Approval Workflow for Documents
Document Management

A PLM Consulting Solution
Approval Workflow for Documents

The PLM Consulting Solution “Approval Workflow for Documents” streamlines the approval process for documents. A user friendly user interface allows to control status transition on DIR supported by workflow. The approval Workflow:

- Defines approval type per document type and status of DIR
- Approval type comprises roles, roles staffing rules for one status transition
- Approval process is based on digital signature for persons in roles involved
- Approval process is conducted automatically and is transparent for all users
- Available for WEB-UI and GUI
- Uses workflow to control approval process and guide user through steps
Approval Workflow for Documents
Customizing Options

Approval Type
- Select signature group
- Select GUI type

Approval Roles
- Define name
- Define sequence
- Define staffing rules

Assignment to DIR type
- Select approval type
- Select status for process
Approval Workflow for Documents
Define approval in status 10

- Tab approval defined for document type Z40
- Roles from customizing
- Editing in status 10
- Author autom. assigned
- Checking approver rules
Approval Workflow for Documents
Process Approval - Workflow per user

- Signature for author after status change
- Signature for other approver from workflow

- Approval per workflow
- One cycle per role
- Status change after approval
- Status reset on reject
Approval Workflow for Documents
Process Approval - Workflow per user

- Assign user on Tab Approver
- Access WEB page through Workflow
- Generated e-mail with link available
- Create signature in WEB page
Approval Workflow for Documents
Processing Rules

User assignment

- A user may be staffed if authorized for signature group
- A user cannot be staffed twice for one approval

Processing Rules per status

- After changing status author has to sign. If customized author is checked against role staffing. Otherwise current user may start approval
- All users of a role receive work item in parallel
- A user may sign from Workflow only. He must sign himself (no forwarding).
- After one role is finished next role is processed
- At the end the status is set by workflow
- Administrator may cancel signature process
Approval Workflow for Documents

Our Service

- An implementation-ready Solution
- Implementation of the Solution
- Documentation of the Solution
- 6 Months of Bugfixing
- Optional Online Scoping Session and/or Presentation at Customer
Approval Workflow for Documents
Easy and fast way to control DMS approval processes

The PLM Consulting Solution “Approval Workflow for Documents” streamlines the approval process for documents. A user friendly user interface allows to control status transition on DIR supported by workflow.

Business Challenges
- You need a flexible solution to define approval process for documents including integration of digital signatures.

Key Features
- Define custom roles
- Define custom approval types with role parameter (min. max user count, interoperability)
- Define document type and status to apply approval type
- UI for defining users per role (WEB and GUI)
- Automatic generation of signature strategies
- Automatic workflow processing for one- or multi-step approvals
- Automatic control of signature process
- Automatic status transition
- Reporting tools

Business Benefits
- No need of programming for common approval processes
- Powerful document control in combination with CVS solution

Availability, Technical Details
- Available for SAP PLM 7 ECC 6.00 EHP6
- Delivered via Consulting Service
- Complete documentation of all development objects

Related Services
- ACM Reporting
- ACM Downport to SAP GUI
- PPM-ACM Integration

Pricing, Links
- Price: 30,000 Euro
- SAP Note: 1941811
- SAP Service No.: 50110859, Enhancement Svcs for PLM
- Contact: plmservices@sap.com

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