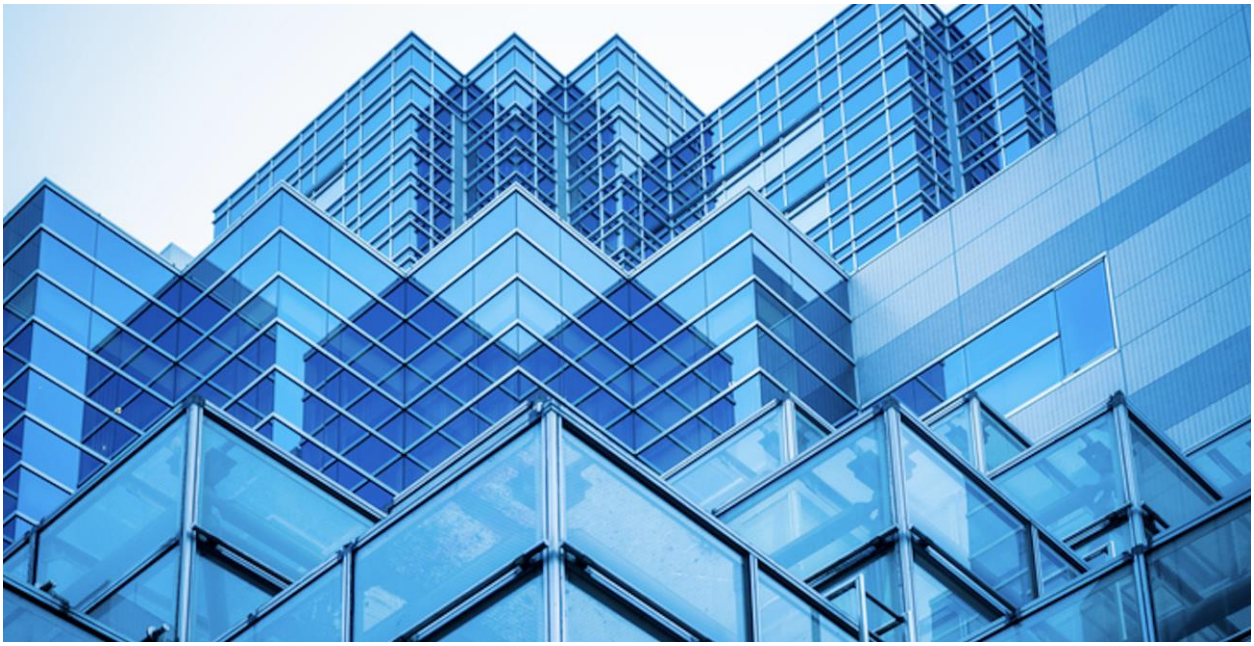

PUBLIC

SAP Build Process Automation

Adhoc Subcontracting Purchase Requisition Creation Template

Configuration and User Guide

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Change Log

Version	Date	Description
1.0.0	September 5, 2023	Document Created

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This document contains 3 sections. Each section covers different information about this template content package.

1. Overview: In this section, you will get quick overview of the use case, what are high-level components used and how the template works in nutshell. Prerequisite section provides information of different services of SAP BTP that are required to use this template.

2. Configuration Guide: It contain sections which will guide you to setup your (a) SAP BTP Account with destination, cloud connector, user roles etc., (b) SAPUI5 application via SAP Business Application Studio and (c) Import and configure the template using SAP Build Process Automation design studio and (d) SAP Work Zone to access the My Inbox or Task Center and other applications.

3. User Guide: This section provides details about different artefacts that are used in this template like process definition, decision diagram, action project details, forms, email notifications etc. to better understand how different capabilities are used in this template.

Notes:

- This documentation is not a detailed guide to setup SAP BTP services. It assumes that IT admin who is setting the content is skilled with SAP BTP environment. Configuration section must be mandatorily followed to import and configure the template.
- This template content is to accelerate your solution development. You must modify this template according to your requirements to achieve the desired business goal. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

Overview

This document provides information about setting up the SAP Business Technology Platform account to consume the SAP Build Process Automation **Adhoc Subcontracting Purchase Requisition Creation Template.** The main audience of this document are technical IT/system administrators.

Automation facilitates to create the Adhoc Subcontracting Purchase Requisition.

Features:

- The Automation must be able to automatically get Maintenance order from SAP S/4HANA system to fill the excel template and send the mail.
- Update the required additional data in excel template.
- After uploading the excel template, will be sent for the approval.
- Approver will be determined and notified for the approval.
- Automation must be able to automatically generate the log file once the uploaded file is approved and send the email with Log File

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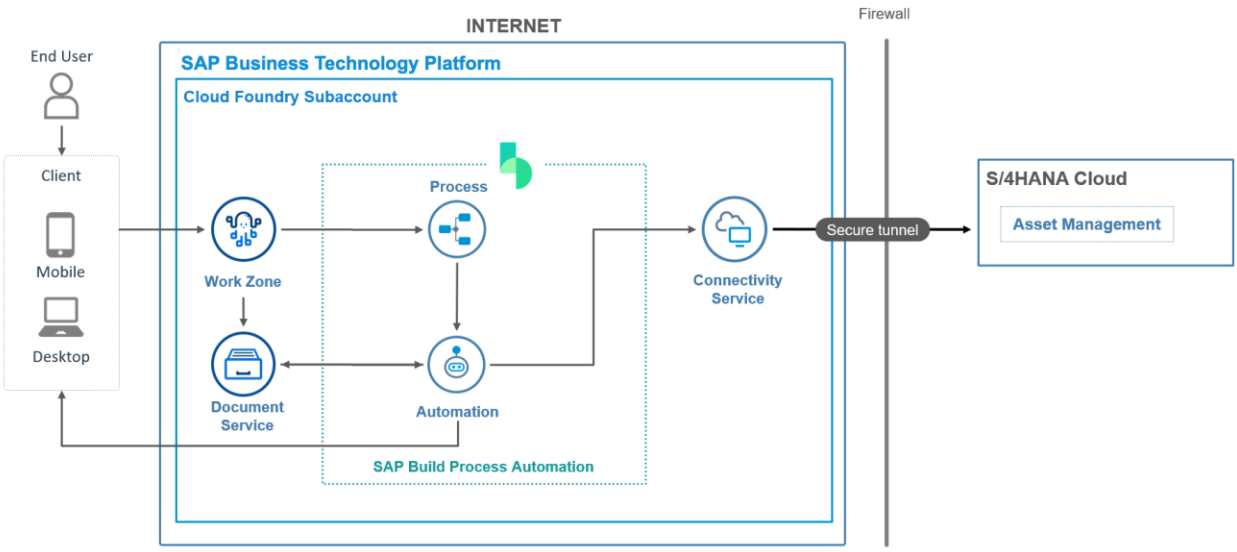
Process Flow Diagram



Steps:

1. In Start UI, fill required selection criteria and request for extraction of Maintenance Order data.
2. Read Maintenance Order data from S/4HANA system and fill excel template.
3. Send the pre-filled excel template as attachment via email.
4. Add required additional data in excel template, upload it in the Start UI and submit for approval.
5. Approver will receive a Task UI for approving the changes.
6. Once tasks are approved, maintenance order excel file is stored in predefined folder.
7. Another Automation will read these excel files and prepare API payloads for posting these changes to SAP S/4HANA.
8. POST maintenance order changes from excel files to SAP S/4HANA.
9. Create an Excel Log File and email it to the requester.

The following steps are included as a part of Adhoc Subcontracting Purchase Requisition Creation template and provide a brief overview about the process flow & features of Adhoc Subcontracting Purchase Requisition Creation template:

This package provides automation for fetching the Purchase Requisition details from S/4HANA and will be entered automatically in **Adhoc_Subcontracting_Purchase_Requisition_Creation** excel template file (Adhoc_Subcontracting_Purchase_Requisition_Creation.xlsx)

The fetched data will be saved in the excel file "**Adhoc_PR_Template_<Timestamp>.xlsx**" in the folder where you have defined in the key parameters then it allows user to update details for Purchase Requisition.

After POST call the Log report will be generated in the name of "**Adhoc_PR_LogReport_<Timestamp>.xlsx**" and will be placed in the folder "**AdhocSubCon_PR**" and notifies the requester through email about the completion with the log report attached to it.

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Prerequisites

The following SAP Business Technology Platform services are required to consume the content package. Adhoc Subcontracting Purchase Requisition Creation:

- SAP Build Process Automation to orchestrate the process.
- SAP Cloud Identity Services - Identity Authentication (Optional)
- SAP Connectivity service to establish access to SAP S/4HANA
- SAP Business Technology Platform, Cloud Foundry runtime
- SAP Work Zone, standard or advanced edition for accessing My Inbox and Process Visibility workspaces.
- SAP Business Application Studio for SAP UI5 application

Other Prerequisites

For this template to run successfully the following other prerequisites are needed

- SAP Desktop Agent 3.17 or higher
- Outlook mailbox configured on the system where the automations will run in order to send mails with attachments.

Notes:

- This package is designed only to work with the provided folder structure & input template file structures. DO NOT CHANGE any column properties and structure.
- If any changes done in the input template structure, related process & automation implementation also need to be updated to handle those changes
- You can decide the folder by the key parameters where the input template should be placed.
- The input template **Adhoc_Subcontracting_Purchase_Requisition_Creation.xlsx**
- Automation Environment variable "**ExcelTemplateFilePath**" need to fill the file path for Input Template. If Input Template placed in other folder it will throw File missing error.

	A	B	C	D	E	F	G	H	I
1	*Template: Import Maintenance Orders*								
2	*Bot Scope ID : XXX*								
3	MaintenanceOrderType	MaintenanceOrder	Equipment	MaintenancePlanningPlant	MaintenancePlant	MaintenanceOrderOperation	MaintenanceOrderSubOperation	OperationControlKey	MaintOrderOperation
4	Text	Text	Text	Text	Text	Text	Text	Text	Decimal
5	*Header*								
6	*Order Type*	*Order Number*	*Equipment Number*	*Planning Plant*	*Maintenance Plant*	*Operation Number*	*Sub Operation Number*	*Control Key*	*Operation Quar*
7									

- The input excel has 2 sheets 'Field List' and 'Orders'.

In the Orders sheet the data will be fetched from the S/4HANA and we will update few data to create or update the Maintenance Orders

In Field List sheet, mandatory fields details are updated. Please fill mandatory fields and upload input template. If mandatory fields are not filled, then Automation will throw errors.

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Configuration Guide

Adhoc Subcontracting Purchase Requisition Creation template requires SAP Build Process Automation subscription or CPEA contract. Follow the setup and configuration section

Setup Business Technology Platform Cockpit

Destination Configuration

Configure Destination to Connect to SAP S/4HANA Cloud System

Destination Property	Value
Name	<Name>
Type	HTTP
URL	<S/4HANA endpoint> Example: https://<s4system-name>- api.xxxxxxxx
Proxy Type	Internet
Authentication	Basic Authentication
Username	<Username> of the S/4HANA Communication User
Password	<Password> of the S/4HANA Communication User

Note: For SAP S/4HANA Cloud and on-premise, the API should be accessible over internet proxy type, as iRPA Automation does not support on-premise as proxy type as explained in the SAP Note.

Note: Add the following additional properties to the destination

Destination Additional Property	Value
HTML5.DynamicDestination	True
sap.applicationdevelopment.actions.enabled	True
sap.processautomation.enabled	True

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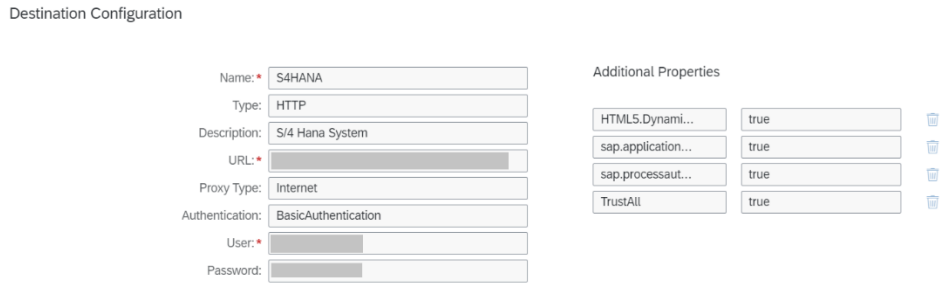

Configure SAP Build Process Automation Email Destination

Mail notifications are used in this template to send notifications to requestor, approver, and admin during different stages of the process. Follow the instructions to setup mail destination in your SAP BTP Account.

Configuring destination, see Configure a SMTP Mail Destination.

- For more information refer to Create HTTP Destinations and OAuth User Token Exchange Authentication.

Configure SAP Document Management Service

In this template, the Input Template document for Adhoc subcontracting Purchase Requisition creation and any supporting documents can be uploaded in the approval form which are then made available as attachments for review and approval to the respective participants. To upload the document from the form, you will need SAP Document Management Service or equivalent CMIS repository and a corresponding destination in SAP BTP to connect to the repository.

- Follow the instructions to configure SAP Document Management Service for Attachments
- Add service instance and service key (follow this) and repository (follow this) to Configure the Destination
- Configuring destination, refer Configure SAP Document Management Service Destination

Note: The destination needs to be created with **sap_process_automation_document_store** name.

IMPORTANT NOTE: This template content is to accelerate your solution development. You can modify this template according to your own requirements to achieve your business goals. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

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User Roles Configuration:

To access this template, the business user will need these roles:

Role Name	Purpose
Process Automation Developer	To fully use this content package, you need to have an active user entitled to this role to use SAP Build Process Automation
TaskCenterAdmin	Permission to execute calls to the Connector Status API and monitor configured destinations and running background jobs.
ProcessAutomationParticipant	To execute (like accessing MyInbox, running the automations, etc.) this content package, you need to have this role assigned to the respective user.
ProcessAutomationAdmin	To perform process admin activities like accessing monitoring application etc., you need to have this role assigned to the respective user.
Business_Application_Studio_Administrator	To fully use this content package, you need to have an active user entitled to this role to use Business Application Studio
Business_Application_Studio_Developer	To fully use this content package, you need to have an active user entitled to this role to use Business Application Studio
Business_Application_Studio_Extension_Deployer	To fully use this content package, you need to have an active user entitled to this role to use Business Application Studio

For more information about SAP Build Process Automation roles, see Authorizations

Setup Communication

To run this template, you must have a communication user, create communication arrangements between the communication user and the following communication scenarios, and assign those communication arrangements to a communication system.

Steps to Create Communication System and Communication Arrangement are available in below documentation links:

How to Create Communication Systems | SAP Help Portal

How to Create a Communication Arrangement | SAP Help Portal

Configuration and Role Details for accessing "Communication Systems" application.

Configuration and Role Details for accessing "Communication Arrangements" application.

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List of communication scenarios to be configured.

Communication Scenario	Related API
Maintenance Processing Integration(SAP_COM_0397)	Overview | Maintenance Order | SAP Business Accelerator Hub
Asset Management Master Data Integration(SAP_COM_0395)	Overview | Equipment | SAP Business Accelerator Hub
An additional communication scenario assigned with custom inbound services	You need to create custom CDS views in your SAP S/4HANA Cloud system, expose them as external APIs, and then create a communication scenario and add these inbound services to this scenario. For details, see next section.

Setup Build Process Automation

Standard automation packages released by SAP will be available at the SAP Build Store

Import Content

This template can be downloaded from the Store:

1. Navigate to the Store in your SAP Build Process Automation account.
2. Select the Project Type filter as “process automation”.
3. In the Search bar type “**Adhoc Subcontracting Purchase Requisition Creation**
4. Select the “Create from Template” button to add the template into your lobby.
5. After successfully adding the template, navigate back to the lobby to find the “Adhoc Subcontracting Purchase Requisition Creation” template available for use.

Configuration & Modification

Once you have added the content to your lobby, you will find the project in your project list. Adapt the content template based on your requirements, and then release and deploy from the Lobby.
In case any enhancement needs to do then follow the below reference links.

Create an Automation

https://help.sap.com/docs/build-process-automation/sap-build-process-automation/create-automation-process-automation

Create a Business Process

https://help.sap.com/docs/build-process-automation/sap-build-process-automation/create-business-process

Create a Forms

https://help.sap.com/docs/build-process-automation/sap-build-process-automation/create-form

Create a Decision

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https://help.sap.com/docs/build-process-automation/sap-build-process-automation/create-decision

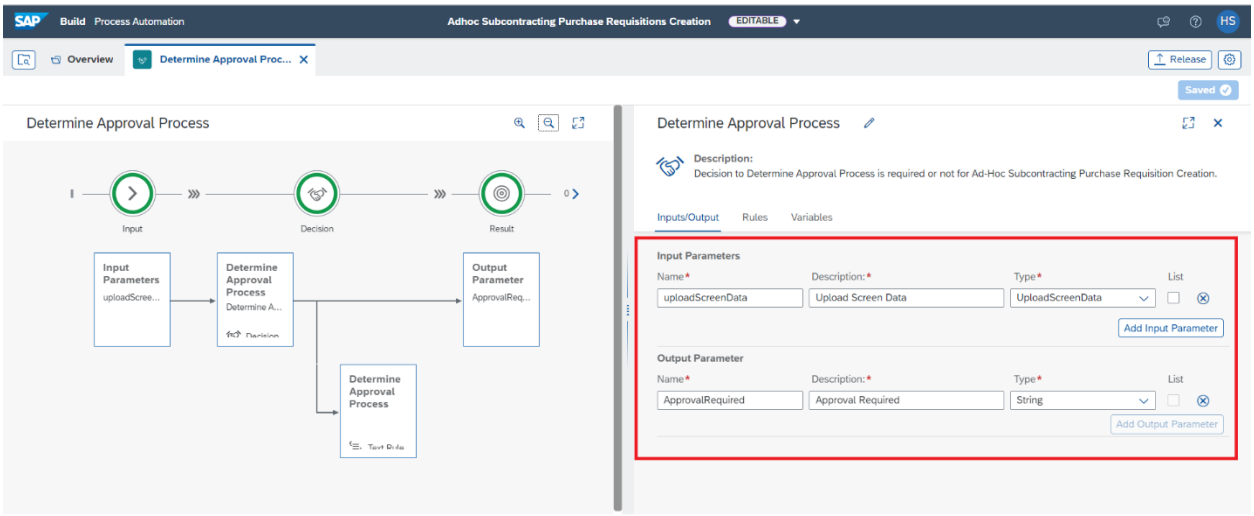
Create a Datatype

https://help.sap.com/docs/build-process-automation/sap-build-process-automation/create-data-type-process-automation

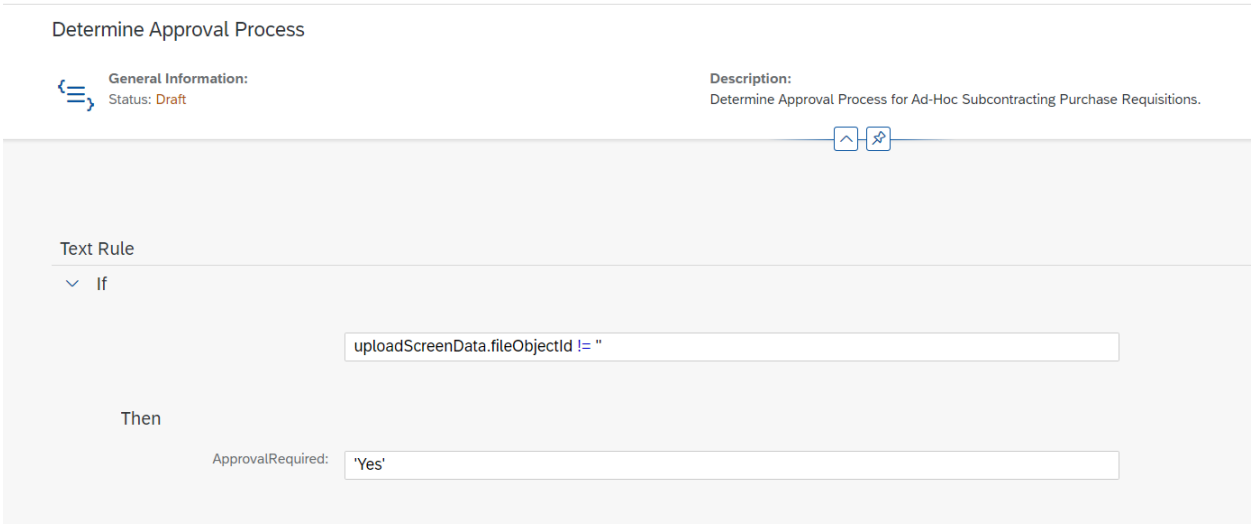
Configure Decisions

We have decisions in this template.

Determine Approval Process – This decision is used to determine whether the approval is required or not for maintenance orders. If required, it will group the maintenance orders and send for the approval else it will create or update the Maintenance Orders.



Defined the text rule as, if the fileObjectId is not empty the approval is required else approval is not required.



Determine Approver - This decision is used to determine the approver email address where the approval task for the grouped Maintenance Orders will be sent.

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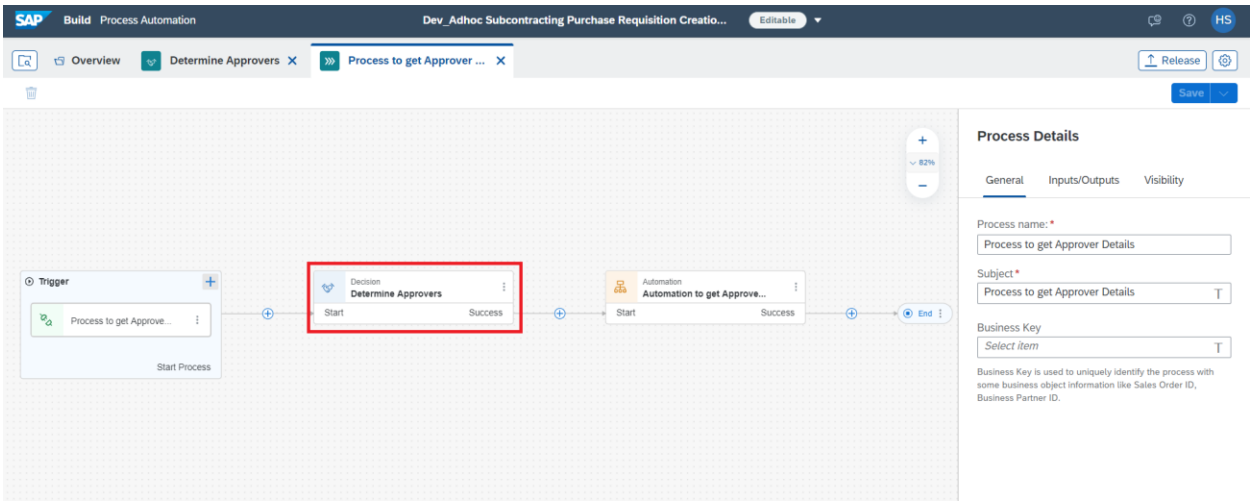
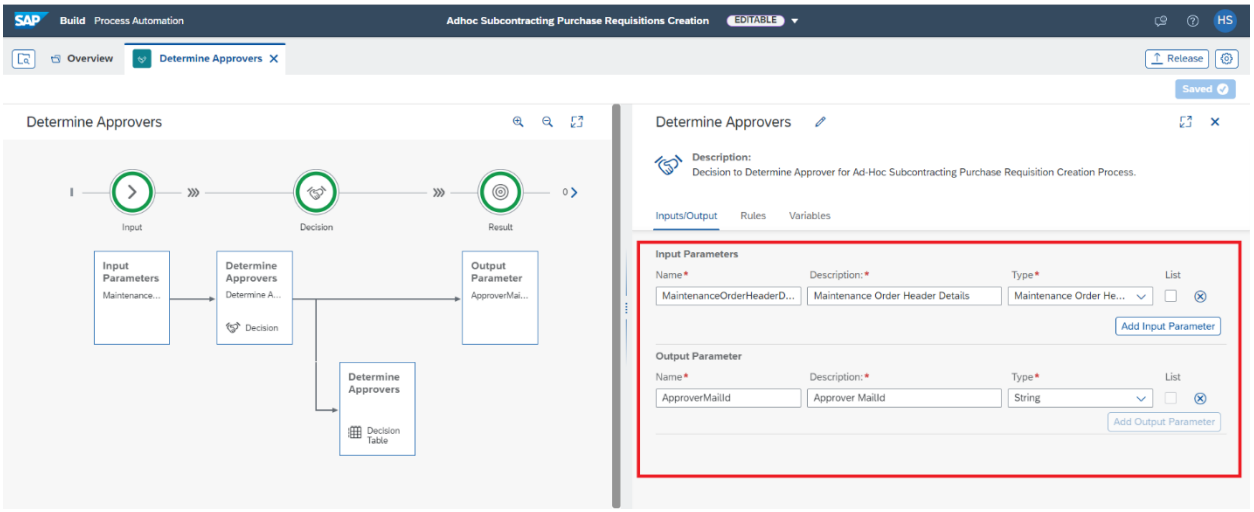


These decisions must be modified for conditions and result values based on your business policies and requirements. To modify the decision:

- In process editor, double click to open the Decision.
- Select the rule from the decision diagram.



The attributes used in the decision rule can be selected as per requirement.

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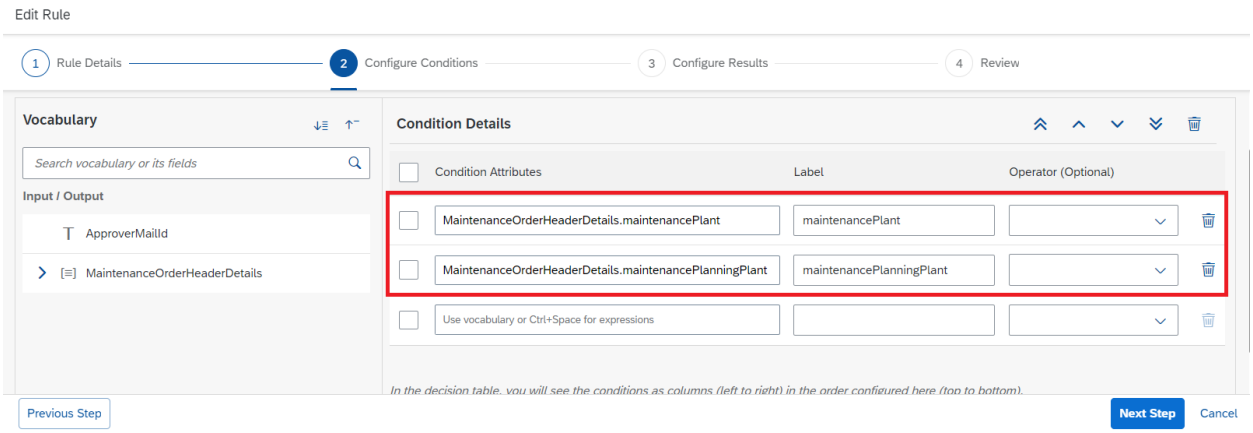
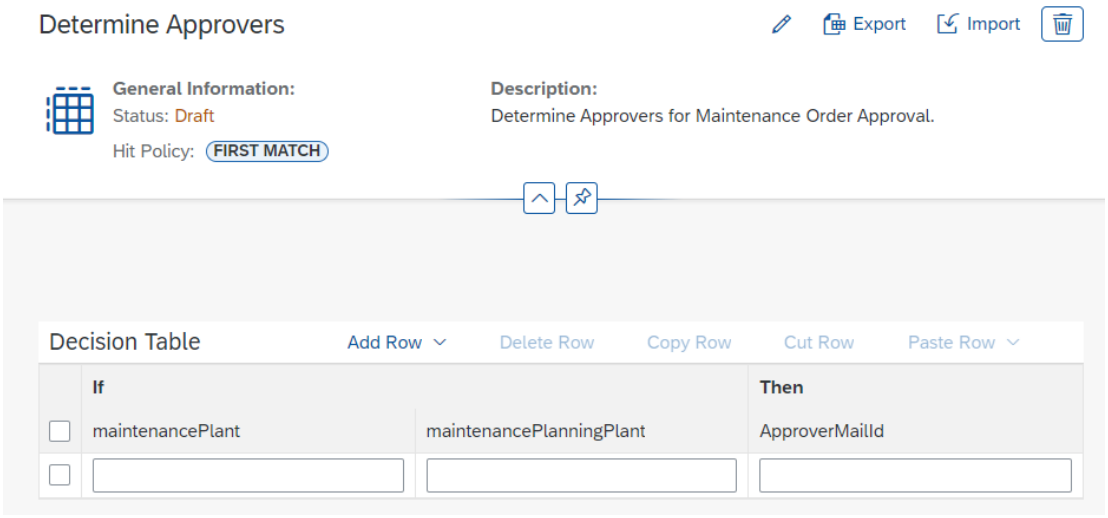


- Edit the rule to add more rows or update existing values.



Configure Email

Email notifications are sent to requestor and approver at different places during process and task execution. All the email artefacts in the process have default template body which can be changed.

To update the email body content, do the following:

- Select the mail artefact in the process.
- From the **Settings** in the right-side panel, check the **Mail Header** to confirm the **To** field (or email recipients) and the **Subject**. You can adjust the subject and recipient, if needed.
- You may also add someone in **CC**.
- Click to '**Open Mail Body Editor'**.

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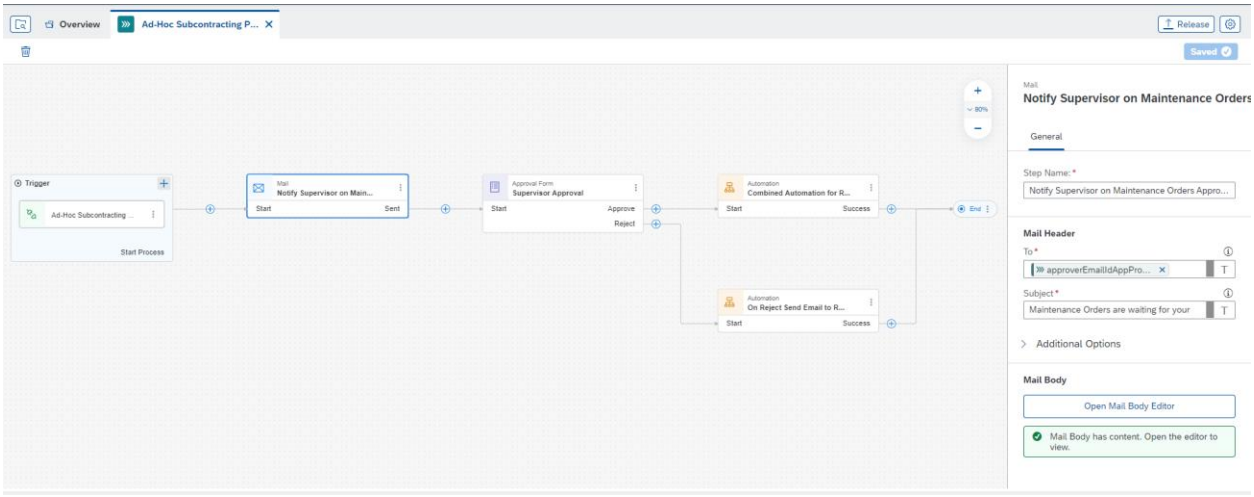

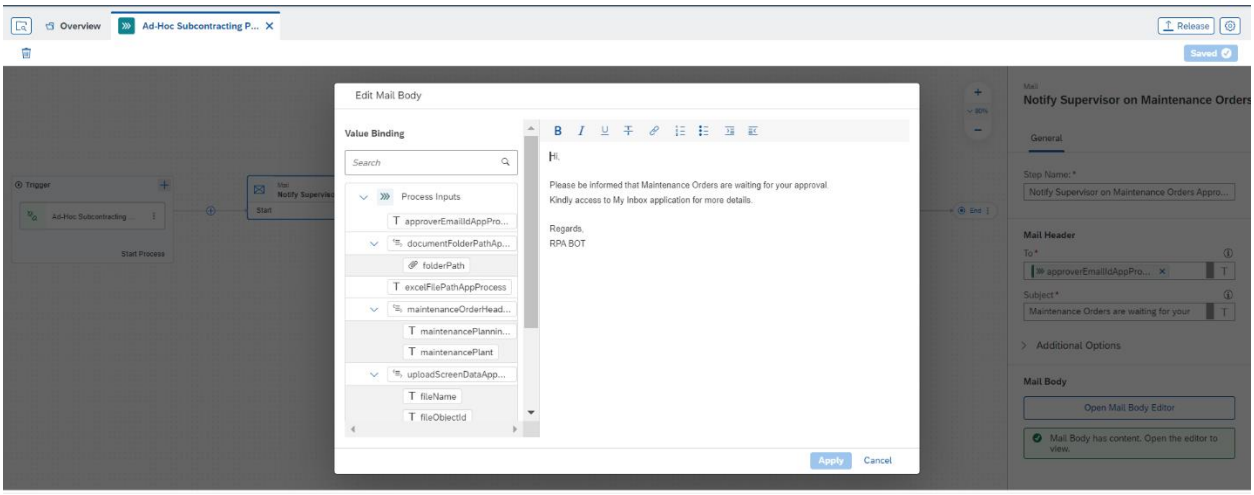

- The mail editor allows you to write and adjust text according to your needs. You can also reuse information that has been collected during the process. If you want to use additional process context data, you can simply drag the fields from the left menu to the editor on the right.

For more information on email configuration and text, refer to the below link:

https://help.sap.com/docs/build-process-automation/sap-build-process-automation/add-mail-notifications-to-process?q=email%20body

Configure Process Visibility (Optional)

This template has a pre-built dashboard with default business KPIs that can be used by the business users to track end-to-end processes in real-time. You can add more KPIs based on your business requirements.

To configure the visibility scenario:

− Open project '**Overview'** tab

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− Select **Ad-Hoc Subcontracting Purchase Requisition Approval** Process (Visibility Scenario)
− Explore and change Phases, Attributes, Performance Indicators etc.

Follow the documentation to learn how to configure process visibility scenario

In case you don't have access to the process visibility workspace where you can access the newly created dashboards, please contact your IT admin.

Note: You might get error popup (Highlighting invalid status of visibility scenario) during package deployment after any modification in the package. To resolve this issue, you might need to delete & add the required process in the visibility scenario as the last modification in the package before package release & deployment.

Configure Destination Settings

Actual destinations that are created in SAP BTP cockpit will be required when you deploy the process. This actual destination will be mapped the destination environment variables during deployment.

For this package following destination needs to be configured in the SAP BTP cockpit:

- **S4HANA_CLOUD**

Note: Above destination names have been configured in BTP but can be named as per the project requirement.

To configure destination,

- click on **Settings.**
- Select **Destinations** from the left panel.
- Click **New Destination**

Select these destinations to be added (Created in the above section). For more information and screen shots, please refer to the below link:

- https://help.sap.com/docs/build-process-automation/sap-build-process-automation/manage-destinations?q=destination%20setting

Release and Deploy the Process

After configuring your process, it's time to publish, test and run it. To run a process, you must first release and deploy it.

Release - This locks the version of your process, meaning that no further edits can be made to that version. At this stage, the process can't be run and isn't available to participants yet.

To release a version of your process,

- First ensure that the status is listed as 'Editable'.
- Then click 'Release.'

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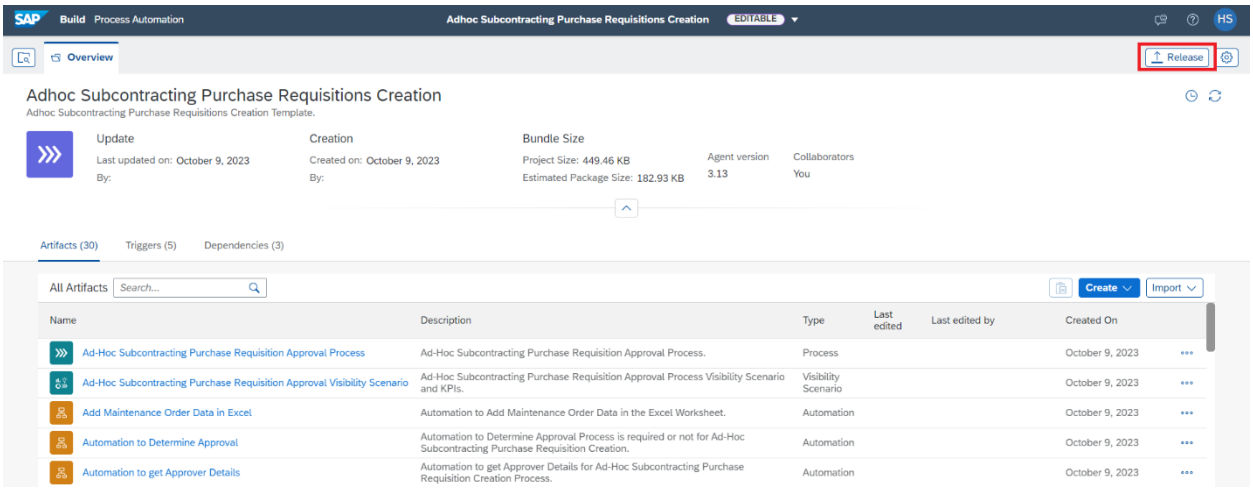

If this is the first time you've released the process, a version labelled 1.0.0 is released. For subsequent releases, you're prompted to select a version type before the process is released.

Deploy – This takes a released version of a process and enables it to be actively run and monitored. A deployed version of this approval process unlocks the request form, allowing participants to submit requests and the approvers to view items in their inbox.

To deploy a released version of your process,

- First ensure that the status is listed as 'Released'.
- Then click ''Deploy'.

To deploy your project, you will be prompted to provide a Destination as an environment variable. Select the destination from the drop-down.

- downloadFilePath: File path where the log files are downloaded.
- Destination: Destination to connect to S/4HANA System
- DMS_Destination: Destination to connect to Document Management Service
- ExcelTemplateFilePath: The path where the Input Template is placed.

Note: If you do not map your destination environment variable with actual SAP BTP destination during deployment, then the process will enter Erroneous state when it
tries to connect to the external system.

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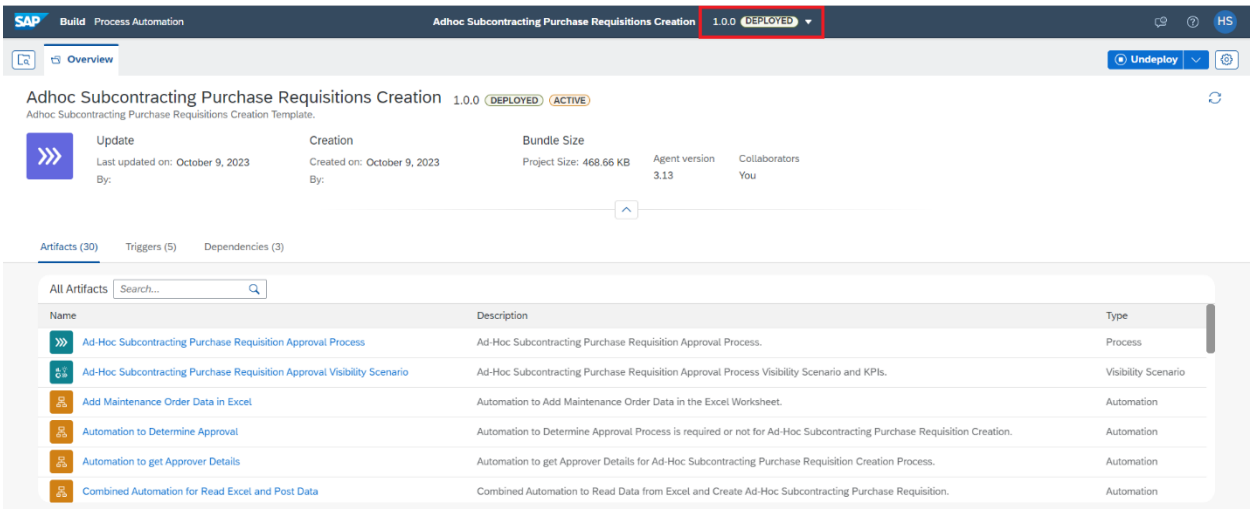
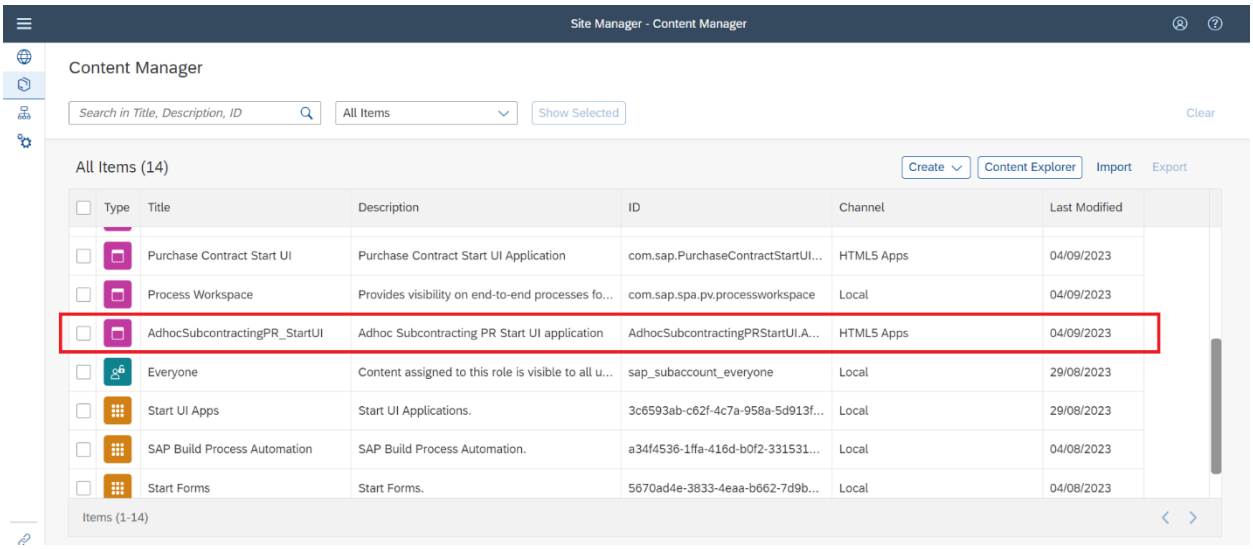


Configure SAP Build Work Zone

Configure SAP Build Work Zone to access the start UI for this automation. Please refer help documentation Configuring SAP Build Work Zone

Once SAP Build Work zone is configured, perform the following steps to create the tile for the start UI:

1. Open Content Manager and click on the HTML5 Apps
2. Select the AdhocSubcontractingPR Start UI from the list of apps and choose Add.



3. Add the relevant roles to the user. The Adhoc Subcontracting Purchase Requisition application start UI will be available to the user as a tile in the launchpad.

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User Guide

Capabilities

The following are the capabilities of this automation template:

Icon	Type	Name	Description
	Automation	Add Maintenance Order Data in Excel	Automation to Add Maintenance Order Data in the Excel Worksheet.
	Automation	Automation to Determine Approval	Automation to Determine Approval Process is required or not for Adhoc Subcontracting Purchase Requisition Creation.
	Automation	Automation to get Approver Details	Automation to get Approver Details for Adhoc Subcontracting Purchase Requisition Creation Process.
	Automation	Combined Automation for Read Excel and Post Data	Combined Automation to Read Data from Excel and Create Adhoc Subcontracting Purchase Requisition.
	Automation	Create Folder for DMS	Automation to Create a Folder in Document Management Service to Upload Excel file.
	Automation	Create Folder for Excel Files	Automation to Create Folder only if the folder doesn't exist in the folder path already.
	Automation	Create Folder for Log Files	Automation to Create Log Folder to Store Log files.
	Automation	Download Document from DMS	Automation to Download Document from Document Management Service.
	Automation	Generating Excel Log file for PR Maintenance Orders	Automation to Create Excel Log Report for Adhoc Subcontracting Purchase Requisition Creation Process.
	Automation	Get Maintenance Orders from API	Automation to Get Maintenance Orders Data from API.
	Automation	On Reject Send Email to Requestor	Automation to Send Email to Requestor about the Rejected Maintenance Orders.
	Automation	Prepare Payload and Post the data	Automation to Prepare Payload and Create Adhoc Subcontracting Purchase Requisition.
	Automation	Process Document from DMS	Automation to get the Excel from Document Management Service and read the Data from Excel to Process further.
	Automation	Read the Excel and Get Data	Automation to Read Excel and Get Data from it.
	Automation	Sending Email with Input Template	Automation to Send Input Log Excel to the Requestor via Email.

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	Automation	Upload Document in DMS	Automation to Upload the Excel in Document Management Service.
	Process	Ad-Hoc Subcontracting Purchase Requisition Approval Process	Process to get the approval for the Ad-hoc Subcontracting Purchase Requisition
	Process	Process to Create Ad-Hoc Subcontracting Purchase Requisitions	Process to Create Ad-Hoc Subcontracting Purchase Requisition
	Process	Process to Determine Approval	Process to Determine Approval
	Process	Process to get Approver Details	Process to get Approver Details
	Process	Process to get Maintenance Order Details	Process to get Maintenance Order Details
	Form	Supervisor Approval	Supervisor Approval Form for Adhoc Subcontracting Purchase Requisition Creation.
	Decisions	Determine Approval Process	Decision to Determine Approval Process is required or not for Adhoc Subcontracting Purchase Requisition Creation.
	Decisions	Determine Approver	Decision to Determine Approver for Adhoc Subcontracting Purchase Requisition Creation Process.
	Data type	Document Folder Path	Document Folder Type Data Type to Display Excel in Approval Form.
	Data type	Maintenance Order	Data Type for Maintenance Order Details.
	Data type	Maintenance Order Header Details	Data Type for Maintenance Order Header Details.
	Data type	ReadScreenData	Data Type for the Inputs from Read Screen UI.
	Data type	UploadScreenData	Data Type for the Inputs from Upload Screen UI.
	Visibility Scenario	Adhoc Subcontracting Purchase Requisition Approval Visibility Scenario	Adhoc Subcontracting Purchase Requisition Approval Process Visibility Scenario and KPIs.

This content package will enable SAP ERP customers to automate the creation of Adhoc Subcontracting Purchase Requisition in SAP S/4HANA System. The purpose of this technical specification is to outline the process and requirements for creating the purchase requisition. This specification also includes the necessary table and field mappings within SAP, as well as the latest API to be used to create Adhoc Subcontracting Purchase Requisition. Automation will be triggered once the user uploads the excel template at the start UI.

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Automation

Get Maintenance Orders from API:

This automation is used to fetch existing Maintenance Orders data from S/4HANA.

API	API Path	Purpose
API_MAINTENANCEORDER;v=2	/sap/opu/odata/sap/API_MAINTENANCEORDER/MaintenanceOrderOperation?$format=json&$expand=to_MaintenanceOrder&$filter=OperationControlKey eq 'PM01' and IsMarkedForDeletion eq false&$select=MaintenanceOrder,MaintenanceOrderOperation,MaintenanceOrderSubOperation,OperationControlKey,MaintOrderOperationQuantity,MaintOrdOperationQuantityUnit,OpExternalProcessingPrice,OpExternalProcessingCurrency,OperationSupplier,to_MaintenanceOrder/MaintenanceOrder,to_MaintenanceOrder/MaintenanceOrderType,to_MaintenanceOrder/MaintenancePlanningPlant,to_MaintenanceOrder/Equipment,SystemStatusText,to_MaintenanceOrder/CreatedByUser&$filter=<selection criteria will be filled>	Get the Maintenance Order data based on the selection criteria

Process Document from DMS:

This Automation will process the excel Document from Document Management Service then read and get the data by “Read the Excel and Get Data” then it will start the process “Process to Determine Approval”

Automation to Determine Approval

This Automation will group the maintenance orders with the Maintenance Plant and Maintenance Planning Plant to send for the approval and start the process “Process to get Approver Details”.

Automation to get Approver Details

This Automation will send the grouped data and will check whether the approval is required or not. If approval is required it will execute the “Create Folder for DMS”, “Upload Document in DMS” sub automations and start the process “Ad-Hoc Subcontracting Purchase Requisition Approval Process”. Else it will execute the automation “Combined Automation for Read Excel and Post Data”.

Combined Automation for Read Excel and Post Data

This Automation will read the excel file by sub automation “Read the Excel and Get Data” and post the data to S/4 HANA and it will generate the log file for the posted data by executing the sub automation “Prepare Payload and Post the data”

API	API Path	Purpose
API_MAINTENANCEORDER;v=2	/sap/opu/odata/sap/API_MAINTENANCEORDER/MaintenanceOrderOperation(MaintenanceOrder='" + Input[1] + "',MaintenanceOrderOperation='" + maintenanceOrderOperation + "',MaintenanceOrderSubOperation='" + a + "')	PATCH API to update the maintenance orders

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Process

Ad-Hoc Subcontracting Purchase Requisition Approval Process:

This process will notify the approver to approve the Maintenance order Request with the Approval Process Form and Automate the Log Files when it’s approved else it will send the reject email notification to the requestor.

Process to Create Ad-Hoc Subcontracting Purchase Requisitions:

The process "Process to Create Ad-Hoc Subcontracting Purchase Requisitions" will trigger via UI. This process will call the "Process Document from DMS” Automation to read data from SAP Document Management Service.

Process to Determine Approval:

This Process calls the "Determine Approval Process" decision to check whether approval is Mandatory or optional for this Create/Update Maintenance Orders.

Process to get Approver Details:

This Process will determine the approver by “Determine Approver” decision then it will execute the “Automation to get Approver Details”.

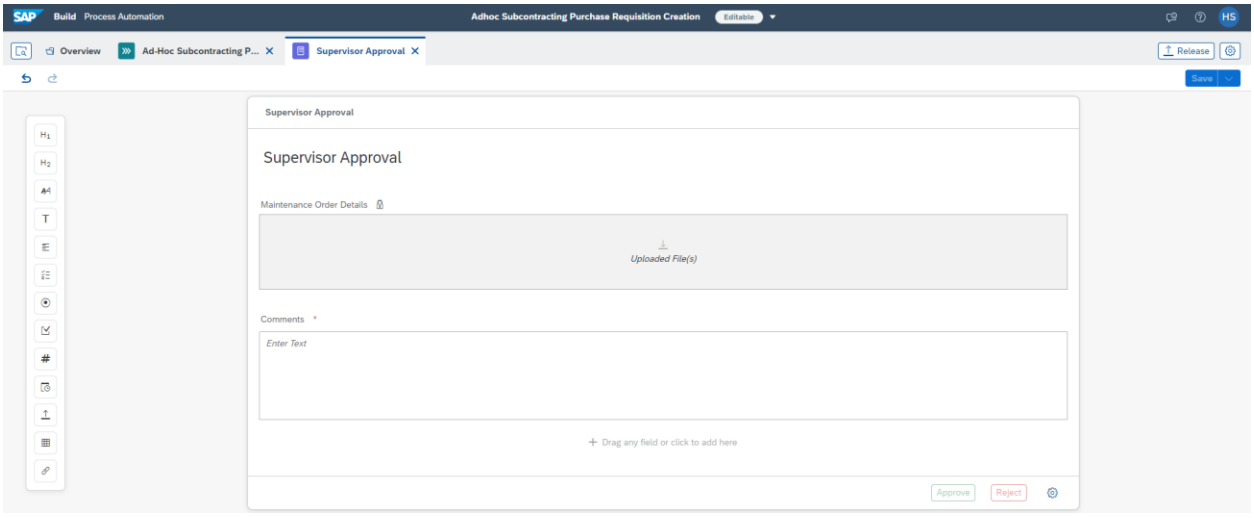
Process to get Maintenance Order Details:

In Start UI whenever User triggers the Read Maintenance Order request after filling Selection Criteria, this Process will be triggered to get all the Maintenance Order that matches based on the selection criteria.

Forms

Supervisor Approval

- Supervisor Approval for Maintenance Orders Request.



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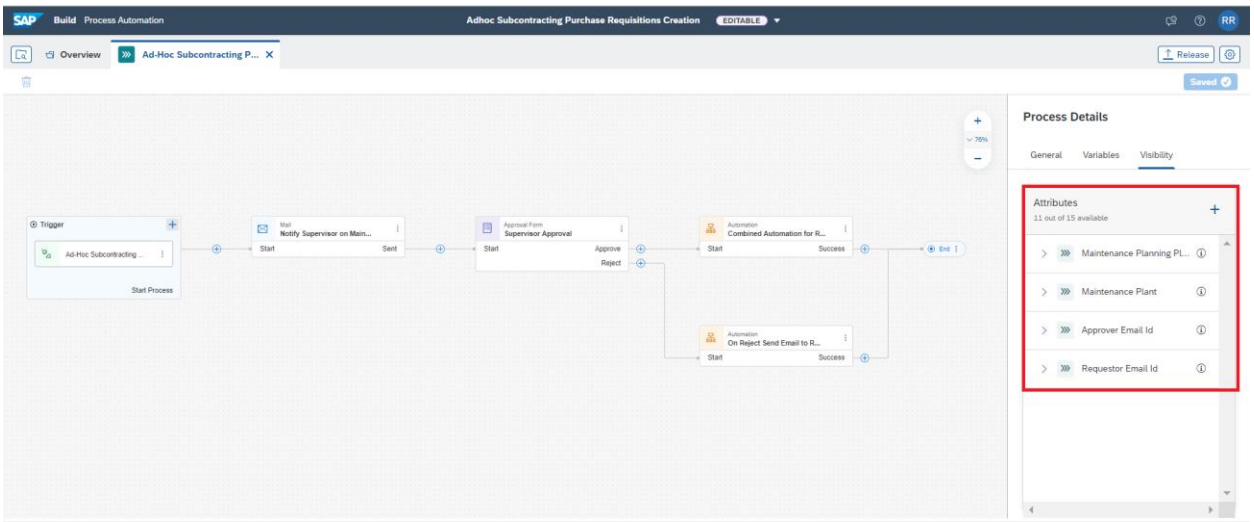
Process Visibility Scenario

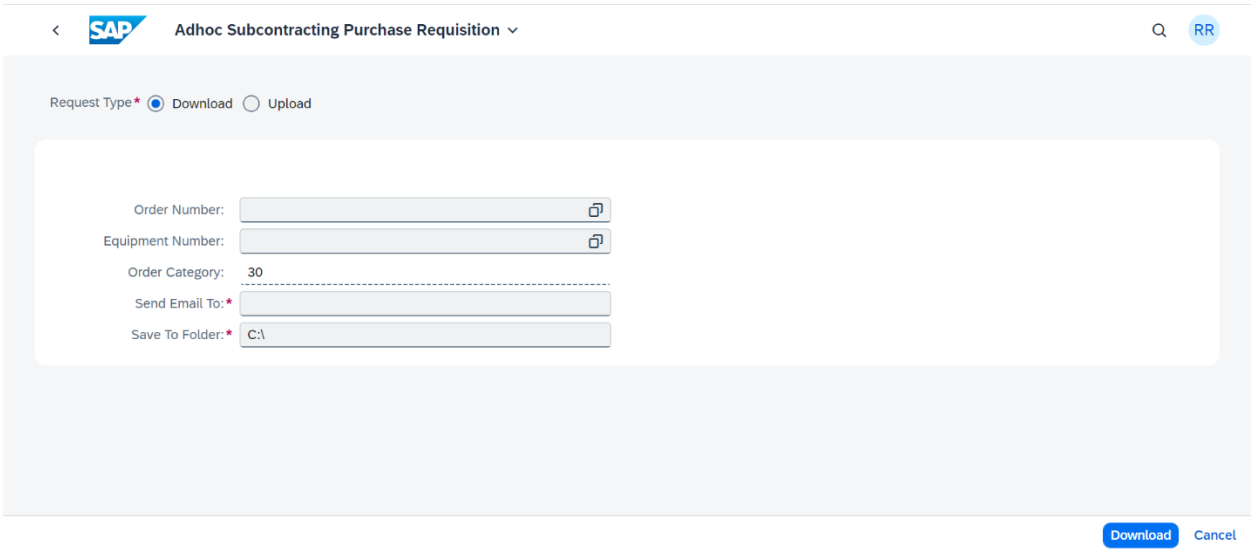
The visibility scenario is a dashboard which allows business users to track relevant process KPIs and statuses. A default dashboard is provided with this template, and it can be customized by selecting attributes from your process which you want to track in the process dashboard. You can read more here



User Interface

Start UI

Users can select from F4 Help or can enter data manually for filter criteria then click “Download” button to trigger Process to read maintenance order data and download in Save To Folder path.



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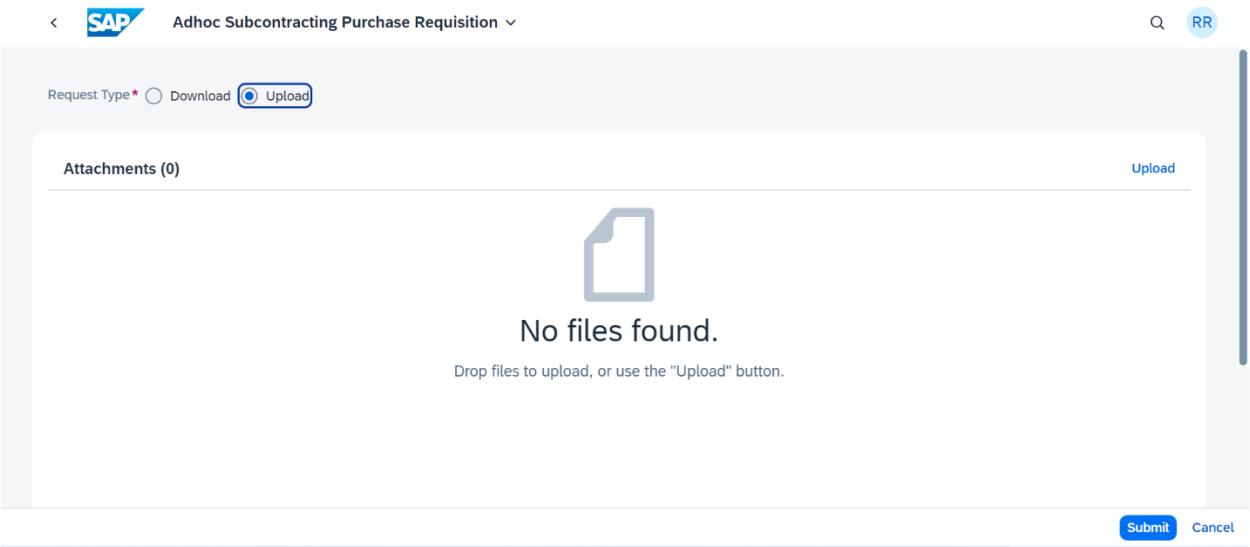
Choose “Upload” Request Type and upload the Maintenance order data in Input Template and click “Submit” button. It will trigger Approval process to update Adhoc subcontracting Purchase Requisition.

Note: Multiple files upload is not supported.



Support

There is no support available for template content. If you experience general issues with SAP Build Process Automation, raise an incident via SAP Support Portal on **BPI-PA-BPC** component.

This template can be modified using SAP Process Automation. For example: add business rules to determine the approver based on a certain business logic or add an action to post collected information to backend SAP system. Refer Help Portal for more details.

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