



PUBLIC

SAP Build Process Automation **Job Offers Approval**

Configuration & User Guide

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Change Log

Version	Date	Description
1.0.0	September 28 th , 2023	Document created

This document contains 3 sections. Each section covers different information about this template content package.

1. **Overview:** In this section, you will get quick overview of the use case, what are high-level components used and how the template works in nutshell. Prerequisite section provides information of different services of SAP Business Technology Platform that are required to use this template.
2. **Configuration Guide:** It contain sections which will guide you to setup your
(a) SAP Business Technology Platform (BTP) Account with destination.
(b) Import and configure the template using SAP Build Process Automation design studio.
3. **User Guide:** This section provides details about different artefacts that are used in this template like process definition, automations, forms, email notifications etc. to better understand how different capabilities are used in this template.

Note:

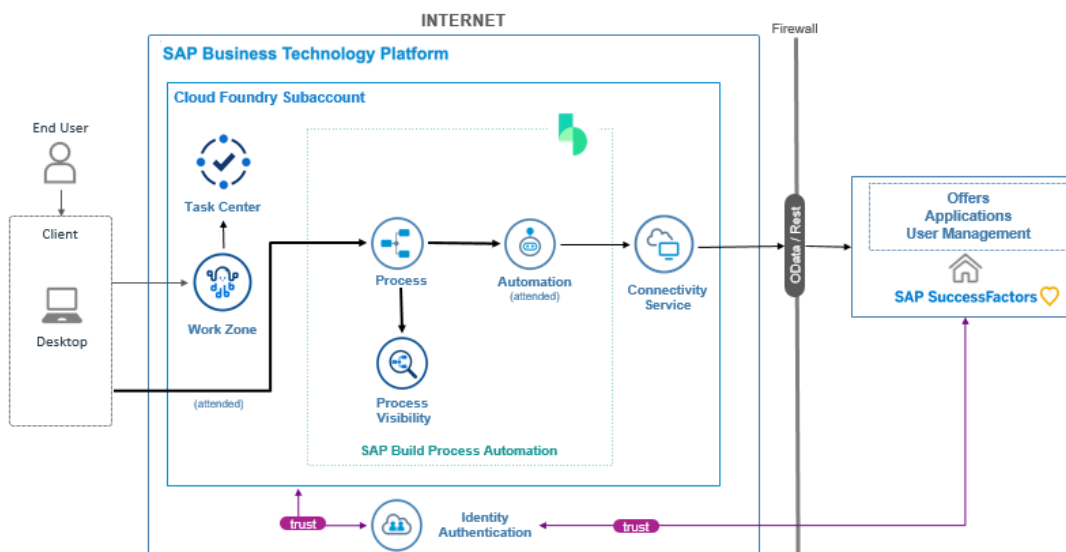
- This documentation is not a detailed guide to setup SAP Business Technology Platform services. It assumes that IT admin who is setting the content is skilled with SAP Business Technology Platform environment. The Configuration section must be mandatorily followed to import and configure the template.
- This template content is to accelerate your solution development. You must modify this template according to your requirements to achieve the desired business goal. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation, SAP Integration Suite, and its capabilities.

Overview

The **Job Offers Approval** automation solution addresses a crucial challenge related to the efficiency and speed of offer approval within the hiring process. It tackles a common issue faced by organizations, where delays in offer approvals can lead to extended hiring timelines. In such cases, HR teams often find themselves repeatedly following up with hiring managers or approvers to obtain the necessary approvals within the company's HR system.

With the introduction of this automation bot, this cumbersome and time-consuming process is streamlined. The bot empowers approvers to swiftly grant their approval for job offers without the need to log into the HR system manually. Once the offer is approved through the bot, the system automatically progresses the candidate to the next relevant status in the hiring workflow. This automation not only accelerates the offer approval process but also ensures a smoother and more efficient experience for both HR teams and candidates.

Solution Diagram:



The following steps are included as a part of **Job Offers Approval Process** template:

- The template uses below API:
 - **Offers API**
 - **/JobOffer** – To fetch the list of offers with status “**pending approval**”
 - **/approveOffer** – To approve the Job offer
 - **/declineOffer** – To decline the job offerMore information can be found in [RCMOffer](#)
 - **Job Application API**
 - **/JobApplication({applicationId})** - To retrieve jobreqID using applicationIdMore information can be found in [RCMJobApplication](#)
 - **User Management API**
 - **/User** – To retrieve User ID and EmailMore information can be found in [PLTUserManagement](#)
 - **Upsert API**
 - **/upsert** – To reassign the approver access to Bot User to perform approval or rejection of an offer
- Trigger for the process:
 - User must fill in the Requestor Name and Requestor Email ID in the trigger form to start the process.
- Identify the pending job offers in SuccessFactors:
 - The system identifies job offers that are in a pending status and need approval.
- Approval mail based on configured rules:
 - Depending on pre-configured rules and conditions, an approval request email is generated and sent to the designated recruiting approver's SAP Build Process Automation Inbox.
- Approval for job offer:
 - The designated approver reviews the job offers details.
 - The approver has the option to either approve or reject the job offer.
- Based on approval, job offer status changed:
 - If the approver approves the job offer, the system performs necessary activities to update the job offer status in the HR system.
 - If the approver rejects the job offer, the system also processes the rejection.
- End the process:
 - The process concludes after the approval or rejection action has been taken, and the job offer status has been updated accordingly.
- Receipt of Approval/Rejection to the receiver:
 - In both cases (approval or rejection), an email notification is sent to the requestor.
- Email notification:
 - Email notifications will be sent after completion of the process or if any error during the process execution.

This structured process ensures that job offers move through an efficient and automated approval workflow. It minimizes delays, reduces the need for manual follow-ups, and provides clear communication to all parties involved in the job offer approval process.

Prerequisites

The following SAP Business Technology Platform services are required to consume the content package of Job Offers Approval in SuccessFactors:

- SAP Build Process Automation to orchestrate the process.
- SAP SuccessFactors API
- SAP Business Technology Platform

Other Prerequisites

For this template to run successfully the following other prerequisites are needed:

- SAP Desktop Agent 3.19.00 or higher
- Outlook mailbox configured on the system where the automations will run to send mails.
- SAP Success Factor Technical user must have the '**System Admin**' role.

Process Flow

1. Process Initiation:

- The process begins when a user fills out the "Offer Approval Request Form."

2. Triggering Main - Offer Approval Process Automation:

- Upon submission of the "Offer Approval Request Form," the "Main - Offer Approval Process Automation" is automatically triggered.

3. Fetching Pending Approval Offers:

- The "Main - Offer Approval Process Automation" retrieves a list of job offers with a "Pending Approval" status from the SuccessFactors system.

4. Iterating Through Offers and Sending Approval Requests:

- For each job offer in the list, the automation initiates another sub-process named "Send Approval Request" which performs all the steps required to complete the approval process for an application ID."
 - a. Getting Approver's details:
 - The process starts by executing the "**Get Approver Email**" automation we retrieve the "Approver Email" and "Approver UserID" for the specific offer.
 - b. Sending Approval Form to Approver:
 - Once the "Approver Email" is obtained, an approval form named "**Offer Approval Form**" is sent to the designated approver.
 - The form includes detailed information about the job offer, allowing the approver to add comments and make an approval or rejection decision.
 - c. Assigning Access to Bot User:
 - Based on the approval or rejection decision made by the approver, the necessary access rights are assigned to the bot user. This is achieved using the "**Reassignment**" automation.
 - d. Approving or Declining the Offer:
 - If the job offer is approved by the approver, the "**Approve Job Offer**" automation is executed to update the offer's status in SuccessFactors and advance it through subsequent steps.
 - If the offer is declined, the "**Decline Job Offer**" automation is executed to reject the offer in SuccessFactors.
 - Additionally, a "**Decline Job Offer Notification**" is sent to the requestor to inform them of the rejection.
 - e. Checking for Further Approval Levels:
 - After approval, the automation checks whether the job offer is still in a "Pending Approval" status using the "**Cross Check Approval**" automation.

- If the offer is still pending, the process identifies the next-level approver and repeats steps from “a” to “e” for the next level of approval.
 - If the status is "completed," indicating that all required approvals have been obtained, an **"Approval Mail Notification"** is sent to the requestor.
- f. Error Handling:
- If any of these steps fail or encounter issues, the process sends an error email to the requestor, notifying them of the problem.

5. Process Outcome Notifications:

- Depending on the overall status of the **"Main - Offer Approval Process"** automation, it sends one of the following notifications to the requestor:
 - "Process Start Email Notification" when the process begins successfully.
 - "Error Notification" in case of any errors or failures during the process.

Configuration Guide

The **Job Offers Approval** process template requires SAP Build Process Automation subscription. Follow the setup and configuration section [setup and configuration setup](#).

Setup SAP Business Technology Platform Cockpit

Destination Configuration

Configure SuccessFactors API Destination

To access the SAP SuccessFactors application to read and update operations, an HTTP destination is required in the SAP BTP account where the SAP Build Process Automation is subscribed.

Create a destination with Basic Authentication.

Make sure the technical user has the appropriate access to Approve the offers in SuccessFactors.

Destination with Basic Authentication

Name	< Job Offers Approval Process>
Type	HTTP
Proxy Type	Internet
Authentication	Basic Authentication
URL	Example: https://<host>/odata/v2
Username	<username>of the SuccessFactors technical User
Password	<Password> of the SuccessFactors technical User

Additional Properties to Destination

Additionally, add the following properties in the destination for cloud integration.

sap.applicationdevelopment.actions.enabled	true
sap.processautomation.enabled	true

Configure SAP Build Process Automation Email Destination

Mail notifications are used in this template to send notifications to requestor various stages of the process. Follow the instructions to set up mail destination in your SAP BTP Account.

Configuring destination, see [Configure a SMTP Mail Destination](#).
For more information refer to [Create HTTP Destinations](#)

IMPORTANT NOTE: This template content is to accelerate your solution development. You can modify this template according to your own requirements to achieve your business goals. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

Setup SAP Build Process Automation Content

Import Content

This template can be downloaded from the Store:

- 1) Navigate to the **Store** in your SAP Build Process Automation application.
- 2) Select the Project Type filter as “**Process Automation**.”
- 3) In the Search bar type “**Job Offers Approval**”
- 4) Select the “Create from Template” button to add the template into your lobby.
- 5) After successfully adding the template, navigate back to the lobby to find the “**Job Offers Approval**” project available for use.

Caution: Be sure to select the **Project Type as “Process Automation” in the filters.**

Configure Agent Management Settings

This configuration is required to execute the Process with Automation. Kindly follow the steps explained [here](#).

Configuration & Modification

Once you have added the content to your lobby, you will find the project in your project list. Adapt the content template based on your requirements, and then release and deploy from the Lobby.

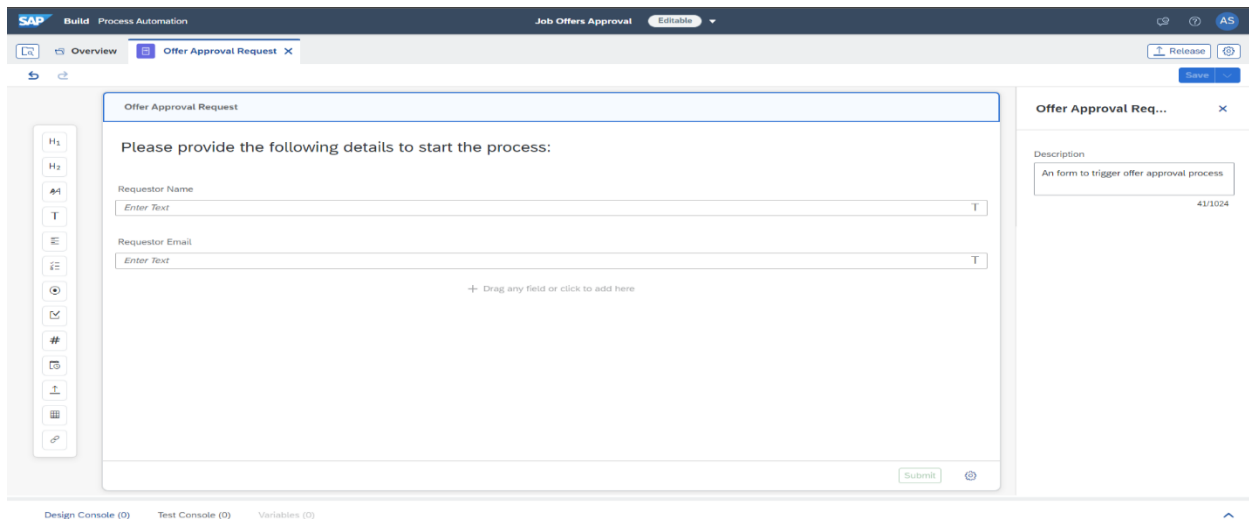
Configure Process

There is no configuration needed in the process, but you extend it based on your requirements.

Configure Forms (Optional)

You can update or extend the forms based on your requirements. To edit the form:

- Double click the form to open the Form Editor
- You can configure existing fields or add new layout or input fields to the form by simply dragging-and-dropping them from the side menu.

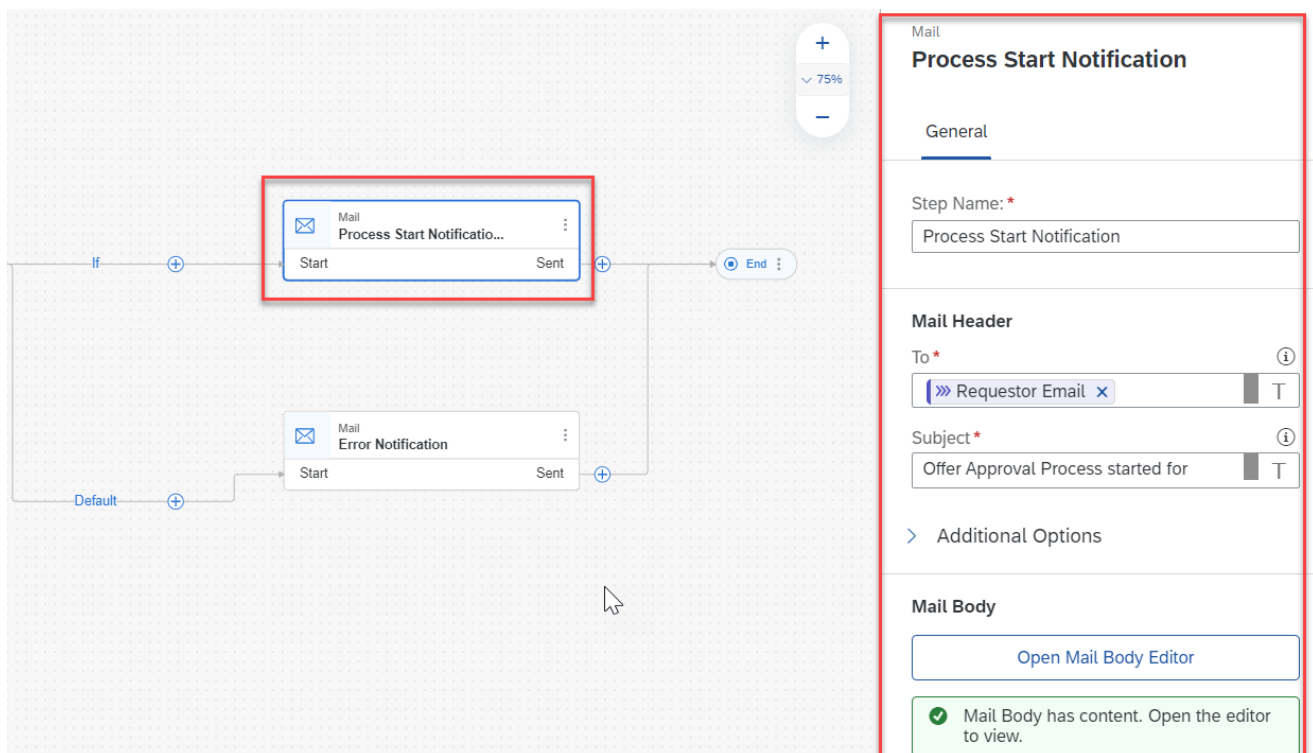


Configure Email

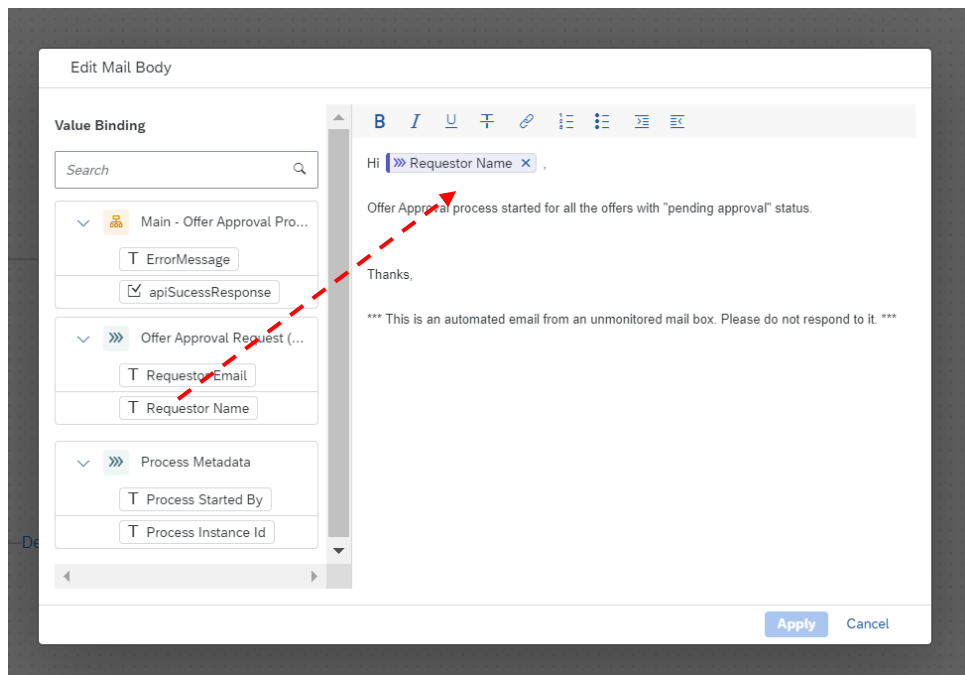
Email notifications are sent to requestors after task execution. All the email artefacts in the process have default template body which can be changed.

To update the email body content, do the following:

- Select the mail artefact in the process.
- From the Settings in the right-side panel, check the Mail Header to confirm the 'To' field (or email recipients) and the Subject. You can adjust the subject and recipient, if needed.
 - You may also add someone in 'CC'.
 - Click to '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.

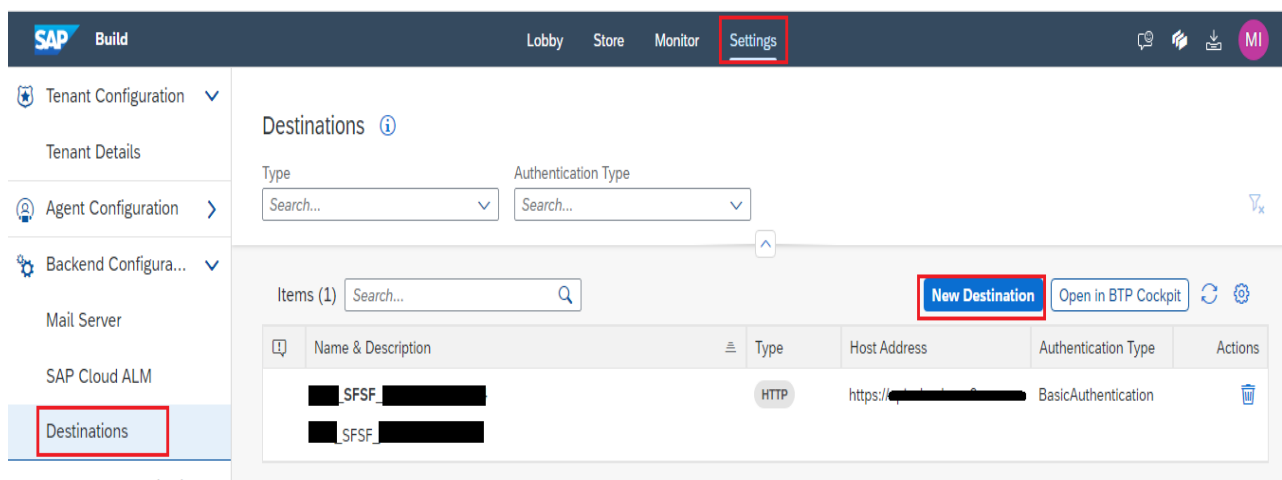


Configure Destination Settings

Actual destinations that are created in SAP BTP cockpit will be required when you deploy the process. This actual destination will be mapped the destination environment variables during deployment.

To configure destination:

- Click on **Settings**.
- Select **Destinations** from the left panel.
- Click **New Destination**
- Select the destinations to be added.



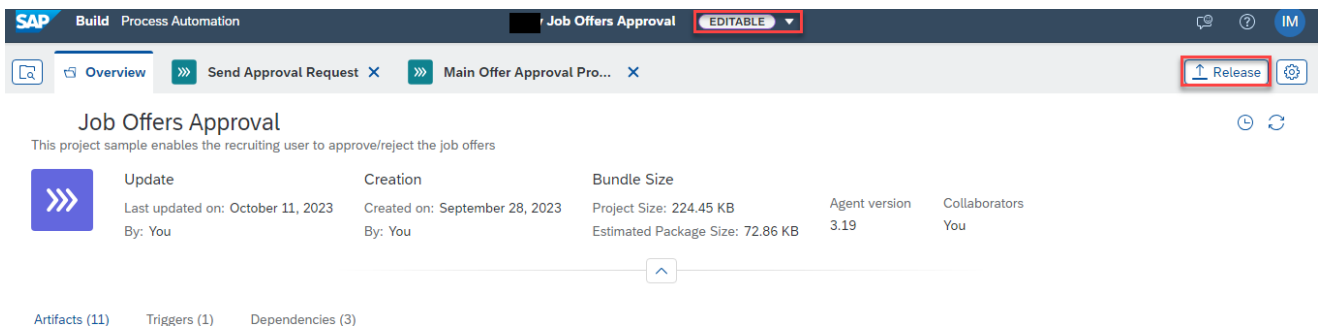
Release and Deploy Process

After configuring your process, it is time to publish, evaluate 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 cannot 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'.
- Then click 'Release':

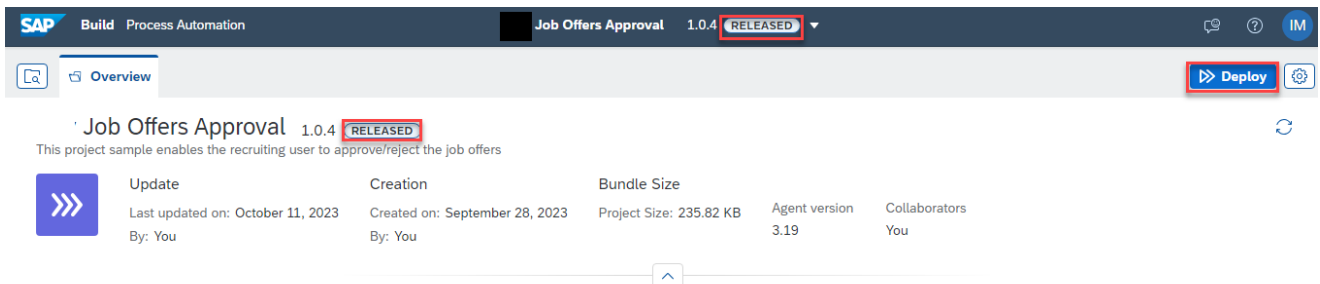


If this is the first time you have released the process, a version labelled 1.0.0 is released. For subsequent releases, you are prompted to select a version type before the process is released.

Deploy – This takes a released version of a process and enables it to be actively run and monitored. A deployed version of this process unlocks the request form, allowing to approve the job offers for requestor and send out a successful email to requestor.

To deploy a released version of your process,

- First ensure that the status is listed as 'Released' -
- Then click "Deploy."



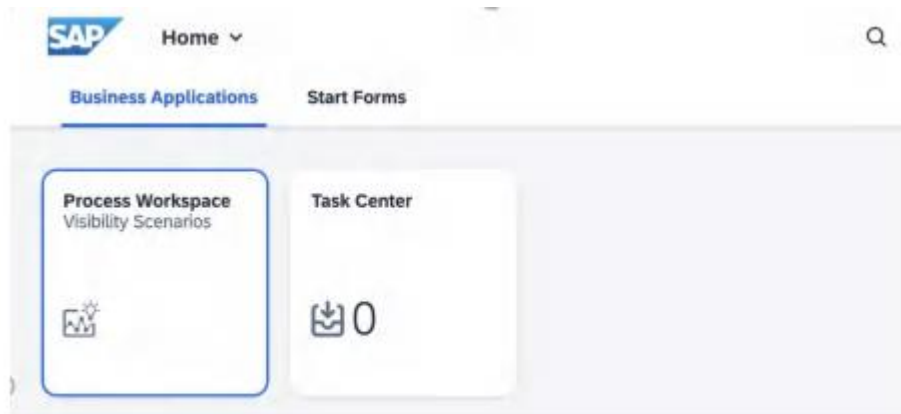
To deploy your project, you will be prompted to provide a destination as an environment variable. Select the destination from the drop-down and enter Bot User ID approver re-assignment.

Note: If you do not map your destination environment variable with actual SAP BTP destination and Bot User ID during deployment, then the process will enter Erroneous state when it tries to connect to the external system. For more details about the Destination artifact, please read our [documentation](#).

Configure SAP Work Zone

Now that the process is released and deployed, you can configure SAP Work Zone standard or advanced edition to give access to your business users to track the process and business KPIs using process visibility workspace.

To configure SAP Work Zone standard edition - add Process Workspace and Task Center tile in SAP Work Zone to access the visibility dashboard. Follow the tutorial to configure Work Zone with visibility tiles.



User Guide

Capabilities

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

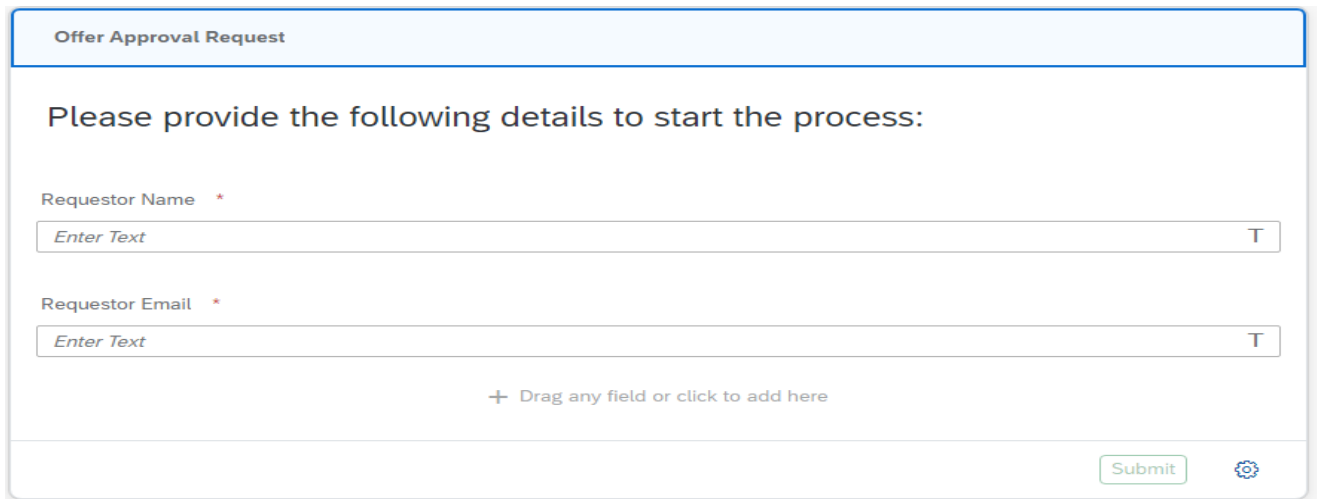
Icon	Type	Name	Description
	Process	Main Offer Approval Process	The "Main Offer Approval Process" is the central workflow where the entire sequence of activities related to job offer approval takes place.
	Process	Send Approval Request	The "Send Approval Request" process is a critical component of the overall job offer approval workflow. Its primary function is to facilitate the interaction between the requester and the approver by sending an approval form to the designated approver and managing subsequent actions based on the approver's response.
	Automation	Main-Offer Approval Process	The "Main Offer Approval Process" serves as the primary automation responsible for retrieving and handling a list of job offers that are pending approval. It processes these offers one by one to ensure they are reviewed and acted upon as needed.

	Automation	Get Approver Mail	This sub automation is used to fetch approver email and approver user id.
	Automation	Approve Job Offer	This sub automation used to approve the offer in SuccessFactors.
	Automation	Cross Check Approval	After the approving the offer this sub automation is used to check again if the status of the approval is still pending for approval or completed.
	Automation	Re Assignment	This sub automation is used to assign the necessary role to the Bot user to approve or decline the offer in SuccessFactors.
	Automation	Decline Job Offer	This sub automation is used to decline the Offer in SuccessFactors
	Form	Offer Approval Request	This is form is used to trigger the Business Process. Form includes the details of Requestor's Name and Email.
	Form	Offer Approval Form	This is the approval form which is sent to the approver, which includes the details of the offer, and the approver can add the comments here while approving or declining.
	Mail	Approve Mail Notification	This mail step sends a notification to the requestor when an offer is approved by all the approvers.
	Mail	Decline Job Offer Notification	This mail step sends a notification to the requestor when an offer is declined by the approver.
	Mail	Process Starts Notification	This mail step sends a notification to the requestor when the process started to process all the list of pending for approval offers.
	Mail	Offers Approval Process- Error Notification	This mail step sends a notification to the requestor when the main process failed due to any reason.
	Mail	Send Error Mail	This mail step sends a notification to the requestor if the process failed in between while processing the approval of an offer.

Forms

Offer Approval Request

This is the form used to trigger the whole Business Process. Form has two fields “Requestor Name” and “Requestor Mail”.



The screenshot shows a web form titled "Offer Approval Request". Below the title bar, there is a prompt: "Please provide the following details to start the process:". There are two required text input fields: "Requestor Name" and "Requestor Email", both marked with a red asterisk. Each field contains the placeholder text "Enter Text" and a small "T" icon on the right. Below these fields is a plus icon followed by the text "Drag any field or click to add here". At the bottom right of the form, there is a green "Submit" button and a gear icon for settings.

Offer Approval Form

This is an Approval Form which is sent to the Approvers. This contains the necessary details of the Offer, and it provides a text box to the Approvers to enter their comments.

Offer Approval Form

Approval form for approving Job offers in SuccessFactors

Take action based on the details below:

Candidate Name

Prepopulated Field

T

Application ID

Prepopulated Field

T

Offer Approval ID

Prepopulated Field

T

Form Data ID

Prepopulated Field

T

Location

Prepopulated Field

T

Base Salary

Prepopulated Field

T

Target Bonus Amount

Prepopulated Field

T

Comment

Enter Text

+ Drag any field or click to add here

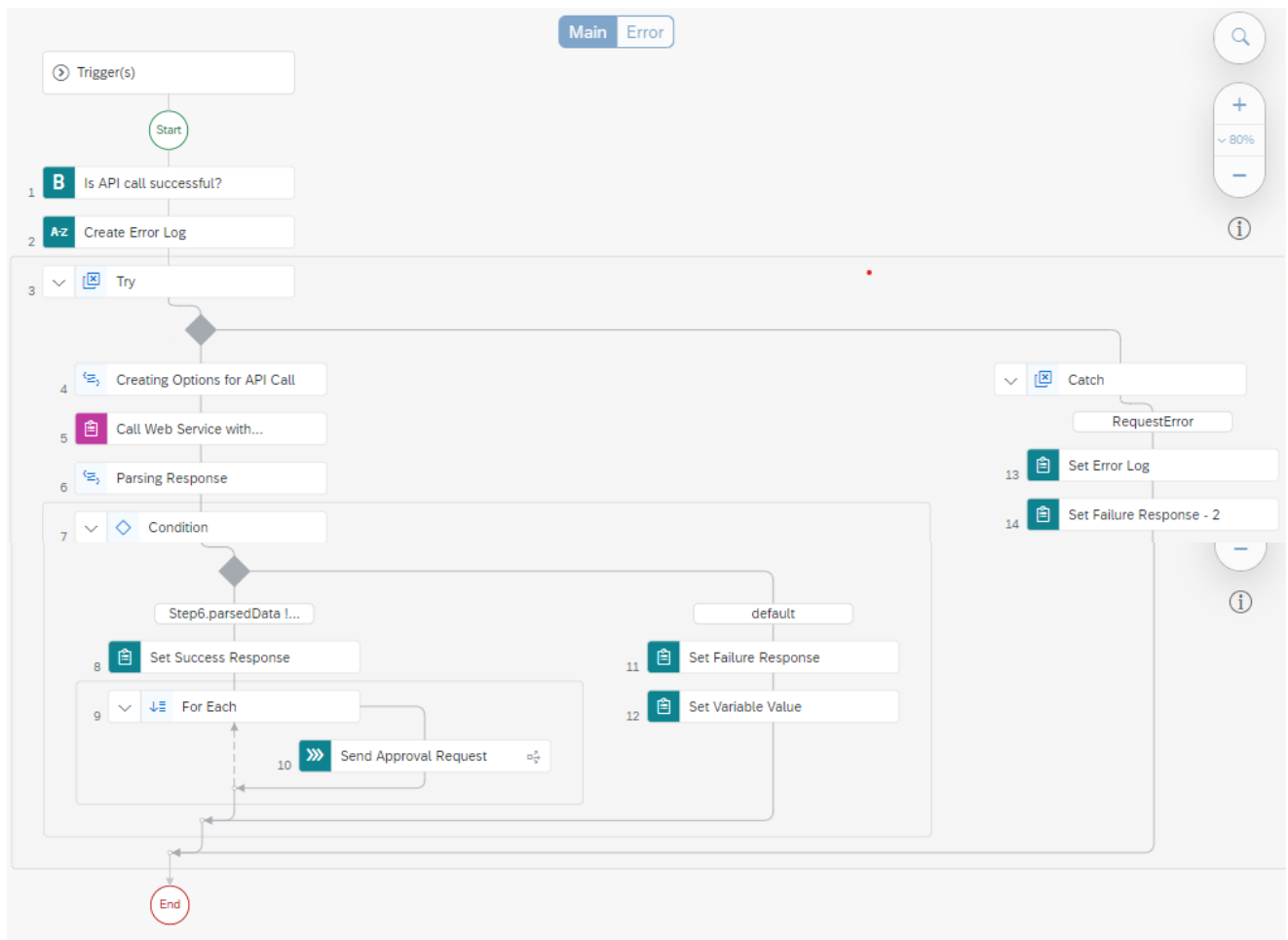
Approve

Reject

Automations

Main - Pending Offer Approval

This is the main automation to fetch list offers with status “Pending for Approval” from SuccessFactors. Automation is making use of API to fetch data. Automation will retrieve a list of Pending Approval Offer details. It will iterate through the list. For each item it will call the sub-process “**Send Approval request**”.



Step 1: Create Boolean variable to check success response.

Step 2: Create Error log variable.

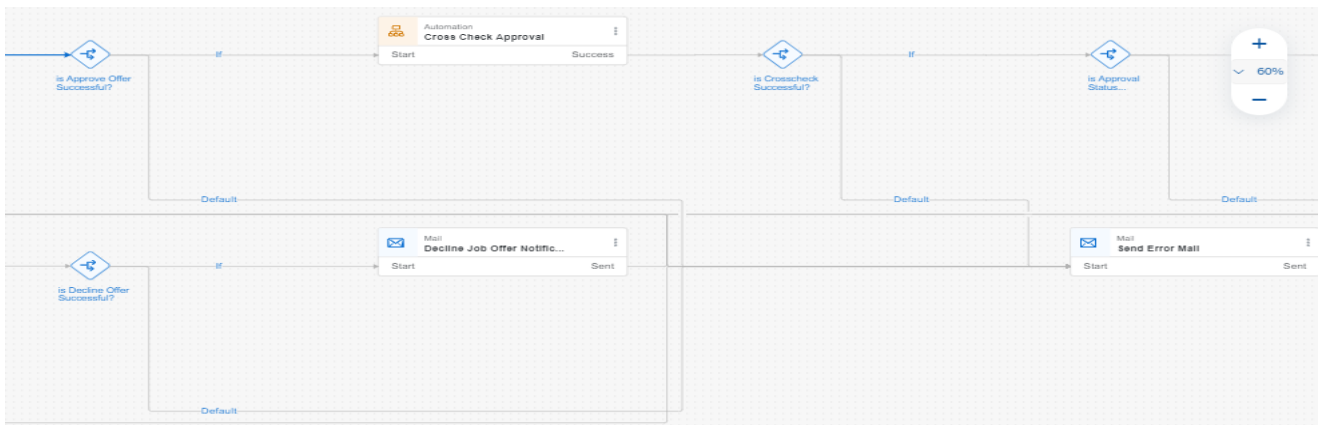
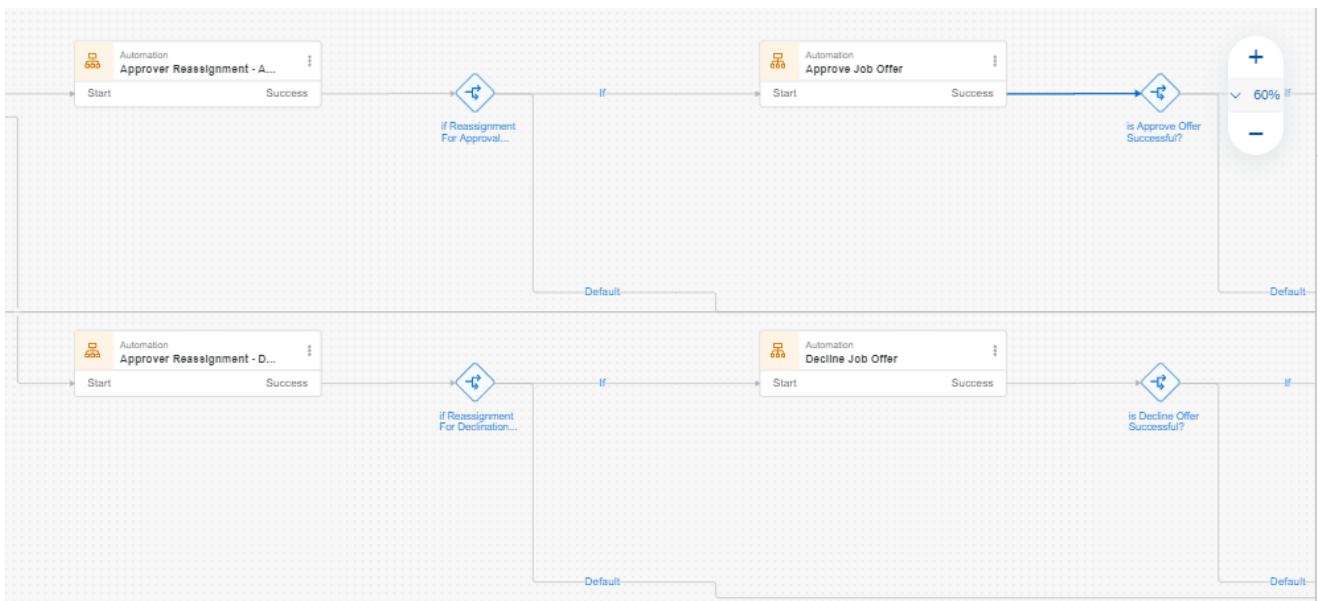
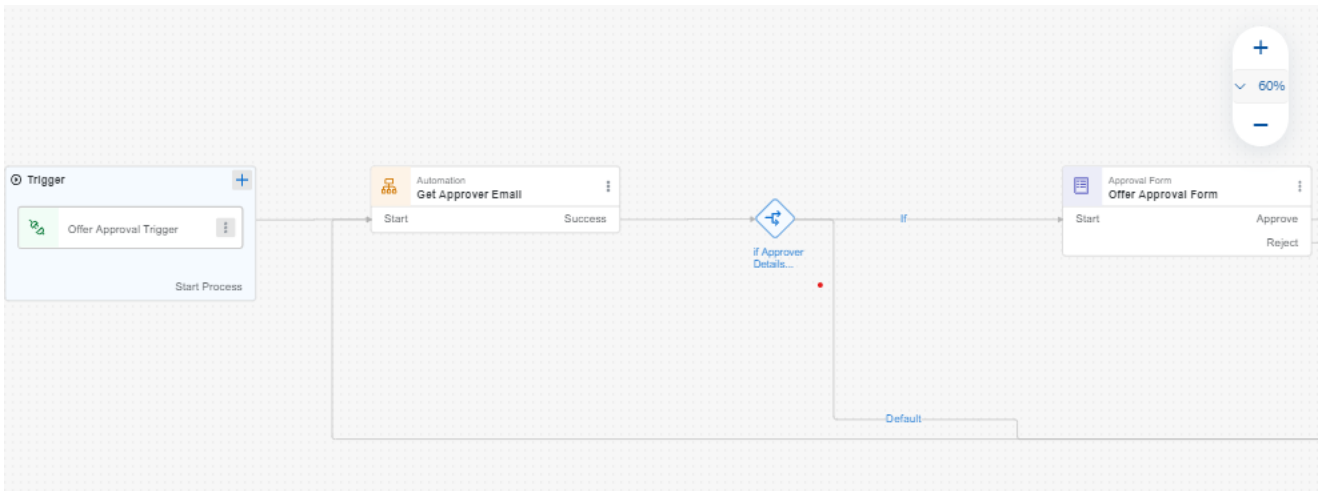
Step 3 to Step 6: Collect all pending approval offers using API.

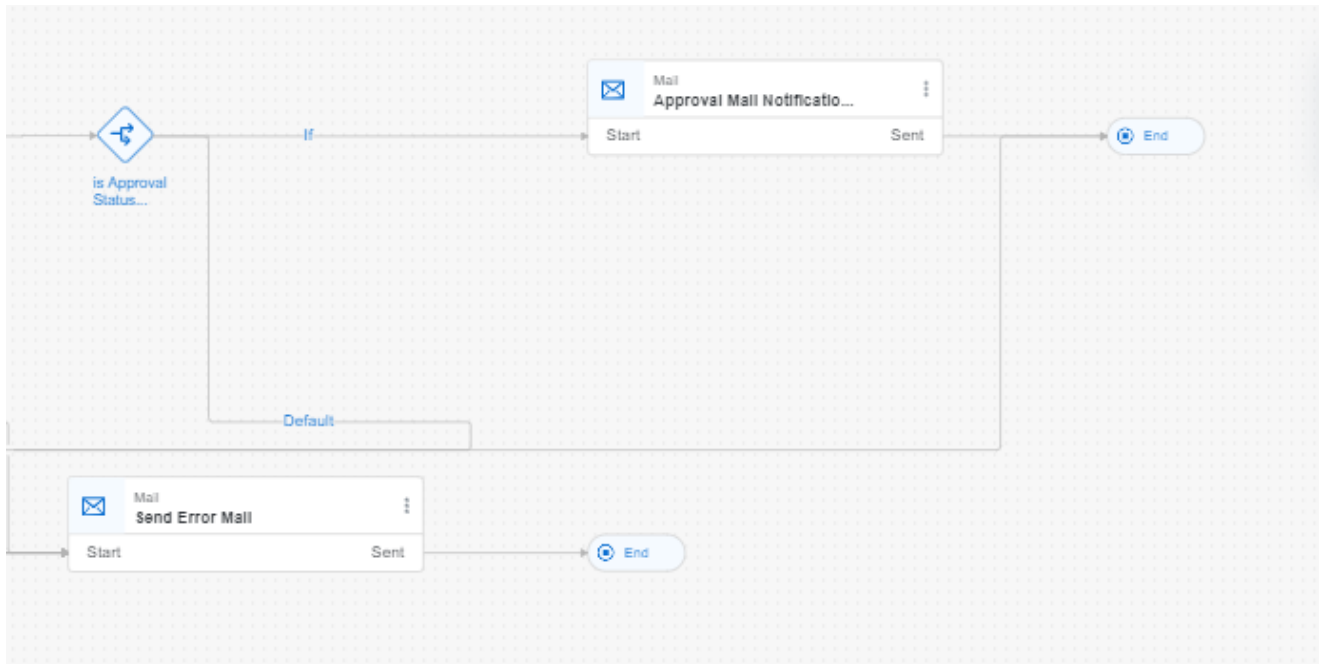
Step 7 to Step 12: Check if pending approval offers available, if yes then call “Send Approval Request” process in loop for each offer.

Step 13 to Step 14: Set error if any errors found while calling an API.

Send Approval Request

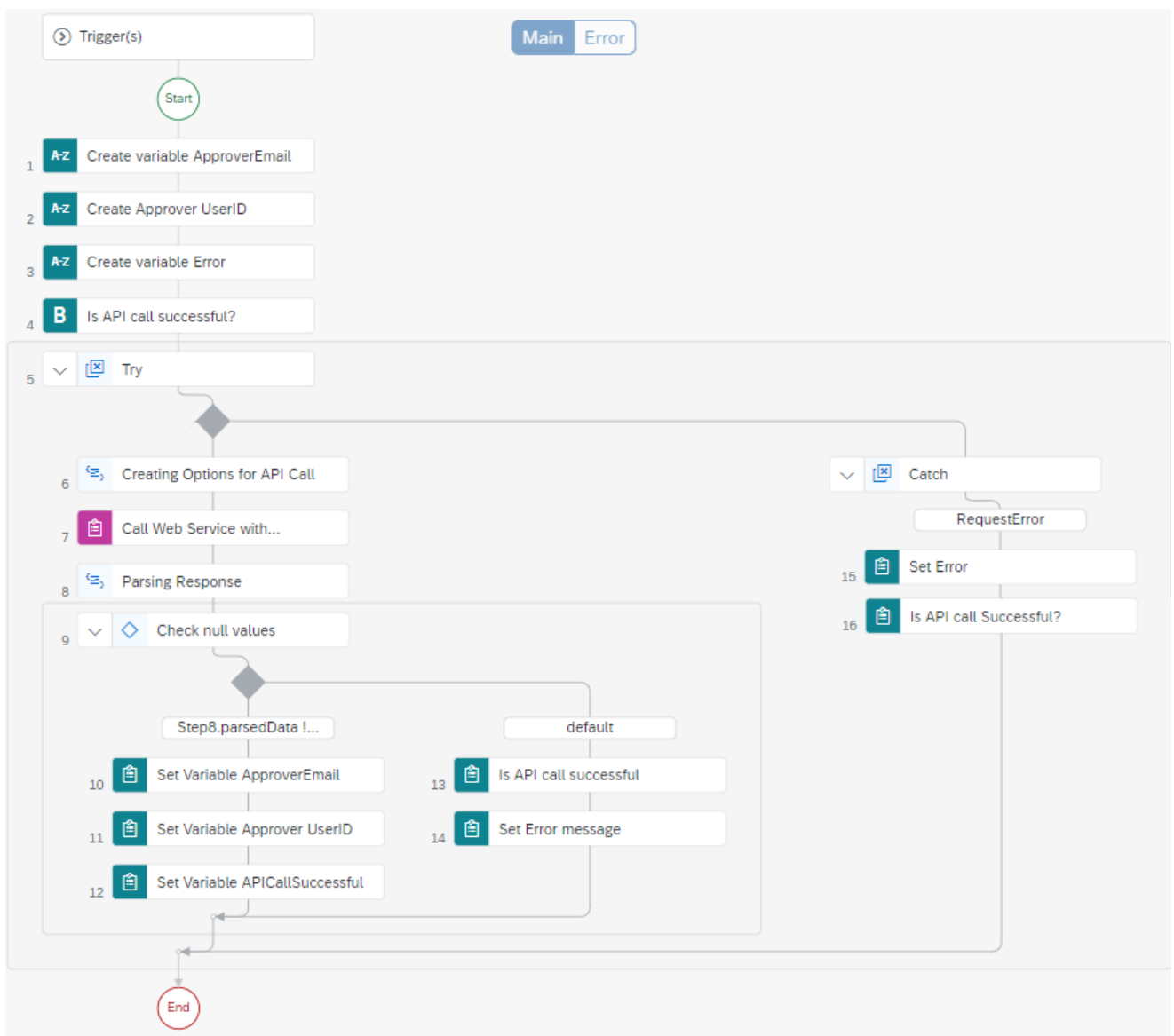
This sub process performs end to end offer approval process as explained in the Process flow section from point 4.





Get Approver Email

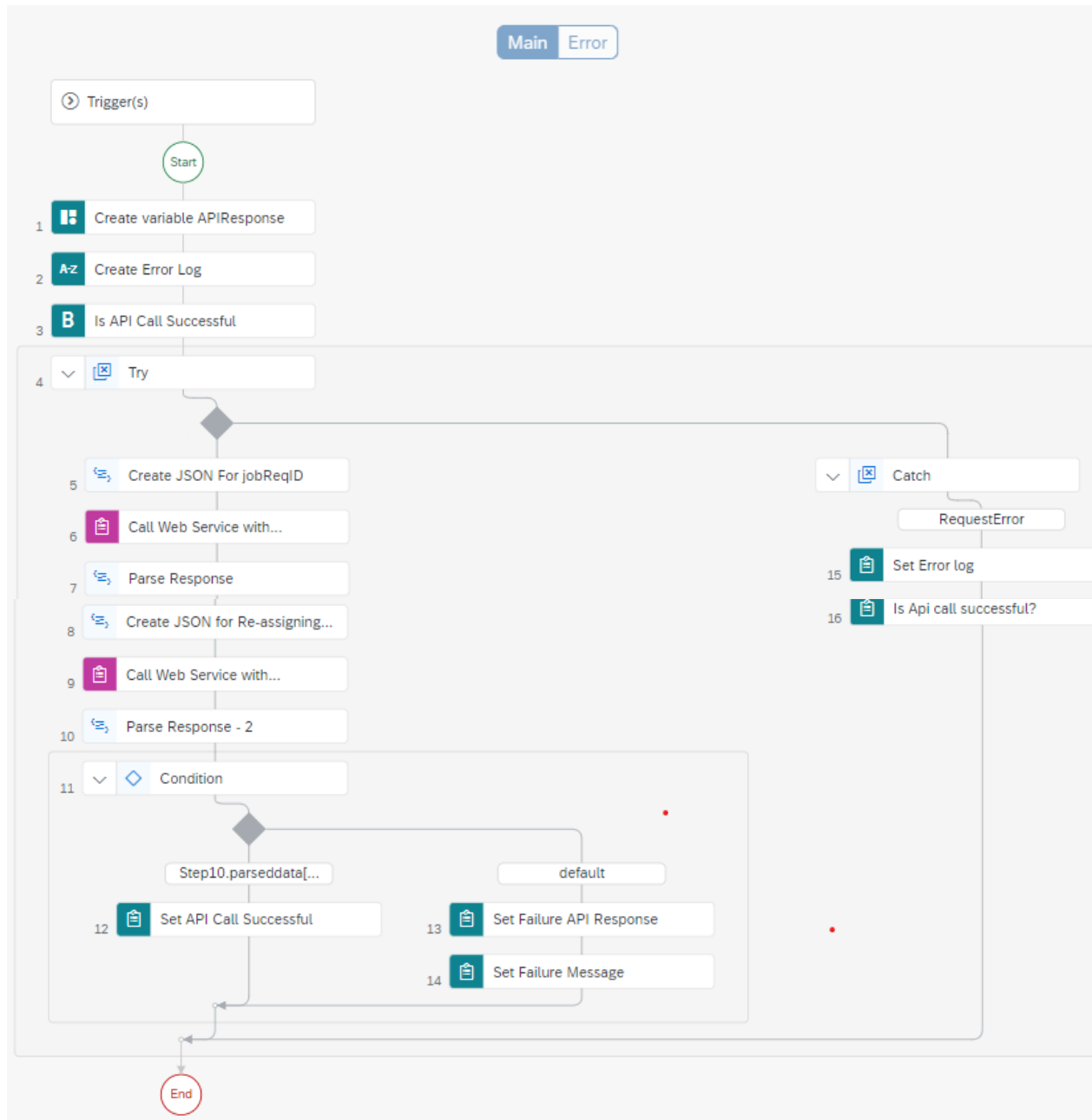
This sub automation is used to find the “Approver Mail” and “Approver ID” of the current processing offer. Automation is making use of API to get the data.



Step 1 to Step 4: Create variables to store approver Email-ID, userID, error log and success response.
 Step 5 to Step 14: Call the success factors API by passing required API inputs to get user email address, userID and parse the response received either success or failure and store the response in the variable.
 Step 15 to Step 16: Set error log variables if any errors found while calling an API.

ReAssignment

This sub automation is used to grant the necessary access to the Bot user to either approve or decline the offer in SuccessFactors. Automation uses two APIs in this automation. First one is to get the job requisition Id and second one is for the reassignment.



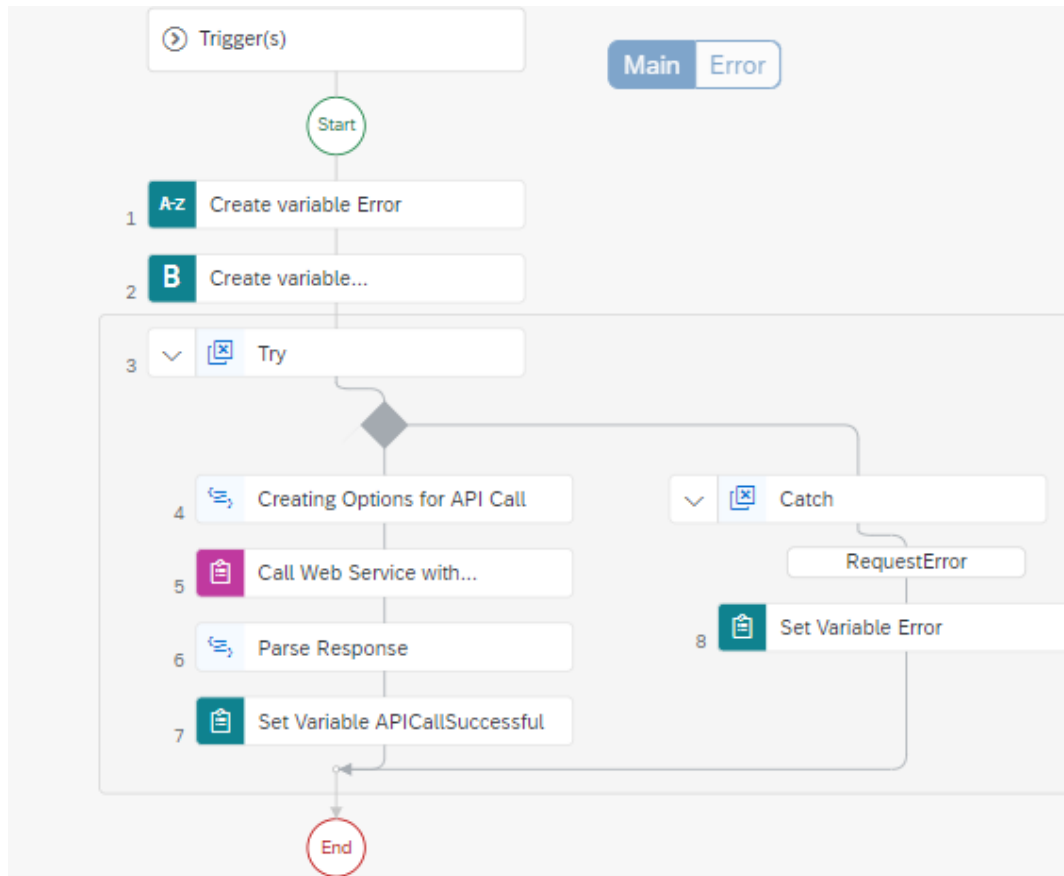
Step 1 to Step 3: Create variables to store API response, error log and success response.

Step 4 to Step 14: Call the success factors APIs by passing required API inputs to get job requisition ID and reassign the approver access. Then parse the response received either success or failure and store the response in the variable.

Step 15 to Step 16: Set error log variables if any errors found while calling an API.

Approve Job Offer

This sub automation will approve the offer in SuccessFactors using API.



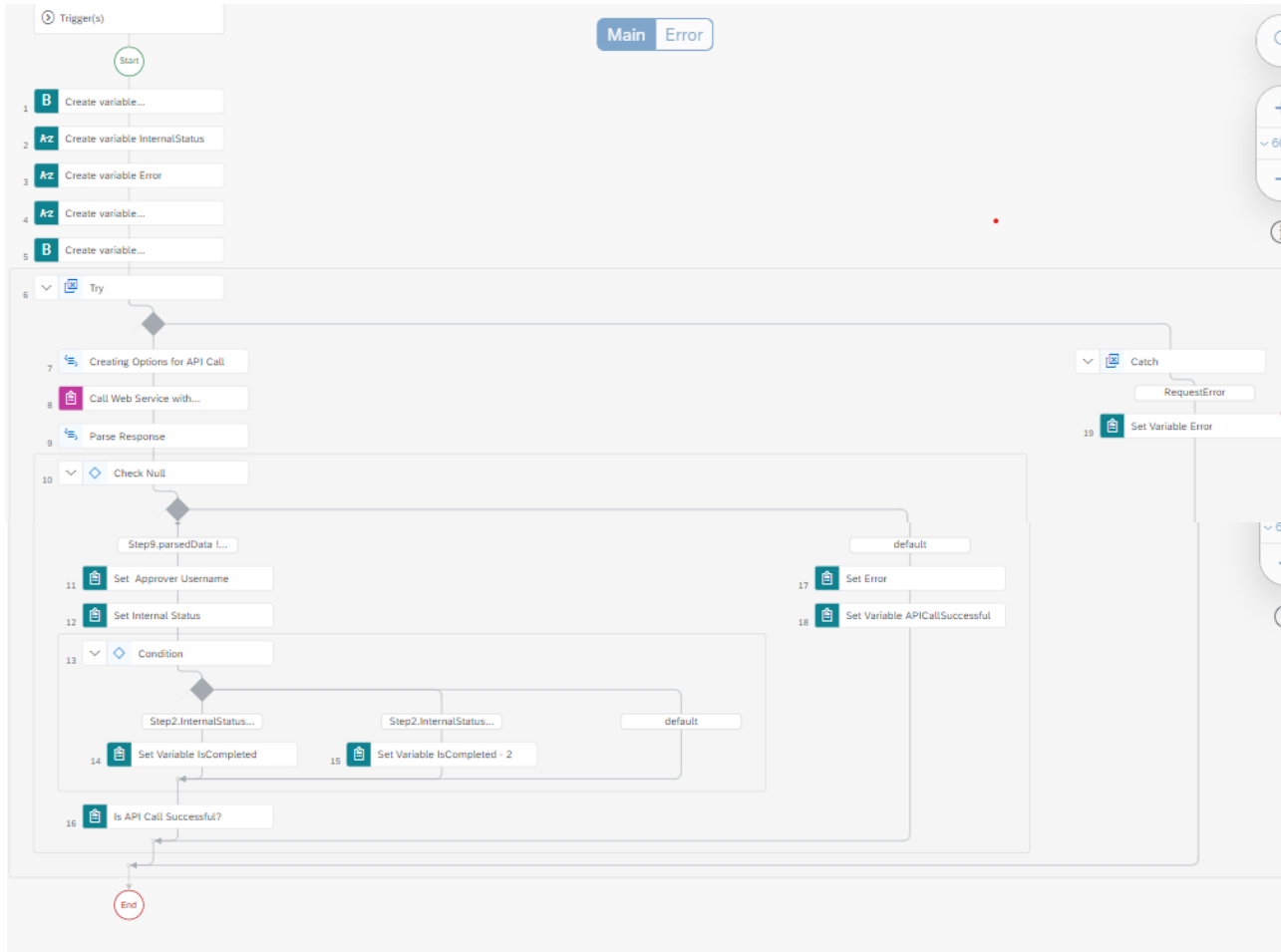
Step 1 to Step 2: Create variables to store error log and success response.

Step 3 to Step 7: Call the success factors APIs by passing required API inputs to approve the job offer. Then parse the response received either success or failure and store the response in the variable.

Step8: Set error log variable if any errors found while calling an API.

Cross Check Approval

This automation is used to check if the offer is still in 'Pending Approval' status or completed. Automation will use the API Call to get the offer details again and check the status. If the status is completed it will return it. Otherwise, if it's still 'Pending Approval', again next level of approval is needed for which automation will fetch the approver's username and return it.



Step 1 to Step 5: Create variable to store completion status, internal status value, error log, approver username, success response.

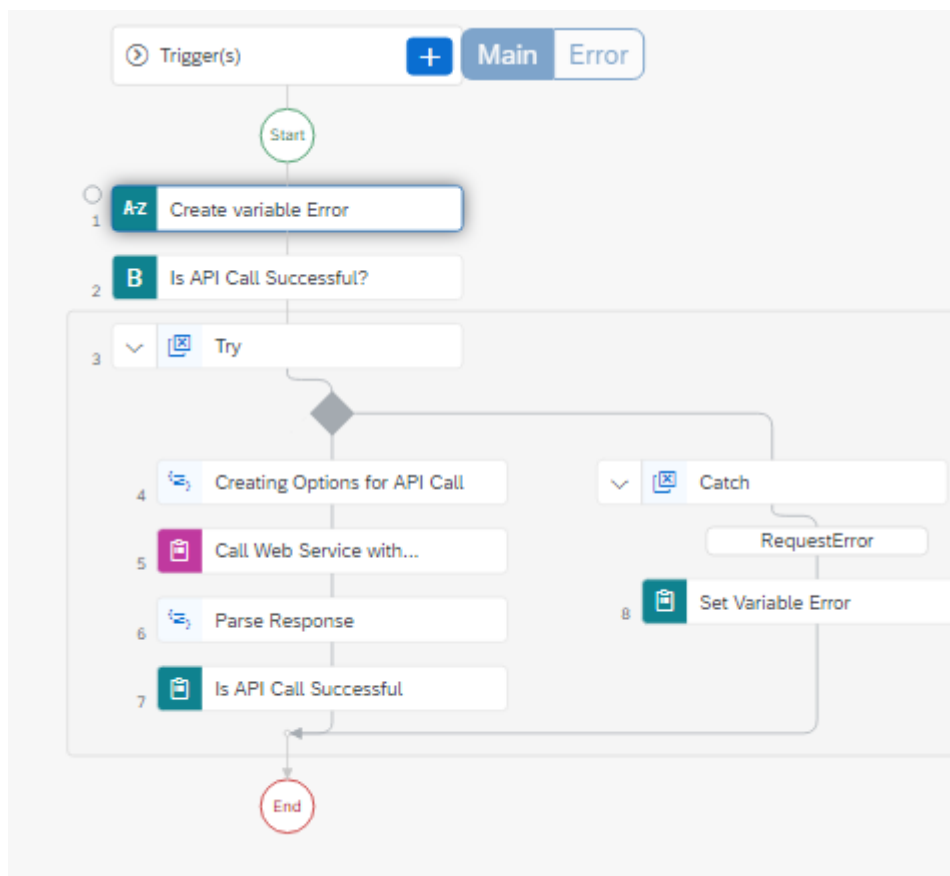
Step 6 to Step 9: Check the offer status and store the response.

Step 10 to Step 16: Check if offer is pending approval offer, if yes then fetch the approver's username

Step 17 to Step 18: Set error if any errors found while calling an API.

Decline Job Offer

This sub automation is used to decline the offer in SuccessFactors using API.



Step 1 to Step 2: Create variables to store error log and success response.

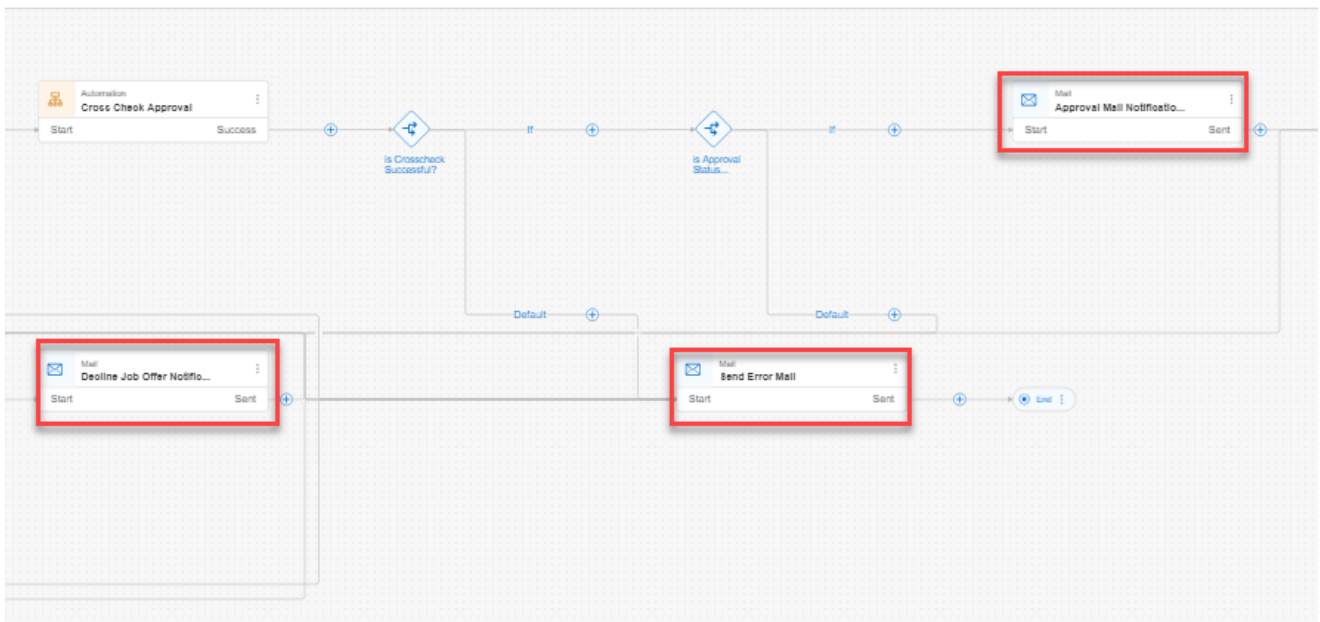
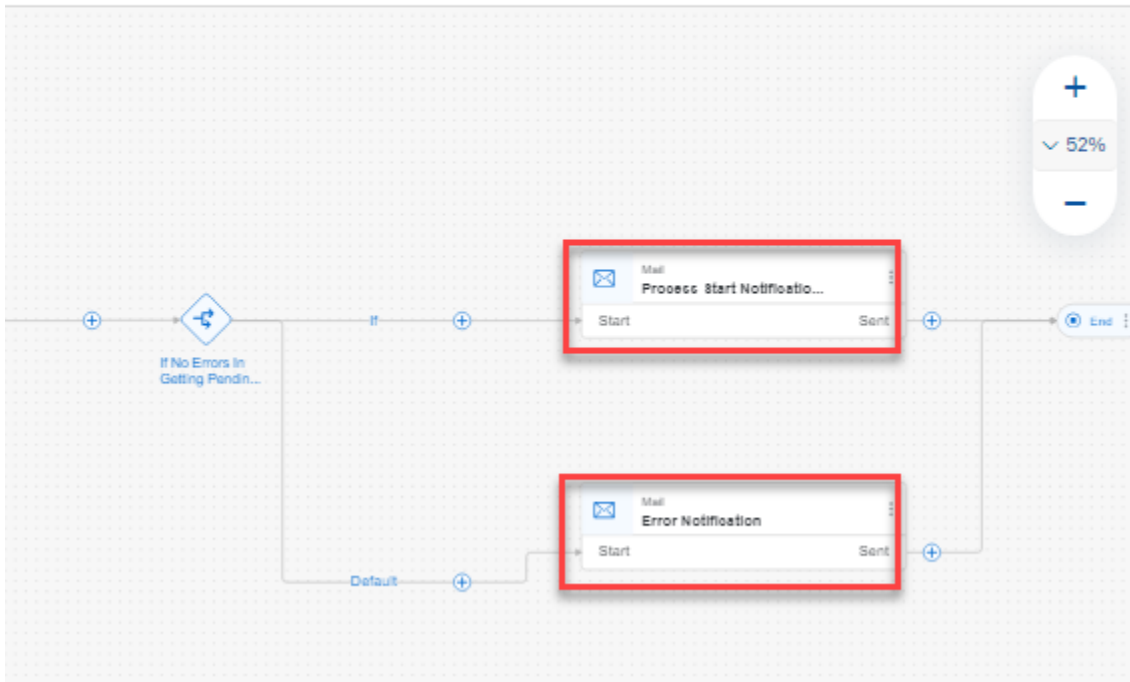
Step 3 to Step 7: Call the success factors APIs by passing required API inputs to decline the job offer. Then parse the response received either success or failure and store the response in the variable.

Step8: Set error log variable if any errors found while calling an API.

Email Notifications

The process contains 5 email tasks,

1. Approve Mail Notification: To send the Approval notification to requestor after all stages of approval.
2. Decline Job Offer Notification: To send the decline notification to requestor when the approver declined the offer.
3. Send Error Mail: If any error happened in the approval process of an offer Error mail will be send to the requestor.
4. Process Start Notification: To send a mail to requestor once the approval process is started for all the offers.
5. Error Notification: To send mail notification to the requestor if the process failed in between while processing the approval of an Offer.



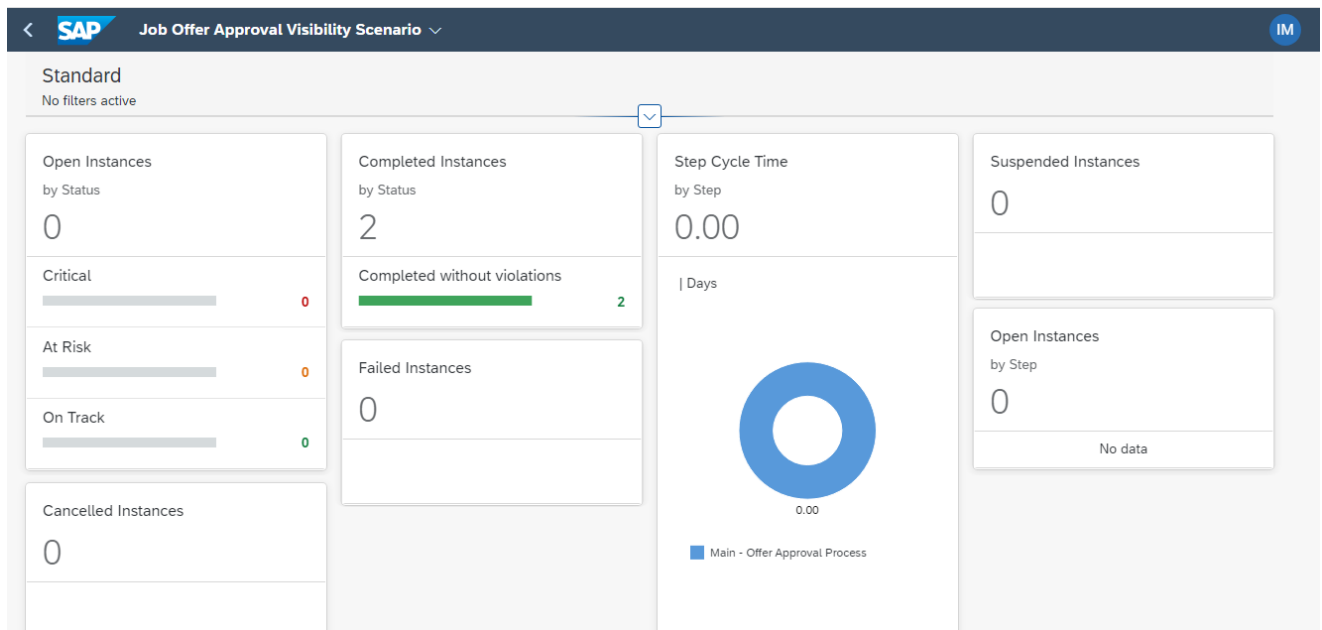
Run automation in attended mode

The following table provides steps to run the automation in attended mode.

Step	Instruction
Launch Desktop Agent	Launch Desktop Agent, make sure that the unattended mode is selected in the Projects tab of the Desktop Agent.
Open SAP Build Process Automation	Perform the following to release and deploy the task automation: Navigate to the Store and search for the Job Offers Approval package. Click Add to add the package to the Lobby . In the Lobby , click the project to open the Overview page. Click Release and then click Deploy . For steps to release and deploy a project, see the Managing Existing Projects topic.
Trigger	Note: Open deployed version of the package. Click on the trigger form and copy the trigger link. Open browser and paste the trigger link copied and click enter. Form will appear. Enter Requestor Name and Email Id. Click on Submit .
Monitor the Job	Open SAP Build Process Automation and click Monitor > Automation Jobs. You should see your job in the list. If not, adjust the date range on the Jobs page and refresh the page. For more details, refer the Automation Jobs topic.
Check for Report	After your job status is complete, verify that documents are moved to the 'Processed' folder and notification emails are sent to the requestor.

Process Visibility Scenario

The visibility scenario is a dashboard which allows business users to track relevant process KPIs and statuses. A default dashboard is provided with this template, and it can be customized by selecting attributes from your process which you want to track in the process dashboard. You can read more [here](#)



Support

There is no support available for the template content. If you experience general issues with SAP Build Process Automation, raise an incident via SAP Support Portal on **BPI-PA-BPC** component. This template can be modified using SAP Process Automation. For example: add decision 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.