SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

Content Guide

Purchase Requisition Approval Process
Sample Content for SAP Build Process Automation

Version: 1.0

THE BEST RUN SAP

Version of document	Date	Description
1.0		Document created

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Introduction

PURPOSE OF CONTENT PACKAGE

Purchase Requisition 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 creating and approving a purchase requisition to speed up the process and increase transparency.

PURPOSE OF THIS DOCUMENTATION

This document describes the content package **Purchase Requisition Approval** for SAP Build Process Automation. Included in this sample is the following:

- Sample form used to collect relevant information
- A condition to determine if the approval should be automatic or not
- An approval form to review the information and decide for approval/rejection
- Confirmation and rejection notifications to notify the requester about the decision
- A visibility scenario for providing transparency on incoming requests

This sample content contains the following elements as key artifacts:

Type	**Name**
Process	Purchase Requisition Pre-Approval
Form	Request Form
Form	Approval Form
Visibility Scenario	Purchase Requisition Approval Visibility

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.

Support

If you experience issues when using this content, we suggest you raise a request through the SAP Support Portal, using the component **BPI-PA**.

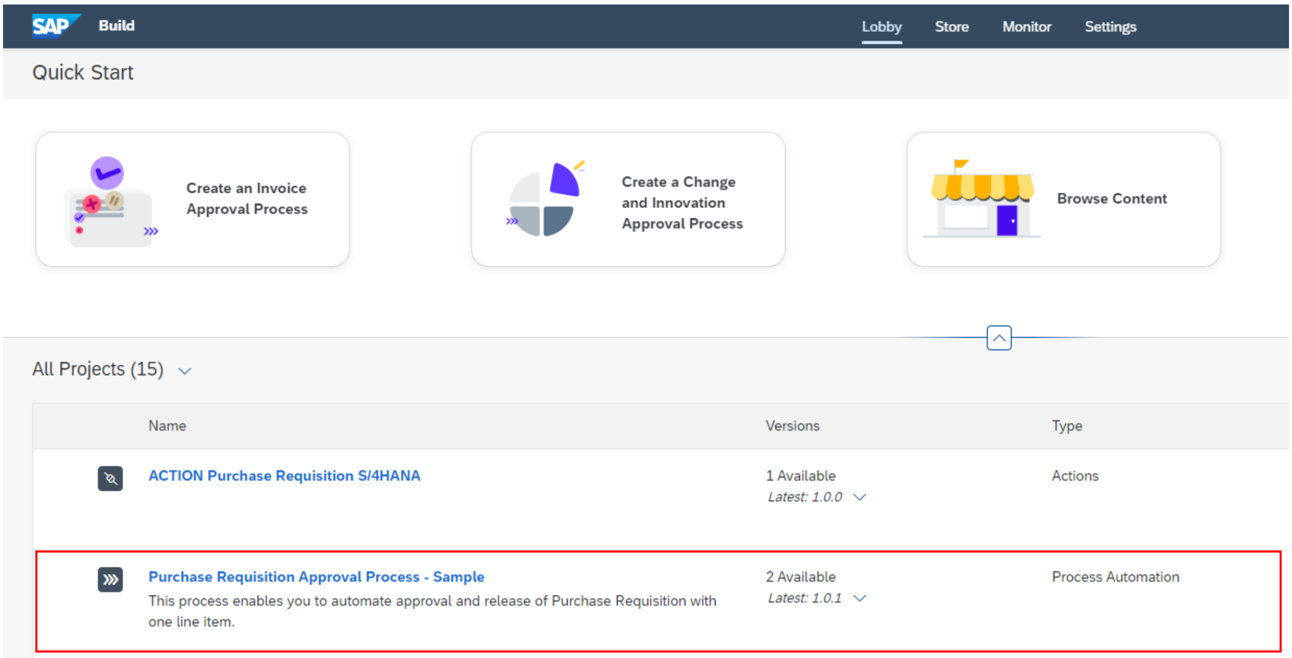
Configuration and Modification

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 needs. To modify and extend this content, you will need to add it as a template.

Access the process

The sample process can be access from the **Application Development 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.

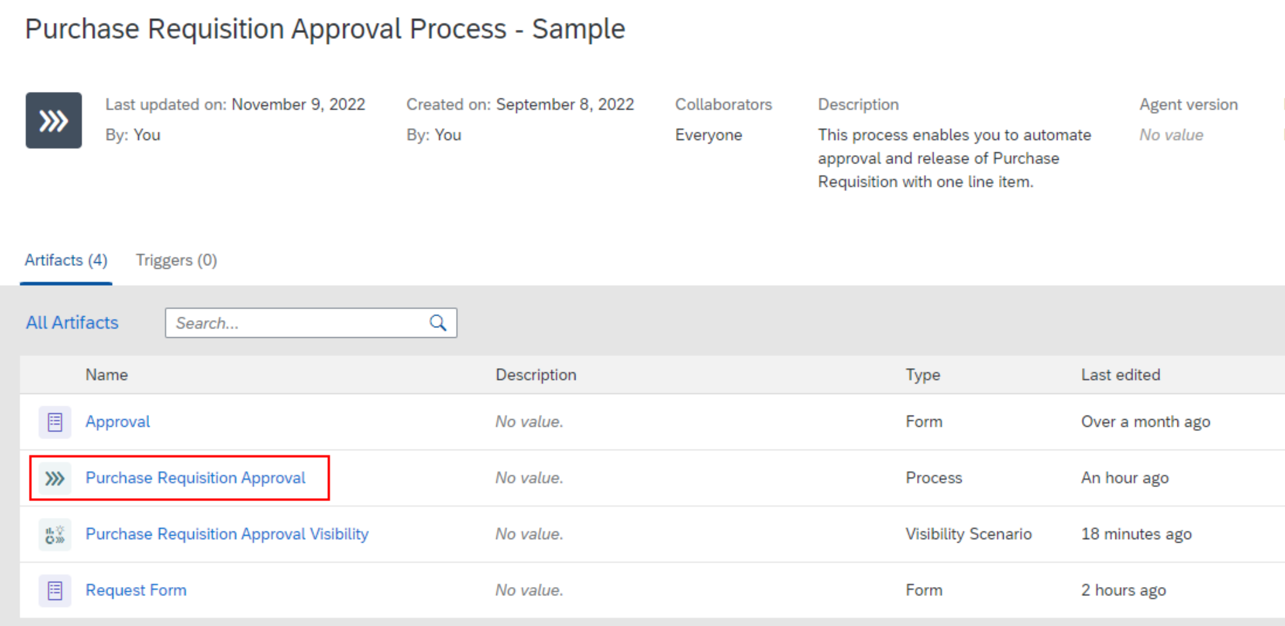
Click on the project named **Purchase Requisition Approval Process – Sample**:



<u>Important:</u> To modify this content you will need to have created it from template as explained earlier. 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 configuring existing ones. 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 **Purchase Requisition Approval Process**:

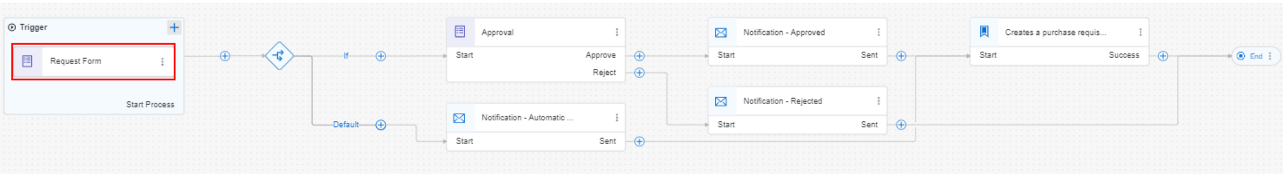


This loads the process builder, displaying a visual overview of the existing process. You can now click on process artifacts, such as the request form, to further configure them.

Configure the Request form

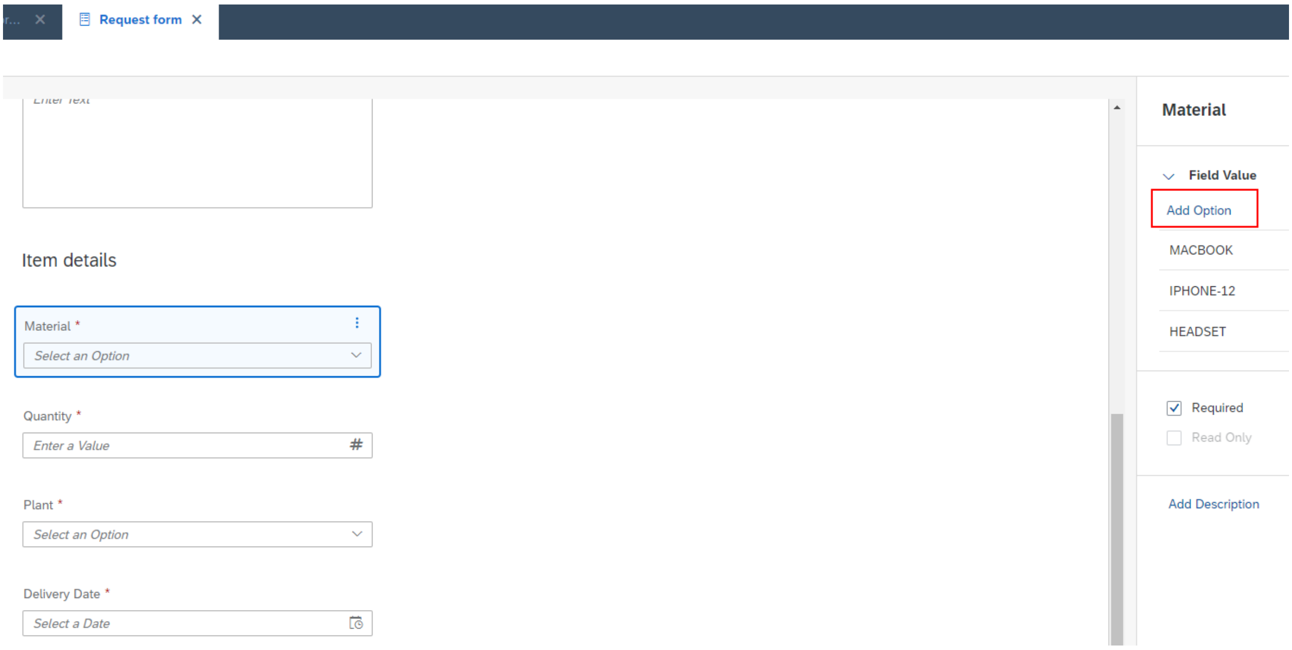
This sample process is initiated (or triggered) by someone submitting a request form. This request form captures data such as the requestor's personal details and further information about their request.

To configure the request form from the process builder, click on the three dots in the top right corner of the Form:



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.

It is also possible for you to change the values available in the drop-down field used to select the item to purchase. To do so, select the **Material** field in the form builder. You can either add new options, modify or remove the existing ones.

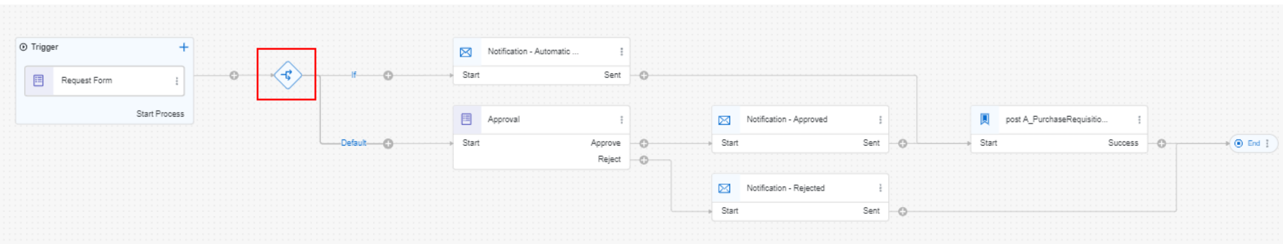


IMPORTANT NOTE

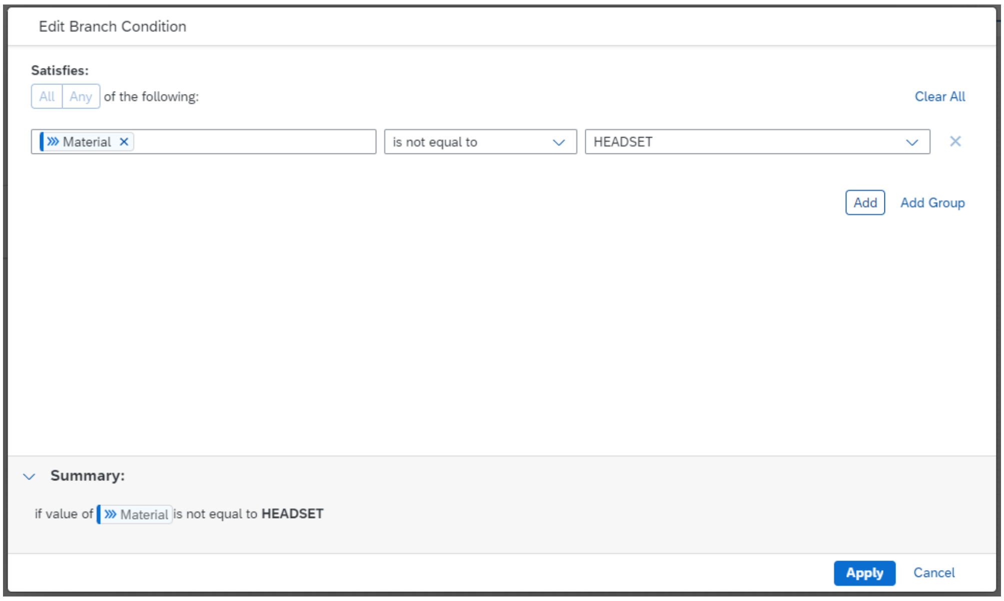
The options of the material field must exist in your SAP S/4HANA system so the Purchase Requisition Order can be created accordingly.

Configure the condition

Returning to the process builder, you'll see that a condition is the next step in the process.



Select the condition and click on the **Open Condition Editor** on the right panel. There you can add new condition or modify the existing one. You can fully customize the condition according to your own needs by selecting the input you want to base your condition on. Depending on the field type, you will see different options to setup the condition.



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

All – All configured condition must be satisfied for the process to be send along the If branch.

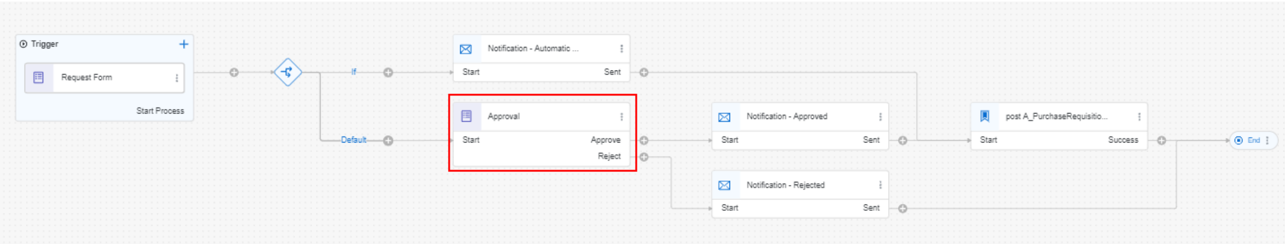
Any – A minimum of one condition must be satisfied

Configure the approval

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

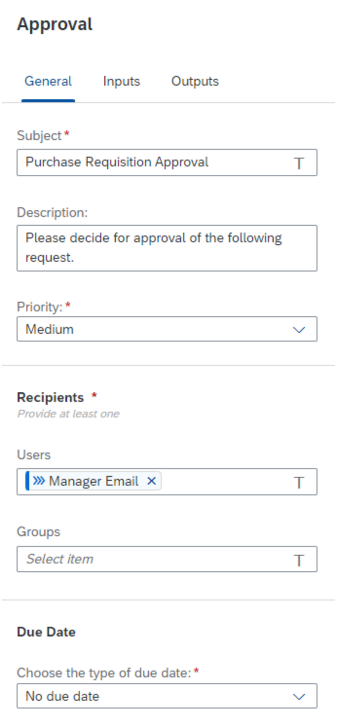
The information that is shared with the approver is configured by creating an approval form.

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



Most of the fields are set to 'Read Only'. In addition there is a **Comment** field which can be used for the approver to provide information about the decision that is to be taken.

Once the content of the form is configured, you can also configure the settings. In the Process Builder, select the Approval form and have a look at the right panel.

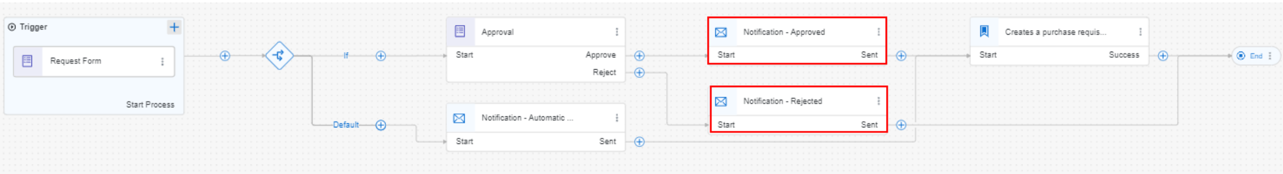


General Settings – These allow you to configure how the approval tasks are displayed in an inbox and to which users or groups of users should receive them.

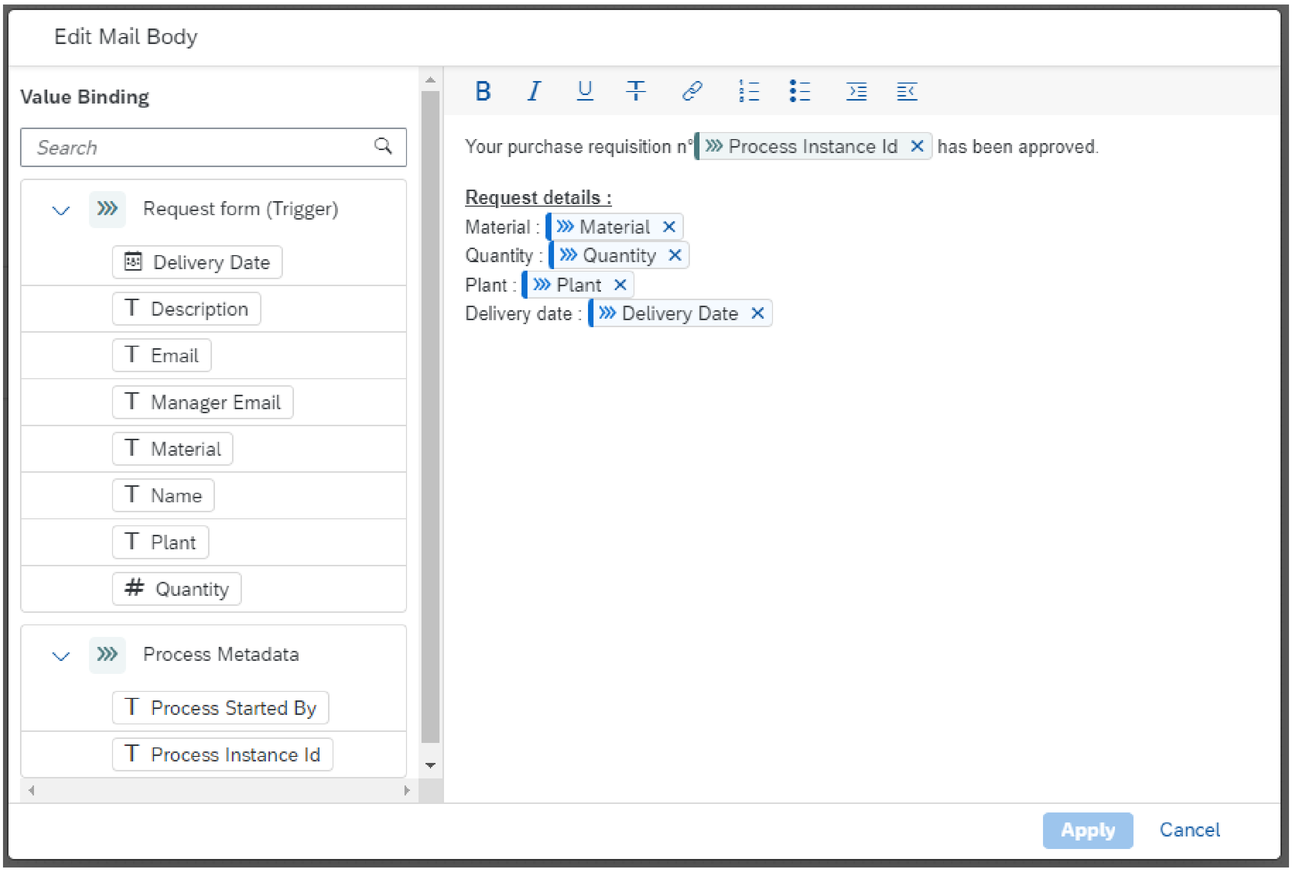
Configure the mail steps

This process is configured to send notification to the requestors to inform them of the status of their request.

To access the settings of the mail, you can select the **Notification – Approved** or **Notification – Rejected** to open the side panel. There you would be able to adjust the subject and recipient.



For adjusting the content of the mail, you can click on the ‘Open Mail Body Editor’ button:



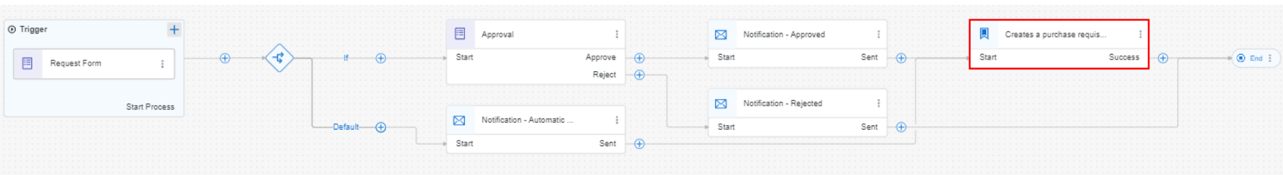
The mail editor allows you to write and adjust text according to your needs. You can also reuse information that has been collected during the process.

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.

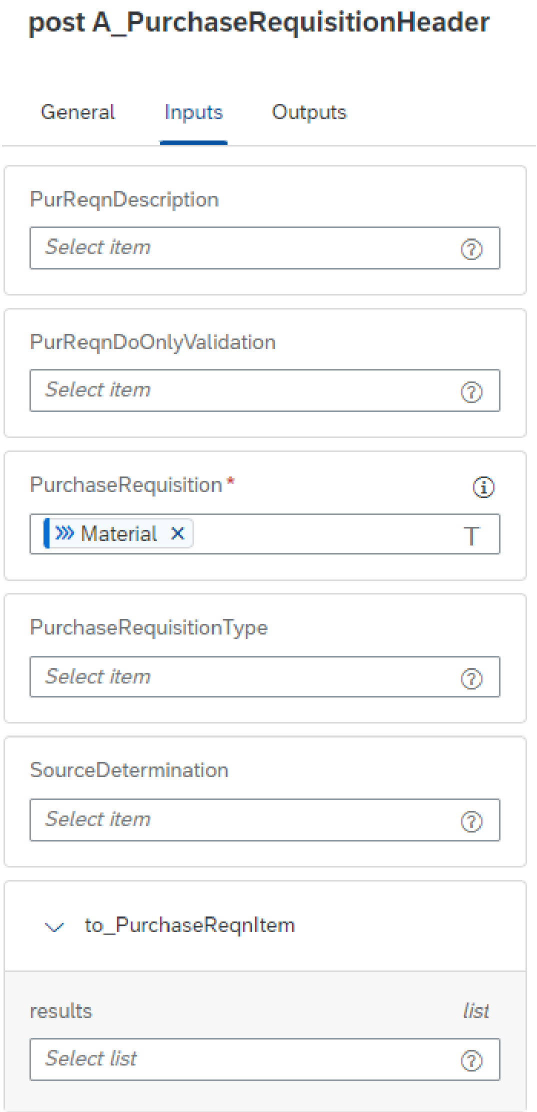
Important: The email notification only works if a mail destination for SAP Build Process Automation is configured for your account (see documentation).

Configure the action

Once the request has been approved and that notification has been sent, the purchase requisition is sent to an external system (SAP S/4HANA for instance) using an Action artifact.



You can adjust the data sent to the external system by modifying the input data. To do so, select the item and open the **Inputs** tab on the side panel. Here, map the data coming from the process to the input parameter.

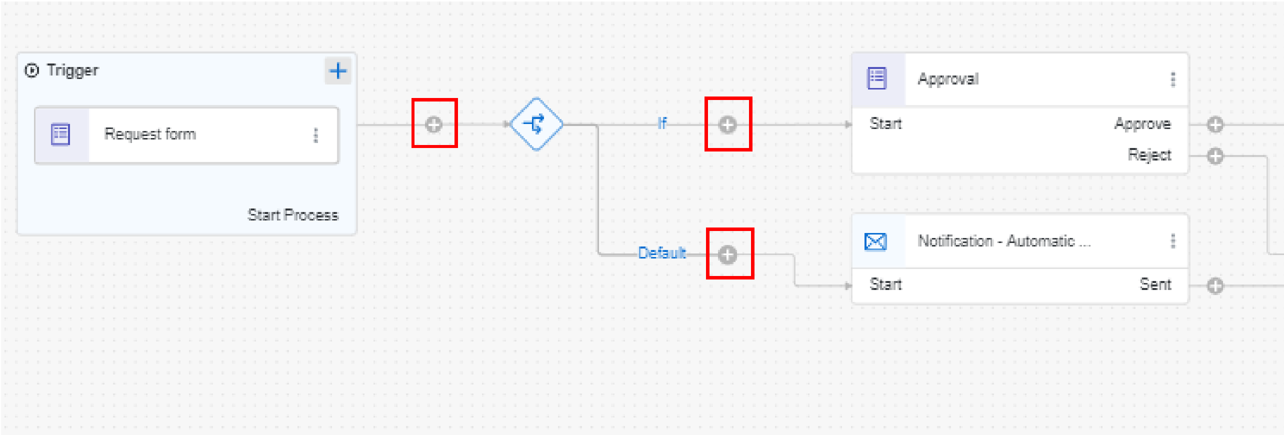


Important: in this sample, the Action item is a POST API call to **/A_PurchaseRequisitionHeader** (see [documentation of the API])

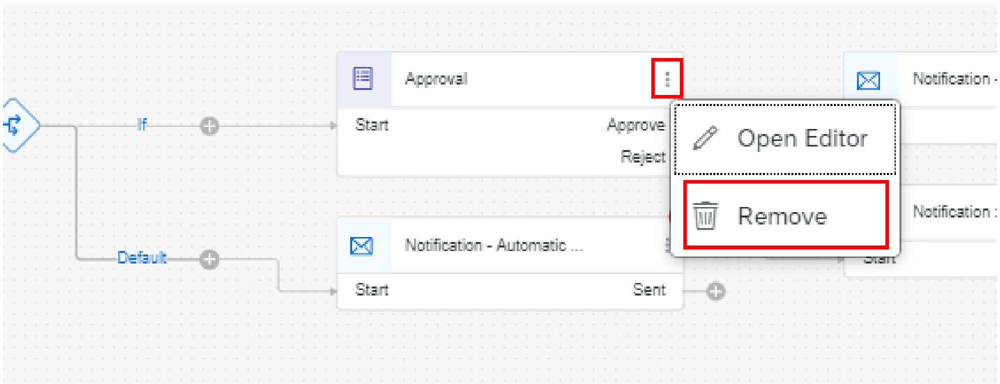
Configure the process flow

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:



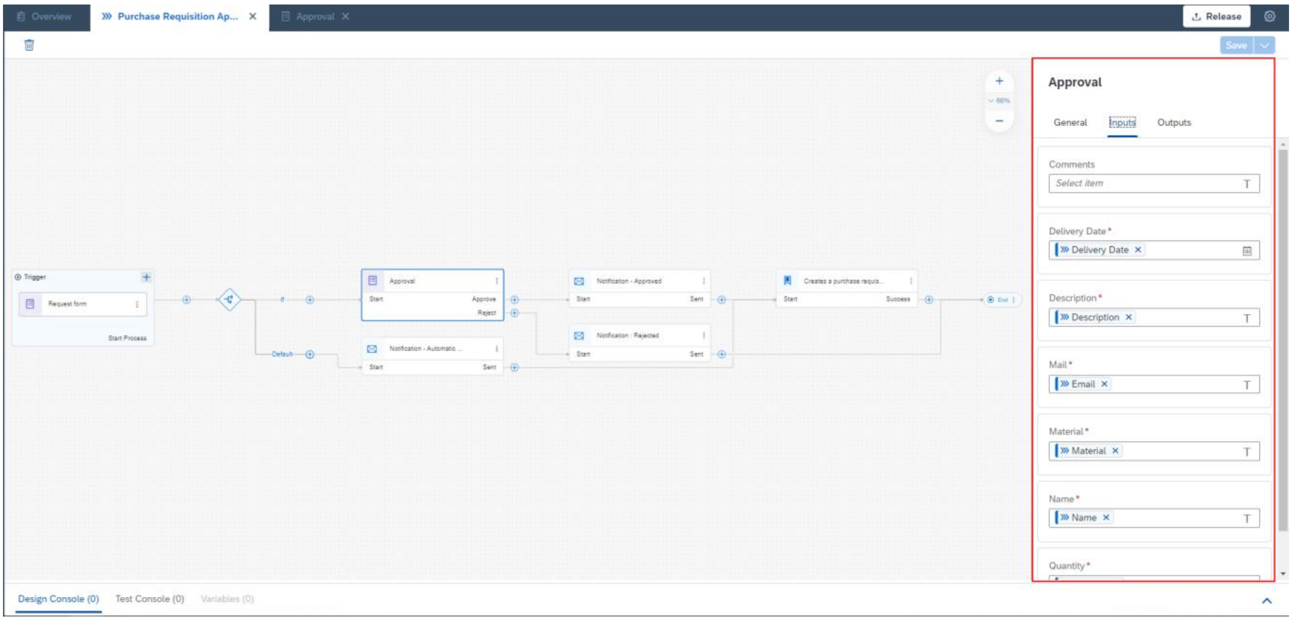
You can remove a step by selecting it by clicking in the top right corner of every step and choosing ‘Remove’:



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. You will need to do this for every process step. Let’s have a look at the data mapping of the **Approval Form** 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 mapped to information coming from the **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.

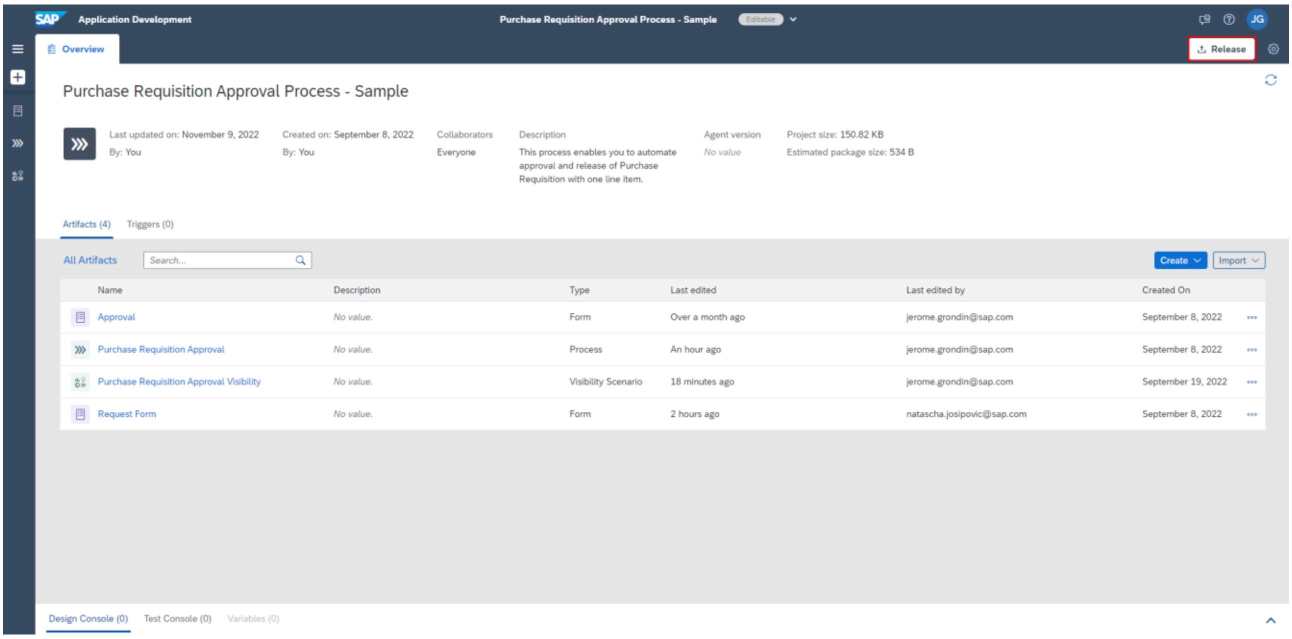
If you switch to the ‘Outputs’ tab in the right side panel, you will see a list of all information that have been newly collected or generated in the respective process step. These will then be available for mapping of the following process steps.

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.

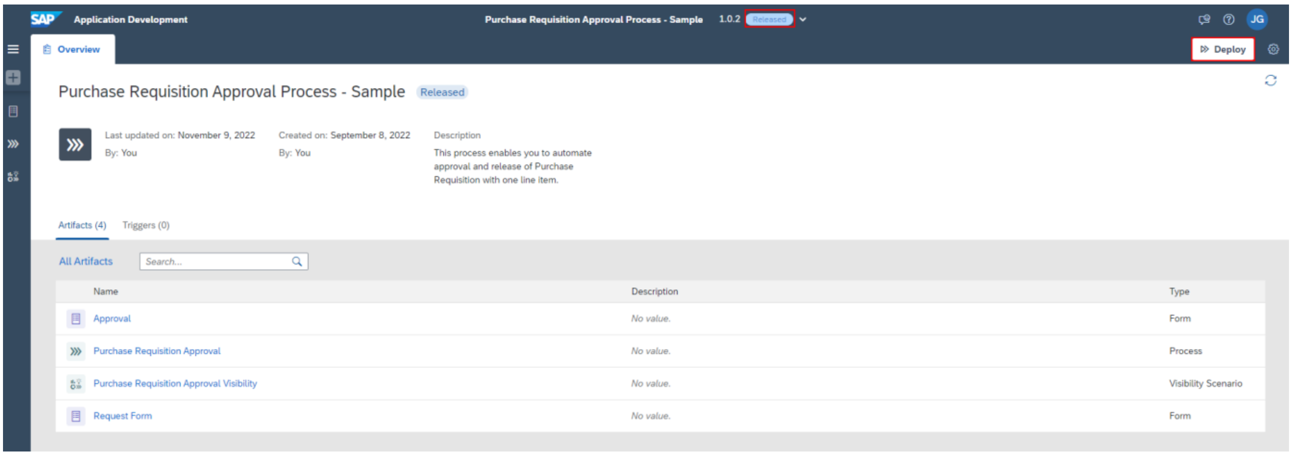
To release a version of your process, first ensure that the status is listed as ‘Editable’. The click ‘Release’:

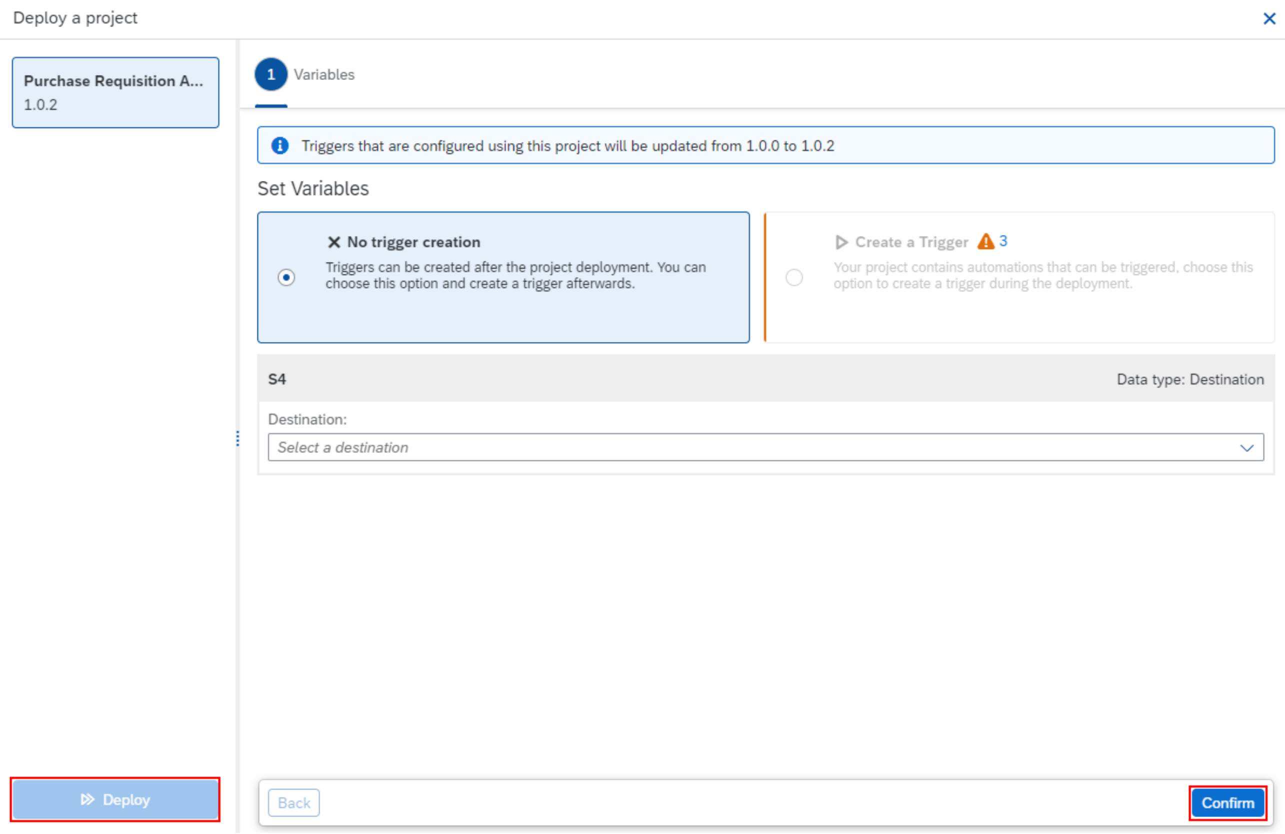


If this is the first time you've released the process, a version labeled 1.0.0 is released automatically. For subsequent releases, you're prompted to select a version type before the process is released.

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.

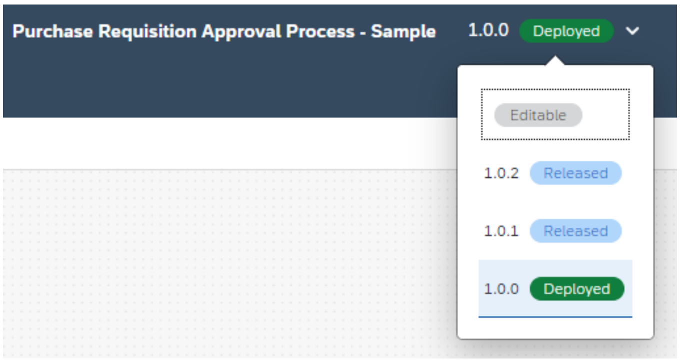
To deploy a released version of your process, first ensure that the status is listed as 'Released'. Then click 'Deploy'.





IMPORTANT NOTE
This package uses a Destination artefact as an Environment variable. You need to create one in your system so you can use it when you deploy your package (see documentation about Destination artefact).

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



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.

www.sap.com/contactsap