

**Topic**

Multi-step Approval Process in Investment Management

**Customer**

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**Task**

As a part of Investment Management, a complex approval procedure was to be implemented in SAP R/3. The objective was to determine the approvers on the basis of several attributes of the appropriation request generated by the requester, to inform the approvers of necessary intervention and to automate the approval process from the release to the order request.

**Implementation**

For the execution of the approval procedure, a workflow was implemented which mainly encompassed the following steps:

- To verify whether an approval is required.  
Whether a requester is allowed to approve of the entered investment amount himself was defined in the system and depends on the user profile of the requester. If this is the case, he/she will be asked directly to create a purchase requisition.
- Determination of the approver.  
On the basis of the cost center and investment amount given in the appropriation request up to 3 approvers are determined through a customer-specific customizing table.

- Notification of the approvers.  
The approvers are notified both through the SAP Business Workplace and by e-mail. By processing the respective work item, the approver reaches the appropriation request to be checked. He/she then approves or declines the request. If one of the approvers declines the request, the requester gets a work item back for him/her to be able to change the request and submit it again.
- Invitation to create a purchase requisition.  
If appropriation requests were approved in all approval phases, the requester receives the request to create a purchase requisition and to record it into the appropriation request. After completing the work item relevant to this step, another work item with the appropriation request and the purchase requisition is forwarded to a member of the purchasing department.

In order to implement the required steps, a delegation type was created referring to the business object of the appropriation request and enhanced with bespoke methods.