Applies To:

SAP Business Objects Global Trade Services 7.1 or later

Summary:

This article talks about the implementation of Case Management with SAP Global Trade Services. It describes case management features, the setups and configurations required for successful implementation of SAP GTS Case Management.

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Author Bio:

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Introduction

The Case Management document demonstrates the process of implementing SAP Global Trade Services Case Management in integration with Compliance Management services Sanctioned Party List Screening, Embargo Screening and Product Classification. This document assumes readers to have basic knowledge of SAP GTS Compliance Management Services and workflow.

Brief Overview of Case Management

SAP GTS Case Management aids in decision-making process when business partners or documents are blocked as a result Sanction Party List Screening process in SAP Global Trade Services. A case enables secure decision-making process by storing relevant documents and background information. A case can be escalated to peers or superior officers through a defined process route. Case Management also aids in the product classification functions in SAP Global Trade Services.

Functional Objects of Case Management

SAP Global Trade Services Case Management can be activated for the following functional objects.

Business Partners

If Case Management is to be implemented for blocked business partners, then it is required to activate case management for business partners.

Documents

If Case Management is to be implemented for blocked customs documents, then it is required to activate case management for customs documents.

Products

If Case Management is to be implemented explicitly for product classification, then it is required to perform case management activation for products.
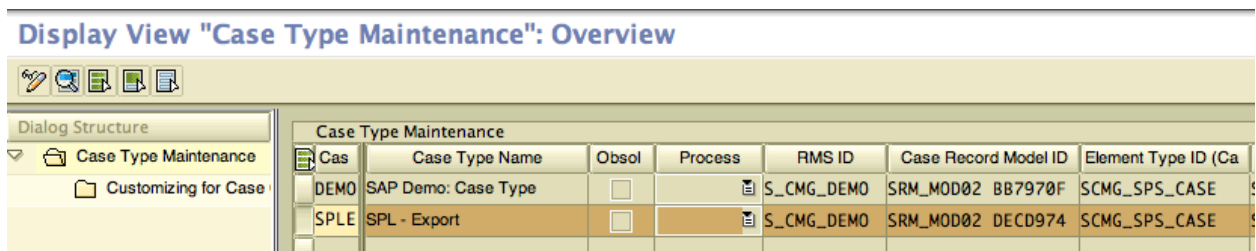
Core Components of Case Management

Case Type

The case type is the main characteristic of a case, which combines the various customizing settings (attributes, functions, statuses, text, etc.).

Create one or more case types for each of the above-mentioned functional object based on business need. However, it requires at-least one Case Type for any functional object to activate Case Management


Process Route Model

A Process route model facilitates the work items to be processed/approved in an organized way.

Process route models can be of 2 types
1) Sequential Process route
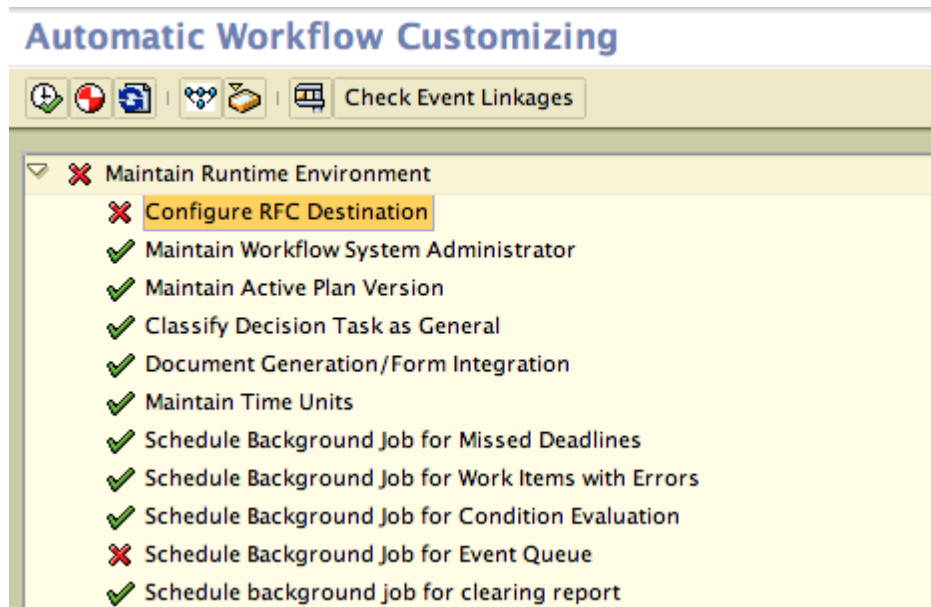
b) Parallel process route.

The work items are automatically escalated to subsequent processor once the processor of the preceding process route item has finished their work item

Maintain Process Route

Activity Area	SCMG Case Managem..
Route ID	000000000004
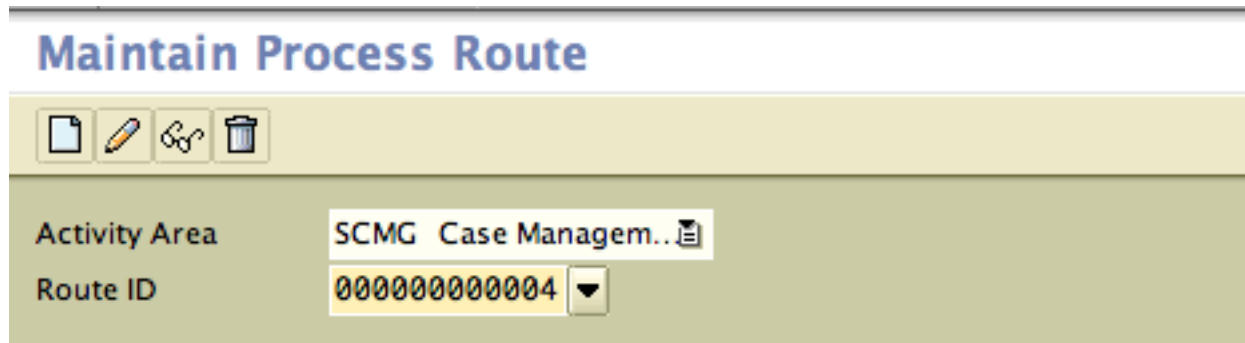
Workflow

Activation of workflow enables to trigger workflow events for SAP GTS Case Management

Carry out out basic SAP Business Workflow customizing via transaction SWU3 to setup Workflow Template and Task

Automatic Workflow Customizing

Check Event Linkages

- ▽ ✗ Maintain Runtime Environment
  - ✗ Configure RFC Destination
  - ✔ Maintain Workflow System Administrator
  - ✔ Maintain Active Plan Version
  - ✔ Classify Decision Task as General
  - ✔ Document Generation/Form Integration
  - ✔ Maintain Time Units
  - ✔ Schedule Background Job for Missed Deadlines
  - ✔ Schedule Background Job for Work Items with Errors
  - ✔ Schedule Background Job for Condition Evaluation
  - ✗ Schedule Background Job for Event Queue
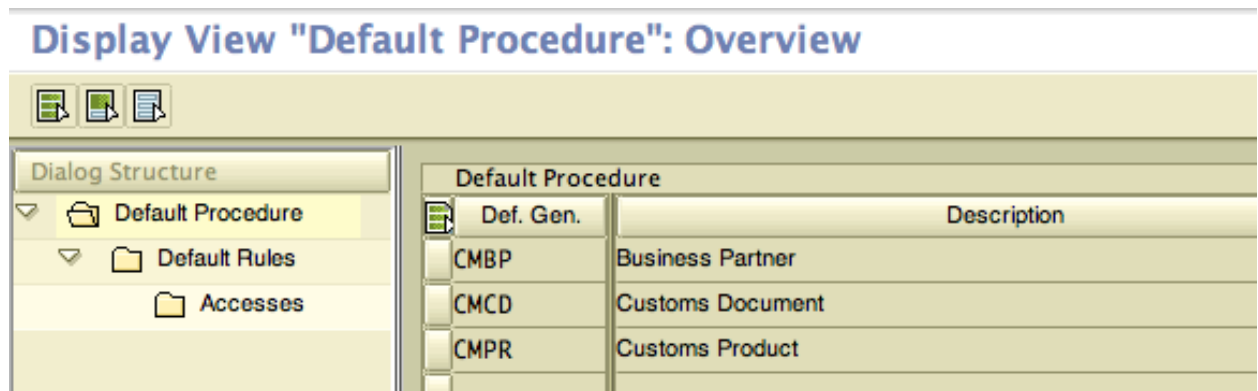 - ✔ Schedule background job for clearing report

Default Data

The data defaulting enables to determine process route for a case in SAP Global trade Services.

Setup default data parameters at the following IMG path:

Global Trade Services -> General Settings -> Case Management -> Define Default Data for Case Management

Business Usage

SAP Global Trade Services Case Management facilitates to create and process cases for the blocked partners, blocked documents and assignment of tariff numbers in the classification of SAP Compliance Management and SAP Customs Management

Blocked Document Case Management Process:
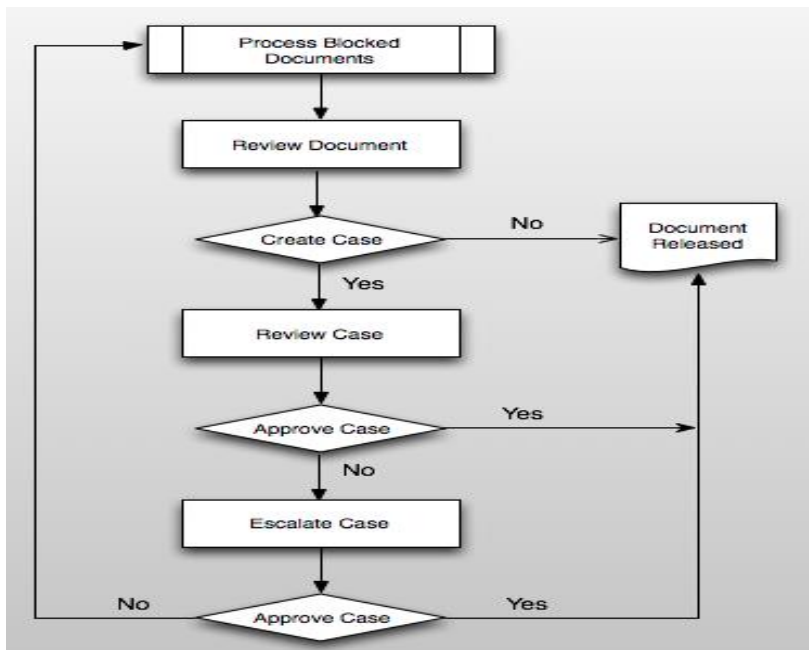
Create Case:

Select the blocked document from the blocked documents report and click on create case icon on the report tool bar then case will be created with the following pop-up message, "case created successfully"

Note: Use the transaction SCASE to manually create a case

Escalate/Approve/Reject Case:

Select the blocked document against which case exists from the blocked document report and click on display case icon on the report tool bar then the following screen will be displayed where case can be approved, rejected or updated with necessary documents to pass to superiors in decision chain for further review and approval.

Conclusion

SAP Global Trade Services Case Management tool helps to automate the process of creating cases for any blocked documents or blocked partners or classified products. It facilitates review and attachment of the supporting documents for subsequent escalation and approval processes.

Related Content

SAP GTS Online Help