

# Integrating SAP Qualtrics Surveys with SAP for Insurance



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# Document History

Version	Date	Change
1.0	2021-10-13	First version

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# 1 Overview

You can connect the experience management system SAP Qualtrics Surveys with the SAP for Insurance back-end systems Policy Management in SAP S/4HANA (FS-PM) and Claims Management in SAP S/4HANA (FS-CM).

The connection between SAP Qualtrics Surveys and the back-end systems is enabled by the integration flow (iFlow) *Read Insurance Policy and Claims Information from SAP S4HANA for SAP Qualtrics*. This integration flow is provided as an artifact in the integration package *SAP Qualtrics Surveys Integration with SAP for Insurance* in SAP Cloud Integration, available in SAP API Business Hub (<https://api.sap.com>).

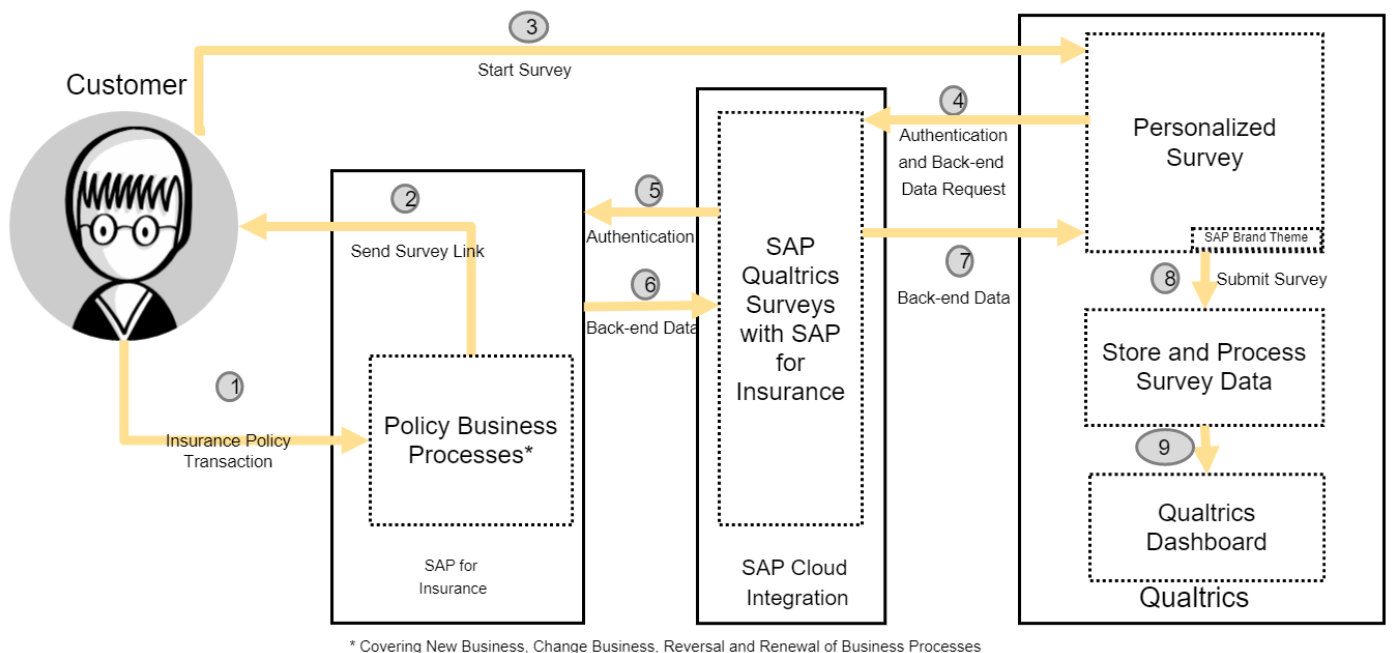
The connection to SAP Qualtrics Surveys enables insurance companies to run customer surveys using the integrated iFlow bringing X-data (experience data) from SAP Qualtrics Surveys and O-data (operational data) from SAP S/4 HANA together. Based on this data, an insurance company gets key insights of customer's satisfaction, experiences, and expectations to meet its business goals.

Surveys are provided for the following business processes in Policy Management:

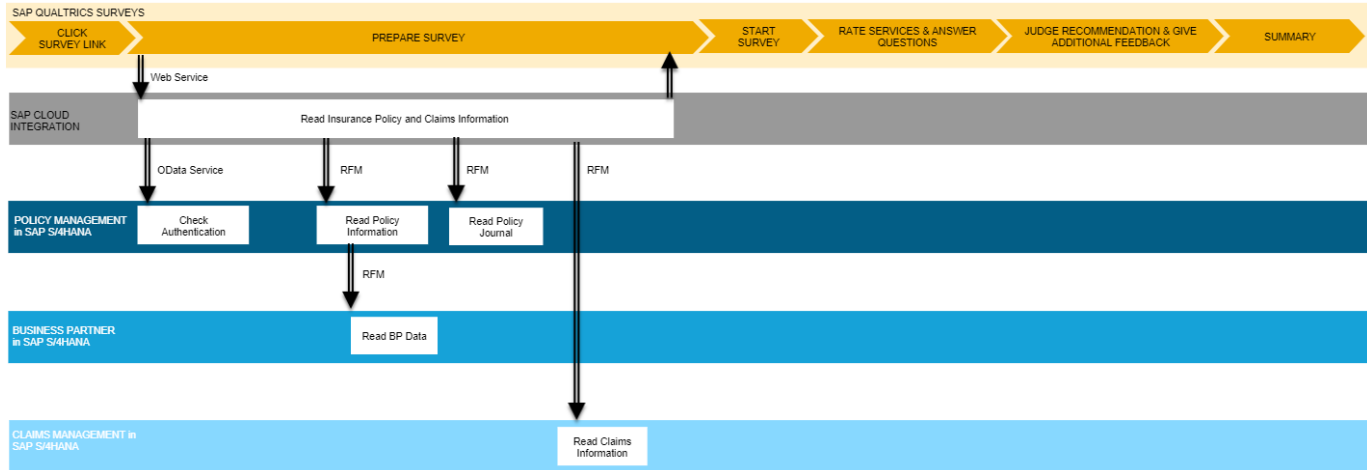
- New Business
- Change Business
- Reversal
- Renewal

The insurance customer receives an e-mail containing specific questions related to the relevant business process. If a policy has an open claim, an additional survey is provided for the Claims related experience.

The following graphic provides you with an overview of the different process steps:



The following graphic provides you with an overview of the services which are called in the iFlow *Read Insurance Policy and Claims Information from SAP S4HANA for SAP Qualtrics* and in the respective back-end systems.



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## 2 System Landscape

### 2.1 Systems Required

Set up the following systems:

#### SAP Qualtrics Surveys

SAP Qualtrics Surveys enables insurance companies and other financial service providers to collect customer feedback about their insurance services and products quickly and effectively.

For general information, see [Survey Basic Overview](#).

#### SAP Cloud Integration

SAP Cloud Integration helps you to connect cloud and on-premise applications with other SAP and non-SAP cloud and on-premise applications.

#### SAP Open Connectors

SAP Open Connectors enables the integration with SAP Qualtrics Surveys. However, SAP Open Connectors is not part of the graphical overview in chapter 1 (Overview).

#### SAP S/4HANA

- Policy Management (FS-PM)  
Policy Management in SAP S/4HANA manages the whole life cycle of insurance contracts, from the creation of an application, to policy issuance and ongoing contract maintenance, to the termination of the contract.
- Claims Management (FS-CM)  
Claims Management enables efficient and transparent processing of claims and claim bundles for different lines of business.

### 2.2 Releases Supported and Related SAP Notes

The following releases are required for the integration of SAP Qualtrics Surveys with SAP for Insurance:

- SAP Cloud Integration, integration package [SAP Qualtrics Surveys Integration with SAP for Insurance 1.0.0](#)
- SAP Open Connectors 2.12.3
- SAP S/4HANA 2021
- For a potential Qualtrics survey, see SAP Note [3079183](#).

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## 3 Configuration

### 3.1 Configuring SAP Open Connectors

For all general configuration steps, see [Configuration](#).

#### 3.1.1 Connecting SAP Open Connectors to SAP Cloud Integration Tenant

To connect SAP Open Connectors to the SAP Cloud Integration tenant, proceed as follows:

1. Get the access data (URL, user, password) from your SAP Cloud Appliance Library administrator.
2. Enter the URL.
3. Enter the username and password and choose [Login](#).

Note:

If you have a valid URL from a trusted source, you can ignore the security warning in the browser.

4. Choose [Subaccount Dashboard](#) -> [Add](#).
5. Enter the account details.
6. Save your data.
7. Check the status of the new account in the [Status](#) column. The connection status must be [Operational](#).

#### 3.1.2 Access Control

To expose back-end resources such as SOAP services and remote function modules (RFM) you must perform the steps described in the following subchapters.

##### 3.1.2.1 HTTP Connection

1. Create a [Cloud to On-Premise](#) virtual host for SAP S/4HANA with the following information:
  - o Backend Type: ABAP System
  - o Protocol: HTTPS
  - o Internal Host: Enter the URL received when activating the OData-Service in the backend service (see [Send a Questionnaire via an Experience Management System > Configuration -> Activate OData-Service in SAP Gateway Client](#) -> Step 6).

- Internal Port: Enter the Port of the URL received when activating the OData-Service in the backend service.
  - Principal Type: None
  - Host in Request Header: Use Virtual Host
2. Configure the *Resources* section.

Ensure that the `A_InsurPlycyApplExistence` service can be accessed (e.g. via a regular URL path).

To do so proceed as follows:

1. Add "/" as the URL path.
2. Select the *Path and all Sub-Paths* checkbox under *Access Policy*.

\*URL Path:

Active:

WebSocket:

Access Policy:  Path Only (Sub-Paths Are Excluded)  
 Path And All Sub-Paths

For more information, see [Configure Access Control \(HTTP\) => Expose Intranet Systems](#).

### 3.1.2.2 RFM Connection

**Recommendation:** Use the protocol **RFC SNC** and the principal type **None** for the following RFM connection.

1. Create a *Cloud to On-Premise* virtual host for the RFM connection with SAP S/4HANA with the following information:
  - Backend Type: ABAP System
  - Protocol: RFC
  - Internal Host: Enter the URL received when activating the OData-Service in the backend service (see [Send a Questionnaire via an Experience Management System > Configuration -> Activate OData-Service in SAP Gateway Client -> Step 6](#)).
  - Internal Port: Enter the PORT of the URL received when Activating the OData-Service in the backend service.
  - Principal Type: None
  - Host in Request Header: Use Virtual Host
2. Configure the following function modules In the *Resources* section:
  - /PM0/ABT\_SVC\_POL\_READ
  - /PM0/ABT\_SVC\_POL\_JOUR\_READ
  - ICL\_CL\_BY\_ELEMENT

Ensure that the resource is set to ACTIVE and the naming policy is **Exact Name**.



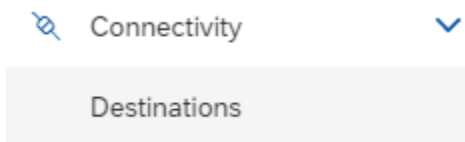
For more information, see [Configure Access Control \(RFC\)](#).

## 3.2 Configuring SAP BTP Account

### 3.2.1 Destinations

Destinations are required to enable iFlows to call certain RFM backend resources exposed in the SAP Open Connectors. To create a destination to the relevant SAP S/4HANA back-end system, proceed as follows:

1. Log into the SAP BTP cockpit and choose your subaccount.
2. Choose [Connectivity](#) -> [Destinations](#).



3. Create a new destination of type [RFC](#).

#### Notes

- o Make sure to specify the virtual host that is configured as RFM connection in SAP Open Connectors (see section 3.1.2.2 RFM Connection).
- o Note that you cannot directly use the information of the screenshots below. You need to specify your open connection instance, the URLs to your SAP S/4HANA instances as well as a user available in your system with the valid password.

#### Destination Configuration

Name:	<input type="text" value="QKLCINT710"/>
Type:	<input type="text" value="RFC"/>
Description:	<input type="text"/>
Proxy Type:	<input type="text" value="OnPremise"/>
User:	<input type="text" value="TEST_SERVICE"/>
Password:	<input type="password" value="*****"/>
Alias User:	<input type="text"/>
Repository User:	<input type="text"/>
Repository Password:	<input type="password"/>
Location ID:	<input type="text"/>

#### Additional Properties

<input type="text" value="jco.client.cli..."/>	<input type="text" value="710"/>	<input type="button" value="🗑"/>
<input type="text" value="jco.client.ms..."/>	<input type="text" value="ldcs[REDACTED]orp"/>	<input type="button" value="🗑"/>
<input type="text" value="jco.client.r3..."/>	<input type="text" value="QKL"/>	<input type="button" value="🗑"/>

For more information, see [Creating an RFC Destination](#).

## 3.2.2 Authorizations

For general information on how to configure the authorizations, see [Role-Based Authorization](#).

To authorize a user to call the tenant (using `HTTPS/basic` authentication), assign the role `ESBmessaging.send`.

## 3.3 Deploying Integration Content from SAP Cloud Integration

To deploy the integration package *SAP Qualtrics Surveys Integration with SAP for Insurance*, proceed as follows:

1. Open the SAP Cloud Integration tenant web UI (for example `https://<your SAP Cloud Integration tenant URL>/itspaces`).
2. Select *All* to see all published integration packages.
3. Search for the *SAP Qualtrics Surveys Integration with SAP for Insurance* integration package.
4. To copy the integration package from the catalog to your customer workspace, select the integration package tile and click *Copy*.

## 3.4 Configuring SAP Qualtrics Surveys

The O-data (operational data) from Policy Management in SAP S/4HANA and Claims Management in SAP S/4HANA can be extracted by using the iFlow *Read Insurance Policy and Claims Information from SAP S4HANA for SAP Qualtrics*. This will be integrated with the Qualtrics survey flow to personalize the survey based on the back-end policy and claims data.

SAP Qualtrics Surveys calls the iFlow via a web service. In the following table, you can find the parameters you have to set in SAP Qualtrics Surveys under *Custom Head* when you configure the web service. For more information, see [Qualtrics Web Services](#).

Parameter Type	Parameter Name	Value	Comment
<b>Authorization</b>	AUTHORIZATION	Authorization key for the technical user for SAP Cloud Integration	You can generate the authorization key by putting the CPI tenant credentials in open source tools such as <i>Postman</i> . There you can select the <i>Basis Auth</i> type and enter the CPI tenant credentials. The system generates the authorization key and displays it under the <i>Header</i> section.
<b>URL Parameters Mapping</b>	POLICY	Policy number	The survey URL generated from Policy Management indicates the value of these parameters. The
	KEY	Application key (GUID of the application)	

Parameter Type	Parameter Name	Value	Comment
	PROCESS	Business process ID	Qualtrics survey will then send back this information to SAP CPI to validate the URL and to extract the policy and claim data.
	EFF_DT	Transaction effective date	

The configuration could look like as shown in the screenshot below:

The screenshot shows the configuration for a Web Service. The URL is set to `https://[redacted]insurance_XM`. The Method is set to GET. Under Custom Headers, the following headers are configured:

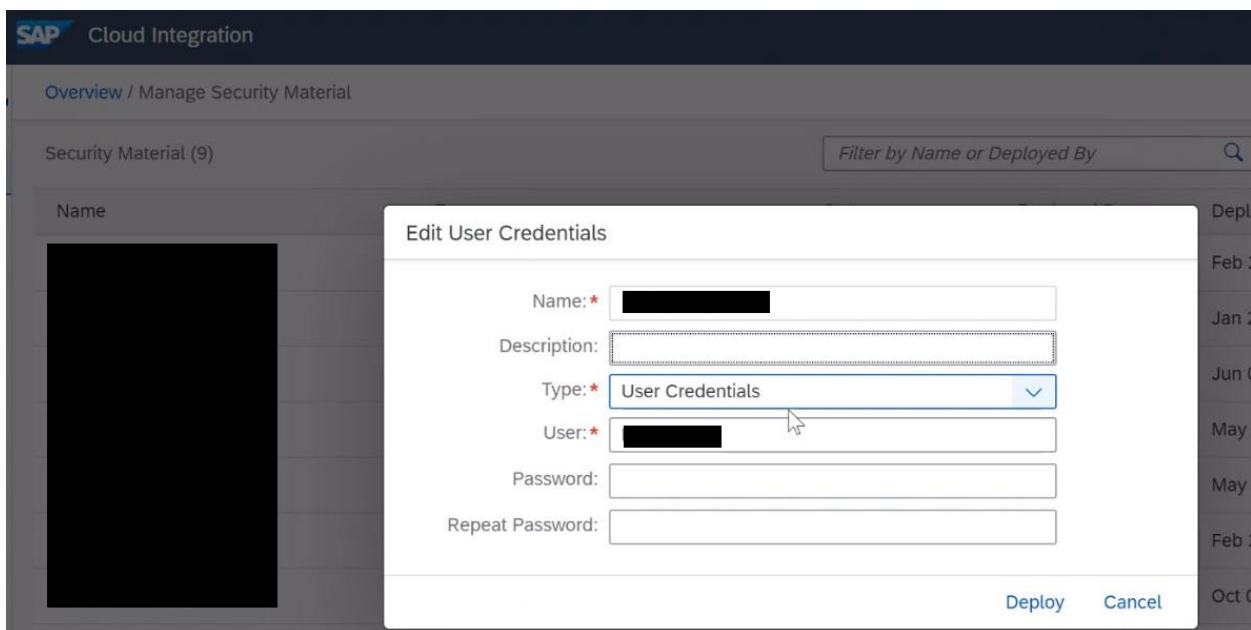
- Authorization: Basic UD [redacted]
- POLICY: `#{e://Field/POLICY}`
- KEY: `#{e://Field/KEY}`
- PROCESS: `#{e://Field/PROCESS}`
- EFF\_DT: `#{e://Field/EFF_DT}`

## 3.5 Configuring SAP Cloud Integration

The iFlow *Read Insurance Policy and Claims Information from SAP S4HANA for SAP Qualtrics* receives all information which is required to authenticate and extract data for SAP Qualtrics Surveys using RFM and OData services of Policy Management in SAP S/4HANA and Claims Management in SAP S/4HANA.

### 3.5.1 Deploying User Credentials

To enable basic authentication for the call of the OData service `A_InsurPlcyApplExistence`, you have to define and deploy the user credentials for the connection with the back-end system in the *Security Material* section:



The screenshot shows the SAP Cloud Integration interface. At the top, it says 'SAP Cloud Integration' and 'Overview / Manage Security Material'. Below that, there's a section for 'Security Material (9)' with a search filter 'Filter by Name or Deployed By'. A table with a 'Name' column is visible on the left. Overlaid on this is a modal dialog titled 'Edit User Credentials'. The dialog contains the following fields: 'Name: \*' (text input), 'Description:' (text area), 'Type: \*' (dropdown menu with 'User Credentials' selected), 'User: \*' (text input), 'Password:' (text input), and 'Repeat Password:' (text input). At the bottom right of the dialog are 'Deploy' and 'Cancel' buttons.

For more information, see [Deploying/Editing a User Credentials Artifact](#).

### 3.5.2 Parameters

Set the following mandatory parameters of the iFlow (see subchapters below).

For more information, see [Configure Externalized Parameters of an Integration Flow](#).

### 3.5.2.1 S4HANA-Auth Receiver

Name	Value
FSPM_HostPort	Internal host and port as defined in section 3.1.2.1 HTTP Connection
Odata_path	/sap/opu/odata/sap
FSPM_Auth_Odata_Service_URL	/API_INSURPLCYAPPLEXISTENCE/Authentication(P_InsurPlcyChgEffctvDte='{property.com.sap.insurance.xml.effective_dt}',P_InsurancePolicy='{property.com.sap.insurance.xml.policynr}',P_InsurPlcyApplUUID='{property.com.sap.insurance.xml.application_key}',P_InsurPlcyBusProcType='{property.com.sap.insurance.xml.biz_process}')/Set
Query	sap-client = <<Client of Policy Management system in SAP S/4HANA>>
Proxy Type	On-Premise
Method	GET
Send Body	Select this checkbox.
Authentication	Basic
Credential name	Credential name as defined in section 3.5.1 Deploying User Credentials
Timeout (in ms)	60000

Method: GET

Send Body:

Authentication: Basic

Credential Name: [REDACTED]

Timeout (in ms): 60000

### 3.5.2.2 S4HANA-FSPM-Read:

Parameter Name	Value
Destination	FSPM system destination as defined in section 3.2.1 Destinations.
Send Confirm Transaction	Deselect this checkbox.
Create New Connection	Deselect this checkbox.

### 3.5.2.3 S4HANA-FSPM Journal-Read

Parameter Name	Value
Destination	FSPM system destination as defined in section 3.2.1 Destinations
Send Confirm Transaction	Deselect this checkbox.
Create New Connection	Deselect this checkbox.

### 3.5.2.4 S4HANA-FSCM-Read

Parameter Name	Value
Destination	FSCM system destination as defined in section 3.2.1 Destinations
Send Confirm Transaction	Deselect this checkbox.
Create New Connection	Deselect this checkbox.

### 3.5.2.5 Additional Constant Parameters with Default Values

Parameter Name	Value
Policy_Cancel_Proc_ID	A_CANCELFLAG
Contract_Cancel_Proc_ID	A_PT_EXREVERSPPD_CF
Prolong_Proc_ID	PROLONG
Renewal_Prolong_Proc_ID	RENEWALPROLONG
Renewal_Transaction_Type	RNW
Newbusiness_Transaction_Type	NB
Change_Transaction_Type	CHNG
Cancellation_Transaction_Type	CNCL

## 3.6 Configuring Policy Management in SAP S/4HANA (FS-PM)

Policy Management provides the following remote-enabled function modules (RFM):

- /PM0/ABT\_SVC\_POL\_READ  
This RFM reads the data of the *Policy* business object based on the input parameters. The policy data is read from the version defined by the effective date.
- /PM0/ABT\_SVC\_POL\_JOUR\_READ  
This RFM reads data from the journal. Only the journal data of the application defined by the application ID is read.

The two RFMs are called by the iFlows in SAP Cloud Integration.

The following table provides an overview of the OData service and RFMs that are called:

Name in iFlow	Technical Name (Service Path)	Description	Type	Target System
Check Application Existence	A_InsurPlcyApplExistence	OData service to check the existence of the given application in SAP S/4 HANA system (FS-PM)	OData Service	FS-PM
Policy Read	/PM0/ABT_SVC_POL_READ	Read policy data	RFM	FS-PM
Read Policy Journal	/PM0/ABT_SVC_POL_JOUR_READ	Read policy journal data	RFM	FS-PM

Now perform the following steps:

- Activate SAP Gateway in SAP S/4HANA
- Activate the OData service in SAP Gateway Client
- Make the settings for the survey URL

For a detailed description of these configuration steps, see [Send a Questionnaire via an Experience Management System -> Configuration](#).

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## 3.7 Configuring Claims Management in SAP S/4HANA (FS-CM)

Claims Management in SAP S/4HANA provides the RFM `ICL_CL_BY_ELEMENT`. This RFM reads the claims data of the given policy using the contract number. The RFM is called from SAP Cloud Integration.







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