

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

# Content Guide

Business Partner Approval Process  
Sample Content for SAP Build Process Automation

Version: 1.0

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| Version | Date         | Description      |
|---------|--------------|------------------|
| 1.0.    | Jan 03, 2022 | Document created |

## INTRODUCTION

## PURPOSE

Business Partner creation approvals are often still done in a manual and distributed way across different communication channels and tools which leads to increased processing times and a lack of transparency.

This sample content helps users to get started in streamlining and digitalizing a process for requesting and approving the creation of new business partners to speed up the process and increase transparency.

## DESCRIPTION

Included in this sample process is the following:

- Sample forms used to collect relevant information
- A condition to root requests over a specified value
- An approval form to review the information and decide for approval
- Confirmation and rejection mails to notify the requester about the decision

This sample content contains the following elements as key artifacts:

| Type                                                                                         | Name                                               |
|----------------------------------------------------------------------------------------------|----------------------------------------------------|
|  Process  | BusinessPartnerCreationApproval_withForms          |
|  Process  | BusinessPartnerCreationApproval_withAction         |
|  Process  | BusinessPartnerCreationApproval_withAPITrigger     |
|  Process  | BusinessPartnerCreationApproval_withDecisions      |
|  Process  | BusinessPartnerCreationApproval_withValueHelp      |
|  Form     | Approve Business Partner Creation                  |
|  Form     | Business Partner Creation Approval with Value Help |
|  Form     | Business Partner Creation Confirmation             |
|  Form     | Business Partner Creation Form                     |
|  Form     | Business Partner Creation Form Value Help          |
|  Form     | Business Partner Creation Rejection                |
|  Form     | Enrich Request with Address Data                   |
|  Decision | SetSearchTerm                                      |

|                                                                                   |                     |                     |
|-----------------------------------------------------------------------------------|---------------------|---------------------|
|  | Data Type           | Business Partner    |
|  | Visibility Scenario | BUP_Visibility_SDD1 |

## REQUIRED PERMISSIONS

To fully use this content package, you need to have an active user entitled to use SAP Build Process Automation with the role **ProcessAutomationDeveloper**.

For more information about SAP Build Process Automation roles, see [Authorizations](#).

## IMPORTANT NOTE

This sample content is not meant for productive usage but to serve as quick start and inspiration for you as a user to modify it according to your own needs.

To use this sample content, you need to have basic knowledge and understanding of SAP Build Process Automation and its possibilities.

## Support

Note: Please be advised that since this content package is sample content only, there is no support available.

If you experience general issues with SAP Build Process Automation or its functionalities, we suggest you raise a request through the SAP Support Portal, using the component [BPI-PA].

## CONFIGURATION AND MODIFICATIONS

Once you have added the content to your lobby, you will find the project in your project list. Before you can deploy and use it, you need to configure it to adjust it to your own needs.

### Access the Sample Process

The sample capital expenditure approval process can be accessed from the **SAP Build Lobby**. This lobby provides an overview of your available SAP Build projects, whether created by you or those you are given access to.

Click on the project named **Business Partner Approval Process - Sample**:

The screenshot shows the SAP Build Lobby interface. At the top, there's a navigation bar with 'Lobby', 'Store', 'Monitor', and 'Settings'. Below the navigation bar, there are four quick start cards: 'Create a Change and Innovation Approval Process', 'Create an Invoice Approval Process', 'Create a Sales Order Approval Process', and 'Browse Content'. Below these cards, there's a section for 'All Projects (28)' with a search bar and a table of projects. The table has columns: Name, Versions, Type, Last Accessed, and Members. The project 'Business Partner Approval Process - Sample' is highlighted with a red box. Its description is: 'Automates validation and approval business partner data before it is created in the backend S/4HANA. Can be used for scenario-driven development or TDD. Backend for...'. The type is 'Process Automation', last accessed is 'Jan 9, 2:54 pm', and members are 'Everyone'.

**Note:** If you named your project differently at the time of creation from the Store, the project name will be different.

The sample project opens, displaying your **project overview** area. This area allows you to create new artifacts or view and configure existing artifacts. The existing artifacts can either be opened directly from your project overview area or through the **process builder** feature.

To view the process builder, click on the process artifact named **BusinessPartnerCreationApproval\_withForms**:

The screenshot shows the SAP Build Process Automation interface. At the top, there's a navigation bar with 'Overview', 'Release', and 'JG'. Below the navigation bar, there's a section for 'Business Partner Approval Process - Sample'. It shows the last updated on: January 9, 2023, created on: January 5, 2023, collaborators: Everyone, description: 'Automates validation and approval business partner data before it is created in the backend S/4HANA. Ca...', agent version: No value, project size: 384.85 KB, and estimated package size: 275.57 KB. Below this, there's a section for 'Artifacts (15) Triggers (1)'. The 'All Artifacts' section is active, showing a table of artifacts. The table has columns: Name, Description, Type, Last edited, Last edited by, and Created On. The artifact 'BusinessPartnerCreationApproval\_withForms' is highlighted with a red box. Its description is: 'Process to automate business partner creation with ...', type is 'Process', last edited is '2 days ago', last edited by is 'jerome.grondin@sap.com', and created on is 'January 5, 2023'.

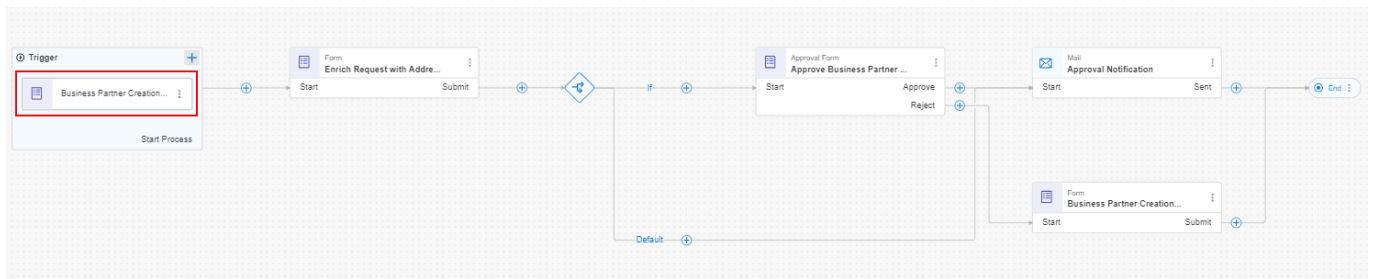
This loads the process builder, displaying a visual overview of the existing process. You can now click on process artifacts, such as the request form, to further configure them.

**Note:** The package contains several processes, all of them having the same purpose. What is described in the next sections can be applied to all of them. Please read carefully those instructions as they might help you to configure all the processes.

## Configure the Request Forms

This business partner approval process is initiated (or triggered) by someone submitting a request form. This request form captures data such as business partner details and further information about their request.

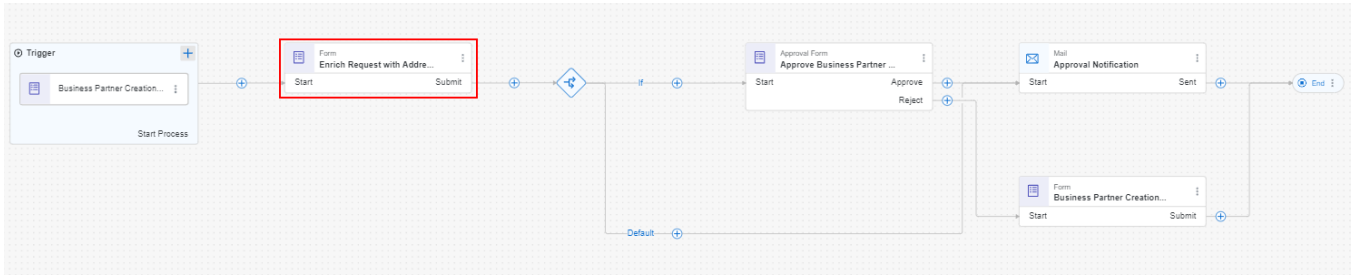
To configure the request form from the process builder, click on the three dots next to the element **Business Partner Creation Form** and choose 'Open Editor':



The request form editor opens, displaying the sample request form. This form is editable, meaning that you can edit existing information here or add and configure new fields if you want to collect additional information in your own request form.

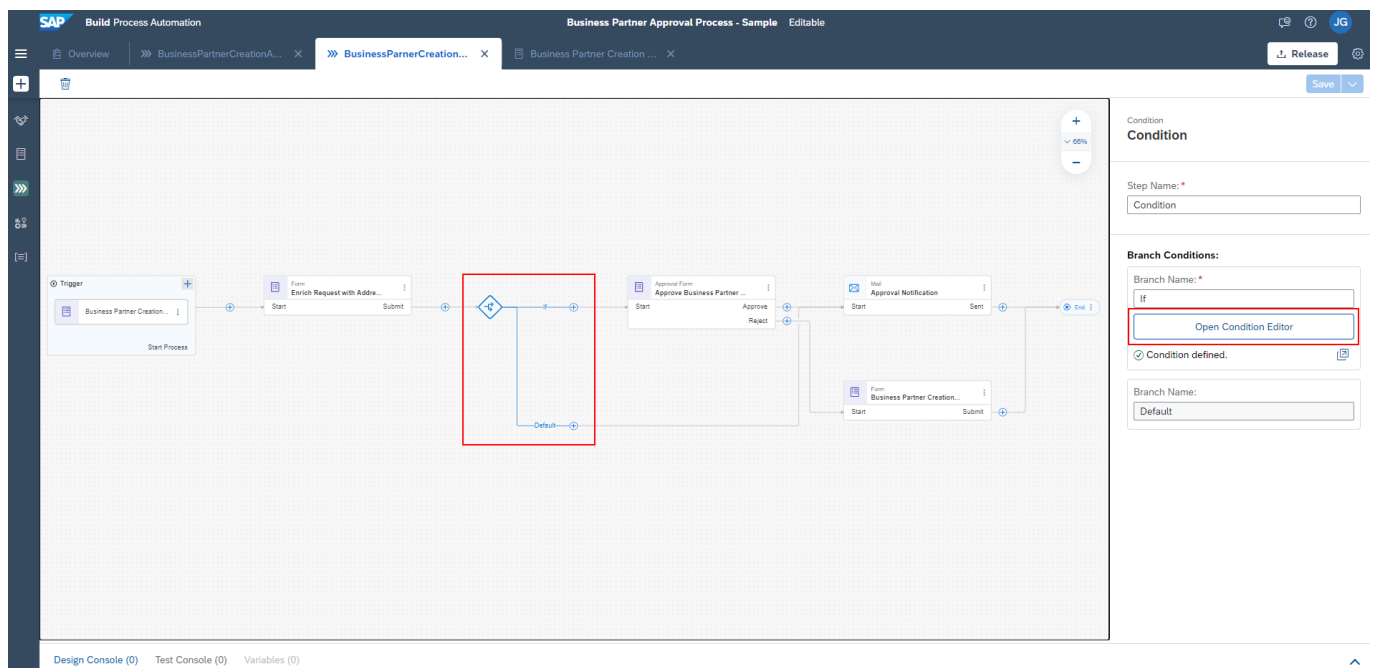
To add additional layout and input fields to the form, drag and drop them from the side menu:

You may proceed the same with the **Enrich Request with Address Data** form.



## Configure the Condition

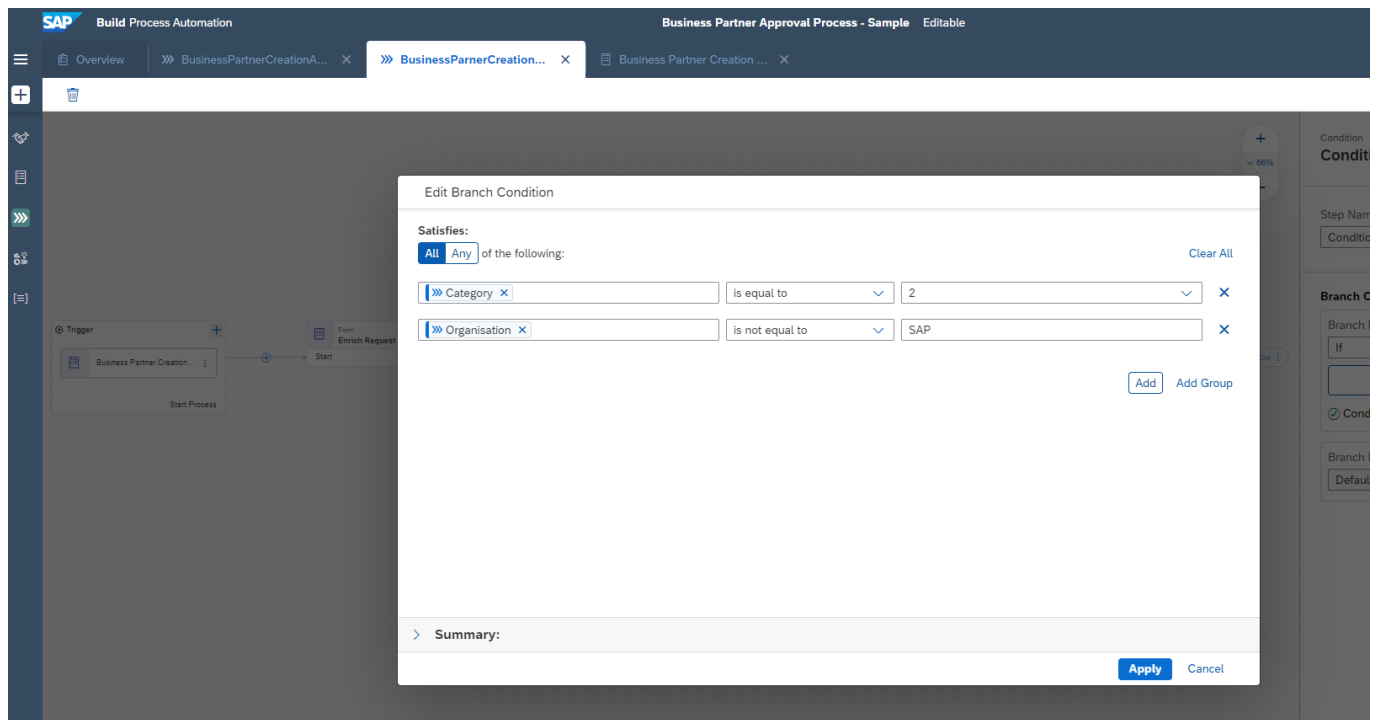
Returning to the process builder, you'll see that a **condition** has been added to this process.



Configured conditions scan a live process for information and then root the process if the information matches (or satisfies) a defined rule. For example, if the organization has a specific name, then the request doesn't need to be approved.

To do this, you configure an **IF** value using the Condition Editor.

In this example, the process checks the submitted form to see if the category is equal to 2 and if the organization has another name than SAP. Requests that match these conditions are then sent to the approval stage.



When using the condition editor, you can configure All or Any condition types.

**All** – All configured conditions must be satisfied for the process to be sent along the If branch.

**Any** – A minimum of one configured condition must be satisfied for the process to be sent along the If branch.

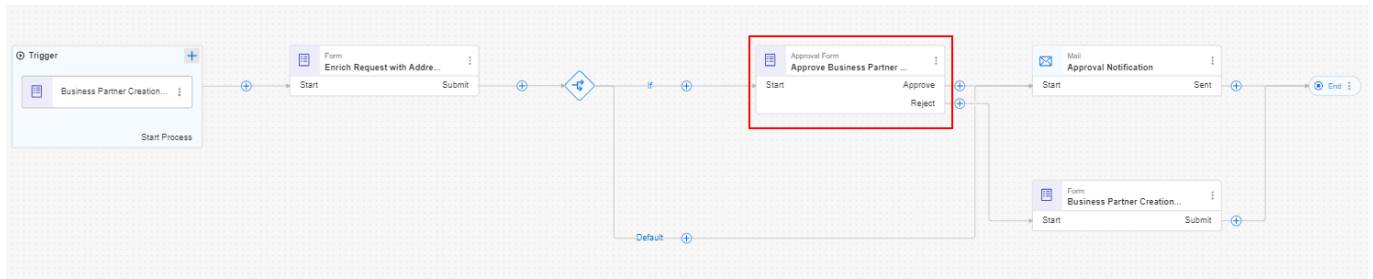
You can fully customize the condition according to your own needs by accessing the condition editor and selecting the input you want to base your condition on. Depending on the field type, you will see different options to setup the condition.

## Configure the Approval

Returning to the process builder again, you'll see that the default path for the process (when the conditions are satisfied) is to include an **approval**. This approval is managed via the responsible person's inbox, appearing as a task for them to review and action.

The information that is shared with the approver is configured by creating an approval form. This approval form can be copied from the request form, ensuring that the same information is shared from requestor to the approver.

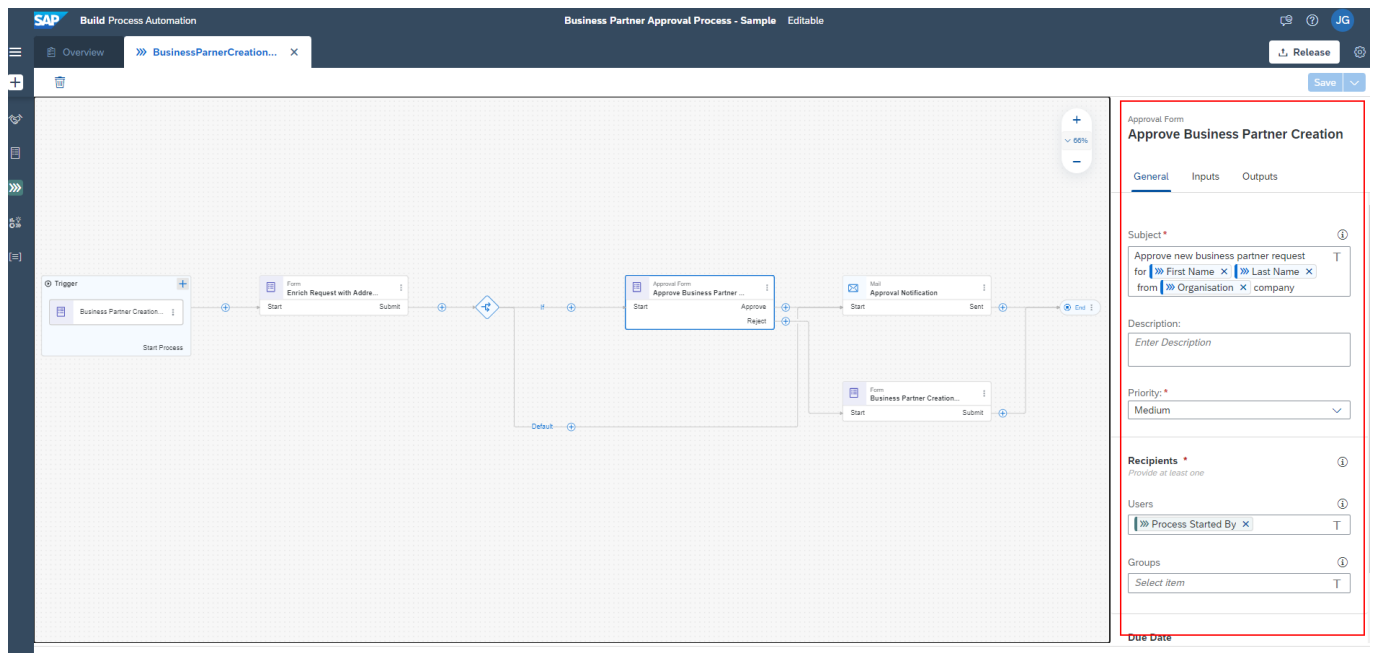
To configure the approval form from the process builder, double click on **Approve Business Partner Creation**:



The approval form editor now loads, with the same layout and input fields available as the request form. The difference is that many of the fields are set to 'Read Only' (identified by a lock icon).

To edit whether a field is Required or Read Only, click the field and select the options on the side panel:

You then edit your approval settings by returning to the process builder and clicking on **Approve Business Partner Creation**, opening the side panel:



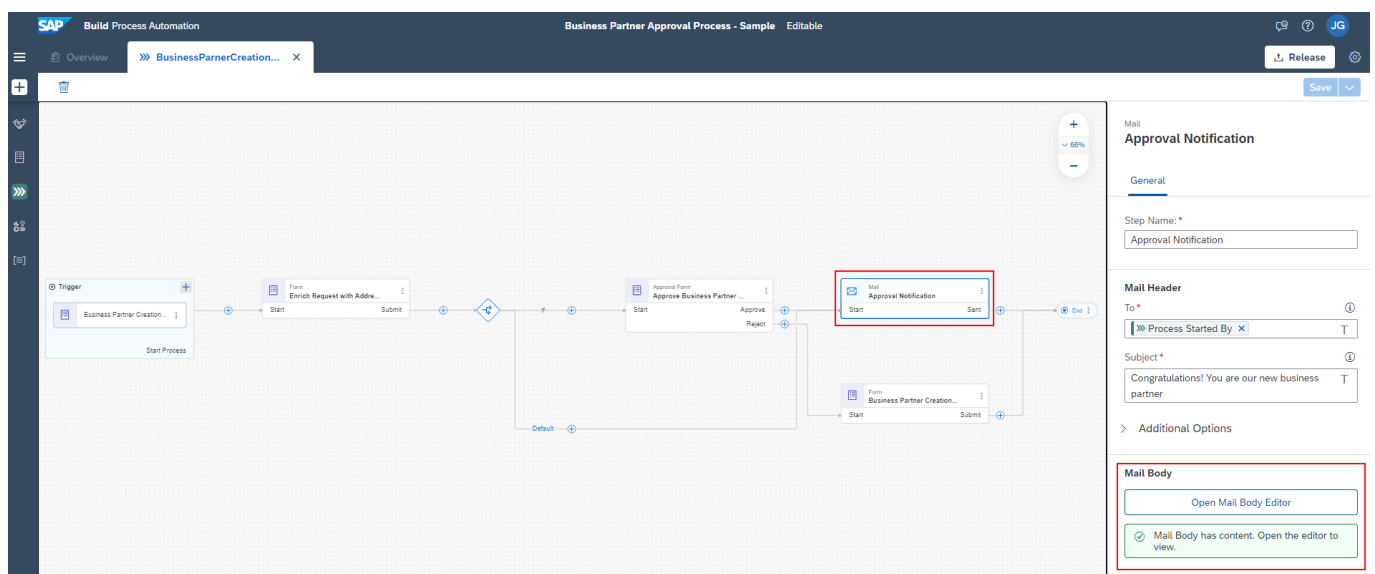
**General Settings** – These allow you to configure how the approval tasks are displayed in an inbox and to which users or groups of users should receive them.

**Recipients** – In this sample content, the recipient of the approval form is the person who initiated the request. This allows you to submit and approve your own requests. This option can also be used if you want to select the requester as the recipient.

Additionally, you could also directly type an email address of the designated recipient into the Users field.

## Configure the Confirmation messages

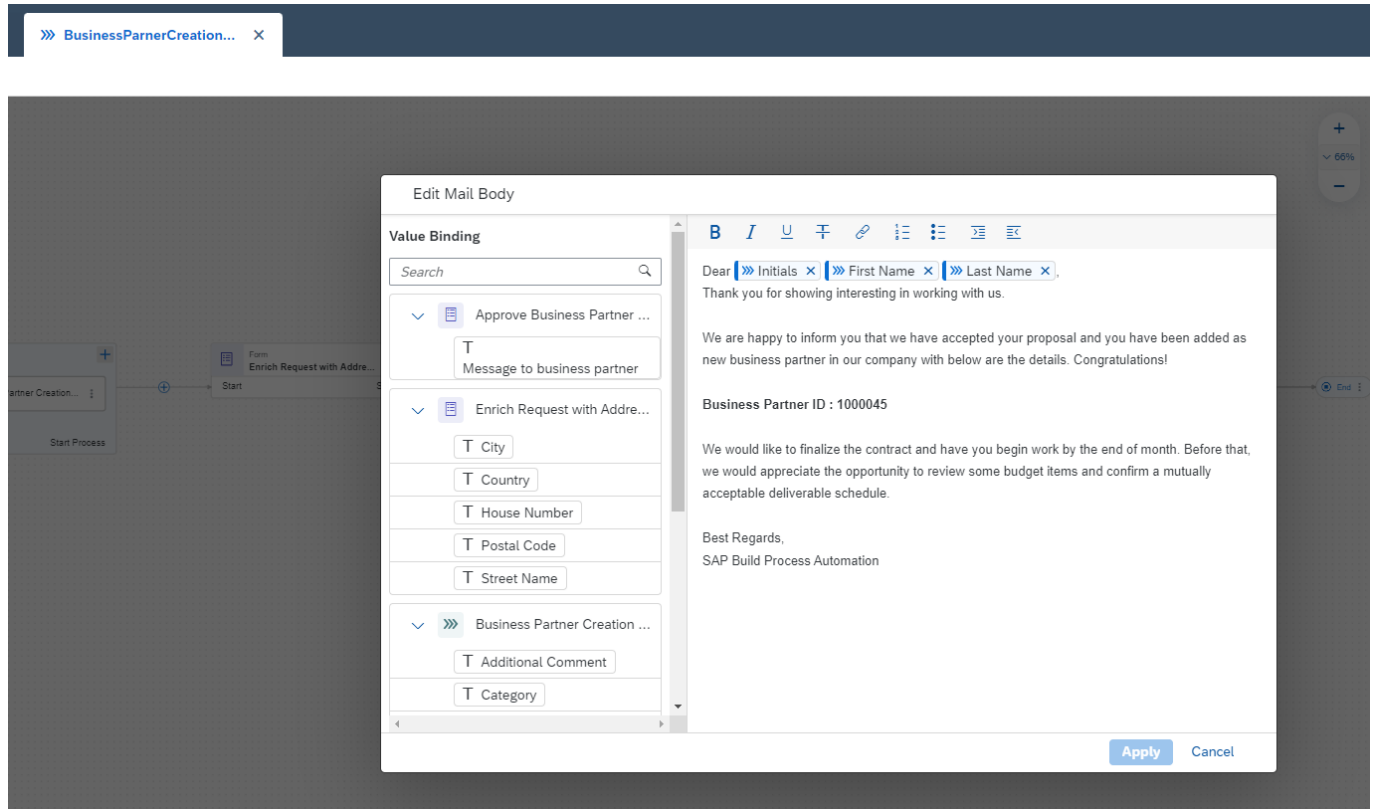
This process is configured to send confirmation (for those automatically or manually approved requests) to the requester's email inbox.



To access the settings of the mail task, you can select it to open the side panel on the right. Here you would be able to adjust the subject and recipient. For adjusting the content of the email, you can click on 'Open Mail Body Editor'.

The mail editor allows you to write and adjust text according to your needs as you know it from other text editors. You can also reuse information that has been collected during the process. In this example, the project lead assigned by the approver as well some information from the original requests were used to allow the recipient to differentiate the request from others.

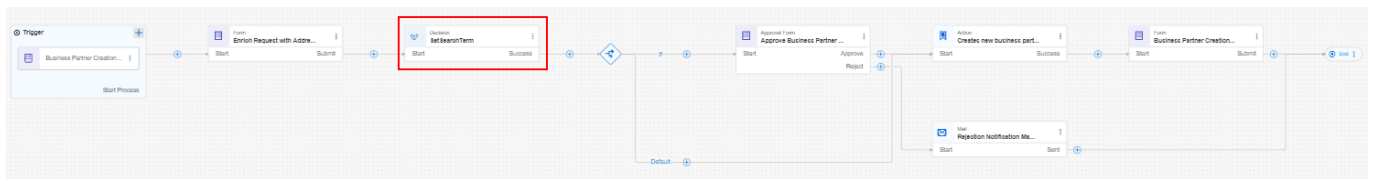
If you want to use additional process context data, you can simply drag the fields from the left menu to the editor on the right.



**Note:** In case of rejection, a task will be visible in the inbox of the requestor. You can configure it the same way you configured the request form.

## Configure the Decision

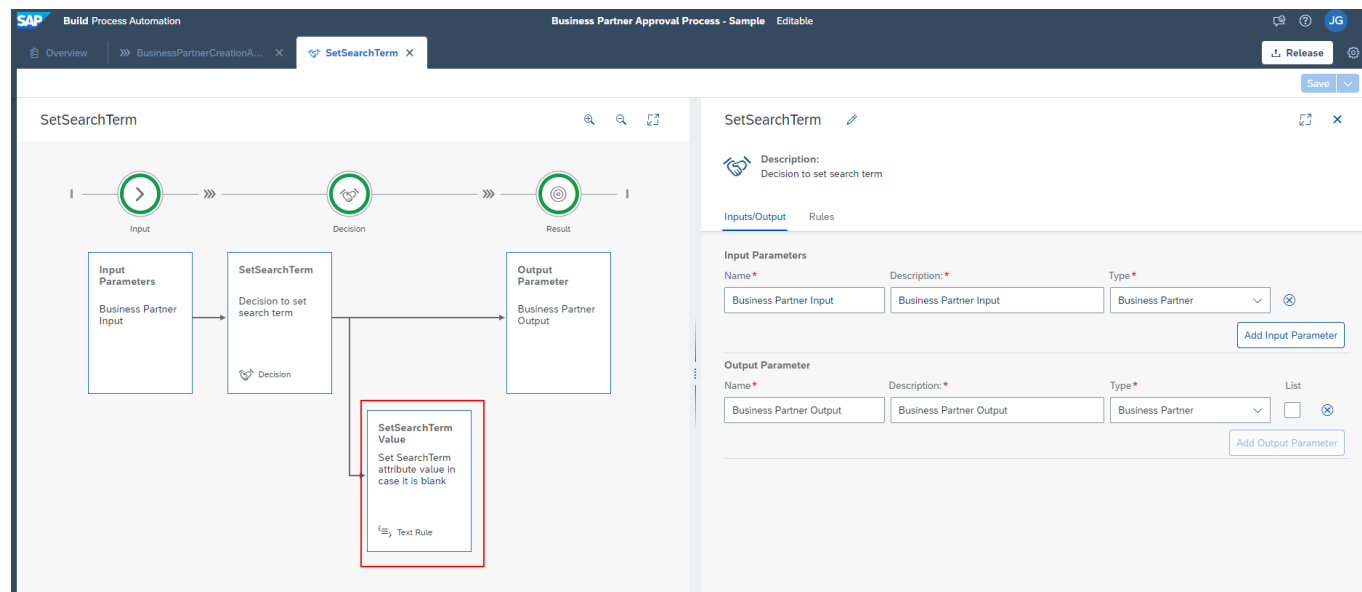
In the process **BusinessPartnerCreationApproval\_withDecisions**, you'll see that a decision artefact has been added to the process.



Decisions determine the Search Term in case it has not been filled by the requestor in the request form.

Decisions are configured by creating a decision table based on process metadata, with similar (but more enhanced) IF and THEN rules applied to the process.

To view the existing decision table, double click on the **decision**. And then click on **SetSearchTermValue**:



In this example, the rule is as follows:

The screenshot shows the 'SetSearchTermValue' rule configuration. It is a 'Text Rule' with an 'If' condition: `Business_Partner_Input.SearchTerm = ""`. The 'Then' section contains two assignments: 'SearchTerm: Business\_Partner\_Input.OrganizationBPName' and 'Email: Business\_Partner\_Input.Email'. There are also 'Add Else If' and 'Add Else' buttons for further rule configuration.

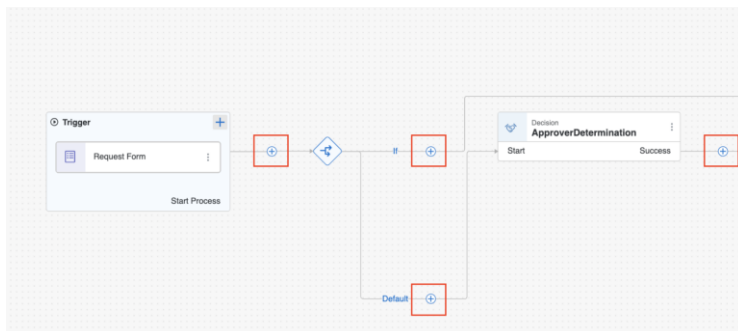
Returning to the process builder, you can then configure the **Input** and **Outputs** for this decision. Again, this is based on the metadata collected during the process. Please keep in mind to adjust this data mapping accordingly if you modified this content package

The screenshot displays the SAP Build Process Automation interface. The main canvas shows a process flow for 'Business Partner Approval Process - Sample'. The flow starts with a 'Trigger' (Business Partner Creation), followed by a 'Start' event, a 'Send Request with Address' task, a 'Decision' (SetSearchTerm), and then an 'Approve Business Partner' task. The 'SetSearchTerm' decision is highlighted with a red box, and its configuration panel is open on the right. The configuration panel shows the 'Inputs' tab, which lists various input fields: BusinessPartnerCategory, Email, FirstName, Initials, LastName, OrganizationBPName, and SearchTerm. Each field has a corresponding input field with a dropdown arrow and a 'T' (True) status.

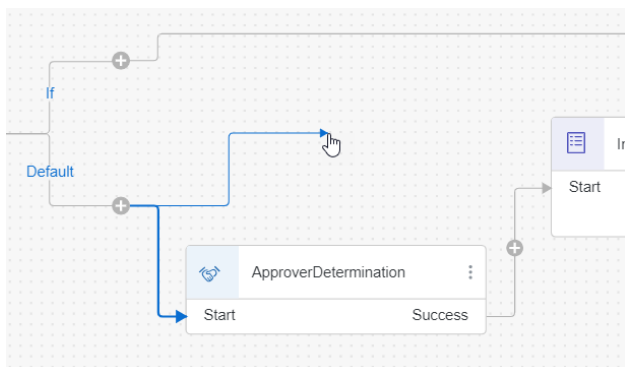
## Configure the Process Flow

When using the process builder, you can also add new steps, change the layout of the existing steps, and edit the process flow.

To add new steps to the process, either click the + button:



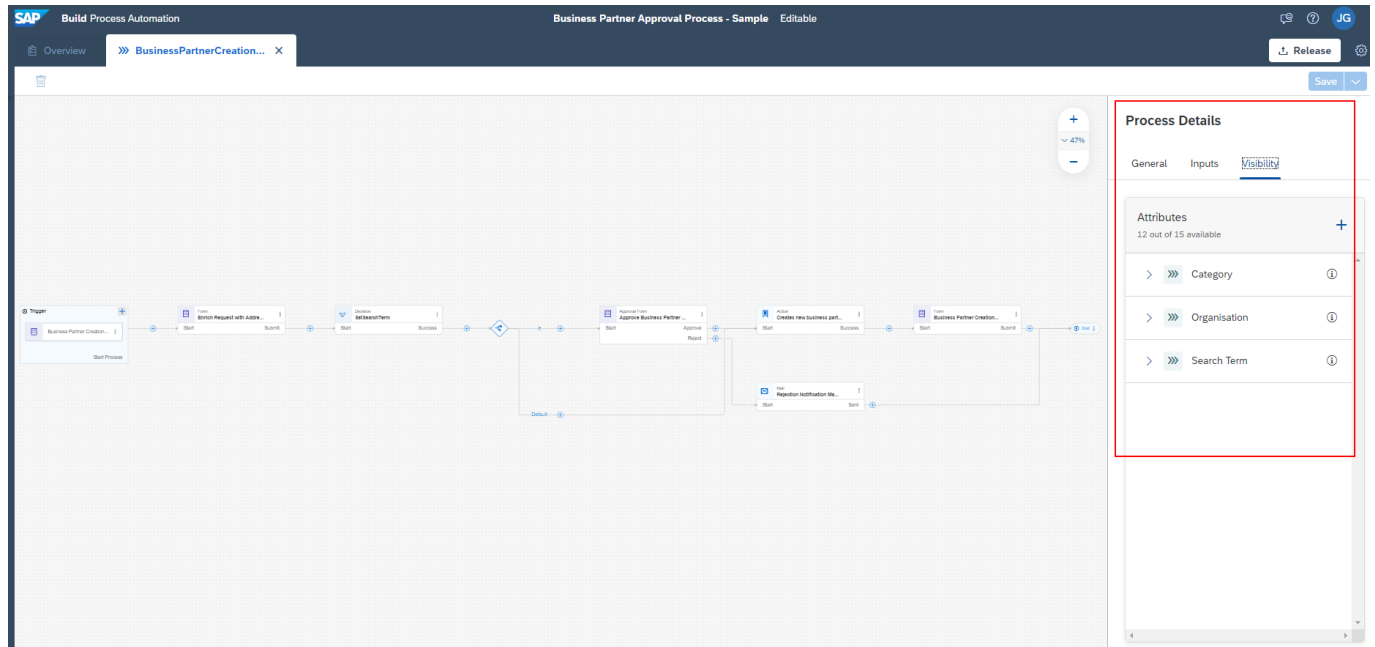
And to re-order or connect steps, drag and drop them respectively:



## Configure the Visibility Scenario

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

To modify and change them, just click outside of any step in the process builder and change to the visibility tab in the side panel on the right.



You can simply add any fields you want to use in your dashboard by selecting the relevant fields from the respective step.

To configure the visibility scenario, you need to return to your project's 'Overview' tab and select the artefact **BUPA\_Visibility\_SDD1**.

Business Partner Approval Process - Sample

Last updated on: January 12, 2023  
By: You

Created on: January 5, 2023  
By: You

Collaborators  
Everyone

Description  
Automates validation and approval business partner data before it is created in the backend S/4HANA. Ca...

Agent version  
No value

Project size: 386.42 KB  
Estimated package size: 277.08 KB

Artifacts (15) Triggers (1)

All Artifacts Search...

Create Import

| Name                                               | Description                                              | Type                | Last edited   | Last edited by         | Created On      |
|----------------------------------------------------|----------------------------------------------------------|---------------------|---------------|------------------------|-----------------|
| Approve Business Partner Creation                  | Approval form with business partner data                 | Form                | 6 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| BUPA_Visibility_SDD1                               | No value.                                                | Visibility Scenario | Just now      | jerome.grondin@sap.com | January 9, 2023 |
| Business Partner                                   | Date type for business partner                           | Data Type           | 7 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Approval with Value Help | No value.                                                | Form                | 6 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Confirmation             | Form to notify business partner that has been succe...   | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| Business Partner Creation Form                     | Form to start the Business Partner Creation process      | Form                | 5 minutes ago | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Form Value Help          | Form to start the business partner creation process      | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| Business Partner Creation Rejection                | Form to notify business partner that it has been reje... | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| BusinessPartnerCreationApproval_withForms          | Process to automate business partner creation with ...   | Process             | 5 minutes ago | jerome.grondin@sap.com | January 5, 2023 |

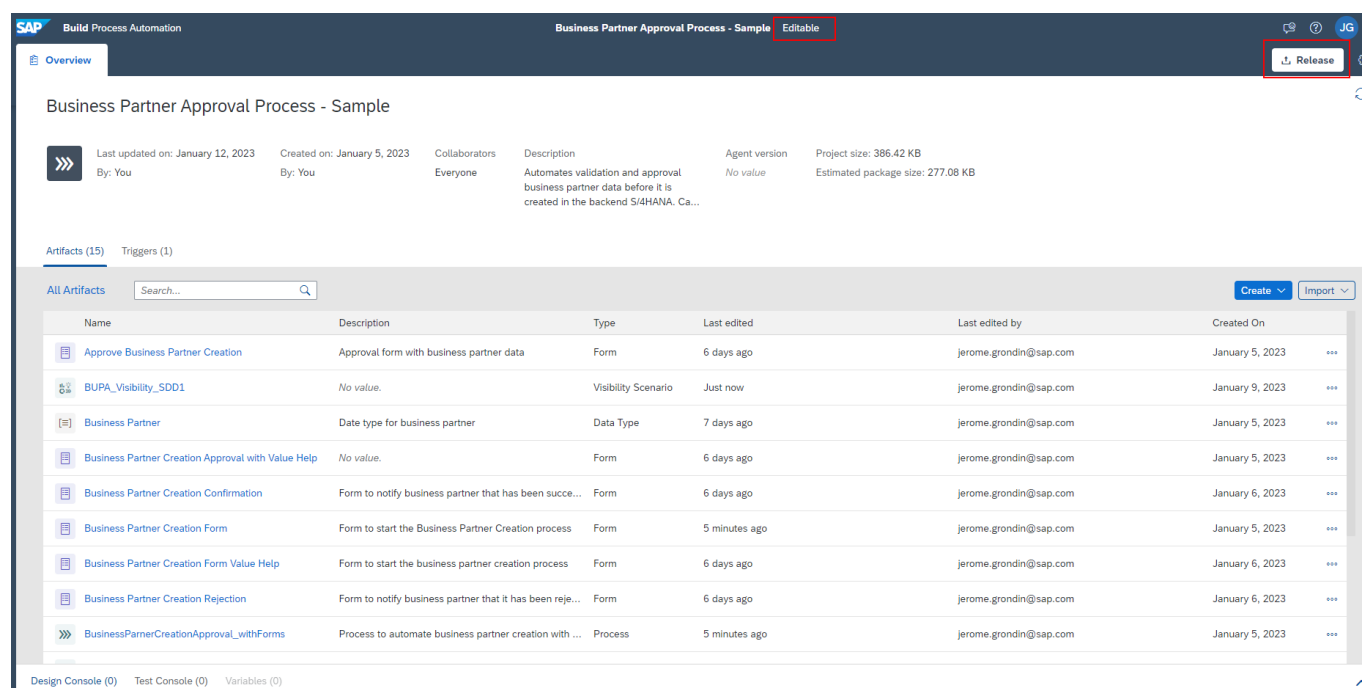
You can now flexibly adjust the dashboard according to your needs. We recommend you to check out our [documentation](#) if you want to learn more about the configuration options of the visibility scenarios. In case you don't have access to the workspace where you can access the newly created dashboards, please contact your IT admin.

## Release and Deploy your 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'. The click 'Release':



The screenshot shows the SAP Build Process Automation interface. At the top, the process name is 'Business Partner Approval Process - Sample' with a status of 'Editable'. A 'Release' button is visible in the top right corner. Below the header, there is a table of artifacts.

| Name                                               | Description                                              | Type                | Last edited   | Last edited by         | Created On      |
|----------------------------------------------------|----------------------------------------------------------|---------------------|---------------|------------------------|-----------------|
| Approve Business Partner Creation                  | Approval form with business partner data                 | Form                | 6 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| BUPA_Visibility_SDD1                               | No value.                                                | Visibility Scenario | Just now      | jerome.grondin@sap.com | January 9, 2023 |
| Business Partner                                   | Date type for business partner                           | Data Type           | 7 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Approval with Value Help | No value.                                                | Form                | 6 days ago    | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Confirmation             | Form to notify business partner that has been succe...   | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| Business Partner Creation Form                     | Form to start the Business Partner Creation process      | Form                | 5 minutes ago | jerome.grondin@sap.com | January 5, 2023 |
| Business Partner Creation Form Value Help          | Form to start the business partner creation process      | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| Business Partner Creation Rejection                | Form to notify business partner that it has been reje... | Form                | 6 days ago    | jerome.grondin@sap.com | January 6, 2023 |
| BusinessPartnerCreationApproval_withForms          | Process to automate business partner creation with ...   | Process             | 5 minutes ago | jerome.grondin@sap.com | January 5, 2023 |

If this is the first time you've released the process, a version labeled 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 investment 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'. The click 'Deploy':

**Business Partner Approval Process - Sample** Released

Last updated on: January 12, 2023  
By: You

Created on: January 12, 2023  
By: You

Collaborators: Everyone

Description: No value

Agent version: No value

Artifacts (15) Triggers (1)

| Name                                               | Description                                                        | Type                |
|----------------------------------------------------|--------------------------------------------------------------------|---------------------|
| Approve Business Partner Creation                  | Approval form with business partner data                           | Form                |
| BUPA_Visibility_SDD1                               | No value.                                                          | Visibility Scenario |
| Business Partner                                   | Date type for business partner                                     | Data Type           |
| Business Partner Creation Approval with Value Help | No value.                                                          | Form                |
| Business Partner Creation Confirmation             | Form to notify business partner that has been successfully created | Form                |
| Business Partner Creation Form                     | Form to start the Business Partner Creation process                | Form                |
| Business Partner Creation Form Value Help          | Form to start the business partner creation process                | Form                |
| Business Partner Creation Rejection                | Form to notify business partner that it has been rejected          | Form                |
| BusinessPartnerCreationApproval_withForms          | Process to automate business partner creation with only forms      | Process             |
| BusinessPartnerCreationApproval_withAction         | Process to automate business partner creation                      | Process             |

Deployment Console (0)

You will be asked to provide a Destination as an environment variable, in order to deploy your project. For more details about the Destination artefact, please read our [documentation](#).

## FURTHER MODIFICATIONS

This sample content can be flexibly extended and modified. You can use all available skills in SAP Build Process Automation to do so. (Eg. add business rules to determine the approver based on a certain business logic, add an automation or an action to post collected information to an SAP system).

We recommend you to check out our help documentation to learn more about the different possibilities in SAP Build Process Automation.