is not described in the current solution. This involves Workflow Program exits to store Workflow Header and Item Level runtime data in two Header (master) and Item (detail) tables in the backend system. The Fiori App is based on OData Service to these tables and displays the output in a master detail format.

NOTE: This is a valid Persona Template and not my own format. Please refer the guides / [this link](#)



Matthew McKenzie

Procurements Manager

“ I like to be on top of things and avoid delays which lead to losses ”

ABOUT

45, Married, Had 10 Years of Procurement Experience and 5 Years of Managerial Experience in Procurement

Currently works as a Procurement Manager with a Leading Publication House. Have to make sure that the procurements are done on time for a smoother operation of the Publication House.

WORKS WITH

CFO, Procurement Team and Logistics Team

JOB RESPONSIBILITIES

- Keep track of Orders
- Ensure timely completion of procurements
- Accommodate new requests for purchases
- Provide statistics of Procurement
- Resolve Procurement Delays

NEEDS

- Clear visibility as to where things are stuck in approvals
- Ability to expedite approvals
- Prioritize high value approvals for completion

MAIN GOALS

- Timely completion of orders
- Timely procurement
- Operations of the Publication House should not be hampered because of procurement delays

PAIN POINTS

- Hard to navigate through the standard workflow transactions – too technical
- Lot of clicks are required to determine the actual approver
- Do not have the ability to send reminders on touch of a button
- Manual reconciliation required to determine the financial impact

Current User Experience Journey

Duration of the Journey: 2 Hours

Mindset

What is on the Persona's mind while taking the actions of their journey? How do they feel each step of the journey?

Need to complete Procurements

50 Approvals stuck with others ☹️

How can I expedite

Can Check Workflow Log (but for 50 workflows one by one) ☹️

I need to send email to Approvers

50 Emails??

Financial impact of stuck approvals?

Should I check all Purchase Orders??

Actions

What actions and activities does the Persona take while going thru the journey to achieve their goal?

Check stuck Approvals

Filter through individual Workflow Logs

Get approver names of each level of approver, save them in notepad

Send Email one by one

Wait for approvals

Go to each Purchase Order and check for their Final value

Touch points

What touch points does the Persona have? (Tools, channels, devices, conversations, and so on.)

Workflow Logs

Outlook

Purchase Order Screen (Me23N)

Point of View

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Procurement Manager, Matthew, needs a way to quickly ascertain how many of the custom built Procurement approvals are stuck, where they are stuck and how much financial value is associated with them so that he can expedite the approvals and keep the Publication House operations going on. Surprisingly, he has to resort to drilling down individual workflows, ascertaining the approvers (multiple clicks) and then using outlook to send them reminders (Ad-hoc reminders) one by one.

Mockup

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Please refer the following link of Splash Designer for the detailed Mockup; I have not included any screen shots here because the Mockup is a high fidelity mockup which displays the right data in Detailed screen based on the Master screen selection. It is more dynamic and conveys the intent more clearly than static screenshots

https://standard.experiencesplash.com:443/api/projects/8a22ce4ba3c0555d0baad50e/prototype/snapshot/atest/index.html#/1458045445823_SO

Study

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Please refer the following link of Splash Designer for the detailed Study:

<https://standard.experiencesplash.com/home/projects/8a22ce4ba3c0555d0baad50e/research/participant/17613af08fea0c4b0baadd93>

SAP Web IDE App Prototype

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Please refer the following YouTube Video for the details of the Proof of concept. I have also tried to give *only a subset of details* on the components implemented and it clearly shows the navigations and various other components implemented.

YouTube URL: <https://youtu.be/9CQqfbSGWKU>

Video Format: MP4

Total Duration of Video: 3 Minutes, 47 Seconds

Total Pages: 4 (of this document)

Total Length = 3.47 Minutes of Video + 4 Pages of this document = 7.47 (which is less than 9 pages)