Administrating
Guided Procedures
This guide leads you through the expert functions that GP provides in the Administration workset:

- The workset is accessible to users holding the GP Administrator portal role.
- It enables GP content administration.
- It offers various tools for …
  - Monitoring and managing process instances
  - Managing e-mail templates
  - Setting up connectivity to backend systems
  - Managing impersonalized interactive forms
  - Configuring GP transports
CAF-GP Administration – Accessing the Workset

1. Log on to the portal as administrator, via http://<localhost>:<port>/irj/portal

2. Select the Guided Procedures tab from the top level navigation bar.

3. Click Administration in the lower navigation bar.
Overview displays all available links on the right side of the screen. Any other link opens one subset of links, for example, General.

(1) Click a link in the contextual navigation panel to open all or one subset of links.
Maintain Processes – Overview

With this function you can do the following:

- You can search and display process instances.
  - You can search for all processes or restrict the search to single-instance processes.
- You can select process instances and change their authorization.
  - For each process role assigned to an instance you can add new users.
- You can terminate instances that you do not need any more.
- Within the results of the single process search, you can unlock instances.
Maintain Processes – I) Searching a Process Instance

(1) Enter search criteria including a Process Contributor.
(2) Select Choose and in the subscreen select the relevant user.
(3) Select one or more process roles.
(4) Choose Find to fill the result table according to your criteria.
Maintain Processes – II) Change Authorization

(1) Select a process instance in the search result.
(2) Choose Change Authorization.
(3) In the follow-up screen, select a role, add or remove users, and choose Set.
Maintain Processes – III) Terminate Instances

1) Select the process instances in the search result.
2) Choose Terminate Instances.
3) In the follow-up screen, confirm your selection.

For further information, refer to the following documentation: SAP NetWeaver → Composite Application Framework by Key Capability → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset → Managing Process Instances.
Unlock Objects – Overview

Sometimes, as the result of a system failure for example, or when a user has not terminated an editing session correctly (saved the object, and exited its design time) administrators may need to unlock development objects.

With this function you can do the following:

- You can **display details of locked objects**.
- You can **unlock the locked objects**.
General – Unlock Objects

1. Select locked items in the Unlock Manager.
2. Choose Unlock.
3. Confirm in the follow-up screen.

In GP design time, GP business experts can unlock objects locked by themselves in another session.
Maintain E-Mail Templates – Overview

With this function you can do the following:

- You can search and display, edit or delete e-mail templates. CAF-GP uses such templates to send approval or rejection messages in response to requests, for example.

- You can create your own templates for e-mails that have interactive forms attached, for example. The e-mail template can have one of these formats:
  - HTML
  - Plain text
Maintain E-Mail Templates – I) Edit/Delete Existing Template

1) Select a template and choose one of the functions:
   • Open to edit a template.
   • Delete the template is removed.

2) In the follow-up screen, add the technical data and the content.
3) Choose Save.
Maintain E-Mail Templates – II) Create New Template

For further information, refer to the following documentation:


1. Under New, click one of the following:
   • HTML Template
   • Plain Text Template
2. In the follow-up screen, add the technical data and the content
3. Choose Create.
Manage Permissions – Overview

With this function you can do the following:

- **Scale the design time UI** to the requirements and the knowledge of the users. Your permission settings affect both design time environments of GP:
  - The regular design time geared to business experts.
  - The simplified GP User design time geared to end users who create and start simple processes using personal templates.

- You can **assign view permission levels** to the individual functions and Callable Objects of the design time.

- You can **use filters** to reduce the number of functions displayed.
  - A group filter for design time areas.
  - A filter for permission levels (basic, advanced, expert).
(1) Select the functions for which you want to change the permission level.
(2) Set the required level and choose Save.
**Manage Permissions – II) Callable Objects**

(1) Select the Callable Objects for which you want to change the permission level and set the required level.

(2) Choose Save.

For further information, refer to the following documentation: SAP NetWeaver → Composite Application Framework by Key Capability → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset → Managing Permissions.
Assign Default Roles – Overview

With this function you can do the following:

- You can assign default users for the process roles of an active process. The process roles must be configured as initiation defined in the Built-in Roles section of the design time.
  - At runtime, the default users will process the action or block unless the assignment is modified when the process is started.
Assign Default Roles – I) Select Active Process

Step 1: Select an active process

(1) Browse through the folder hierarchy and select a process.
(2) Choose Select.
Assign Default Roles – II) Add Role to Default User

(1) Select a process role, search for a user and choose Add. Repeat this step for each process role and — if necessary — assign several default users to the (initiation-defined) role.

(2) Choose Finish.

For further information, refer to the following documentation: SAP NetWeaver → Composite Application Framework by Key Capability → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset → Assigning Default Roles.
Schedule Process Initiation – Overview

With this function you can do the following:

- With reference to a designed process template, you can create scheduling tasks and create corresponding schedules. You can set up future and recurrent schedules.

- In the wizard-driven steps to create tasks, you can – for example – assign a user as initiator and you can determine whether to start only one process for all users of a process role (Single Initiation) or to start a separate process for every user of a process role (Mass Initiation).

- You can choose between schedule types that determine a singular or recurrent process initiation. You specify a date and priority level and an error mode.
  - The different error modes either abort the processing or try to execute the initiation again. You can configure a maximum number of attempts to reintiate the process in case of an error.
To create a scheduling task, choose Create.

In the follow-up screen, enter the necessary Basic Data and choose Next.

For further information, refer to the following documentation:
1) Select the initiator, either the current user or choose Pick User to select one in the subscreen.  
2) Choose Next. The system displays the user name and ID.  
3) Choose Select, browse for a process template and choose it. The system displays the template attributes.
Schedule Process Initiation – III) Fill Parameters & Roles

1. If required, fill the parameters of the selected template.
2. If required, add users to the selected process roles, either for single or mass initiation.
3. Choose Done and Next, and in the optional follow-up step choose Finish. The system creates a task line in the Scheduled Processes table (IV).
Schedule Process Initiation – IV) Create Schedule

1. In the upper table, select a task.
2. In the lower table, choose Create. The Create/Edit Schedule subscreen opens.
3. Enter the schedule details and choose Save. The system updates the Assigned Schedule table with a new entry, which you can edit or delete.
You can transport GP content (objects, folders) across different SAP installations. To do this, you create a transport request and either use the ABAP-based transport system or the Java-based Software Deployment Manager (SDM). You import content to the other system and then you release this content so that all GP users can work with it.

For further information, refer to the following documents:

- SAP NetWeaver How-to Guide (via service.SAP.com/rkt-netweaver)
  How To... Transport in CAF-GP.

- SAP documentation (via help.SAP.com):
  SAP NetWeaver → Composite Application Framework by Key Capability
  → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset →
  — Creating a Transport Request
  — Importing Transport Requests
  — Post-processing Imported Objects
You can configure the adapters for interactive form processing, as well as the mail queues for forms sent by e-mail. In addition, you can access the impersonalized form templates and create document instances from them.

For further information, refer to the following documents:

- **SAP NetWeaver How-to Guide (via service.SAP.com/rkt-netweaver)**
  How To... Configure GP for Interactive Forms.

- **SAP documentation (via help.SAP.com):**
  SAP NetWeaver → Composite Application Framework by Key Capability
  → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset →
  - Configuring Adapters
  - Managing Queues
  - Managing Impersonalized Forms
Configure End Points – Overview

With this function you can do the following:

- As an expert familiar with the SLD and SAP system connections, you can create, edit and delete endpoint aliases (communication endpoints between your J2EE Engine and the SAP Systems connected).
  
  - You configure different properties according to the different connection modes supported:
    - Connection defined by System Landscape Directory (default).
    - Connection defined by User

- You can search and display available aliases.
  
  - You can search for all alias types or restrict the search to a type:
    - Endpoint Alias for Remote Function Call (RFC) (default)
    - Endpoint Alias for EJB Remote Call
To edit an alias, you enter search criteria – either the alias name or you use a placeholder (*) – and choose **Edit**.

To delete an alias, you enter search criteria – either the alias name or you use a placeholder (*) – and choose **Delete**.

For further information, refer to the following documentation: SAP NetWeaver → **Composite Application Framework by Key Capability** → CAF Guided Procedures → CAF-GP: Administration Guide → Admin Workset → Configuring Endpoint Aliases.
### CAF-GP Administration – II) SAP System: Add New Alias

1. To create a new endpoint alias, choose **Add**.

2. In the follow-up screen, add the required data. Depending on the **Connection Mode**, different input is required.

3. Test and save your entries.