



PUBLIC

SAP Build Process Automation **Mass Create Permission Group**

Configuration & User Guide

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Change Log

Version	Date	Description
1.0.0	September 28th, 2023	Document created.
1.0.1	February 6 th , 2024	Removed form trigger and added attended trigger through desktop agent

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

1. Overview: In this section, you will get a 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 (BTP) that are required to use this template.
2. Configuration Guide: It contains 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.

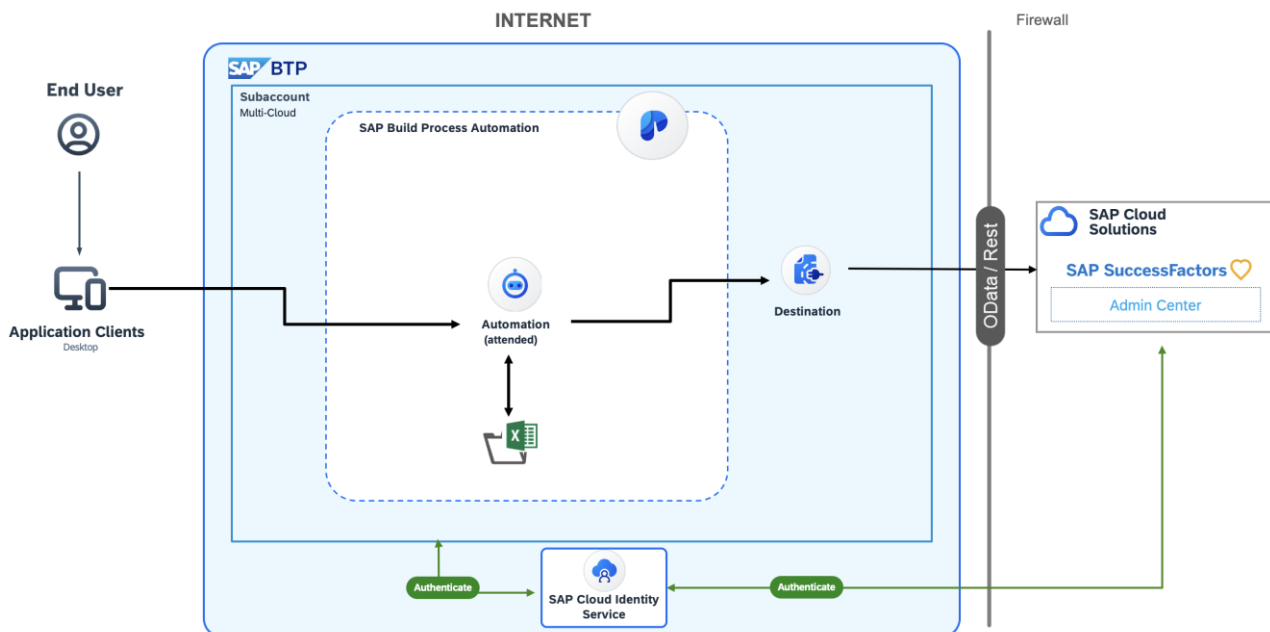
Note:

- This documentation is not a detailed guide to setting up SAP Business Technology Platform (BTP) services. It assumes that the IT admin who is setting the content is skilled with SAP Business Technology Platform (BTP) 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 “**Mass Create Permission Group**” process automates mass creation of permission groups in the SAP SuccessFactors system. It is more time-efficient for the users to upload an excel template with the necessary data, instead of creating permission groups individually in the SAP SuccessFactors system.

Solution Diagram:



The following steps are included as a part of **Mass Create Permission Group** template:

- The template uses **DYNAMIC GROUP API**
 - More information can be found in [DynamicGroup | SAP Help Portal](#)
- Users must download the pre-defined template available in the package and fill the excel template file with the group details.
 - Folder can contain any number of files with the predefined template.
 - Folder name and File name can be named anything but excel should contain the pre-defined format.
- Start Process – An attended trigger creates jobs that are based on the schedule you define in the trigger. These jobs can be triggered by the user from the “**Desktop Agent**” by providing requestor email Id and the folder path to start the process.
- Read operation – ‘**Read Permission Group Details From File**’ automation fetches the file(s) from the folder. It can handle multiple files in the folder.
 - The fetched file is read, and the permission group details are used for creating permission group.
 - Once the record is processed from the file, the status of the record is updated in the excel file in the respective columns.
- Once the file(s) have been processed completely, it is moved to the ‘Processed’ folder in the same folder path and renamed to ‘<FileName_TimeStamp>’.
 - Processed folder will be created if not present already.
- Email Notification: Email notifications will be sent after completion of the process or if there is any error during the process execution.

Prerequisites

The following SAP Business Technology Platform services are required to consume the content package of Mass Create Permission Group:

- SAP Build Process Automation to orchestrate the process.
- SAP Cloud Identity Services - Identity Authentication (Optional)
- SAP Connectivity service to establish access to the SAP SuccessFactors system.

More information about SAP Build Process Automation can be found [here](#).

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 SuccessFactors technical user must have the ‘**System Admin**’ role.

Important Note –

- Template structures are fixed; no changes should be made to them for the entire process to work.
- The values that are expected for the permission group category as per the input template should match with the backend SuccessFactors values like usernames, picklist labels, external codes, etc. else the backend system cannot recognize the values and returns an error. The user of this bot is advised to keep such values needed to be passed in input file for this bot ready, offline by referencing the backend SuccessFactors system with a one-time effort.

Process Flow

- 1) The requestor triggers the **Mass Create Permission Group** process with the desktop agent by entering their email Id and the folder path in which the files are saved.
- 2) The **'Read Permission Group Details From File'** automation fetches the data from the excel template and triggers the sub automation **"Create Permission Group"** to create the permission group in the SAP SuccessFactors system.
- 3) Column **E, F** and **G** in the input excel file is filled with the status of each record after **"Create Permission Group"** automation is executed completely.
- 4) The input file is then moved to the **'Processed'** folder once all the records in the file are processed.
- 5) An email notification is sent to the requestor after processing all files in the folder.

Configuration Guide

The **Mass Create Permission Group** process template requires SAP Build Process Automation subscription. Follow the setup and configuration section [setup and configuration setup](#).

Setup SAP Business Technology Platform (BTP) Cockpit

Destination Configuration

Configure SuccessFactors Destination.

To access the SAP SuccessFactors application to read and update operations, an HTTP destination is required in the SAP Business Technology Platform (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 create permission group in the SAP SuccessFactors system.

Destination with Basic Authentication

Name	< Mass Create Permission Group>
Type	HTTP
Proxy Type	Internet
Authentication	Basic Authentication
URL	Example: https://<host>/odata/v2
Username	<username>of the SAP SuccessFactors technical user
Password	<Password> of the SAP 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

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 **"Mass Create Permission Group"**
- 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 **"Mass Create Permission Group"** 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.

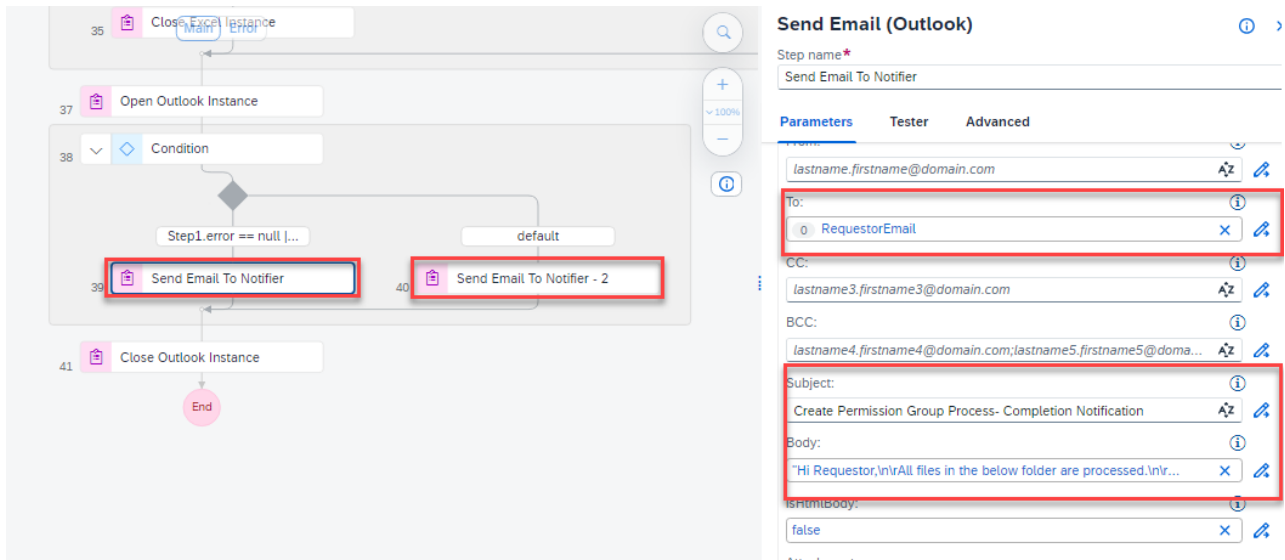
Configure Process

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

Configure Email

Email notifications are sent to requestors after process execution. These are sent via Microsoft outlook on the computer where the automations run.

The body and subject of the email can be modified accordingly as per your needs.

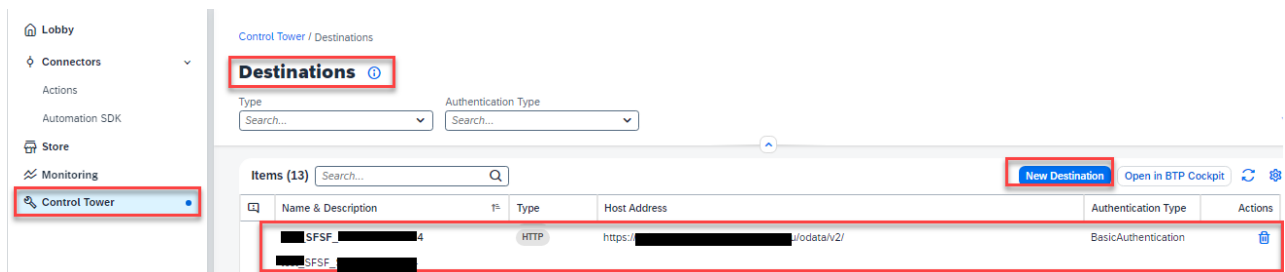


Configure Destination Settings

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

To configure destination:

- Click on **Control Tower**.
- Select **Destinations** from the right panel.
- Click **New Destination**
- Select the destinations to be added.



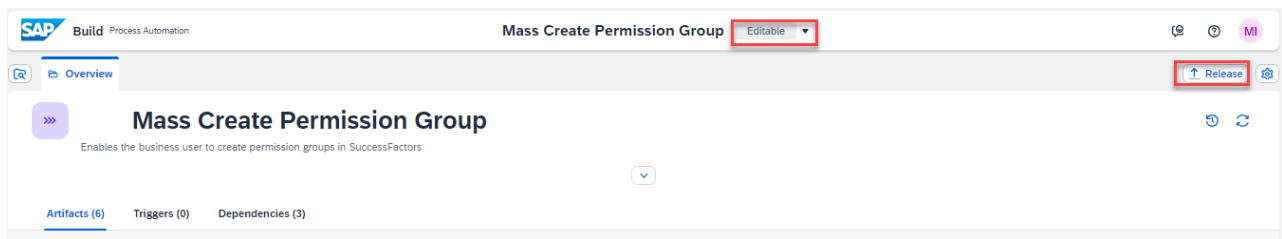
Release and Deploy Process

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':

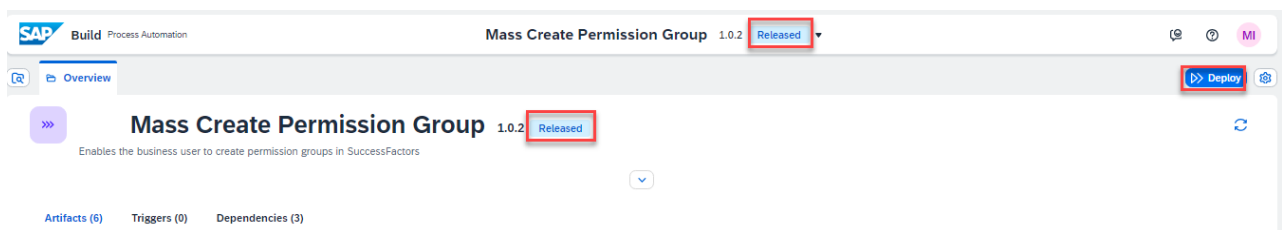


If this is the first time you have released the process, a version labelled 1.0.0 is released. For subsequent releases, you are prompted to select a version type before the process is released.

Deploy – This takes a released version of a process and enables it to be actively run and monitored. A deployed version of this Mass Create Permission Group process allows to create permission groups for requestor and send out a successful email to requestor that groups are created successfully.

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.

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

User Guide

Capabilities

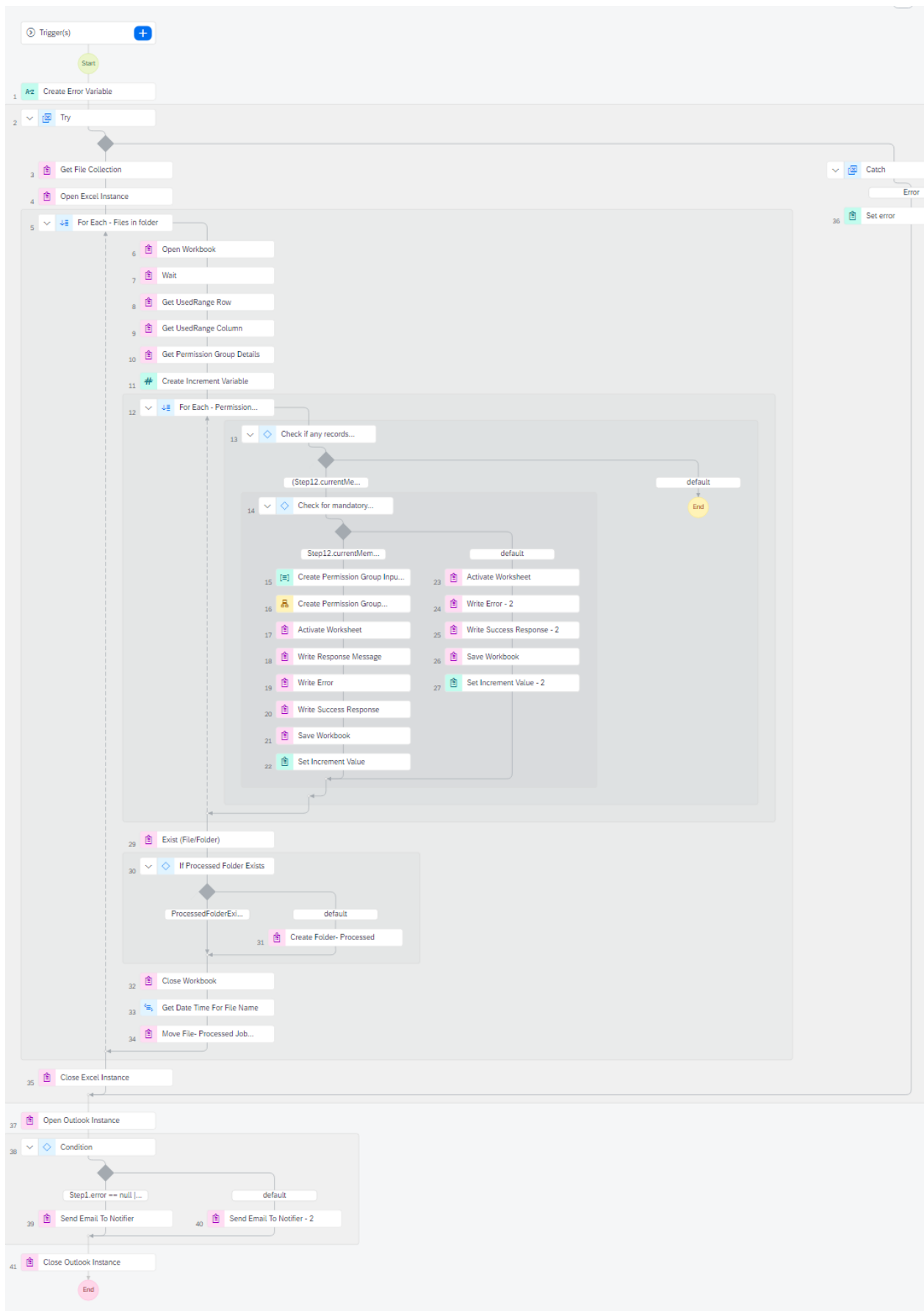
This template content contains the following key artifacts:
Please refer [help documentation](#) about these different artifacts.

Icon	Type	Name	Description
	Automation	Read Permission Group Details From File	Automation to fetch input details from excel which will be fed into sub automation "Create Permission Group" automation.
	Automation	Create Permission Group	Sub automation to create permission group in the SAP SuccessFactors system.

	Data Type	Input Data (Create)	Data type to store request data to create permission group.
	Data Type	Input Data From Excel	Data type to store input data from excel file.
	Project Launcher	Permission Group (Create)	Project Launcher to start the process by triggering "Read Permission Group Details From File" automation

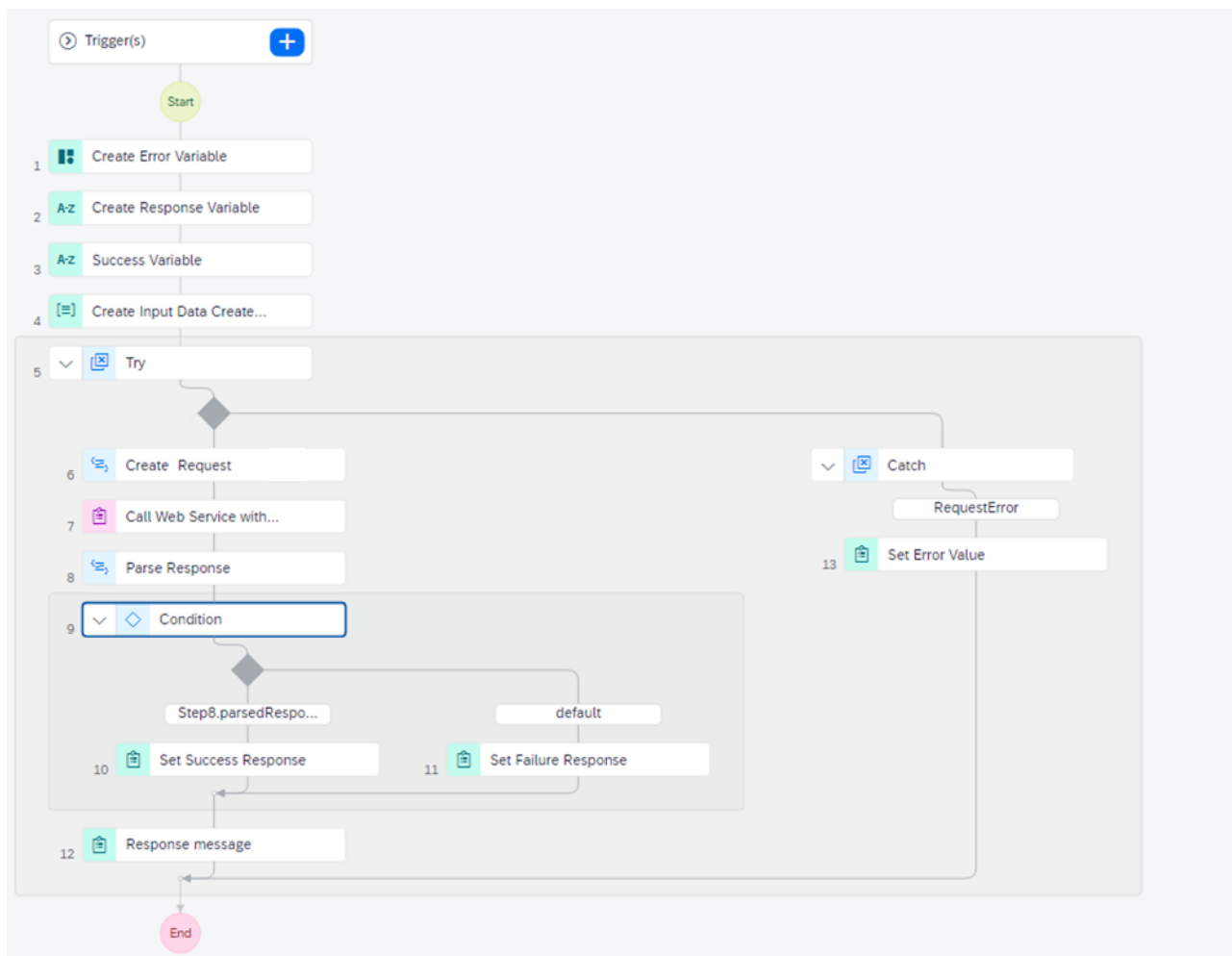
Automations

Read Permission Group Details From File



Step 1: Create error variable.
 Step 3: Get file collection from folder.
 Step 4 to Step 10: Open excel and retrieve data from excel.
 Step 11: Create increment variable.
 Step 12 to Step 16: Iterate through each record in the excel file and create permission group for each record.
 Step 17 to 27: Log the responses in the excel file.
 Step 29: Check if **"Processed"** folder exists.
 Step 30 to Step 34: If the folder exists then move the processed file to folder "Processed", else create the folder named **"Processed"** and move the processed file to the folder.
 Step 35: Close excel instance.
 Step 36: Log any errors during the process.
 Step 37 to Step 41: Send mail notification upon completion of the process.

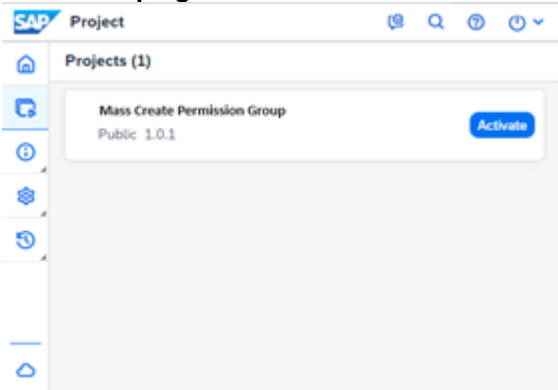
Create Permission Group:



Step 1 to Step 4: Create variables required for the automation.
 Step 5 to Step 11: Create permission group in the SAP SuccessFactors system and record response received either success or failure and store the response in the variable.
 Step 12: Save the response message.

Run An 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 attended mode is selected in the Projects tab of the Desktop Agent.
Open SAP Build Process Automation	<p>Perform the following to release and deploy the task automation:</p> <ul style="list-style-type: none"> • Navigate to the Store and search for the Mass Create Permission Group 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. <p>For steps to release and deploy a project, see the Managing Existing Projects topic.</p>
Add an attended Trigger	<p>To add an attended trigger, refer add attended trigger topic.</p> <p>Once the trigger is created for the desired period, it will be visible in the Project tab of the Desktop agent.</p>  <p>The screenshot shows the SAP Project Overview page. The title bar says 'SAP Project'. Below it, there's a section 'Projects (1)' containing a card for 'Mass Create Permission Group' with version 'Public 1.0.1' and an 'Activate' button. A sidebar on the left contains various icons for navigation.</p> <ul style="list-style-type: none"> • When triggered from the agent, requestor email Id and the folder path where the excel template files are saved need to be provided.
Monitor the Job	Open SAP Build Process Automation and click Monitor > Automation Jobs. You should see your job on 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.

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.