

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

Content Guide

Change and Innovation Approval Process

Sample Content for SAP Build Process Automation

Version: 1.1

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INTRODUCTION

PURPOSE

Due to a fast-changing environment, the need for improving and redefining business processes and in an agile way is constantly growing. The demand for new processes and solutions or adjusting existing ones by the business is increasing while IT is often struggling to keep up with the rapidly evolving needs.

There is often a lack of transparency for requests for new solutions or changes to existing solutions raised by the business that IT needs to provide a solution for since those are often raised and managed manually and across different channels and stakeholders. On the one hand the business does not know what happened with their request and on the other hand the IT is lacking an overview on how many requests are received, from whom, what evaluation has been done already etc. This often leads to increased processing times.

This sample content helps users to get started in streamlining and digitalizing a process for requesting and approving innovations and changes to existing solutions 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 the strategic fit
- An approval form to review the information and decide for approval
- Confirmation and rejection forms to notify the requester about the decision
- A mail task to send a short confirmation via email to the requester
- A visibility scenario for providing transparency on incoming requests

This sample content contains the following elements as key artifacts:

Type	Name
 Process	Change and Innovation Approval Process
 Form	Change and Innovation Request
 Form	Final Approval
 Form	Review & Effort Estimation
 Visibility Scenario	Change and Innovation Requests - Dashboard

REQUIRED PERMISSIONS

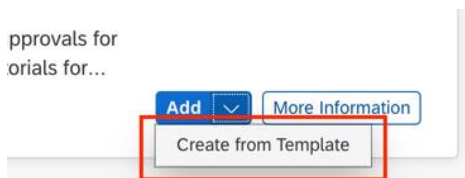
To fully use this content package, you need to have an active user entitled to use SAP Build Process Automation with the role **ProcessAutomationDeveloper**. For users that are only participating in testing and execution of this content, the role **ProcessAutomationParticipant** will be sufficient.

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. You will find more information about the possibilities in the sections below.

To be able to modify the package, you need to **add it as a template** from the Store.



To use this sample content, you don't need any previous 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. To modify and extend this content, you will need to add it as a template.

Access the Sample Process

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

Click on the project named **Change and Innovation Approval Process – Sample**:

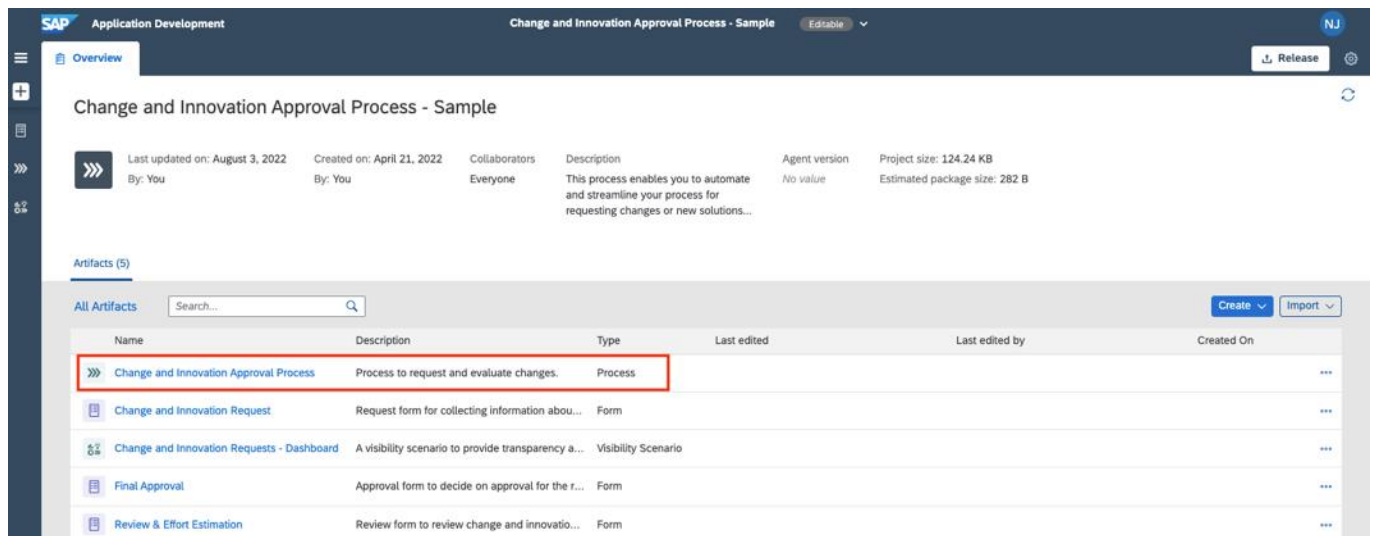
The screenshot shows the SAP Build Lobby interface. At the top, there's a navigation bar with 'SAP Application Development' and tabs for 'Lobby', 'Store', 'Monitor', and 'Settings'. Below this is a 'Quick Start' section with four cards: 'Create a Process', 'Create a Form', 'Create an Automation', and 'Browse Content'. The main section is titled 'All Projects (13)' and features a search bar and a 'Create' button. A table lists the projects:

Project Name	Version	Type	Created	Access	More
Change and Innovation Approval Process - Sample This process enables you to automate and streamline your process for requesting changes or new solutions from your IT department.	2 Available Latest: 1.0.1	Business Process	Aug 3, 1:33 pm	Everyone	...
Sales Order Approvals - Sample This process enables you to streamline your sales orders approval process. NOTE: There is a developer tutorial available for you to...	1 Available Latest: 1.0.0	Business Process	Aug 3, 1:30 pm	Everyone	...

Important: To modify this content you will need to have created it from template as explained in chapter [Introduction – Important Note](#). During this step you might have assigned a different name to your project which you would see in this list instead of the name shown in this example.

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 **Change and Innovation Approval Process**:

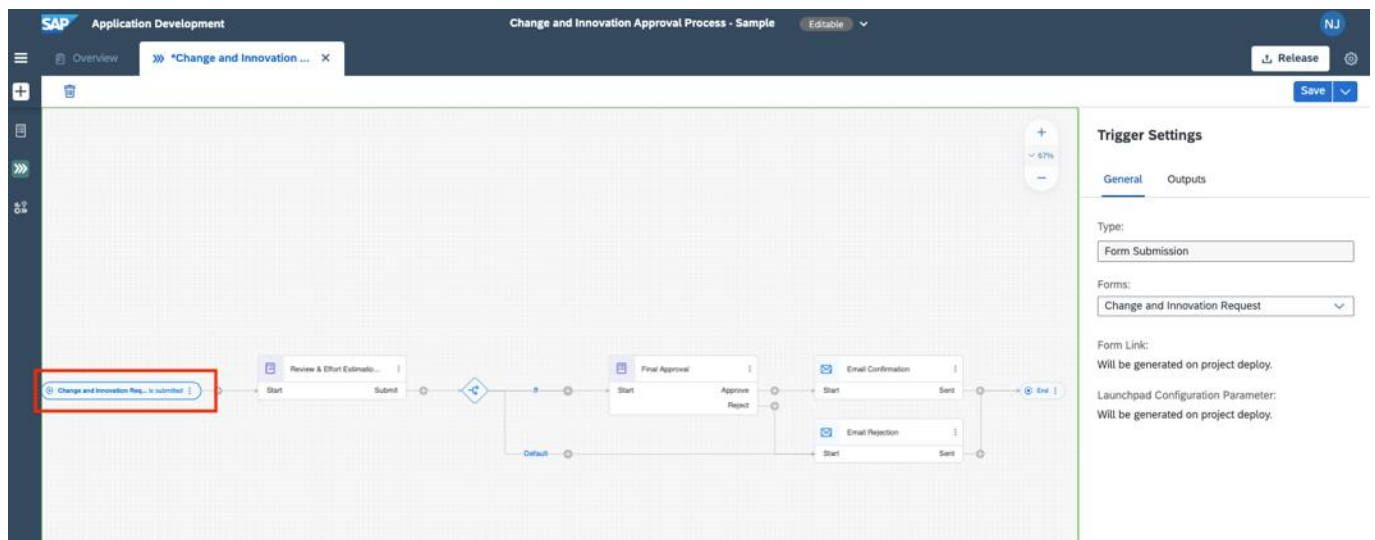


This loads the process builder, displaying a visual overview of the existing process. You can now click on process artifacts, such as the request form, to further configure them.

Configure the Request Form

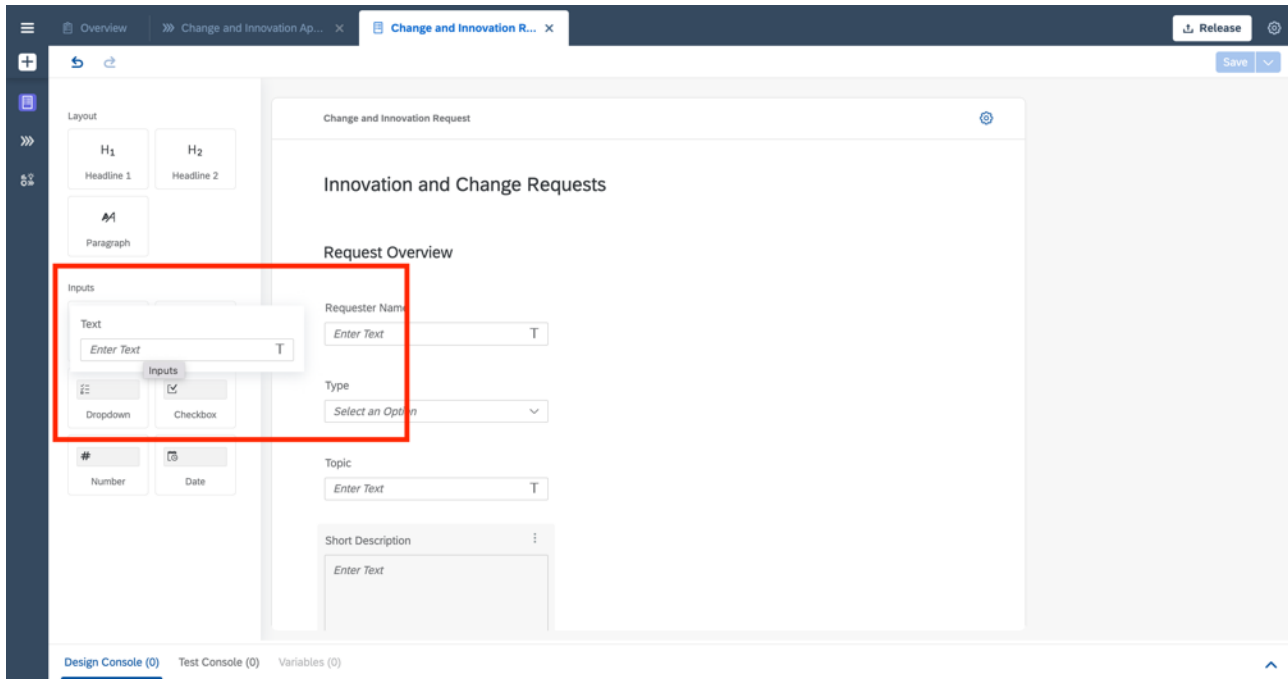
This sample change and innovation approval process is initiated (or triggered) by someone submitting a request form. This request form captures data such as requestor's personal details and further information about their request.

To configure the request form from the process builder, click on the three dots in the top right corner of the **Change and Innovation Request** trigger:



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:

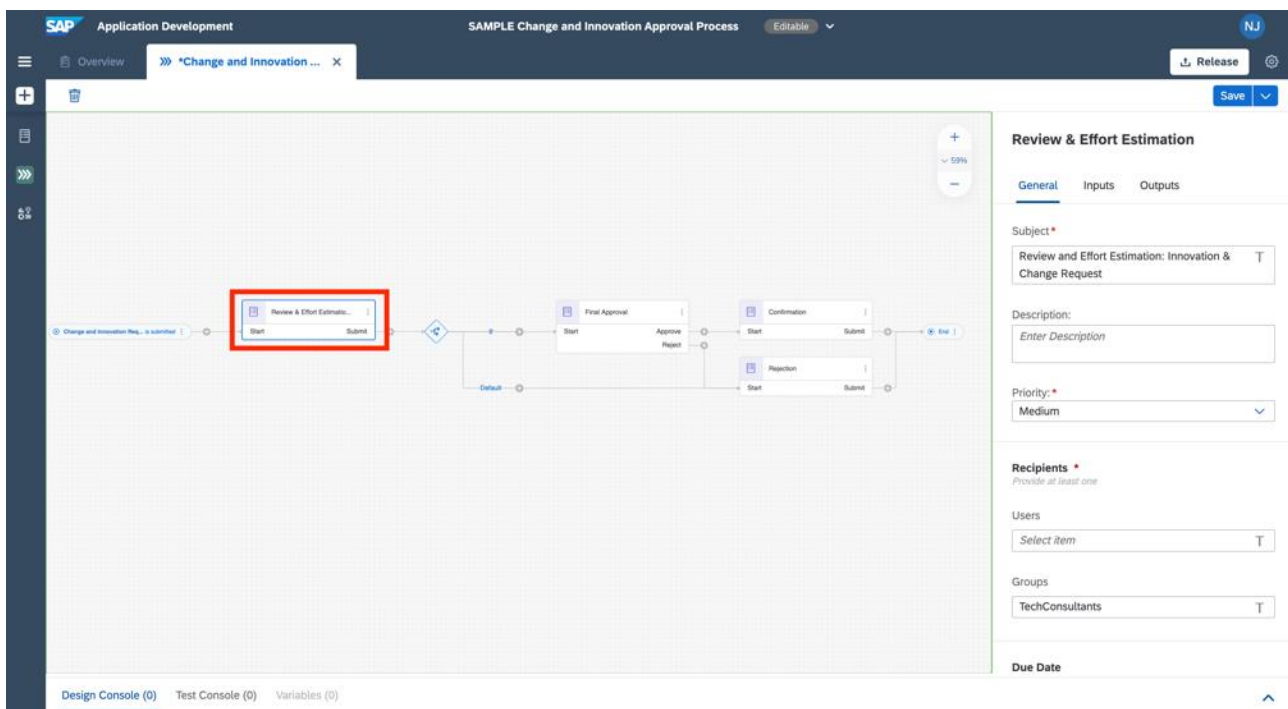


Configure the Review Form

Returning to the process builder (click on the open tab), you'll see that the next step of the process is a **review & effort estimation step**. This form step 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 reviewer is configured by creating a form. The form can be copied from the request form, ensuring that the same information is shared from requestor to the reviewer.

To configure the review form from the process builder, double click on **Review & Effort Estimation**:



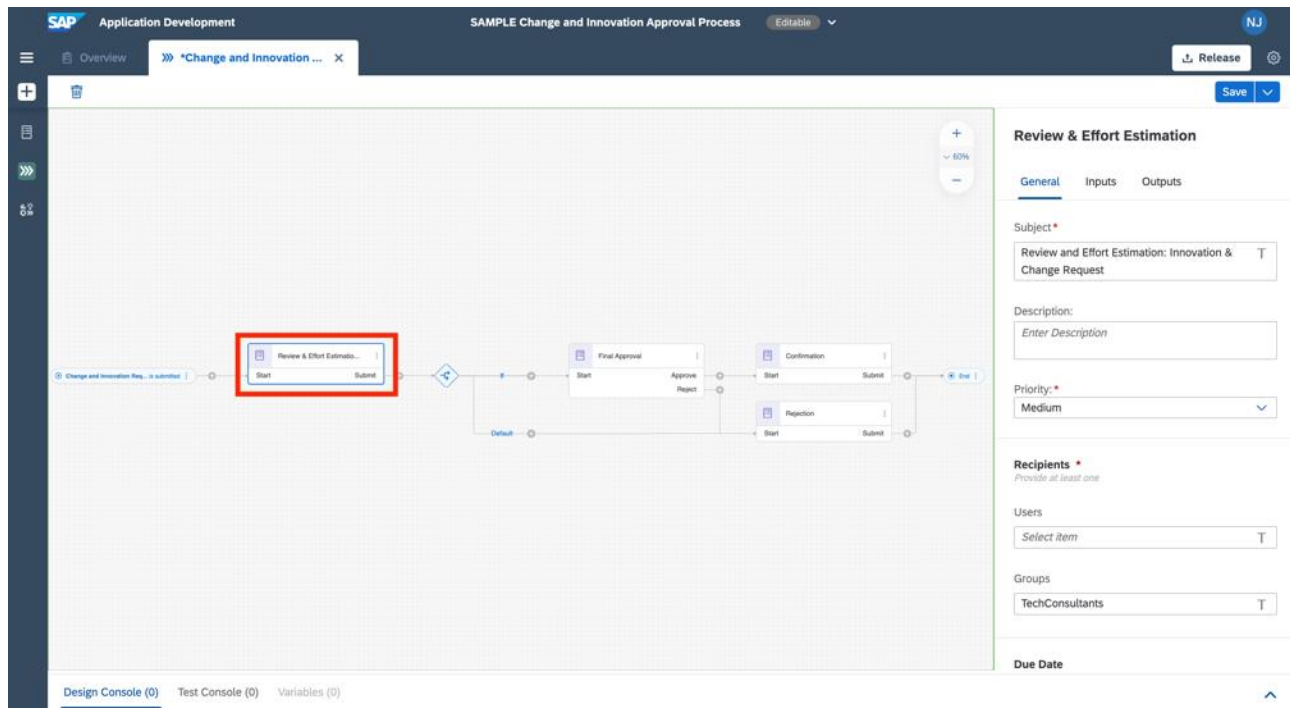
The form editor now loads, with the same layout and input fields available as the request form plus some additional fields for the effort estimation. The additional difference is that many of the fields are set to 'Read Only' (identified by a lock icon):

The screenshot shows the SAP Application Development interface for the 'SAMPLE Change and Innovation Approval Process'. The 'Review & Effort Estimation' form is displayed. The form includes a 'Request Overview' section with fields for 'Requester Name', 'Type', 'Topic', and 'Short Description'. The 'Requester Name' field is highlighted with a red box, indicating it is a 'Prepopulated Field' and is 'Read Only'. The 'Type' and 'Topic' fields are also 'Prepopulated Fields'. The 'Short Description' field is a 'Prepopulated Field'. The form is set to 'Read Only' mode, as indicated by the lock icon in the top right corner.

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

The screenshot shows the SAP Application Development interface for the 'SAMPLE Change and Innovation Approval Process'. The 'Review & Effort Estimation' form is displayed. The 'Requester Name' field is highlighted with a red box, indicating it is a 'Prepopulated Field' and is 'Read Only'. The side panel is open, showing the 'Requester Name' field settings. The 'Read Only' checkbox is checked, indicating the field is 'Read Only'. The 'Required' checkbox is unchecked. The 'Character Limit' is set to 0. The 'Add Description' button is visible at the bottom of the side panel.

You then edit your form settings by returning to the process builder and clicking on **Review & Effort Estimation**, opening the side panel:



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

Recipients – If you’re running this process on your own and want to test it, you can select the field ‘Process Started By’ here. 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. In both recipient fields, you can either add the value by typing or selecting input from a previous process step. In this sample content, we used the a group as recipient. With the group function, you can route the request for a dedicated group of people who are jointly responsible for processing the request.

The screenshot displays the SAP Build Process Automation interface for the 'Change and Innovation Approval Process - Sample'. The process flow is visible on the left, showing a sequence of tasks: 'Change and Innovation Req... is submitted', 'Review & Effort Estimation...', a decision diamond, 'Final Approval', and email tasks. The right sidebar is titled 'Review & Effort Estimation' and contains configuration fields for 'General', 'Inputs', and 'Outputs'. The 'Recipients' section is highlighted with a red box, showing 'Users' and 'Groups' with 'TechConsultants' selected.

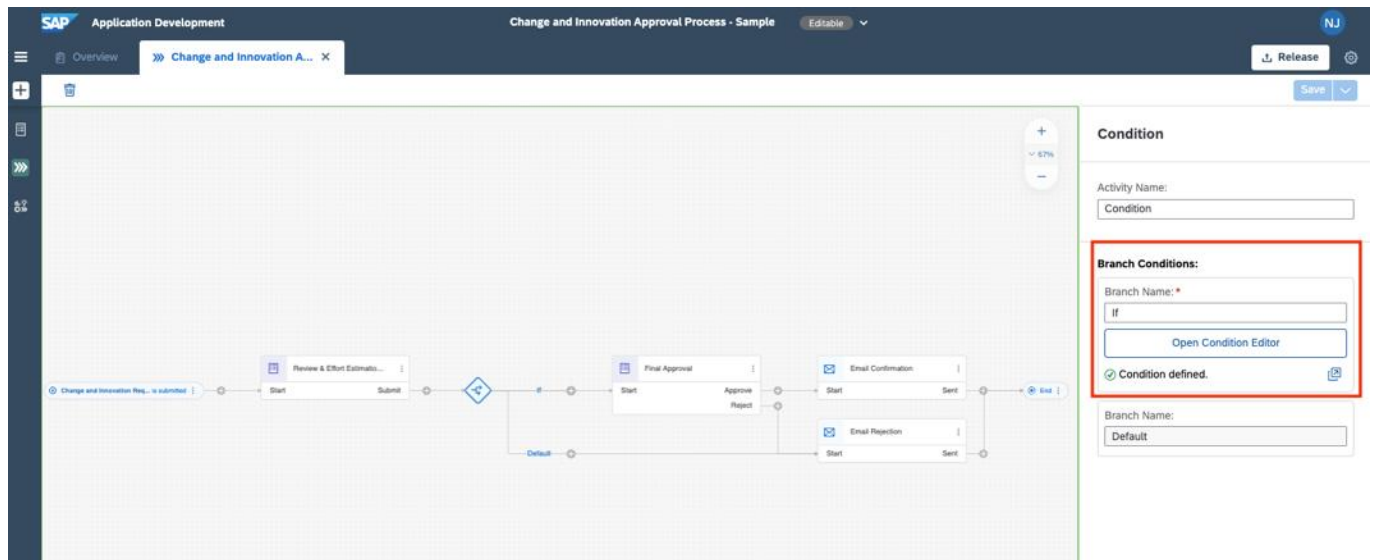
Important: If you want to use 'groups' from the form and approval settings, you need to verify with your IT admin, that the group exists in your identity provider or BTP cockpit. In case there is no central group available but you want to leverage the option of sending a task to multiple recipients, you can also leverage the decision functionality in SAP Build Process Automation. Please refer to [our documentation](#) for more details.

Configure the Condition

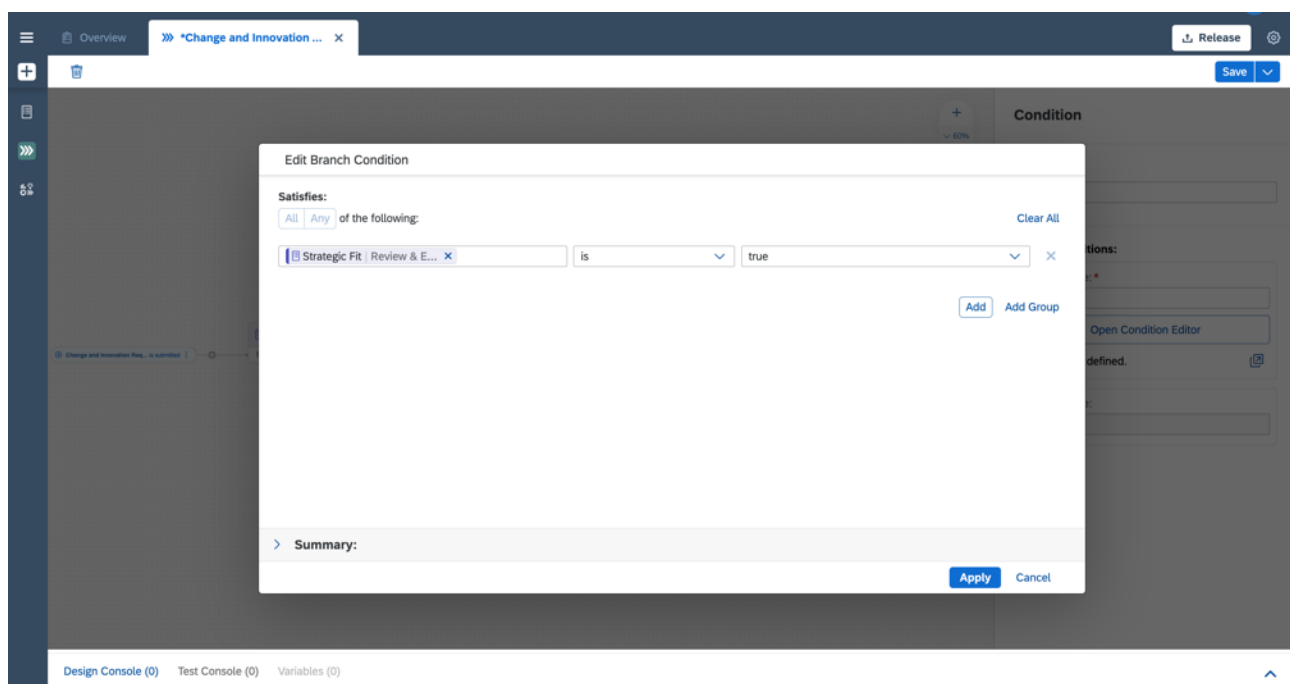
Returning to the process builder (click on the open tab), you'll see that a **condition** has been added to this process.

The screenshot displays the SAP Build Process Automation interface for the 'Change and Innovation Approval Process - Sample'. The process flow is visible on the left, showing a sequence of tasks: 'Change and Innovation Req... is submitted', 'Review & Effort Estimation...', a decision diamond, 'Final Approval', and email tasks. The right sidebar is titled 'Condition' and contains configuration fields for 'Activity Name' and 'Branch Conditions'. The 'Branch Conditions' section is highlighted with a red box, showing 'Branch Name' and 'Condition' fields.

Configured conditions check a live process for information and then root the process if the information matches (or satisfies) a defined rule. To do this, you configure an **IF** value using the Condition Editor.



In this example, if the strategic fit is not given, then the request doesn't need to be approved and is routed directly to rejection.



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

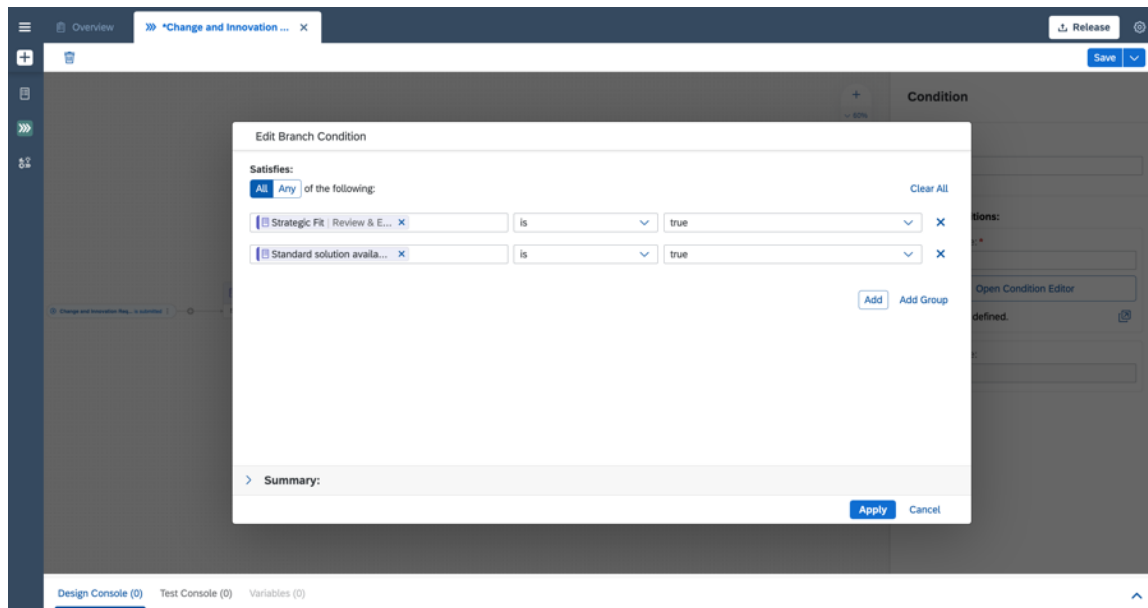
All – All configured conditions must be satisfied for the process to be sent along the If branch.

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

As a further example, this All condition looks for the following information to be available in the process for the

request to be routed to automatic rejection:

- Strategic Fit is true
- Standard solution available is true



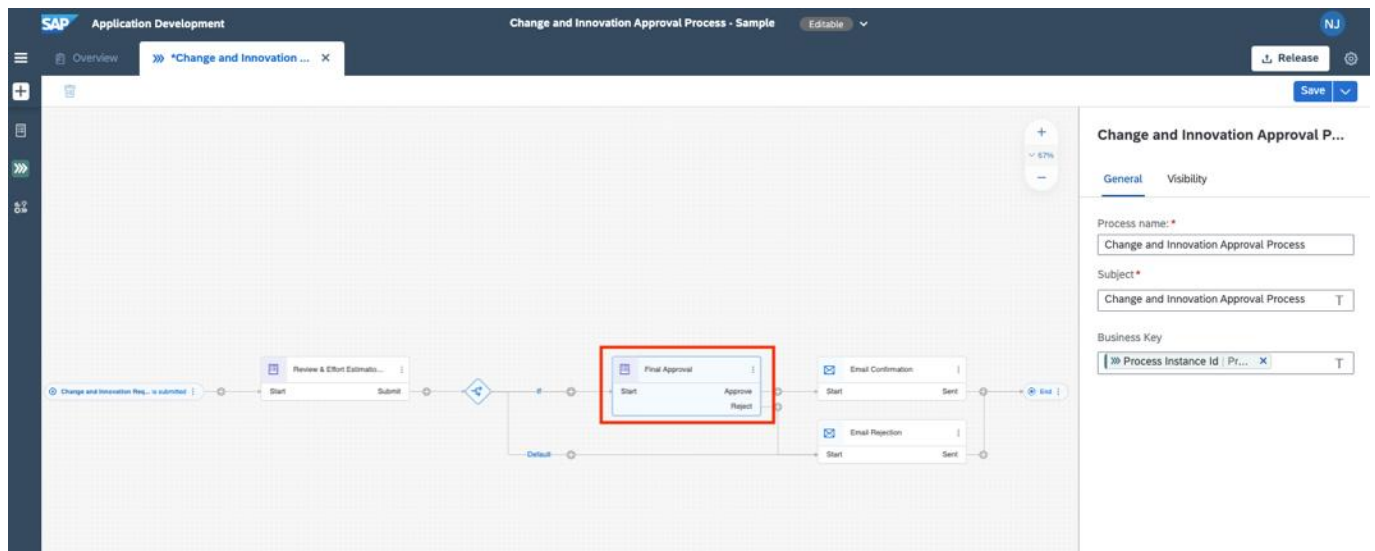
You can fully customize the condition according to your own needs by accessing the condition editor and selecting the input you want to base your condition on. Depending on the field type, you will see different options to setup the condition.

Configure the Final Approval

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

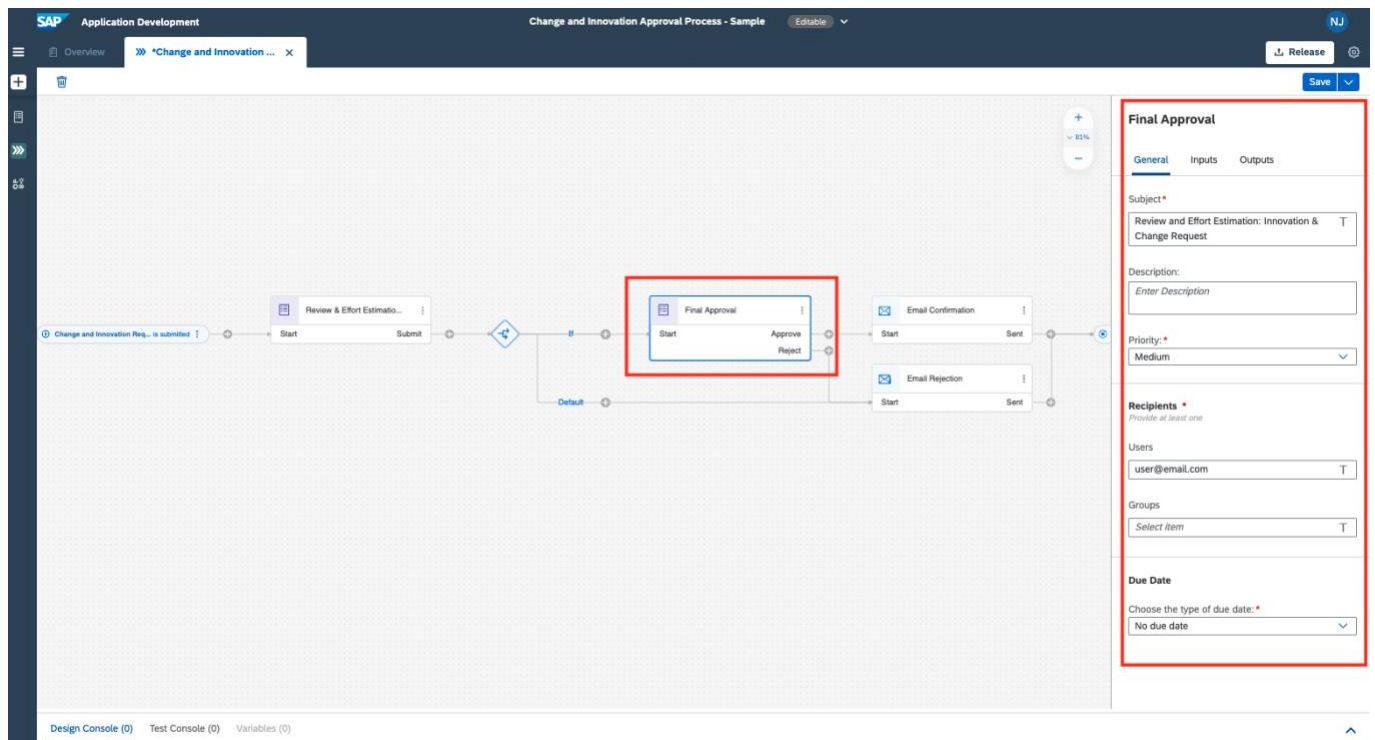
The information that is shared with the approver is configured by creating an approval form. This approval form can be copied from the request form, ensuring that the same information is shared from requestor to the approver.

To configure the approval form from the process builder, double click on **Final Approval**:



The approval form editor now loads, with the same layout and input fields available as the review & effort estimation form. Here again, most of the fields are set to 'Read Only' (identified by a lock icon). In addition, there are also new fields that can be filled by the approver to define who should be the project lead of the approved innovation or change project plus if there are additional comments the requester should be informed about. You will also notice the approve and reject button at the bottom right of the page that indicate you that this form is an approval form.

Returning to the process builder, you can now edit your approval settings by clicking on **Final Approval**, 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 – If you're running this process on your own and v Started By' here. This allows you to submit and approve your want to select the requester as the recipient.

Important: In this example, the approver would be one dedicated person you can specify the email address for. You either need change the email address according to your needs or make sure you select the information from a previous process step. (Eg. if you collected it or added a decision)

Recipients *
Provide at least one

Users

user@email.com T

Groups

Select item T

rocess
used if you

Alternatively, you could select the output from the decision (the determined approver) or another field in the process or you could type an email address of the designated recipient.

Configure the Confirmation / Rejection Mail Tasks

This change and innovation approval process is then configured to send confirmation or rejection emails to the requester using the mail tasks.

To access the settings of the mail task, you can select either **Email Confirmation** or **Email Rejection** to open the side panel. Here you would be able to adjust the subject and recipient.

The screenshot displays the SAP Application Development interface for a process named 'Change and Innovation Approval Process - Sample'. The process flow diagram shows a sequence of steps: 'Change and Innovation Req... is submitted' (Start), 'Review & Effort Estimation' (Submit), a decision diamond, 'Final Approval' (Approve/Reject), and 'Email Confirmation' (Sent). The 'Email Confirmation' step is highlighted with a red box, and its configuration panel is open on the right.

Email Confirmation Configuration Panel:

- General:** Mail Activity Name: * Email Confirmation
- Mail Header:**
 - To*: [Process Started By / Pro...]
 - Subject*: Your change/innovation request has been approved!
- Additional Options:**
 - CC: Type or select items
 - BCC: Type or select items
- Mail Body:**
 - Open Mail Body Editor
 - Mail Body has content. Open the editor to view.

Important: You will need to adjust the recipients of all form and approval steps according to your needs in order to be able to test and run the process successfully.

For adjusting the content of the email, you can click on 'Open Mail Body Editor' in the bottom:

The screenshot shows the 'Edit Mail Body' dialog box open over the process flow diagram. The dialog box has a 'Value Binding' section on the left and a text editor area on the right.

Edit Mail Body Dialog:

- Value Binding:**
 - Final Approval:
 - Project Lead
 - Comments
 - Review & Effort Estimation:
 - Required Activities (eg. Consulting, Co...)
 - Standard solution available
 - Reviewer Comments
 - Strategic Fit
 - Effort (in person days)
 - Cost Category
 - Change and Innovation Requ...
- Text Editor:**

Congratulations! Your request below has been approved. The assigned project lead [Project Lead / Final Appr...] will reach out to you soon.

Topic: [Topic / Change and Inno...]

Short Description: [Short Description / Chan...]

Type: [Type / Change and Inno...]

Requester Name: [Requester Name / Chan...]

We thank you for your contribution for making everyone's work easier and encourage you to continue submitting your ideas!

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.

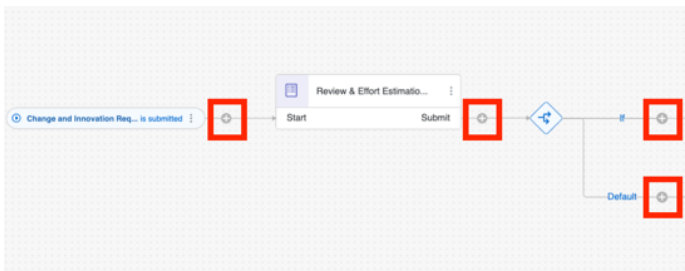
If you want to use additional process context data, you can simply drag the fields from the left menu to the editor on the right.

Important: The email notifications only work, if a mail destination for SAP Build Process Automation is configured for your account. (See [documentation](#)). If you are not sure or don't receive those emails during testing, please contact your IT admin to verify if this has been setup for your account.

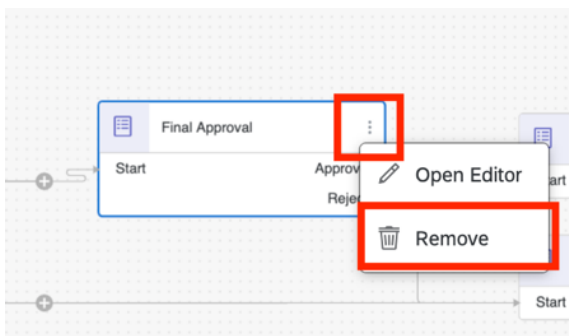
Configure the Process Flow

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:



You can remove a step by selecting it by clicking in the top right corner of every step and choosing 'Remove'.



Important: Removing a step does not delete the content but only removes the step from the process diagram.

Map your Process Data

To transfer data from one step to another, you need to define, from which process step the data should come for every field that should show values from a previous step.

In the side panel of every step that can receive or pass on data, you find tabs for 'Input' and 'Output' next to

‘General’ in the top of the right side panel. Let’s have a look at the data mapping of the ‘Review & Effort Estimation’ Step.

All fields that are shown under ‘Input’ in the respective process step are available fields that can be mapped to information collected during previous steps. In this example, the review form should show the processor all information collected from the requestor. That’s why you will see that respective fields are all mapped to information coming from the **Change and Innovation Request** form.

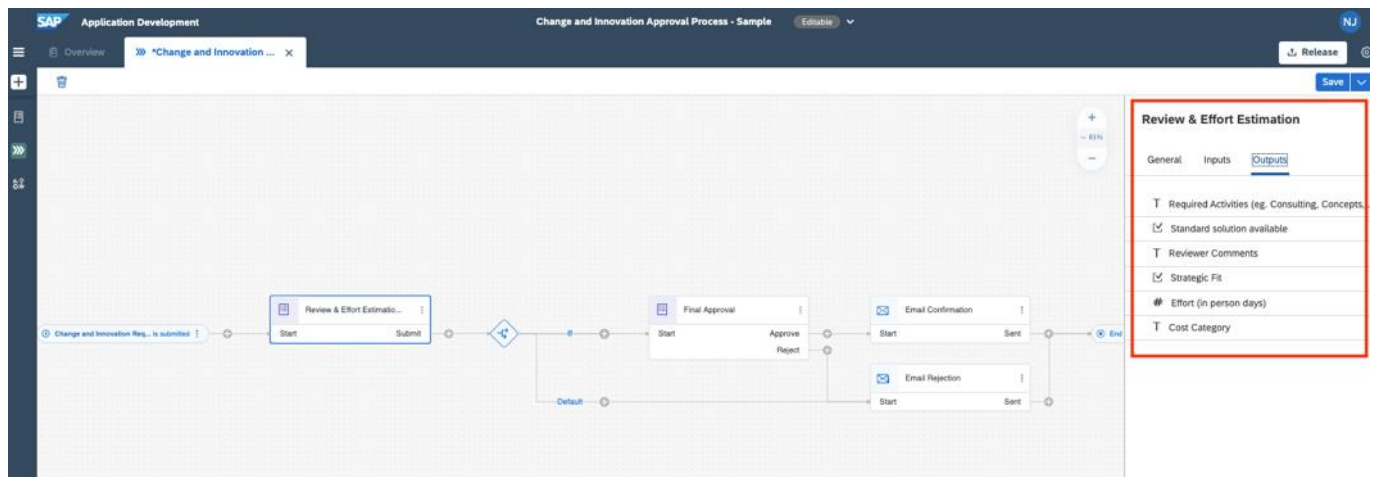
If you click in the respective field, you will be able to see a list of all available process content elements that you can use to be shown in the selected process step. These can come from previous steps or from process meta data.

If input fields are empty in this mapping view, it means that they will appear as empty in the request form. This is the case if the information needs to be filled by the processor of the current step and has not been collected in previous process steps.

Fields that are marked as ‘Read only’ fields in the form editor must be mapped and are highlighted as mandatory in the mapping view.

Important: You can only map information from fields with the same type. Eg. you would not be able to map a field of type ‘Text’ to a field of type ‘Number’. In this case, the respective fields will appear as greyed out in the selection menu.

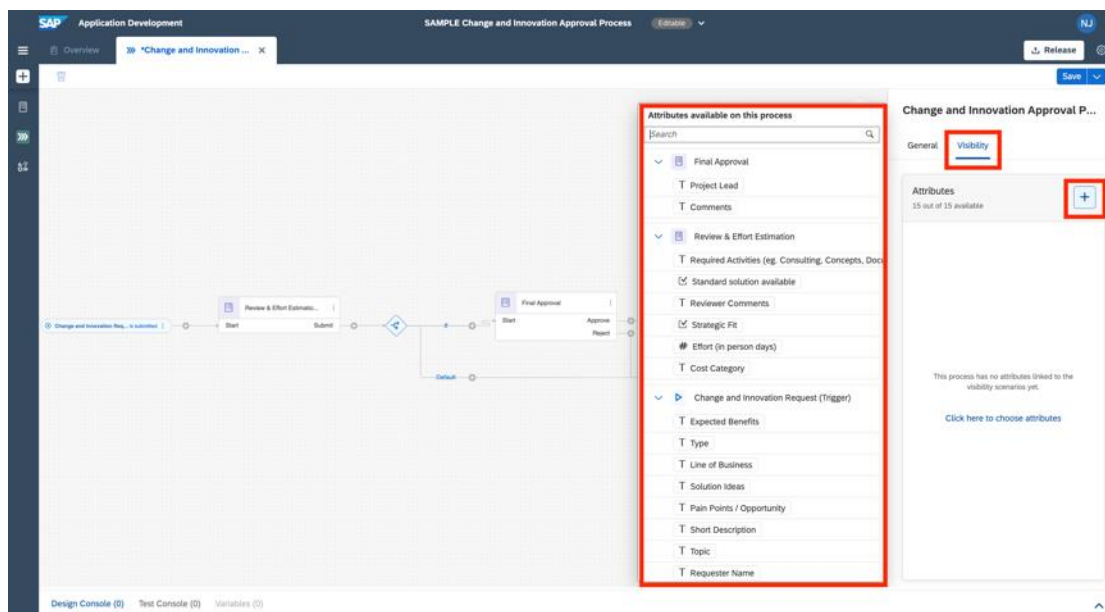
If you switch to the ‘Outputs’ tab in the right side panel, you will see a list of all information that have been newly collected or generated in the respective process step. These will then be available for mapping of the following process steps.



Configure the Visibility Scenario

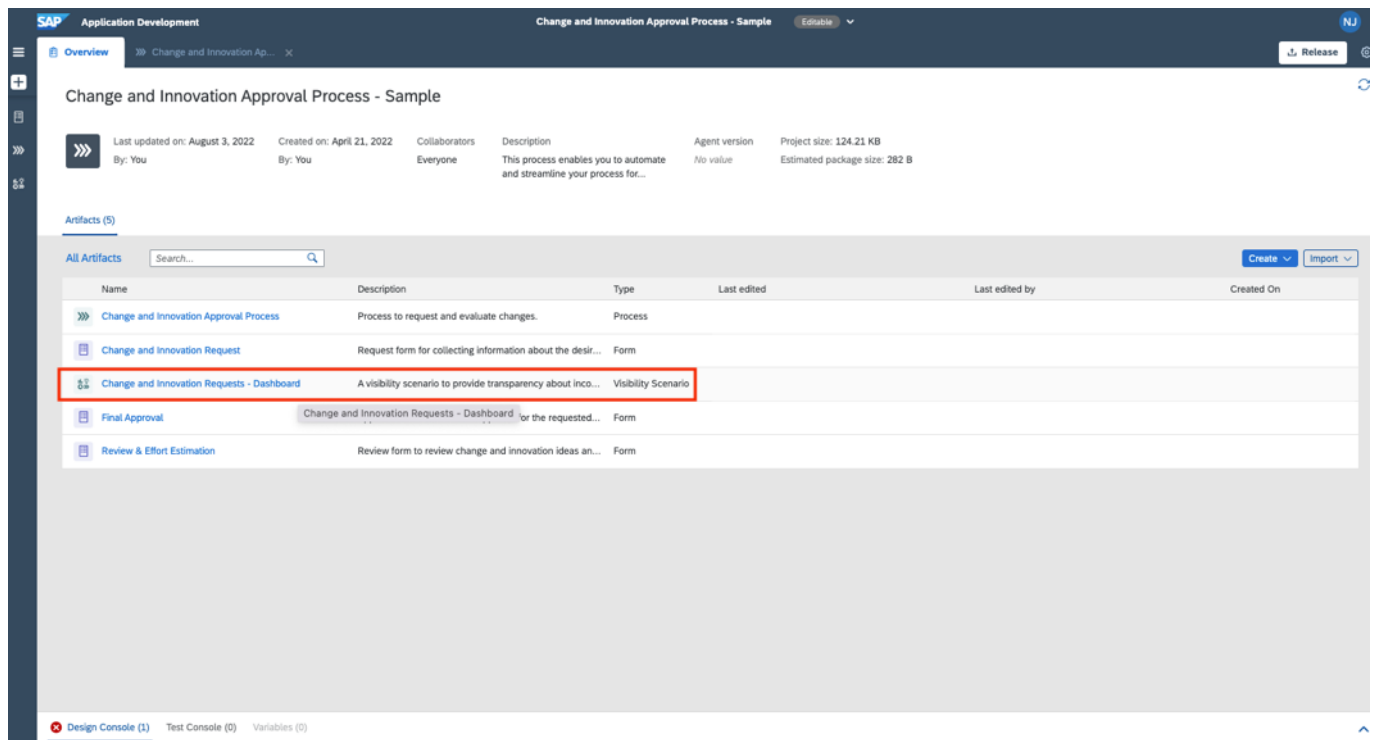
The visibility scenario is a dashboard which allows business users to track relevant process KPIs and statuses. In this example, we included the default dashboard which is provided out of the box. If you want to enrich it with context information from the process, you can select attributes from your process which you want to track in the process dashboard.

To access and add the process attributes you want to track, you just click anywhere on the blank canvas in the process builder and switch to the 'Visibility' tab in the side panel.



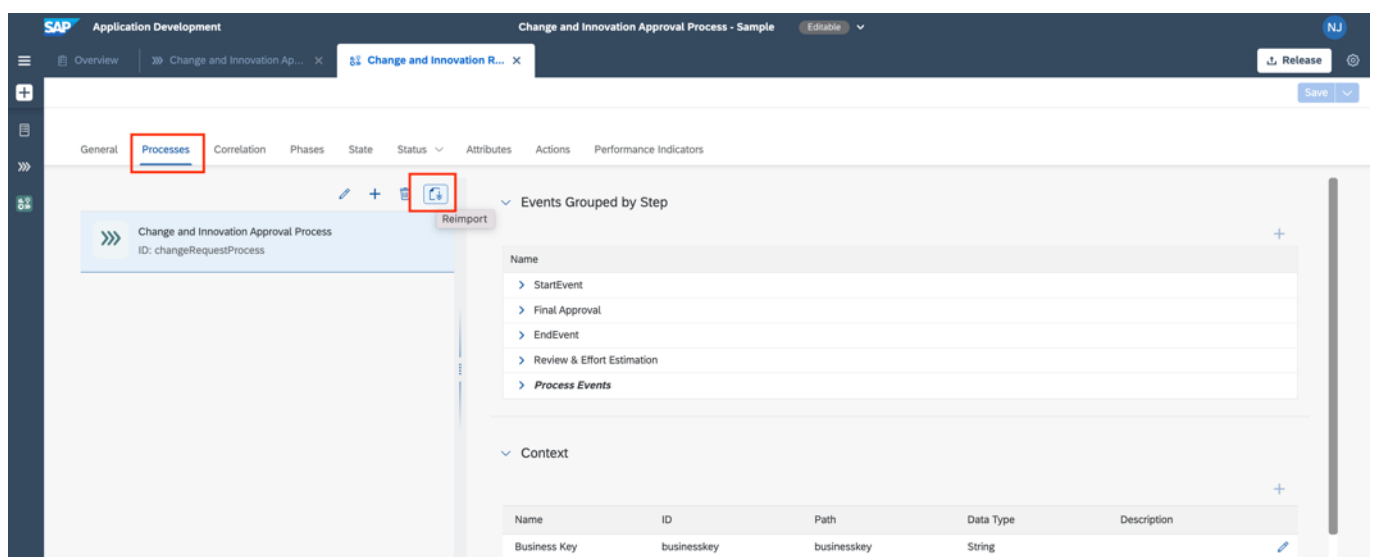
You can simply add any fields you want to use in your dashboard by selecting the relevant fields from the respective step.

To configure the visibility scenario, you need to return to your project's 'Overview' tab and select the artefact 'Change and Innovation Requests - Dashboard'.



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.

Note: After you have performed changes and configurations to the process in the process builder, you will need to reimport the process in the visibility scenario, clicking on the tab 'Processes' and clicking on the 'Reimport' icon. In the next step you are asked if you want to overwrite the events, context or data types before you can click on 'Reimport' and consequently save the visibility scenario.

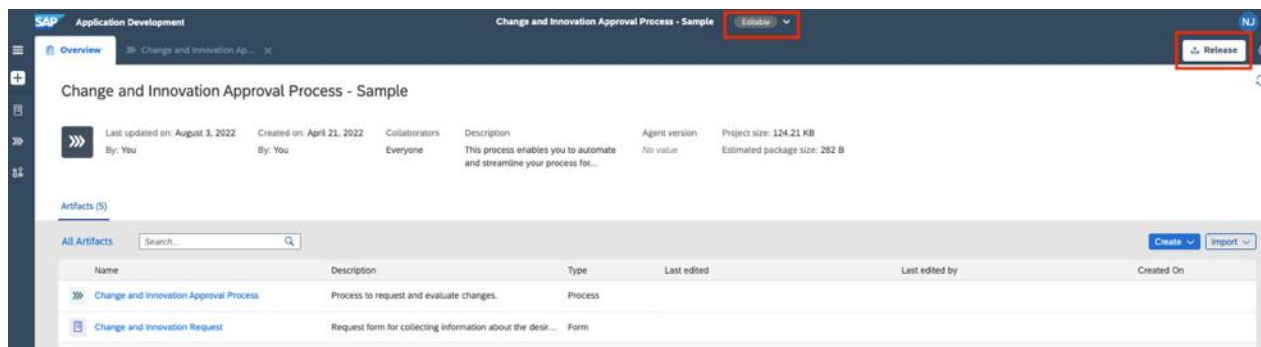


Release and Deploy your Process

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.

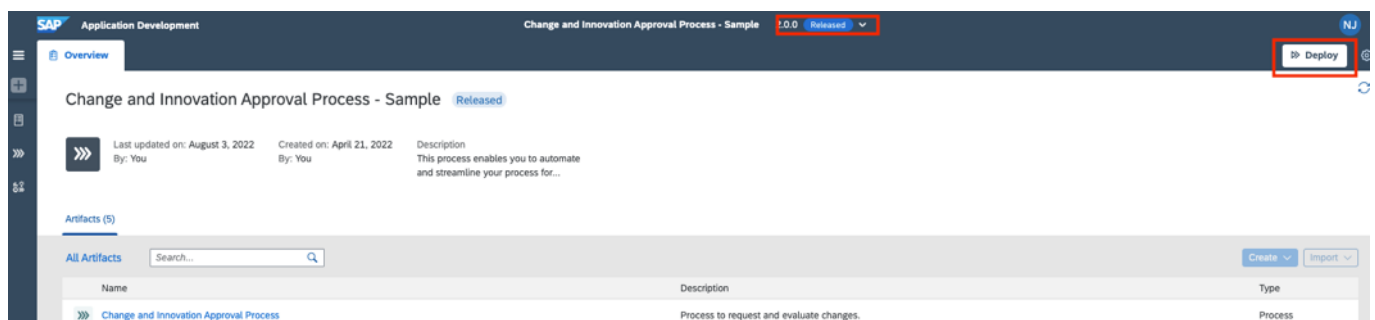
To release a version of your process, first ensure that the status is listed as 'Editable'. Then click 'Release':



If this is the first time you've released the process, a version labeled 1.0.0 is released automatically. 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'. Then click 'Deploy':



Your deployed process can now be accessed from the version dropdown:

Change and Innovation Approval Process - Sample
2.0.0 Deployed

Editable

2.0.0 Deployed

1.0.1 Deployed

1.0.0 Deployed

process - Sample
Deployed Active

April 21, 2022

Description
This process enables you to automate
and streamline your process for...

Test and Run your Process

To test and run a deployed version of this sample change and innovation approval process, you need to submit a request form. This request form can be either accessed directly or via an SAP Launchpad tile.

To access the relevant links from the process builder, open the process artifact **Change and Innovation Approval Process** and click **Change and Innovation Request is submitted** to retrieve the links from the side panel:

In this example we access the request form directly, opening the form link in a browser. Alternatively, your process can be setup as a tile in the Fiori Launchpad by your IT admin.

Change and Innovation Requests

Request Overview

Requester Name
Enter text

Type
Select an option

Topic
Enter text

Short Description
Enter text

Line of Business
Select an option

Request Details

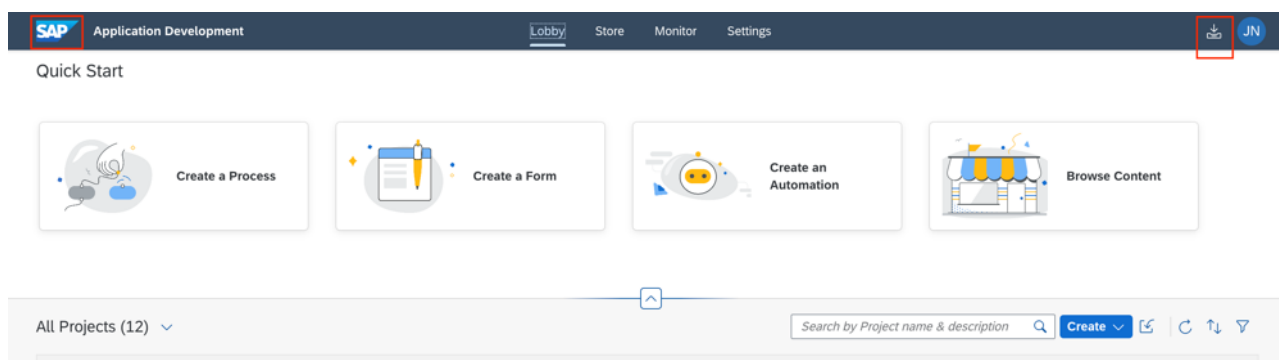
Pain Points / Opportunity
Enter text

Expected Benefits
Enter text

Submit

And then submit a request according to the path you want to test.

Once you have successfully submitted the request, you can return to your lobby and open your testing inbox via the icon in the top right corner.



If you configured the process accordingly and selected yourself as recipient of the next steps (or 'Process started by'), you should now see the request in your inbox which you can process, approve or reject to finalize this request instance.

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](#) or visit [SAP Build Process Automation @ SAP Community](#) to learn more about the different possibilities in SAP Build Process Automation.