

## **WF-REL: How to request changes to your bureau's requisition workflow**

This document is for use by Change Agents. It describes the process for requesting changes to requisition workflow.

### **Introduction**

What workflow does: Requisition workflow determines how purchase requisitions will be routed for approval. The system looks at the funds center in a requisition, then finds that funds center in the workflow table. It sends a notice to the user specified in that row of the table.

What workflow doesn't do: Being in the workflow table doesn't give the user the ability to release requisitions. For that, the user must also have the correct SAP role (MM-Bureau Approver A1, A2 and/or A3). Role-mapping is a separate process. The bureau change agent is responsible for requesting role mapping if necessary.

Changing the SAP workflow table is a manual process for EBS support staff. The following steps are designed to streamline the process and minimize errors.

### **1. Review your current workflow**

Each time EBS updates the workflow for your bureau, we send you back a spreadsheet showing the updated workflow. You can use this spreadsheet as a template for your next request.

If you need a new copy of the workflow for your bureau, the EBS support team member can generate one for you. Send your request by email to the support person for MM/Procurement.

Here's what the workflow spreadsheet looks like:

Clipboard		Font		Alignment	
A7					
	A	B	C	D	F
1	FUNDS CENTER	LEVEL	US	USERID	
2	WAAD000001	A1	US	SBAILEY	
3	WAAD000001	A2	US	SBAILEY	
4	WAAD000001	A3	US	WBDAVIDS	
5	WAAD000002	A1	US	JBROWN	
6	WAAD000002	A2	US	JBROWN	
7	WAAD000002	A3	US	WBDAVIDS	
8	WAAD000003	A1	US	WBDAUSTIN	
9	WAAD000003	A2	US	WBDAUSTIN	
10	WAAD000003	A3	US	WBDAUSTIN	
11	WAAD000003	A4	US	WBDAUSTIN	
12	WAAD000003	A5	US	WBDAUSTIN	
13	WAAD000003	A6	US	WBDAUSTIN	
14	WAAD000003	A7	US	WBDAUSTIN	
15	WAAD000003	A8	US	WBDAUSTIN	
16	WAAD000003	A9	US	WBDAUSTIN	
17	WAAD000003	A10	US	WBDAUSTIN	
18	WAAD000003	A11	US	WBDAUSTIN	
19	WAAD000003	A12	US	WBDAUSTIN	
20	WAAD000003	A13	US	WBDAUSTIN	
21	WAAD000003	A14	US	WBDAUSTIN	
22	WAAD000003	A15	US	WBDAUSTIN	
23	WACS000004	A1	US	KATHYK	
24	WACS000005	A1	US	BARBARA	
25	WACS000006	A1	US	WBLEANNE	
26	WACS000007	A1	US	KATHYK	
27	WACS000008	A1	US	COPENUK	
28	WACS000010	A1	US	CAROLINE	
29	WACS000011	A1	US	RICHB	
30	WAEN	A1	US	WBANNETTE	

10 character funds centers

4-character funds center

Note that full 10-character funds centers as well as 4-character funds centers are shown. Some bureaus also use 2-character funds centers. This provides various levels of granularity for approval. Decisions about this granularity are up to the bureau.

In this example, WBANNETTE is responsible for approving all requisitions at the A1 level in all funds centers beginning with WAEN. By contrast, each different funds center WAADXXXXXX has its own approval chain.

**2. Mark changing records for deletion**

In the above example, suppose that users SBAILEY and WBLEANNE (highlighted in yellow) are both changing jobs and will no longer be approving requisitions. Instead, NEWUSER1 will be approving requisitions in WAAD000001, and NEWUSER2 will be taking over in WACS000006.

First, mark the changing records for deletion by indicating DELETE in Column E.

Clipboard Font Alignment						
E25 X ✓ fx DELETE						
	A	B	C	D	E	F
1	FUNDS CENTER	LEVEL		USERID		
2	WAAD000001	A1	US	SBAILEY	DELETE	
3	WAAD000001	A2	US	SBAILEY	DELETE	
4	WAAD000001	A3	US	WBDAVIDS		
5	WAAD000002	A1	US	JBROWN		
6	WAAD000002	A2	US	JBROWN		
7	WAAD000002	A3	US	WBDAVIDS		
8	WAAD000003	A1	US	WBDAUSTIN		

22	WACS000003	A1	US	KATHYK		
23	WACS000004	A1	US	KATHYK		
24	WACS000005	A1	US	BARBARA		
25	WACS000006	A1	US	WBLEANNE	DELETE	
26	WACS000007	A1	US	KATHYK		
27	WACS000008	A1	US	CPOPENUK		
28	WACS000010	A1	US	CAROLINE		
29	WACS000011	A1	US	RICHB		
30	WAEN	A1	US	WBANNETTE		

### 3. Create new rows for the changes

Next, create a new row for each of the changes. Typically these will be duplicates of the rows you've marked for deletion, but with a different username. Be sure to mark these new rows with ADD in Column E:

Clipboard							Font		Alignment	
E106							X ✓ fx		ADD	
	A	B	C	D	E	F	G			
94	WARP000003	A2	US	JUDI						
95	WARP000004	A1	US	JANETS						
96	WARP000004	A2	US	JANETS						
97	WARP000005	A1	US	STEVEK						
98	WARP000005	A2	US	STEVEK						
99	WARP000006	A1	US	MYLAT						
100	WARP000006	A2	US	WBEDWARDC						
101	WARP000007	A1	US	DICKR						
102	WARP000007	A2	US	DICKR						
103										
104	WAAD000001	A1	US	NEWUSER1	ADD				←	
105	WAAD000001	A2	US	NEWUSER1	ADD				←	
106	WACS000006	A1	US	NEWUSER2	ADD				←	
107										

### 4. Remove unchanging records

Strip any unchanging records from the spreadsheet, so that only DELETE and ADD rows remain. Save a copy of the spreadsheet with only these Delete and Add rows in it.

Clipboard							Font		Alig	
E13							fx			
	A	B	C	D	E	F				
1	FUNDS CENTER	LEVEL		USERID						
2	WAAD000001	A1	US	SBAILEY	DELETE					
3	WAAD000001	A2	US	SBAILEY	DELETE					
4	WACS000006	A1	US	WBLEANNE	DELETE					
5	WAAD000001	A1	US	NEWUSER1	ADD					
6	WAAD000001	A2	US	NEWUSER1	ADD					
7	WACS000006	A1	US	NEWUSER2	ADD					
8										

### 5. Submit a helpdesk ticket

Submit a helpdesk ticket with a subject line that mentions SAP Requisition Workflow Changes. Attach your Add/Delete spreadsheet.

NOTE: The ticket may also include any role-mapping changes relating to the request (for example, NEWUSER1 and NEWUSER2 both need the MM-Bureau Approver A1 and A2 roles).

## **6. Workflow changes are made**

EBS staff, on receipt of the helpdesk ticket, will generally turn workflow requests around in a day. We will enter your Adds and Deletes and generate an updated workflow table, which we'll email back to you.

## **7. Other kinds of workflow changes**

You can use the same template and instructions for these types of workflow changes too:

- Your bureau is eliminating a particular funds center (mark all rows with that funds center for deletion)
- Your bureau is adding a funds center (create ADD rows for each approval level and approver in the new funds center)
- Your bureau is consolidating all approvals for a group of funds centers; for example, requisitions in all WAAD funds center will be approved by a single A2 approver. (Mark all WAADXXXXXX rows with A2 approvers for deletion and create an ADD row for WAAD, showing the A2 approver who will be taking over the function.)

## **8. Additional note**

SAP doesn't automatically validate funds centers or userIDs in the workflow table, and won't generate error messages if invalid data is stored in the table. The support team member doing the updates is not able to validate either field. It's up to the Change Agent to submit correct funds centers and userIDs.