

PUBLIC

SAP Build Process Automation

Document Centric Approval Process Template Configuration & User Guide



Contents

Change Log	3
Overview	4
Prerequisites	4
Procedure	6
Setup SAP Business Technology Platform Cockpit	6
Destination Configuration	6
User Roles Configuration	6
Import Content	7
Configuration & Modification	8
Configure Process	8
Configure Forms	8
Release and Deploy your Process	14
Trigger/Consume the Form	15
Support	15

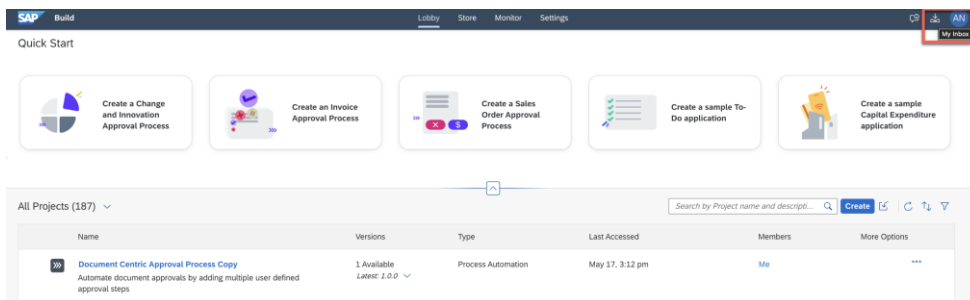
Change Log

Version	Date	Description
1.0.0	May 12 th , 2023	Document created

Overview

The Document Centric Approval Process Template enables customers to automate approvals of documents involving multiple business users (Approvers) from different organizations.

The Template contains Requester's Information, Comment to all Approvers, Request Title, multiple Approval Levels, with a minimum of one mandatory Approval Level and Document Upload functionality. Upon creating a request, user specifies the Step names, Approver Name, Watcher Email(optional), due date and comment for Approver (optional) for each defined approval step. Moreover, requestor uploads one or more attachments for further review by approver(s) in their **Inbox**.



The following steps are included as a part of Document Centric Approval Process:

- Business user (Requester) uploads one or more documents & invites approvers/watchers and starts a workflow.
- Approver(s) & Watcher(s) are notified via email about the new Request and Requester gets a confirmation email that the request has been sent for approval.
- Approver(s) accesses **My Inbox** to view the task, review the document and choose one of the following decisions.
 - Approve: Upon selecting "Approve" option, Requester (and Watcher if specified) is notified via email about approval of the Request by the final Approver only, if multiple Approvers exist. In case of multi-level approvals, intermediate approval steps trigger the next approval step only and notify the next approver (and Watcher if specified) via mail.
 - Reject: Upon selecting "Reject" option, Requester (and Watcher if specified) are notified via email about rejection of the request and the process is terminated.
- When the request is accepted by all Approver(s), email notification is sent out to Requester (and Watcher if specified) informing about full approval and the process is completed.

Prerequisites













The following SAP Business Technology Platform services are required to consume the content package

Document Centric Approval Process:

- SAP Build Process Automation to orchestrate the process.
- SAP Launchpad Service
- SAP Cloud Identity Services - Identity Authentication

Capabilities

This sample content contains the following elements as key artifacts:
Please refer [help documentation](#) about these different artifacts.

Icon	Type	Name	Description
	Process	MainProcess	This is the Main Process and responsible for triggering the initial "Requester/Approver Info" Form
	Form	Requester/Approver Info	This Form is used to collect Requester's information, Request Details and Approver's details. It is also used to upload the files which are required for approval.
	Form	Approver Level - L1	This Approval Form is used by the Approver to view Requester's details, Request details, Files uploaded & comments to Approvers (if any). The Approver can Approve the Request (to the next level, if it exists) or Reject the Request and terminate the process.
	Form	Approver Level – L2 (Optional)	This Approval Form is called only if the Requester populates the Approver Level, Approver Name & Approver email address for the L2 level. This Approval Form is used by the 2 nd level of Approver to view Requester's details, Request details, Files uploaded & comments to Approvers (if any). They can also view the Previous Approver's(L1) comments, if any. The Approver can Approve the Request (to the next level, if it exists) or Reject the Request and terminate the process.
	Mail	Send Mail - Requester -Multi Approver	This mail & mail body is triggered to the Requester in case multiple levels of Approvers exist.
	Mail	Send Mail - Requester - Single Approver	This mail & mail body is triggered to the Requester in case of a single level Approver.
	Mail	Send Mail - Approver - L1	This mail & mail body is triggered to the 1 st level of Approver to notify them of the request
	Mail	Send Mail - Rejected - L1	This mail & mail body is triggered to the Requester in case the request is rejected at 1 st level of approver.
	Mail	Send Mail - Approver - L2	This mail & mail body is triggered to the 2 nd level of Approver (if it exists) to notify them about the request.
	Mail	Send Mail - Full Approval L1	This mail & mail body is triggered to the Requester when only single level of Approver exists, and the request is approved by the only Approver.
	Mail	Send Mail - Full Approval L2	This mail & mail body is triggered to the Requester when both (L1 & L2) Approvers, approve the request.
	Mail	Send Mail - Rejected - L2	This mail & mail body is triggered to Requester when the request is rejected by the L2 Approver

Procedure

The Document Centric Approval Process template requires SAP Build Process Automation subscription or CPEA contract. Follow the [setup and configuration section](#).

Setup SAP Business Technology Platform Cockpit

Destination Configuration

- **Configure SAP Build Process Automation Email Destination**

Configure workflow email destination. For more information on configuring destination, see [Configure a SMTP Mail Destination](#).

- **Configure Document Management Service Repository**

If not available already, to create and configure root Document Management Service repository please follow the steps described in [Configure SAP Document Management Service for Process Attachments](#)

For more information refer to [Create HTTP Destinations](#) and [OAuth User Token Exchange Authentication](#).

User Roles Configuration

- To access this template, the business user will need these roles:

Role Name	Purpose
“SDM_Admin” or “SDM_User”	To give access for File Upload
ProcessAutomationDeveloper	To fully use this content package, you need to have an active user entitled to this role to use SAP Build Process Automation

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

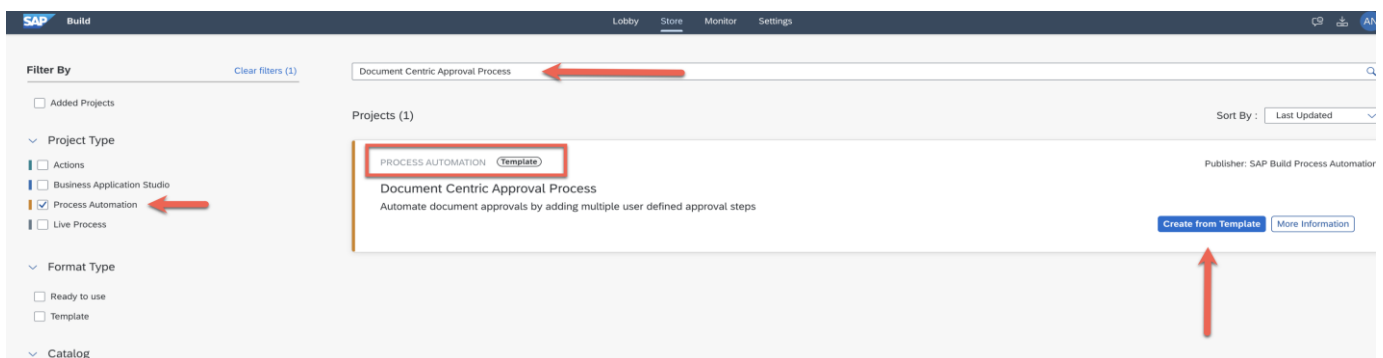
SAP Build Process Automation

Import Content

This template can be downloaded from the Store :

- 1) Navigate to the **Store** in your SBPA tenant.
- 2) Select the Project Type filter as **“Process Automation”**
- 3) In the Search bar type **“Document Centric Approval Process”**
- 4) Select the “Add” button to add the template into you lobby.
- 5) After successfully adding the template, navigate back to the lobby to find the “Document Centric Approval Process” template available for use.

Note: Be sure to select the **Project Type as “Process Automation”** in the filters as there is another template available for SAP Workflow / Live Process and should not be used.



Configuration & 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 can configure it or adjust it to your own needs.

Configure Process

The process “**MainProcess**” does not need to be explicitly configured.

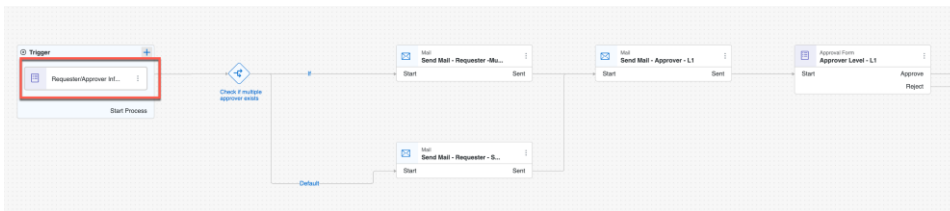
Configure Forms

Requester/Approver Info Form:

This Form can be enhanced to include more Approvers Steps/Levels. By default, the template has 2 levels of Approvers with a minimum of 1 level being mandatory.

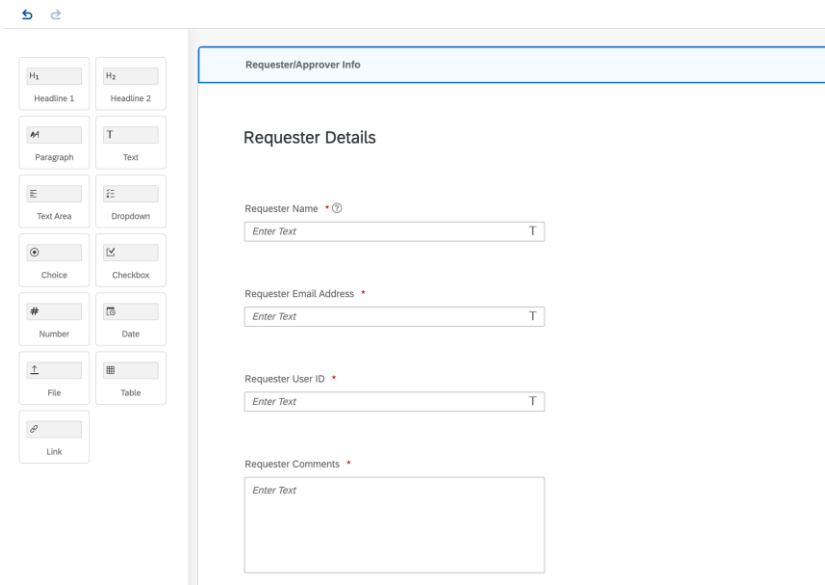
Approver’s information, like Approver Level, Approver Name and Approver Email & due date are **mandatory** fields for each Approver step.

To configure the request form from the process builder, click on the three dots next to the element “Requester/Approver Info” 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:



To add additional levels of approvers (more than the 2 levels provided), approvers block needs to be replicated.

In the example below, L2 Approvers would have to be replicated to L3 Approvers keeping all the naming conventions intact in order to easily identify the elements in the process.

Approver Step (L2)

Note: For Multi-Approvers- Approver Level, Approver Name, Approver Email Address & Due Date are Mandatory

Approver Level - L2
 T *

Approver Name - L2
 T *

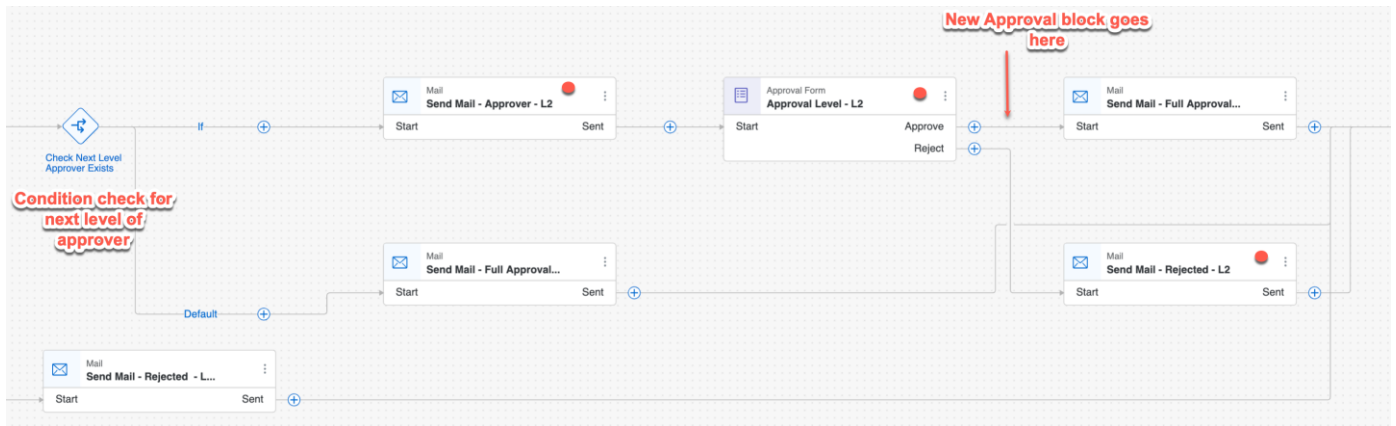
Approver Email Address - L2
 T *

Watcher Email Address (cc) - L2
 T

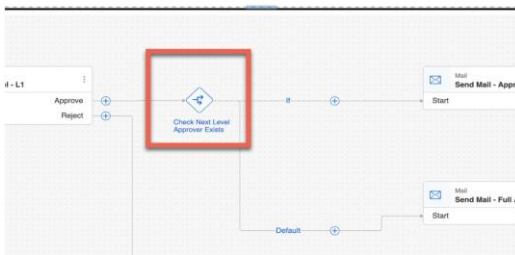
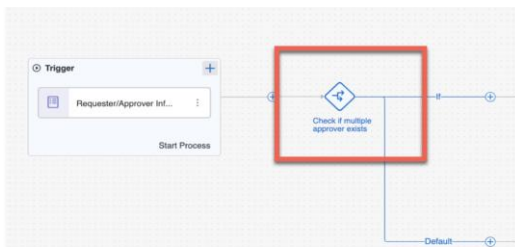
Due Date - L2
 T *

Comment to Approver - L2
 T

The process also needs to be enhanced to accommodate this new level of Approver. The condition check along with the mails and new Approver Form marked in red below would also need to be replicated in a similar fashion.



The condition step would also have to be replicated to check if another level of approver exists.



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

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.

Edit Branch Condition

Satisfies:

All Any of the following: Clear All

<input type="text" value="»» Approver Email Address ... x"/>	is not empty	Mandatory checks	x
<input type="text" value="»» Approver Name - L2 x"/>	is not empty		
<input type="text" value="»» Approver Level - L2 x"/>	is not empty		

Add Group

Approval Level L* Form :

These forms contain information about the requester, the request, attachments, the current level of approver and comments from the current approver. It may also contain comments from the previous level of approver, if it exists in the process.

In case of enhancing the template with an additional level of Approver (L3), this form would have to be copied & enhanced to include L3 details in place of L2, comment from L2 level (previous step- un-editable) and comment from the current Approver L3 (new current step- editable).

The image shows a design tool interface for creating an SAP form. On the left is a sidebar with various widget options:

- Headline 1 (H1), Headline 2 (H2)
- Paragraph, Text
- Text Area, Dropdown
- Choice, Checkbox
- Number, Date
- File, Table
- Link

The main form area is titled "Approver Step Details" and contains the following sections:

- Approver Level - L2**: A text field labeled "Prepopulated Field" with a "T" icon.
- Comment to Approver - L2**: A text field labeled "Prepopulated Field" with a "T" icon.
- Attachments**: A section titled "Attachment to Approvers" with a "T" icon and a large box labeled "Uploaded File(s)".
- Approver Comments**: A section with two text fields:
 - Comment from Approver - L1**: A text field labeled "Prepopulated Field" with a "T" icon.
 - Comment from Approver - L2**: A text field labeled "Enter Text" with a red asterisk.

You can then edit your approval settings by returning to the process builder and clicking on **Approve Level L3**(newly created), opening the side panel:

The screenshot displays a process flow in SAP Process Builder. The main canvas shows three tasks: 'Approval Form Approval Level - L2', 'Mail Send Mail - Full Approval...', and 'Mail Send Mail - Rejected - L2'. The 'Approval Form Approval Level - L2' task has 'Approve' and 'Reject' buttons. The 'Approve' path leads to 'Send Mail - Full Approval...', and the 'Reject' path leads to 'Send Mail - Rejected - L2'. Both mail tasks lead to an 'End' task. A zoom level of 89% is visible in the top right.

The right-hand side panel is titled 'Approval Form Approval Level - L2' and has tabs for 'General', 'Inputs', and 'Outputs'. The 'General' tab is active, showing the following configuration:

- Step Name:** Approval Level - L2
- Approval Form:** Approval Level - L2 (with an 'Edit Form' button)
- Subject:** Request for Approval Level L2 - Approver Level - L2
- Description:** Enter Description
- Priority:** Medium
- Recipients:** Provide at least one
 - Users:** Approver Email Address ...
 - Groups:** Select item

The screenshot displays a process flow in SAP Process Builder. The main canvas shows two tasks: 'Approval Form Approver Level - L1' and a decision diamond 'Check Next Level Approver Exists'. The 'Approve' path from the first task leads to the decision diamond, and the 'Reject' path leads to the 'Check Next Level Approver Exists' task. The 'Check Next Level Approver Exists' task has a 'Yes' path leading to the 'Approve' path and a 'No' path leading to the 'Reject' path.

The right-hand side panel is titled 'Approval Form Approver Level - L1' and has tabs for 'General', 'Inputs', and 'Outputs'. The 'General' tab is active, showing the following configuration:

- Groups:** Select item
- Due Date:** Choose the type of due date: Reference Date (with a calendar icon and 'Due Date - L1' label)

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 template, the recipient of the approval form is the person defined by the Requester in the **Requester/Approver Info Form**.

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

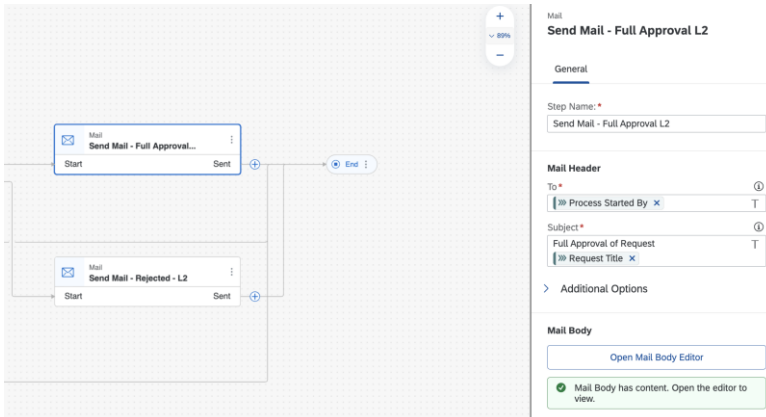
Due Date – This defines the Due Date of the task in the Approvers “My Inbox” application.

Email Blocks

The multiple email blocks throughout the process serve to:

- 1) Notify the Requester via email that the request has been created.
- 2) Notify an Approver (and Watcher if specified) via email that a Request has been created for their Approval Level.
- 3) Notify the Requester (and Watcher if specified) via email that the request has been fully approved OR
- 4) Notify the Requester (and Watcher if specified) via email that the request has been Rejected.

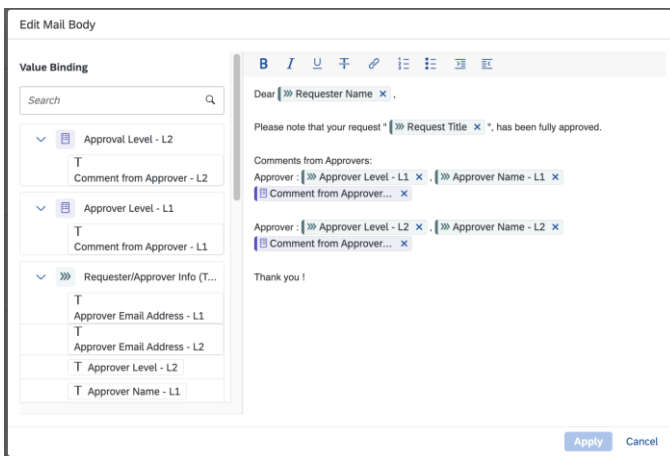
In the example below the mail element is configured to send an email to the requestor after all levels of approval are successful.



To access the settings of the mail element, you can select it to open the side panel on the right. Here you can adjust the subject and recipient & the body 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. 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.

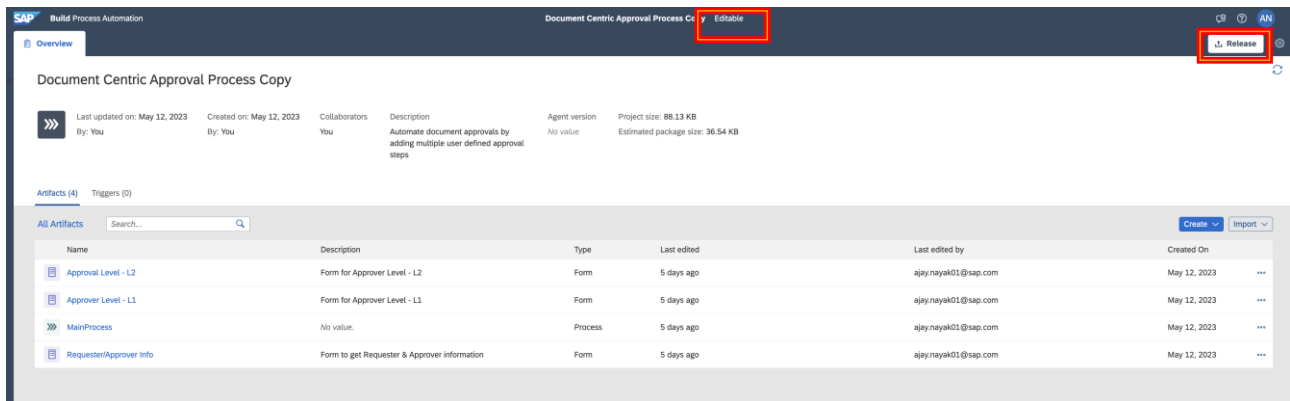


Release and Deploy your Process

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.

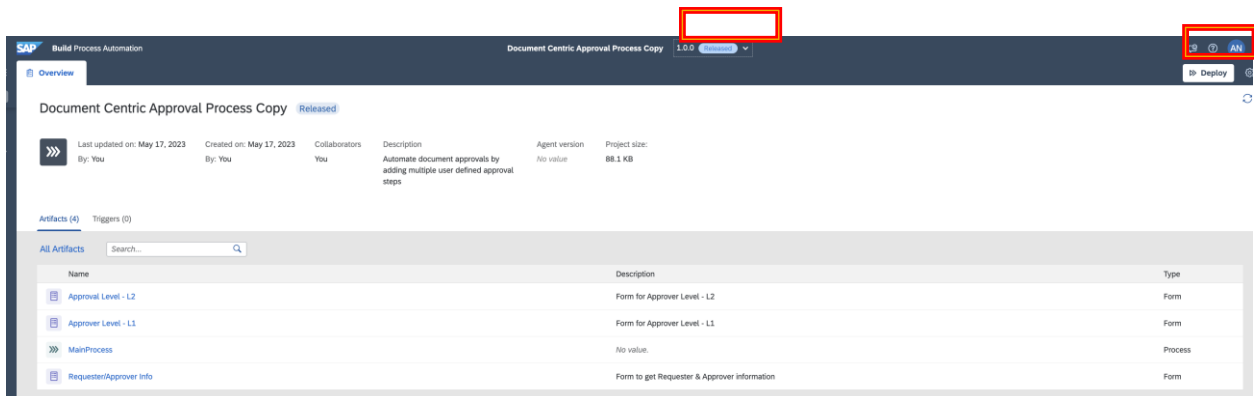
To release a version of your process, first ensure that the status is listed as 'Editable'. The click 'Release':



If this is the first time you've released the process, a version labelled 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 approval process unlocks the request form, allowing participants to submit requests and the approvers to view items in their inbox.

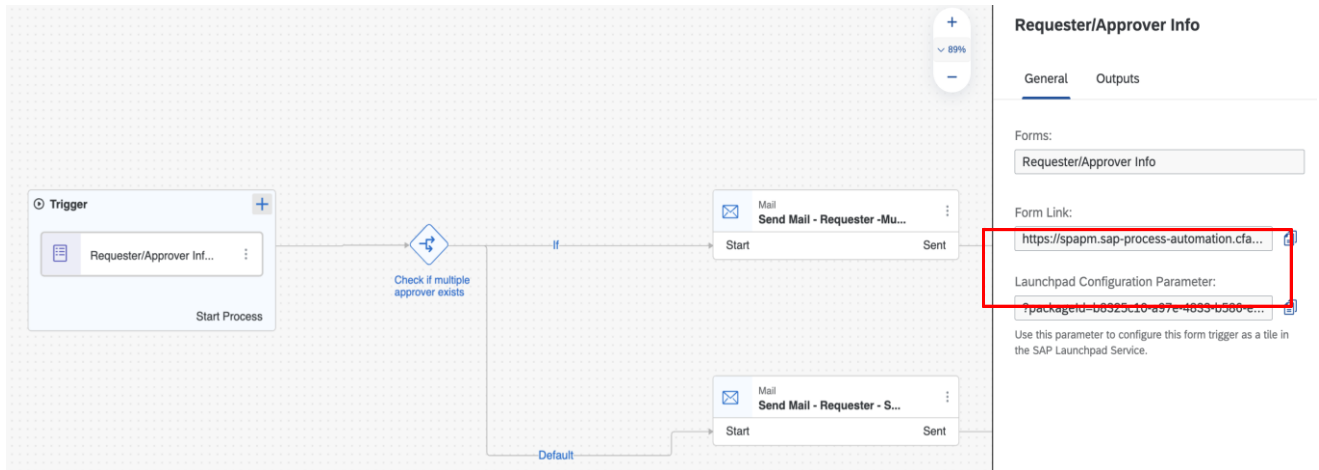
To deploy a released version of your process, first ensure that the status is listed as 'Released'. The click 'Deploy':



Trigger/Consume the Form

Now that your process is Released and Deployed, open the 'MainProcess in Process editor and select the 'Requester/Approver Info' Form with a single click.

The form link displayed on the right panel can be used to trigger the form or the Launchpad Configuration Parameter can be used to configure this form trigger as a tile in the SAP Launchpad Service.



Support

There is no support available for template content. If you experience general issues with SAP Build Process Automation, raise an incident via SAP Support Portal on **BPI-PA** component.

This template can be modified using SAP Process Automation. For example: add business rules to determine the approver based on a certain business logic or add an action to post collected information to backend SAP system. Refer [Help Portal](#) for more details.

www.sap.com