

SAP TechEd 2020

INT162: No-Code Academy:

Learn to Build Process Extensions Without Code

WORKSHOP OVERVIEW

This session introduces attendees to how to build, run, and monitor SAP process extensions without using a single line of code.

This is based around creating and publishing an example investment request process template in SAP Ruu. This template consists of:

- An investment request form
- A financial controlling review
- A facility review
- A financial approval
- A connected system (from which a purchase order is raised)

A diagram of this example process is provided here:



Exercise 1 - Creating Template

To start creating your process template from your SAP Ruum Lobby, use the following steps:

1. Using the side menu, **click Templates**, opening your Templates Library.
2. Click **+ New**, opening the Create Template window
3. Enter **Investment Request + YOUR USER NAME** as the Template Name, **add a brief Template Description**, select your **Workspace**, and then click **Next**
4. With the new template open and your first section displayed, enter **Investment Request Form** as the section title
5. Click the **Lock icon** to lock this section, ensuring that someone using this template can't edit its contents during a live process
6. Click into the **canvas** and enter the following text (either using your keyboard or copying and pasting the line): **Please fill in and submit the following form to trigger an approval request for an investment.**
7. Click below the text you created and select **Insert - Custom Field**, opening the Add Custom Field to Canvas window.
8. Select the custom field **Category** and click **Add Fields**:
9. Using a combination of Custom Fields and the Controller role, **replicate the remainder of the process section** as displayed in this example:

The screenshot shows a digital form titled "Investment Request Form" within a software interface. At the top, there are icons for lock, settings, and search. The main text reads: "Please fill in and submit the following form to trigger an approval request for an investment." Below this, the form contains several input fields: a dropdown for "CATEGORY", a large text area for "DESCRIPTION" with the placeholder "Enter text", and three input fields for "COST CENTER", "AMOUNT (IN EUR)", and "INVESTMENT TYPE", each with the placeholder "Enter a value". To the right of these fields are vertical ellipsis icons. Below the input fields, there is instructional text: "If you need to attach documents to your request, please upload them using the paper clip in the top right corner." and "When you've finished filling out your form, please assign the Controller who is responsible for your area. Then click 'Submit'". At the bottom, there is a section for "CONTROLLER" with a button "Assign members" and a plus icon. A button "Add Transition" is located in the bottom right corner.

Your Investment Request Form has now been created and automatically saved to your template.

Exercise 2 - Adding a Transition

With your first process section completed, you can now add a transition between that section and your Controlling Review section. This transition will be added as a simple 'Submit' button, informing the process that it can move onto the next stage.

To add a transition and create a new section, follow these steps:

1. Click **Add Transition**, opening the New Transition window
2. Enter **Submit** in the Button Text field and then select New Section - **Data Collection Step**
3. Click **Create**

Your transition is added, linking section 1 and section 2 of your process, and your second section has been created.

4. Title your second section **Controlling Review**
5. Click the **Lock** icon to lock this section, ensuring that someone using this template isn't able to edit its contents during a live process
6. Now, using a combination of text, custom fields, roles, and tasks, **replicate the remainder of the process section** as displayed in this example:

Controlling Review

CATEGORY

DESCRIPTION

COST CENTER

AMOUNT (IN EUR)

INVESTMENT TYPE

☐ Please review the information above and assign the right controller

BUDGET REVIEW OK?

APPROVER

If the request is relevant to facilities, please assign a facility associate below and then click 'Forward to Facilities'. For all other requests, click 'Confirm & Send to Approver'

FACILITY ASSOCIATE

Add Transition

Note: After creating the task, you need to assign this task to the 'Controller' role:

Your Controlling Review section has now been created and automatically saved to your template.

Exercise 3 - Adding Multiple Transitions

After creating your IT Review section, you're now able to add further process transitions.

As your IT Review section has EITHER / OR conditions (where a controller either has to 'Forward to Facilities' or 'Confirm & Send to Approver'), you need to add a transition for both options here. We start the steps with the 'Forward to Facilities' option.

To add multiple transitions to your process, follow these steps:

1. Click **Add Transition**, opening the New Transition window
2. Enter **Forward to Facilities** in the Button Text field and select **New Section**
3. Select **Data Collection Step**
4. Click **Create**

Your transition is added, linking your Controlling Review section and your Facilities Review section (which is edited in a later step).

5. Click **Add Transition** again, opening the New Transition window
6. Enter **Confirm & Send to Approver** in the Button Text field and then select **New Section - Approval**

Your transition is added, linking your Controlling Review section and your Approval section (which is edited in a later step).

7. Click **Add Transition** again, opening the New Transition window
8. Enter **Create Purchase Order** in the Button Text field and then select **New Section - System Connector**

Your transition is now added, linking your Controlling Review section and your connected system (which is configured in a later step).

Exercise 4 - Configuring Your Facilities Review Section and Adding Further Transitions

Underneath your Controlling Review section is now an unnamed section, which we now use for your Facilities Review and further transitions. To configure your facilities review section and add further transitions, follow these steps:

1. Enter **Facilities Review** as the section title
2. Now, using a combination of tasks, custom fields, and text, **replicate the following example section**:

Facilities Review

Please review the investment request and decided if it can be forwarded for approval

CATEGORY: Enter text

DESCRIPTION: Enter text

COST CENTER: Enter a value

AMOUNT (IN EUR): Enter a value

Please add any additional comments that might be relevant for the approver:

ADDITIONAL COMMENTS: Enter text

Add Transition

Note: After creating the task, you need to assign this task to the 'Facility Associate' role:

3. Click on the **Custom Field Settings icon** for Category, and select **Read Only**:
4. Repeat step 3 for all custom fields in this section
5. Click **Add Transition**, opening the New Transition window:
6. Enter **Send Back to Controlling** as the Button Text and select **Section - Controlling Review**
7. Click **Create**

Your transition back to your Controlling Review has been added.

8. Click **Add Transition** again, opening the New Transition window:
9. Enter **Confirm & Send to Approver** as the Button Text and select **Section - Approval**
10. Click **Create**

Both transitions have now been added to your Facility Review section:

Exercise 5 - Configuring Your Approval Section

You're now ready to configure your approval section. Approval sections come with three preset transitions: Send Back, Reject, and Approve. These transitions then need to be configured, allowing you to choose where the process transitions.

To configure your approval section, follow these steps:

1. Enter **Investment Approval** as the section title
2. Click the **Lock icon** to lock this section, ensuring that someone using this template isn't able to edit its contents during a live process:
3. Click **Send Back**, opening the Approval Transition Settings window:
4. Under Approval 1, select your **Approver role**:
5. Configure your Transitions using the **following selections**:

APPROVAL TRANSITIONS TO: System Connector

REJECTION TRANSITION TO: Investment Request Form

SEND BACK TRANSITIONS TO: Investment Request Form

Send back / Reject message mandatory: Yes

6. Now, using custom fields, **replicate the following example section**:

The screenshot shows a configuration window for an 'Investment Approval' section. The title 'Investment Approval' is at the top left, with a lock icon, a gear icon, and a search icon at the top right. The form contains several fields: 'CATEGORY' (a dropdown menu), 'DESCRIPTION' (a large text area with 'Enter text' placeholder), 'BUDGET REVIEW OK?' (a dropdown menu), 'ADDITIONAL COMMENTS' (a text area with 'Enter text' placeholder), and 'AMOUNT (IN EUR)' (a text area with 'Enter a value' placeholder and a '#' symbol). To the right of each field is a gear icon and a vertical ellipsis icon. At the bottom right, there are three buttons: 'Send Back', 'Reject', and 'Approve', each with a gear icon.

Exercise 6 - Publishing Your Process

Once you've finished creating your process, you're ready to publish your template to your workspace.

Publishing your process templates makes it available for all team members within your workspace, allowing them to run that process.

To publish your process template, follow these steps:

1. Review all existing sections and transitions, ensuring that you've added all required custom fields, roles, tasks, text, and transitions.
2. Click ***Publish Template***
3. Click ***Publish***

Your process template is now published and available within your workspace.

4. Click ***Home***, opening your Lobby

Exercise 7 - First Submission

Steps for submitting the request form

To then submit an investment request for replacement equipment, use the following steps:

1. From your Lobby, click + ***New - Ruum from Template:***
2. Select your ***Investment Request*** template and click ***Create Ruum:***
3. Using the following request information, ***complete the fields displayed:***

Category - Equipment

Description - Laptop

Cost Center - 14476

Amount (in EUR) - 500

Investment Type - Replacement

Assign your username to the Controller role

4. Click ***Submit***

Steps for the Controller Role

When a new request arrives, the Controller can use the following steps:

1. Open the Investment Request Form, displaying the Controlling Review section
2. Mark the section ***Task as Done***
3. Review the information provided and then select ***Budget Review OK? - Yes***
4. ***Assign your username*** to the Approver role
5. ***Assign your username*** to the Facility Associate role
6. Click ***Forward to Facilities***

The investment request is now forwarded to the team member listed as the Facility Associate, who is notified of a new request.

Steps for the Facility Associate Role

When a new request arrives, the Facility Associate can use the following steps:

1. Review the information and then mark the section ***Task as Done***
2. Click ***Confirm & Send to Approver***

The investment request is now sent to the team member listed as the Approver, who is notified of a new request.

Steps for the Approver Role

When a new request for approval arrives, the Approver can use the following steps:

1. Type ***Laptop can be ordered*** into the comment box
2. Click **Approve**

The investment request process is now complete.

Exercise 8 - Second Submission

Steps for submitting the request form

To then submit an investment request for replacement equipment, use the following steps:

1. From your Lobby, click + ***New - Ruum from Template***:
2. Select your ***Investment Request template*** and click Create Ruum:

The process loads, displaying the Investment Request Form

3. Using the following request information, ***complete the fields displayed***:

Category - Training and Compliancy

Description - Training Course

Cost Center - 14476

Amount (in EUR) - 125

Investment Type - Other

Assign your username to the Controller role

4. Click ***Submit***

The investment request is now submitted to the team member listed as the Controller, who is notified of a new request.

Steps for the Controller Role

When a new request arrives, the Controller can use the following steps:

1. Open the ***Investment Request Form***, displaying the Controlling Review section
2. Mark the section ***Task as Done***
3. Review the information provided and then select ***Budget Review OK? - Yes***
4. ***Assign your username*** to the Approver role
5. Click ***Confirm & Send to Approver***

The investment request is now forwarded to the team member listed as the Approver, who is notified of a new request.

Steps for the Approver Role

When a new request for approval arrives, the Approver can use the following steps:

1. Type “***Please provide details of the course***” into the comment box
2. Click ***Send Back***
3. Click ***Home***, returning to the Lobby

The investment request is now pending further information from the original requestor.