

SAP CLOUD PLATFORM | EXTERNAL

Configuration & User Guide

Document Centric Approval Process

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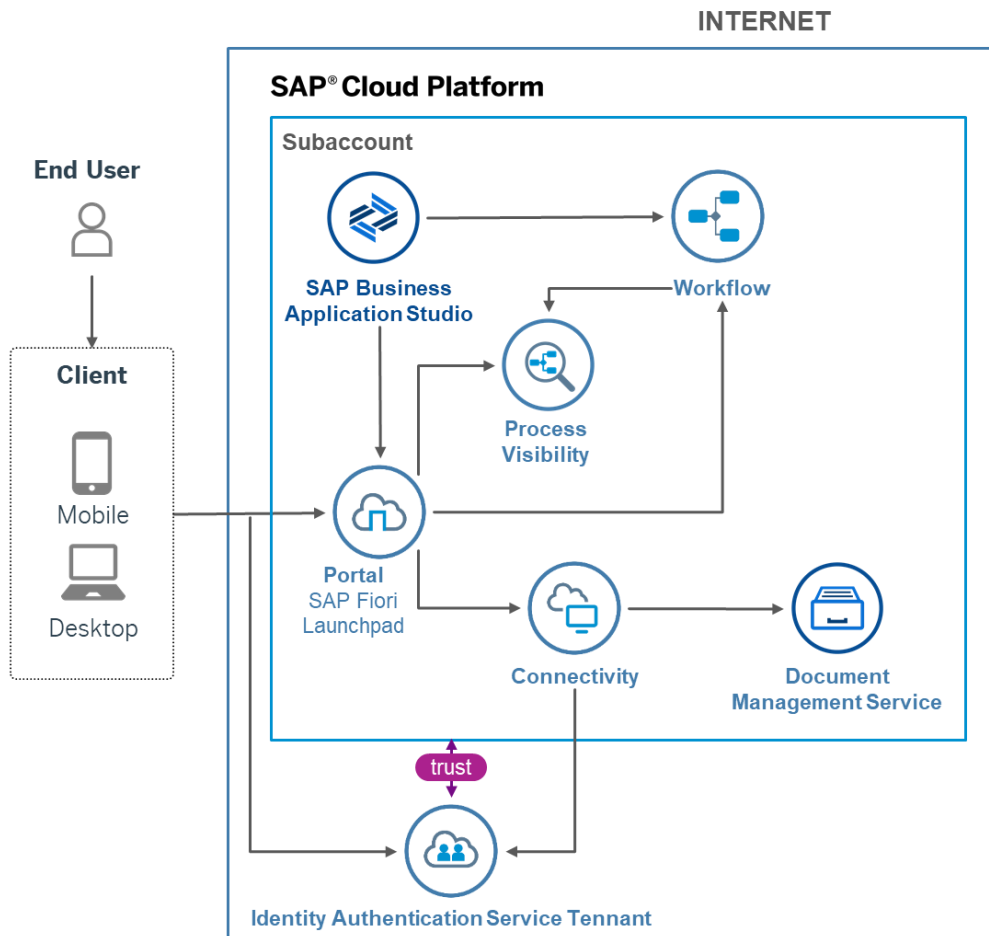
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Overview

This document provides information about what needs to be configured to make Document Centric Approval Process run. The main audience of this document are IT administrators, developers, Consultants, Line of Business Experts, and product owners.

The solution enables customers to accelerate the digitalization of their document centric approval in a transparent way and provide flexibility to meet business requirements.

Document Centric Approval Process



Document Centric Approval Process enables customers to automate approvals or review of documents involving multiple business users from different organizations. Upon creating a request, user defines multiple approvals steps and specifies step names, Approver, Watcher (optionally), due date and comment for Approver (optionally) for each approval step. Moreover, requestor uploads one or more attachments for further review by approver(s).

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

- Business user (Requester) uploads one or more documents, invites approvers/reviewers and starts a workflow.
- Approvers are notified via email;
- Approvers accesses My Inbox to claim their tasks, review the document and choose one of the following decisions.

Approve

- Upon selecting “Approve” option, Requester and Watcher (if specified) are notified via email about acceptance of the request by a given Approver on a given step and the next approval step is initialized (if present).

Reject

- Upon selecting “Reject” option, Requester is notified via email about rejection of the request and the process is terminated;

Rework

- Upon selecting “Rework” option, Requester is notified via email that the request needs to be reworked. Requester then accesses the task in My Inbox app, modifies the request in accordance with Approver’s comments and sends request for reapproval by clicking on “Send for Approval” button. Alternatively, Requester can choose “Terminate” option which triggers termination of the process.

Approver can also get expert opinion by sharing the task with another business user using the “**Forward**” action. Approver then selects a user from the list, specifies the comment for that user (optionally) and forwards the request. The user to whom the request was forwarded can now access the task in My Inbox app and review the request. This user doesn’t have permissions to edit or complete the request and can only specify a comment (optionally) and send the request back to Approver by clicking on “Update” button.

- When the request is accepted by all Approvers, email notification is sent out to Requester informing about full approval and the process is completed.

The document has two sections.

1. Configure SAP Cloud Platform Subaccount to deploy and consume the content
2. How to operate the application by Line of Business users.

SAP Cloud Platform Workflow Management shall not be used to store or process sensitive personal data. This service can be used if you have a legal ground to process personal data.

Required SAP Cloud Platform Services

The following SAP Cloud Platform services are required to consume the content package **Document Centric Approval Process**:

- Application Runtime
- SAP Cloud Platform Workflow management
- SAP Cloud Platform Portal
- SAP Cloud Platform Document Management Service, Integration option
- SAP Cloud Platform Identity Authentication Service

Setup and Configuration

Document Centric Approval Process content package requires SAP Cloud Platform Workflow Management subscription or a CPEA contract. Follow [Initial Setup](#) guide to correctly configure SAP Workflow Management.

Please [create a service instance of workflow](#) and name it as **Workflow**.

Configure Workflow Email Destination

Configure workflow email destination. For more information on configuring destination, see [configure workflow email destination](#).

Configure Document Management Service Repository

To create and configure root Document Management Service repository please follow the steps described in [Initial Setup for Document Management, Integration Option](#) and [Connect to Document Management, Repository Option Using API](#) (incl. Prerequisites).

Save generated Repository ID from the response.

Configure Document Management Service Destination

Configure a Document Management Service destination with the following parameters:

Name	bpmworkflowruntime_attachments
Type	HTTP
Proxy Type	Internet
Authentication	OAuth2UserTokenExchange
URL	<"endpoints":"ecmservice":"url">/browser/<Repository_ID>/root/
Token Service URL	<"uaa":"url">/oauth/token
Token Service URL Type	Dedicated

Populate Client ID and Client Secret with the values from the Service Key created on the previous step (see [Create Service Keys Using the Cockpit](#)).

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

Make sure that the users which are going to use the application have “SDM_Admin” or “SDM_User” roles assigned to them.

Configure Identity Authentication Service Destination

Configure [SAP Cloud Platform Identity Authentication Service](#) destination with the following parameters to call [SCIM REST APIs](#).

Name	SCIM
Type	HTTP
Proxy Type	Internet
Authentication	Basic Authentication
URL	https://<IAS tenant ID>.accounts.ondemand.com
User	
Password	

To obtain User and Password values please follow [how to add system administrator](#).

Deploy Custom UIs and Workflow module

Use Public [SAP github](#) to download the project. Extract the following projects under the [document centric approval](#) folder.

The project consists of the following:

- **DocumentCentricStartUI HTML5 module** – serves as the Workflow Start User Interface application for creation of document centric approval requests by Requester;
- **DocumentCentricTaskUI HTML5 module** – serves as the Workflow Task User Interface application for processing pending document centric approval requests by Approver;
- **DocumentCentricReworkUI HTML5 module** – serves as the Workflow Task User Interface application for processing of document centric rework requests by Requester;
- **DocumentApproval Workflow module** – To automate the document review and approval process

Deploy Custom Fiori Launch Pad (FLP) module

Please following [readme.md](#) file in SAP git hub.

FLP includes Process Applications tiles for processing Tasks (My Inbox), configuring Visibility Scenarios and accessing Process Workspace as well as Business Application tile for creating document centric approval requests (Document Centric Request).

Please note that during deployment of the project those resources will be processed:

- Destination service with the name **Destination** (will be created, if not existent);
- Workflow Management service with the name **WorkflowMgmt** (will be created, if not

existent);

- Process Visibility service with the name **ProcessVisibility** (will be created, if not existent);
- Workflow service with the name **Workflow** (you should have created the service instance with this name);

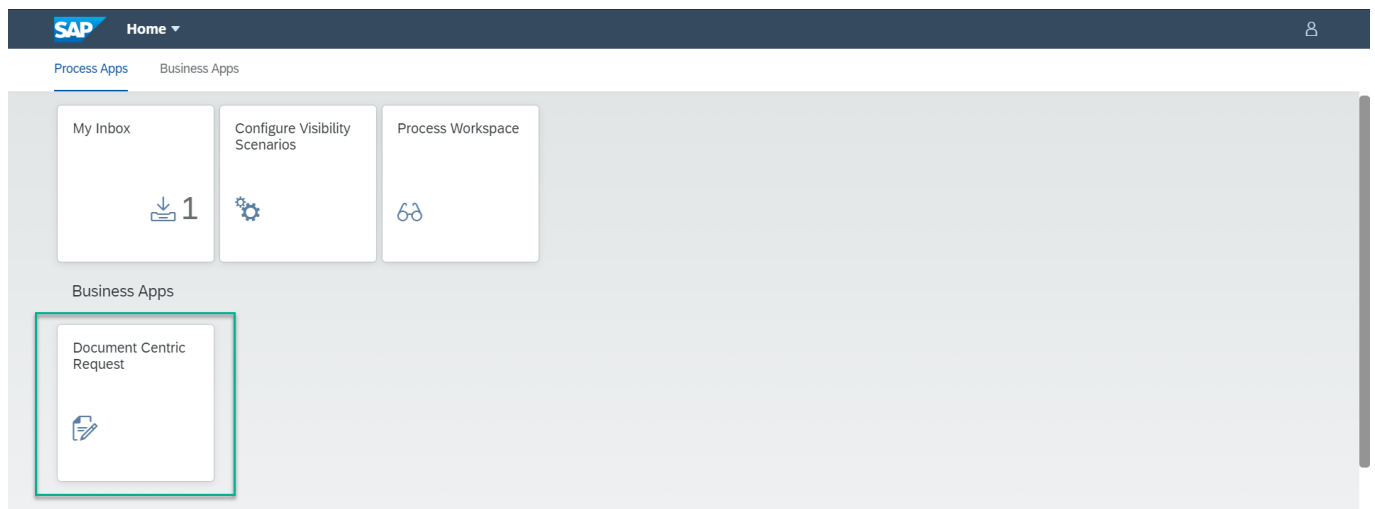
If you have previously created these service instances with the different names and would like to reuse them in this project, please modify mta.yaml file accordingly.

Using the Document Centric Approval workflow

The applications that are part of Document Centric Approval content package will be available in the SAP Cloud Platform Fiori Launchpad. Check with your administrator for the link to access the same.

Creating Document Centric Request

The application for submitting a document centric request for approval can be accessed from a tile in SAP Cloud Platform Fiori Launchpad.



Application automatically prepopulates *First Name*, *Last Name*, *Email Address* and *User ID* fields in the “*Requester*” section with the data from Identity and Authentication service (you can edit these values, if necessary).

In the “*Request Details*” section provide relevant *Title* for the request.

In the “*Approval Steps*” section define at least one approval step by specifying *Step ID*, selecting *Approver* from the list of users from Identity and Authentication service and specifying *Due Date*. Optionally you can select *Watcher* for the approval step (this user will be included in the cc of the approval notification email) and specify *Comment for Approver* of the step. To add new approval step, click on “*plus*” icon in right top corner of the table (1). To delete an approval step, click on “*delete*” icon (2).

Approval Steps

Local Manager Group Head

1 +

Step ID*	Approver*	Watcher	Due Date*	Comment for Approver	
1	Local Manager	John +	Peter +	Oct 7, 2020 📅	Some relevant comment 🗑️ 2
2	Group Head	Steve +	Peter +	Oct 30, 2020 📅	🗑️

In the *Attachments* section you can attach one or more documents.
 After all required fields are populated, submit the request by clicking on *Request Approval* button.

Document Centric Approval Request

[Requester](#) [Request Details](#) [Approval Steps](#) [Attachments](#)

First Name: *

Last Name: *

Email Address: *

User ID: *

Comment from Requester:

Request Details

Request ID: *

Title: *

Approval Steps



Step ID *	Approver *	Watcher	Due Date *	Comment for Approver	
1	<input type="text" value="Local Manager"/>	<input type="text" value=""/>	<input type="text" value="Oct 3, 2020"/>	<input type="text" value="Important comment for Local Manager"/>	
2	<input type="text" value="Group Head"/>	<input type="text" value=""/>	<input type="text" value="Oct 31, 2020"/>	<input type="text" value="Important comment for Group Head"/>	

Attachments

Attachments (3)

[Upload](#)

- Picture.jpg**
Uploaded By: · Uploaded On: Sep 23, 2020, 7:38:02 PM · File Size: 147.3 kB ✕
- Document1.pdf**
Uploaded By: · Uploaded On: Sep 23, 2020, 7:37:25 PM · File Size: 0.1 kB ✕
- Document2.xlsx**
Uploaded By: · Uploaded On: Sep 23, 2020, 7:37:42 PM · File Size: 6.0 kB ✕

[Request Approval](#)

Approving Document Centric Request

Once Requester has submitted approval request, Approver is notified about this via email and accesses “My Inbox” app to process the request.

Approver reviews the data provided by Requester and the History of approval request, specifies a comment (optionally) and chooses one of four decision options:

- **Approve:** the approval request will continue with the next step, or complete if this was the last configured step. The decision data is stored in the History of the request. Requester and Watcher (if present) are notified about the decision via email.
- **Reject:** the approval request will immediately be stopped. No further approval steps are executed. Requester is notified about the decision via email.
- **Rework:** Requester is assigned to rework the request. For this, Requester is notified about the decision via email and a Rework Task is created. The decision data is stored in the History of the request.
- **Forward:** the approval request is forwarded to another user. For this, Approver selects the user to whom the request should be forwarded (via a popup select list), provides a comment for that user (optionally) and accepts forwarding of the request. The decision data is stored in the History of the request.

Reworking Document Centric Request

Once Approver has sent the approval request for rework, Requester is notified about this via email and accesses task in “My Inbox” app to rework the request.

Requester reviews Approver’s comment in the History section and can edit the request details: upload/delete attachments, add/edit comments, etc.

Once necessary changes are applied, requester sends reworked version of the request to Approver of the current step by selecting decision option “**Send for Approval**”. After that, Approver of the current step is once again notified about the request submission via email and can access task in “My Inbox” app to review reworked version of the request. Information that the request is reworked is stored in the History.

If Requester feels that it is not possible to apply the changes requested by Approver for the current request, Requester can stop the execution of the workflow by selecting decision option “**Terminate**”.

Forwarding Document Centric Request

In case Approver wants to get an expert’s opinion regarding the request, he/she can share the task with another business user using the “**Forward**” action.

For this, Approver selects a user from the “Select User” list.

After that Approver can add a comment and accept forwarding of the request by clicking on “OK” button. Approver comment and information that the request is forwarded is stored in the History.

Updating Document Centric Request

Once Approver has forwarded the request to the other user (e.g., to get expert's opinion on the matter), that user can access the task in "My Inbox" app to review the request. The user to whom the request was forwarded cannot complete the Task or edit the request, he/she can only add a comment and by selecting decision option "**Update**" return the Task back to the Approver of the current step.

Provided comment and information that the request is updated is stored in the History.