

# RE Real Estate Management: Workflow Scenarios



HELP.BCBMTWFMISRE

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## Icons

| Icon  | Meaning        |
|---|----------------|
|  | Caution        |
|  | Example        |
|  | Note           |
|  | Recommendation |
|  | Syntax         |

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## 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):

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



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 \[Ext.\]](#)

Link to PM (Plant Maintenance) (RE-BD-RU)

## Link to PM (Plant Maintenance) (RE-BD-RU)

### Purpose

You use this workflow template if you want to assign a **functional location** (PM component) to a **rental unit** (RE component).

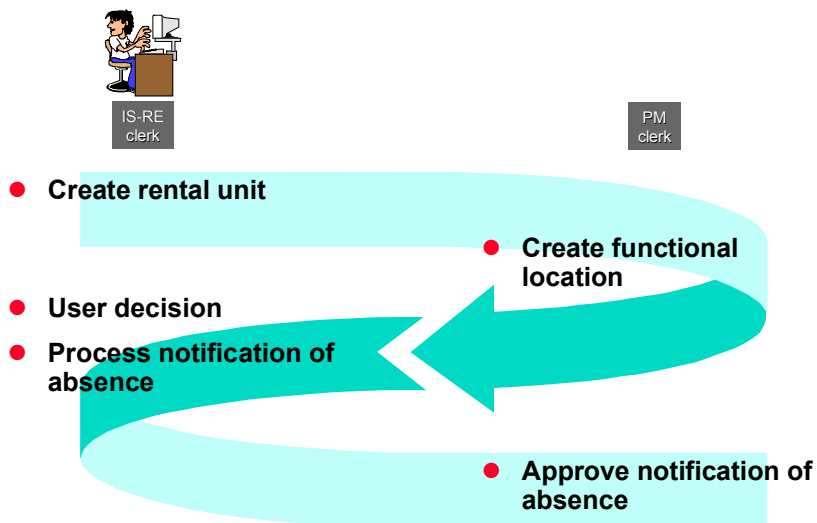
### Process Flow

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.



## 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

| Object Type | Event   | Receivable Type |
|-------------|---------|-----------------|
| BUS1133     | CREATED | WS20000215      |

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.

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

### 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.

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

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.

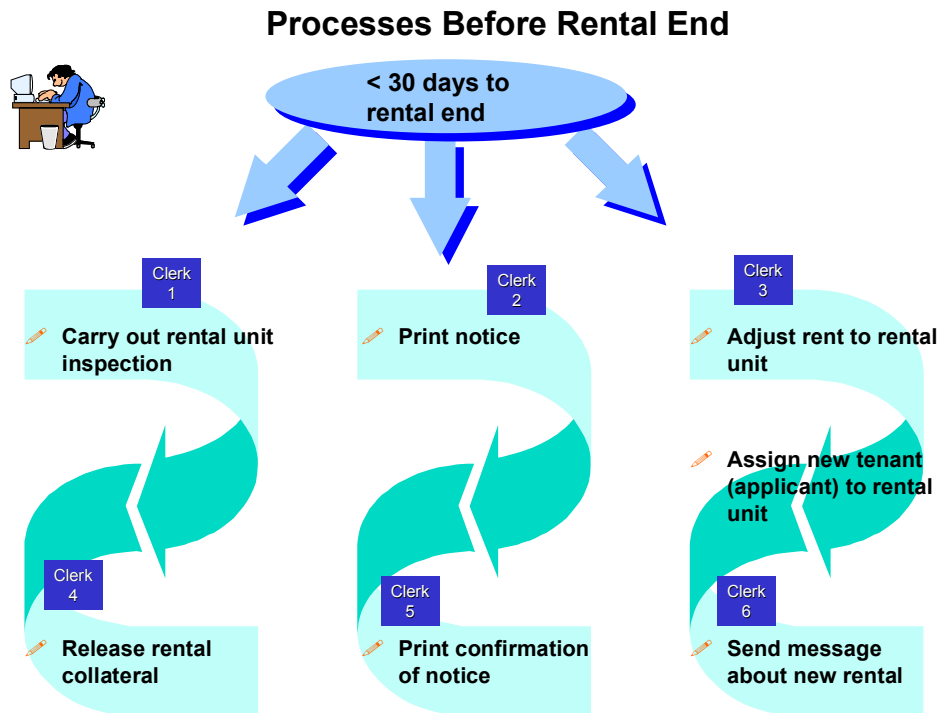
From this time on, the clerk responsible receives various business processes for processing as a [work item \[Ext.\]](#):

- 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

## Technical Realization (RE-RT-RC)



## 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, 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 20000266: Rental unit inspection (ISRE\_Inspec)

## Preparation and Customizing (RE-RT-RC)

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

3. Enter the standard task (TS) that is to be assigned to an agent and choose *Display*
4. Choose *Extras* → *Agent assignment* → *Maintain*



This assignment could look as follows:

- Standard task 20000369 (Printout of the confirmation of notice) for the task *notice\_1*.
- Standard tasks 20000266 (rental unit inspection) and 20000368 (process rental collateral) for task *notice\_2*
- Standard tasks 20000379 (calculating rental adjustment to RU), 20000370 (assigning applicant rental unit) for the task: *new rental*

## 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

| Object Type | Event          | Receivable Type |
|-------------|----------------|-----------------|
| BUS1130     | ENDDATECHANGED | WS20000197      |

4. Choose *Detail* and select the *enabled* field

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



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:

- a) Changes the date of notice (*DKUEZU* field) using the RE notice editing function.
- b) 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 \[Ext.\]](#) in the integrated inbox. This work item represents a standard task.




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

**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:

|   |  |  |
|---|--|--|
| <p><b>20000266: Rental unit inspection</b></p>  | <p><b>20000369:<br/>Notice confirmation print</b></p>  <p>The clerk can decide if he/she wants to print it or not</p> | <p><b>20000379:<br/>Calculate rent adjustment to RU</b></p>  |
| <p>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 <b>work item</b> in their inbox representing the tasks to be done.</p> |  |  |
| <p><b>20000368: Edit rental collateral</b></p> <p>This branch of the workflow ends here as soon as the data is released</p>   | <p>This branch of the workflow ends here regardless of whether it has been printed or not</p>  | <p><b>20000370:<br/>Assign application to a rental unit</b></p> <p>If this task has been performed, then another named person receives a work item</p> |
|   | <p><b>TS20000374:<br/>Message for new rental</b></p>   |  |
| <p><b>WORKFLOW END</b></p>  |  |  |