RE Real Estate Management: Workflow Scenarios

Release 4.6C
Copyright

© Copyright 2001 SAP AG. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP AG. The information contained herein may be changed without prior notice.

Some software products marketed by SAP AG and its distributors contain proprietary software components of other software vendors.

Microsoft®, WINDOWS®, NT®, EXCEL®, Word®, PowerPoint® and SQL Server® are registered trademarks of Microsoft Corporation.

IBM®, DB2®, OS/2®, DB2/6000®, Parallel Sysplex®, MVS/ESA®, RS/6000®, AIX®, S/390®, AS/400®, OS/390®, and OS/400® are registered trademarks of IBM Corporation.

ORACLE® is a registered trademark of ORACLE Corporation.

INFORMIX®-OnLine for SAP and Informix® Dynamic Server™ are registered trademarks of Informix Software Incorporated.

UNIX®, X/Open®, OSF/1®, and Motif® are registered trademarks of the Open Group.

HTML, DHTML, XML, XHTML are trademarks or registered trademarks of W3C®, World Wide Web Consortium, Massachusetts Institute of Technology.

JAVA® is a registered trademark of Sun Microsystems, Inc.

JAVASCRIPT® is a registered trademark of Sun Microsystems, Inc., used under license for technology invented and implemented by Netscape.

SAP, SAP Logo, R/2, R/3, ABAP, SAP ArchiveLink, SAP Business Workflow, WebFlow, SAP EarlyWatch, BAPI, SAPPHIRE, Management Cockpit, mySAP.com Logo and mySAP.com are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world. All other products mentioned are trademarks or registered trademarks of their respective companies.
## Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>😷</td>
<td>Caution</td>
</tr>
<tr>
<td>🤖</td>
<td>Example</td>
</tr>
<tr>
<td>📜</td>
<td>Note</td>
</tr>
<tr>
<td>🔥</td>
<td>Recommendation</td>
</tr>
<tr>
<td>⚙️</td>
<td>Syntax</td>
</tr>
</tbody>
</table>
Contents

RE Real Estate Management: Workflow Scenarios ................................................. 5
Link to PM (Plant Maintenance) (RE-BD-RU)................................................................. 6
Technical Realization (RE-BD-RU)............................................................................... 7
Preparation and Customizing (RE-BD-RU).................................................................... 7
  Setting Up Organizational Structure ........................................................................ 8
  Implementing Task-Specific Customizing ............................................................... 8
  Activating Event Receivable Linkage ..................................................................... 9
Operation and Link to Application Functions (RE-BD-RU)............................................. 10
Processes Before Rental End (RE-RT-RC) .................................................................. 10
Technical Realization (RE-RT-RC) ............................................................................. 12
Preparation and Customizing (RE-RT-RC) .................................................................. 13
  Setting Up Organizational Structure ....................................................................... 14
  Making Task-Specific Settings ............................................................................. 14
  Activating Event Receivable Linkage .................................................................... 15
Operation and Link to Application Functions (RE-RT-RC) .......................................... 16
### RE Real Estate Management: Workflow Scenarios

Workflow scenarios can be generated for the following business objects [Ext.] in the Real Estate (RE) component (some of them are supplied as standard scenarios):

<table>
<thead>
<tr>
<th>Object type (objects in the Business Object Repository = BOR)</th>
<th>Technical description</th>
<th>Workflow scenarios supplied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business entity</td>
<td>BUS1123 / REBusinessEntity</td>
<td></td>
</tr>
<tr>
<td>Management contract [Ext.]</td>
<td>BUS1124 / REManagementContract</td>
<td></td>
</tr>
<tr>
<td>Settlement unit [Ext.]</td>
<td>BUS1125 / RESettlementUnit</td>
<td></td>
</tr>
<tr>
<td>Building [Ext.]</td>
<td>BUS1126 / REBuilding</td>
<td></td>
</tr>
<tr>
<td>Room [Ext.]</td>
<td>BUS1127 / RERoom</td>
<td></td>
</tr>
<tr>
<td>Property [Ext.]</td>
<td>BUS1128 / REProperty</td>
<td></td>
</tr>
<tr>
<td>Land register [Ext.]</td>
<td>BUS1129 / LandRegister</td>
<td></td>
</tr>
<tr>
<td>Lease-out [Ext.]</td>
<td>BUS1130 / Lease-Out</td>
<td>Process before rental end</td>
</tr>
<tr>
<td>Rental offer [Ext.]</td>
<td>BUS1131 / RentalOffer</td>
<td></td>
</tr>
<tr>
<td>Application [Ext.]</td>
<td>BUS1132 / RentalApplication</td>
<td></td>
</tr>
<tr>
<td>Rental unit [Ext.]</td>
<td>BUS1133 / RentalUnit</td>
<td>Link to PM</td>
</tr>
<tr>
<td>General contract [Ext.]</td>
<td>BUS1133 / RentalUnit</td>
<td></td>
</tr>
</tbody>
</table>

All BOR objects can be sent for display purposes to users registered in the system by choosing System → Workflow → Send object with note in the processing screen.

**See also:**

BC - Workflow Scenarios in Applications [Ext.]
Purpose
You use this workflow template if you want to assign a functional location (PM component) to a rental unit (RE component).

Process Flow
1. A clerk creates a rental unit.
2. If it is stipulated that a functional location is to be assigned to each rental unit, the system automatically determines the clerk responsible for the functional location on the basis of the organizational structure [Ext.] entered in the system and informs the responsible person by generating a work item [Ext.].

This workflow template finishes here; in other words no workflows will be started once a functional location is made.

Plant Maintenance Link
Technical Realization (RE-BD-RU)

Object types
The interface between the R/3 functions and the workflow system is realized by the object technology.

The information that follows is of a technical nature: You need this information if you are interested in implementation details or want to undertake your own enhancements.

Object type BUS1133: RentalUnit

Standard tasks
The standard tasks (TS) [Ext.], which SAP supplies as single-step tasks, described basic business activities from an organizational point of view.

The standard tasks that are used here are available as “modules”, and can be used in their original form in other workflow scenarios.

TS 20000390: Create functional location (ISRE_FUNCLOC)

Roles
As a rule, roles [Ext.] are specifically defined for one particular application scenario.

There are no roles defined for this workflow template.

Workflow template
The business process flow is implemented as a workflow definition in a workflow template.

The workflow template is available in your R/3 System.

WS20000215: Link to PM

Preparation and Customizing (RE-BD-RU)

Use
In addition to the general Customizing that guarantees the proper operation of the workflow, further Customizing specific to this workflow model is necessary.

Prerequisites
You have made the general Customizing settings required for the SAP Business Workflow.
Setting Up Organizational Structure

Process Flow
1. Define your organizational structure [Ext.] for your workflow template.
2. Assign the standard tasks (TS) [Ext.] to the employees responsible for them.

Setting Up Organizational Structure

Use
Specification of the object types involved in the workflow for details of agents or details of those responsible (See also: Organization objects [Ext.])

Procedure
To set up suitable organizational structures, implement the following steps:

1. Choose Tools → Business workflow → Organization structure
2. Define your organizational structure

   Task: Logistics_1 (Processing functional location)
   User: Brown (user name of the an agent responsible)

   The tasks and users listed above are examples.

Result
You have specified the basis for the allocation of standard tasks of the workflow template to an agent.

Implementing Task-Specific Customizing

Use
Allocation of organizational structure to the standard task 20000390 (creating functional location).

Prerequisites
Organizational structure is created.
Activating Event Receivable Linkage

Procedure

1. Choose Tools → Business workflow → Development
2. Choose Definition tools → Tasks/task groups → Display
3. Enter the standard task 20000390 (creating functional location) and choose Display
4. Choose Extras → Agent assignment → Maintain

As an example, enter the pre-defined task Logistics_1 as a possible agent of the standard task 20000390 (creating functional location)

Activating Event Receivable Linkage

Use

The CREATED event for the object type BUS1133 (lease-out) is the triggering event for the workflow template WS20000215 (connection to PM) and as such is entered as standard in the event linkage table. The linkage between the event to be triggered and the workflow template must be activated as event receiver in the SAP business workflow (development) to actually activate the workflow template.

Procedure

To activate the workflow template WS20000215 in your system:

1. Choose Tools → Business workflow → Development in the R/3 application window
   You branch into the SAP business workflow
2. Choose Utilities → Events → Event-type linkage
   You branch to the view for event-type linkage
3. Select the entry that corresponds to the combination below: object type, event and receivable type

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Event</th>
<th>Receivable Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS1133</td>
<td>CREATED</td>
<td>WS20000215</td>
</tr>
</tbody>
</table>

4. Choose Detail and select the enabled field

As an alternative you could also activate the event receivable linkage by choosing the function Events to be triggered from the WS20000215 (connection to PM) and activate the event receivable linkage there with a click of the mouse.
**Result**

When you create a rental unit, the workflow is started in the system.

**Operation and Link to Application Functions (RE-BD-RU)**

**Prerequisites**

You have made all the settings described in the section Preparation and Customizing (RE-RT-RC).

**Process Flow**

**Create rental unit**

A clerk creates a new rental unit.

The triggering event **CREATED** is generated and this starts the workflow.

**Create functional location**

The person responsible for the task **TS20000390 (create functional location)** finds a work item [Ext.] in the integrated inbox. This work item represents the standard task.

**Perform standard tasks**

The clerk can access the integrated inbox via Office → Workplace → Workflow in the main menu of the R/3 System.

If the clerk creates the functional location in the inbox, this is automatically assigned to the relevant rental unit. You can see this if you choose Extras → Assignments → Plant maintenance in the master record of the rental unit.

**Processes Before Rental End (RE-RT-RC)**

**Purpose**

As a rule, various business processes have to be initiated before a rental unit is rented again.
This workflow template gives you a sample process flow for the new rental of a rental unit (rental unit inspection, rental adjustment to rental unit, application and offer management).

The individual tasks of the workflow can be assigned to different clerks; in theory, all the tasks can be assigned to one single clerk. You can determine the criteria in your organizational structure [Ext.].

**Process Flow**

1. The workflow starts automatically when you active a **limited lease-out** with a rental end date.

   The workflow is stopped and starts from the beginning again if the following **fields** are changed after the agreement has been activated:
   - The rental end date
   - The date of notice

   If both fields are changed in the lease-out the most recent date is used as a reference date for determining when the 30-day period comes to an end.

2. The active workflow pauses until there is less than **30 days** (standard setting can be changed) left to the date set.

   From this time on, the clerk responsible receives various business processes for processing as a **work item** [Ext.]:
   a) Rental unit inspection
   b) Notice print
   c) Readjust rent to rental unit

3. If the individual tasks have been performed by this clerk, all other clerks are notified by the system to carry out the following **work items**;
   a) Release of rental collateral
   b) Notice confirmation print
   c) Application and offer management
Processes Before Rental End

- **< 30 days to rental end**
  - Carry out rental unit inspection
  - Release rental collateral
  - Print notice
  - Print confirmation of notice
  - Adjust rent to rental unit
  - Assign new tenant (applicant) to rental unit
  - Send message about new rental

**Technical Realization (RE-RT-RC)**

**Object types**

The interface between the R/3 functions and the workflow system is realized by the object technology.

The information that follows is of a technical nature: You need this information if you are interested in implementation details or want to undertake your own enhancements.

**Object type BUS1130: Lease-Out**

**Standard tasks**

The standard tasks (TS) [Ext], which SAP supplies as single-step tasks, describe basic business activities from an organizational point of view.

The standard tasks that are used here are available as “modules”, and can be used in their original form in other workflow scenarios.

**TS 20000266: Rental unit inspection (ISRE_Inspec)**
TS 20000369: Notice confirmation print (ISRE_print)
TS 20000379: Calculate rental adjustment for rental unit (ISRE_Adjust)
TS 20000370: Assign application to rental unit (ISRE_Ass_ME)
TS 20000368: Edit rental collateral (ISRE_Collat)
TS 20000374: Message for new rental (ISRE_Mail)

Roles
As a rule, roles [Ext.] are specifically defined for one particular application scenario. There are no roles defined for this workflow template.

Workflow template
The business process flow is implemented as a workflow definition in a workflow template. The workflow template is available in your R/3 System.

WS20000197: Processes before rental end

Preparation and Customizing (RE-RT-RC)

Use
In addition to the general Customizing that guarantees the proper operation of the workflow, further Customizing specific to this workflow system is necessary.
- Assign employees to the individual standard tasks.

Prerequisites
You have made the general Customizing settings required for the SAP Business Workflow.

Process Flow
1. Define your organizational structure [Ext.] for your workflow template.
2. Assign the standard tasks (TS) [Ext.] to the employees responsible for them.
Setting Up Organizational Structure

Setting Up Organizational Structure

Use
Specification of the object types involved in the workflow for details of agents or details of those responsible (See also: Organization object [Ext.]).

Procedure
To set up suitable organizational structures, implement the following steps:

1. Choose Tools → Business workflow → Organization structure
2. Define your organizational structure

As an example, an entire scenario that is to be carried out by 3 clerks could lead to the organization structure looking as follows:

Task: Notice_1 (Print)
User: Smith (user name of agent responsible)

Task: Notice_2 (inspection/release)
User: Macdon (user name of agent responsible)

Task: New rental (rental adjustment/applicant/offer management)
User: Adams (user name of agent responsible)

The tasks and users listed above are examples.

Result
You have specified the basis for the allocation of individual standard tasks of the workflow template to agents.

Making Task-Specific Settings

Use
Assigning the organizational structure to the standard tasks of the workflow template.

Prerequisites
Organizational structure is defined.

Procedure
1. Choose Tools → Business workflow → Development
2. Choose Definition tools → Tasks/task groups → Display
Activating Event Receivable Linkage

Use

The ENDDATECHANGED event for the object type BUS1130 (lease-out) is the triggering event for the workflow template WS20000197 (process prior to rental end) and as such is entered as standard event linkage table.

The linkage between the event to be triggered and the workflow template must be activated as event receiver in the SAP business workflow (development) to actually activate the workflow template.

Procedure

To activate the workflow template WS20000197 in your system:

1. Choose Tools → Business workflow → Development in the R/3 application window
   You branch into the SAP business workflow
2. Choose Utilities → Events → Event-type linkage
   You branch to the view for event-type linkage
3. Select the entry that corresponds to the combination below: object type, event and receivable type

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Event</th>
<th>Receivable Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS1130</td>
<td>ENDDATECHANGED</td>
<td>WS20000197</td>
</tr>
</tbody>
</table>

4. Choose Detail and select the enabled field
As an alternative, you could also activate the event receivable linkage by choosing the function *Events to be triggered* from the WS20000197 (process prior to rental end) and activate the event receivable linkage there with a click of the mouse.

**Result**

Every change of the fields for the rental end date (*DMIEND*) and for the notification date (*DKUEZU*) in the lease-out activates the workflow.

---

**Operation and Link to Application Functions (RE-RT-RC)**

**Prerequisites**

You have made all the settings described in the section *Preparation and Customizing (RE-RT-RC)* [Page 13].

**Process Flow**

**Change notice or date of rental end**

A clerk activates a limited lease-out (lease-out with a date of rental end).

This activates the *ENDDATECHANGED* event. This event has the following effects:

- If the system date of the computer is in a time period of < 30 days before the changed rental-end date, the workflow is started and the work items appear in the inbox of the person responsible.

**Special cases**

Additional changes in an *active lease-out* has the following effect on the workflow:

- Changes the date of notice (*DKUEZU* field) using the RE notice editing function.
- Changes the rental-end date (*DMIEND* field) by manual entry.

The workflow is stopped/is no longer to be found in the inbox of the clerk responsible. The workflow starts again automatically within the 30-day period.

- If both fields are changed in the lease-out the most recent date is used as a reference date for determining when the 30-day period comes to an end.

**Parallel processing by clerks**

The people responsible for tasks in the workflow find a [work item](#) in the integrated inbox. This work item represents a standard task.
Perform standard tasks

The clerks can access their integrated inbox via Office → Workplace → Workflow in the main menu of the R/3 System.

As a first step, the workflow sends three work items to the clerks responsible:

<table>
<thead>
<tr>
<th>Work Item ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20000266: Rental unit inspection</td>
<td></td>
</tr>
<tr>
<td>20000369: Notice confirmation print</td>
<td>The clerk can decide if he/she wants to print it or not</td>
</tr>
<tr>
<td>20000379: Calculate rent adjustment to RU</td>
<td></td>
</tr>
</tbody>
</table>

When these tasks have been performed, the second step of the process flow begins. In this step, the people responsible for the workflow tasks receive a work item in their inbox representing the tasks to be done.

<table>
<thead>
<tr>
<th>Work Item ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20000368: Edit rental collateral</td>
<td></td>
</tr>
<tr>
<td>20000370: Assign application to a rental unit</td>
<td>If this task has been performed, then another named person receives a work item</td>
</tr>
</tbody>
</table>

This branch of the workflow ends here as soon as the data is released.

<table>
<thead>
<tr>
<th>Work Item ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TS20000374: Message for new rental</td>
<td></td>
</tr>
</tbody>
</table>

WORKFLOW END