

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Business Partner Creation Approval Process using SAP Workflow Management

Table of Contents

Table of Contents.....	2
Overview	3
Business Partner Creation	4
My Inbox Tasks	7
Enrich Address Data	7
Enrich Finance Data	8
Approval.....	9
Reject	10
Rework	10
Approve	12
Create Business Partner.....	12
Review Business Partner Data	12
Process Visibility Workspace	14
Access Process Workspace	14
Insight to Actions.....	15

Overview

This document provides information about how to use the user interfaces of Business Partner Creation Approval Process. Process Operators, Approvers, Requestors, are the target users of the user interfaces explained in this document.

Business Partner Creation Approval Process content package for S/4 HANA cloud enables to automate business partner creation in a flexible and transparent way. It provides flexibility in executing a specific variant of the process depending on attributes like business partner category, etc. When a user submits a request to create a new business partner, a pre-configured process variant is triggered in SAP Workflow Management based on configurable business conditions. On approval, a business partner is created in SAP S/4 HANA cloud system.

Salient features of this content package are mentioned below:

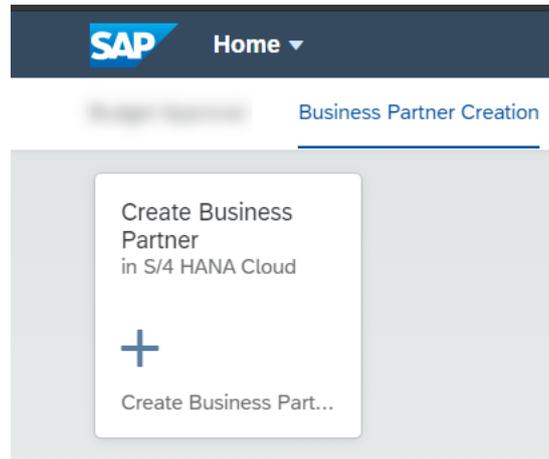
- Plug and Play with SAP S/4 HANA cloud without any additional development
- Possible to create business partner of category types Person and Organization
- Process steps delivered to create a business partner
- Automatic email notification to parties involved
- Business Rules provides flexibility in determining process variants and approvers
- Custom validation on business partner attributes using Business Rules.
- New variant of the process can be created using the pre-delivered process steps in a no-code / low-code approach
- Insight to actions using Process Visibility
- Out-of-the-box visibility into key process performance indicators

Process Operators, Approvers, Requestors are the target users of the user interfaces explained in this document.

Business Partner Creation

The applications that are part of Business Partner Creation Approval Process content package will be available in the SAP Fiori Launchpad. Check with your administrator for the link to access the same.

This application, accessed from a tile in SAP Fiori Launchpad, can be used to submit a request to onboard / create a business partner.



The details like First Name, Last Name, Email Address, User ID will be pre-populated from the IAS tenant along with the Request ID. Use the application to fill in the Comment and basic data like business partner Category where you can choose from Person or Organization. The basic data fields will vary depending on whether the category is Person or Organization. For Person it will ask to enter Last Name as mandatory and First Name, Title as optional fields. For Organization, it will ask for Name.

The screenshot shows the SAP 'Create Business Partner' interface. At the top, there is a dark header with the SAP logo, a back arrow, the text 'Create Business Partner', and a search icon. Below the header, the main title is 'Business Partner Creation Request'. There are three tabs: 'Requester', 'Basic Data', and 'Roles'. The 'Requester' tab is selected and contains a 'User ID' field with a red asterisk and a 'Comment from Requester' text area. The 'Basic Data' tab is also visible, showing a 'Category' dropdown menu with 'Person' and 'Organization' options. The 'Roles' tab is partially visible at the bottom.

In the Roles section, click on the **+** icon to add a row and click on the Business Partner Role input help, to choose the role from the list. A popup window opens with the list of roles retrieved from the custom CDS view of the configured S/4 HANA Cloud system. User can select a role by clicking on the row.

Select: Roles

[Go](#) [Show Filters](#)

Items (34)

Business Partner Role	Role Description
AGC001	External Marketing Agent
BBP005	Service Performer
BBP010	Freelancer
BUP001	Contact Person
BUP002	Prospect
BUP003	Employee
BUP004	Organizational Unit
BUP101	No Blocking
BUP102	Blocking Approval
CRM000	Sold-to Party

[Cancel](#)

Submit the request using the *Submit* button. It returns a Success message. Once the initial request to create business partner is submitted, the next steps in the process are automatically determined.

My Inbox Tasks

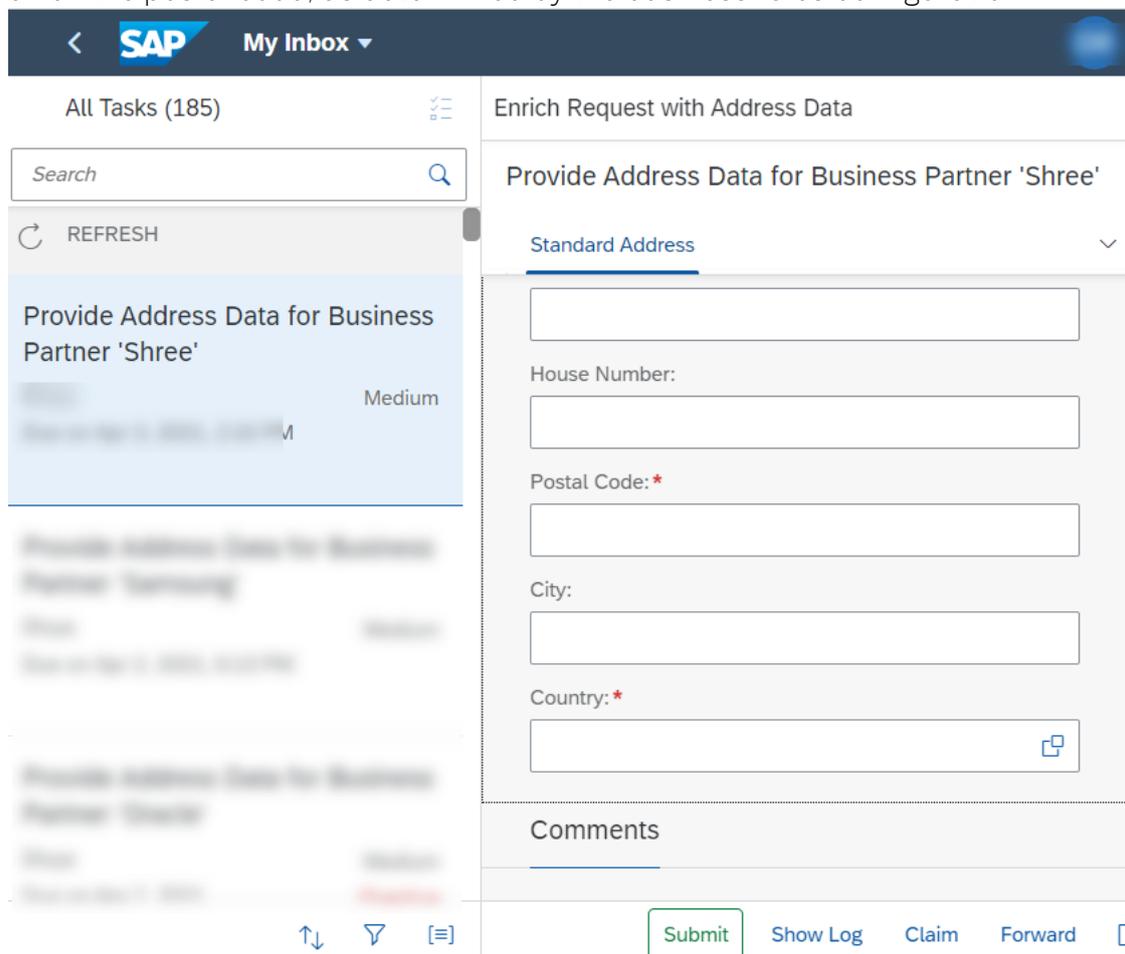
Once the request to create a new business partner is submitted, based on the business configuration respective users will receive tasks in My Inbox application.

The My Inbox application in SAP Workflow Management enables line of business users to claim and complete their task. Please check the [documentation for My Inbox](#) for more details.

Enrich Address Data

The step to enrich address based on the process configuration starts and the processor, determined by the business rule, gets email notification of the task present in My Inbox application. The task is presented with the requester details captured while submitting the request.

The owner of the task in this step is required to enrich the address details (like street, postal code, country, city etc.), enter a comment which is optional and submit the task for next steps. There is a validation on the postal code, as determined by the business rules configuration.



The country input help reads data from the configured custom CDS view.

Select: Country

[Show ...](#)[Go](#)

Items (250)

	Country Key	Country Name
	BF	Burkina Faso
	BG	Bulgaria
	BH	Bahrain
	BI	Burundi
	BJ	Benin

[Cancel](#)

Finally, once all required data is entered, the task needs to be submitted for the next steps by clicking on the "Submit" button. If there is no action on the assigned task by the current processor and the due date of the task is crossed, then a reminder mail is sent out to processor for the pending task.

Enrich Finance Data

Based on the process configuration, the processor of the task, determined by the configured business rule, gets notified via an email that there is a task created which can be accessed in My Inbox application. The responsible task owner on accessing the task, is presented with the details captured from the previous steps including the enriched address data. In this task, the processor, needs to fill in the finance related data in the sections **Bank Accounts** and **Tax Numbers**. Clicking on + icon adds a row to choose Bank Key from the input help, enter Account Number and Account Name in the **Bank Accounts** section, choose Tax Category from input help and enter Tax Number in the **Tax Numbers** section. The Tax Number validation and Tax Category determination are carried out by the business rules configuration.

The screenshot displays the SAP My Inbox interface. On the left, a task list is visible with the title 'Provide Finance Data for Business Partner "Shree"'. The main area shows the task details and a form titled 'Enrich Request with Finance Data'. The form has several tabs: 'Requester', 'Basic Data', 'Roles', 'Standard Address', and 'Bank Accounts' (which is currently selected). The 'Bank Accounts' section contains a table with columns for 'Bank Key', 'Bank Name', 'Bank Country', 'Account Nu...', and 'Account Na...'. Below this is a 'Tax Numbers' section with columns for 'Tax Category' and 'Tax Number'. At the bottom of the form, there is a 'Comments' section and a 'Submit' button. Other buttons like 'Show Log', 'Claim', and 'Forward' are also visible.

Comment section is optional and in the History section, the data from the previous step is shown. Finally, once all the data is entered, the task needs to be submitted for the next steps by clicking on the submit button. If there is no action on the assigned task by the current processor and the due date of the task is crossed, then a reminder email is sent out to processor for the pending task.

Approval

Based on the process configuration to initiate an approval for the business partner creation request, the responsible users as determined by business rules, receives email notification along with the approval task in My Inbox application. The user is presented with all the information that has been captured in the previous tasks and can either Approve or Reject or request Rework, with a comment(optional).

Approve Request

Approval of Business Partner Shree Creation Request

Standard Address Bank Accounts Tax Numbers **Comments** History

History

User	Step Name	Status	Comment
	Address Data Provisioning	address data is provided	Address enriched
	Finance Data Provisioning	finance data is provided	Finance data enriched

Approve Reject Rework Show Log Claim Forward

Reject

If rejected, then a notification email is sent out to the requester and the process is stopped.

Rework

If the processor sees the need for rework, the request can be sent for rework by clicking on the Rework button. Possible options within Rework are **Complete Rework**, **Rework Address Data**, **Rework Finance Data**.

- a) Complete Rework – If the processor of the task chooses to send for **Complete Rework**, a notification email is sent out and a rework task gets created for the person based on the process configuration. The determined task owner receives the task in My Inbox and can rework on Basic Data and Roles which are in editable state. Once done, the request is submitted by clicking on Submit button.

The screenshot displays the SAP My Inbox interface. At the top, it shows 'All Tasks (185)' and a search bar. The main task is titled 'Rework Task' and 'Rework Required For Business Partner Creation Request 1617352321'. Below the title, there are tabs for 'Standard Address', 'Bank Accounts', 'Tax Numbers', 'Comments', and 'History'. The 'History' section contains a table with the following data:

User	Step Name	Status	Comment
	Address Data Provisioning	address data is provided	Address enriched
	Finance Data Provisioning	finance data is provided	Finance data enriched
	Approval	rework is	

At the bottom of the task view, there are buttons for 'Submit', 'Show Log', 'Claim', and 'Forward'.

Then based on the process configuration, process is restarted, and the configured steps are executed, email notifications are sent out and tasks are assigned to task owners in My Inbox applications, as per the configuration. In the History section of the task, the data from the previous steps are shown.

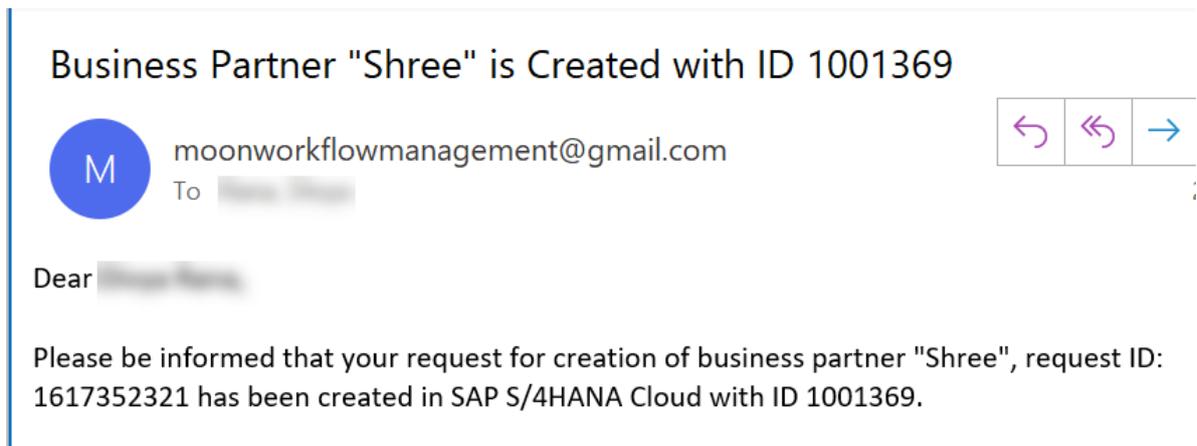
- b) Rework Address Data - If the processor of the task chooses “**Rework Address Data**” option, a notification email is sent out to the responsible task owner as determined by business rules and receives a task in My Inbox application for “Enrich Request with Address Data”. In such a task, only the **Standard Address** section is editable, which can be further enriched. The task owner can also provide a comment in the Comment box. The History shows the data captured from the previous steps. Once the processor submits this task, next Approval Request task is created for the determined processor, where the processor can again decide to Accept, Reject or Rework.
- c) Rework Finance Data - If the processor of the task chooses “**Rework Finance Data**” option, a notification email is sent out to the responsible task owner as determined by business rules receives a task in My Inbox application for “Enrich Request with Finance Data”. In such a task, only the **Bank Accounts** and **Tax Numbers** sections are editable, which can be further enriched. The task owner can also provide a comment in the Comment box. The History shows the data captured from the previous steps. Once the processor submits this task, next Approval request task is created for the determined processor, where the processor can again decide to Accept, Reject or Rework.

Approve

The task owner can approve the task by clicking on Approve button in the Approve Request task. Once the task is approved, an email notification is sent out to the requester informing the request for business partner creation is approved.

Create Business Partner

Once the Approval request is through, the system automatically starts the next step of business partner creation. Once successful, the requester is informed about the creation in the corresponding S/4 HANA Cloud system, via configured email.



Review Business Partner Data

If the process is configured to include review step, then the requester receives a task in My Inbox application to just review the created business partner. This task is displayed in read only mode. Clicking on **Confirm** completes the process of business partner creation.

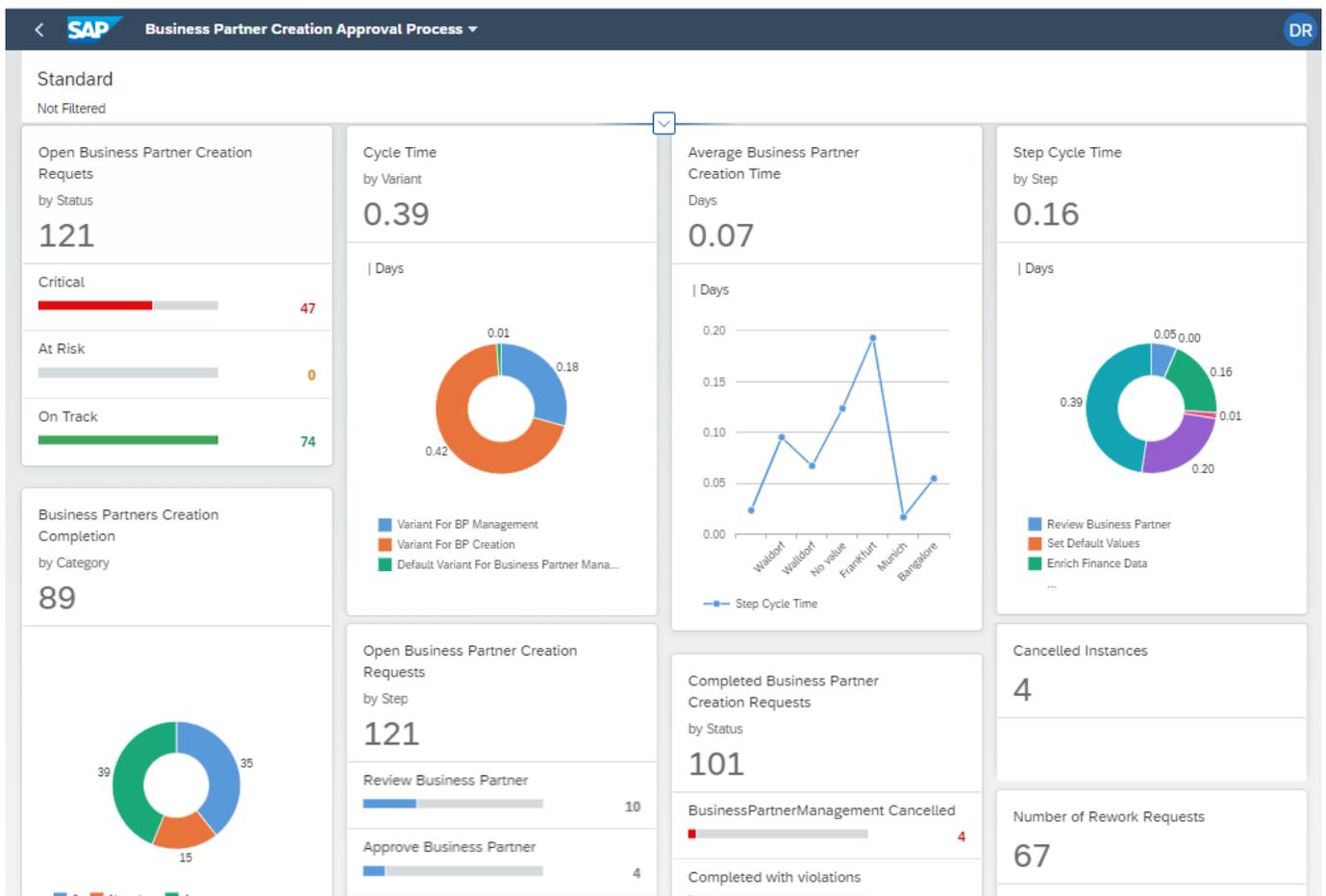
Process Visibility Workspace

Process visibility enable Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. Process visibility capability enable customers gain out of the box process visibility into their deployed processes. Please refer [help documentation](#) for more details.

The Business Partner Creation Approval Process content package provide out of the box visibility on process performance indicators for all the deployed process variants in SAP Workflow Management. A process owner or line of business expert can enhance the visibility scenario.

Access Process Workspace

1. Go to Process Flexibility Cockpit.
2. Select Business Partner Creation Approval Process.
3. Click Live Process Insights – Business Partner Creation Approval Process.



Please go through [help documentation](#) to know about process workspace.

Insight to Actions

All critical, overdue, failed and suspended instances are notified in real time to the respective process owners or administrators. Process owners/operators could also trigger actions based on the process sub-status. Refer the [official help document](#), to know how to configure actions.

 Business Partner Creation Approval Process ▾

Business Partner Request

State: **Open** Cycle time: **2 min**

Status: **Critical** Target Cycle Time: **1 Day**

Sub-Status: **Process Suspended**

Start Date: **Apr 2, 2021, 2:55:37 PM**

End Date: **—**

Target Date: **Apr 3, 2021, 2:55:37 PM**

Information Path Action Logs

Action	Status	User	Trigger Type	Triggered On
Escalate to Process Admin	Triggered	-	USER	Apr 2, 2021, 2:58:09 PM
Notify Process Administrator	Triggered	-	SYSTEM	Apr 2, 2021, 2:56:34 PM

[Escalate to Process Admin](#)