Introduction to Universal Worklist
Business Task Management

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Appendix: Details for adding a new system to UWL and user personalization
Business Task Management is the automation, execution and monitoring of tasks

- Coordinate and execute tasks arising from automated process flows and spontaneous events
- Track the progress of tasks

Tasks include a wide variety of activities

- Business Transaction
- Alert
- Form
- Desktop Document
- Impromptu Request
Lifecycle of a Task

- Trigger to start process
- Process description
- Create Step
- Work Item
- Task description
- Possible task participants
- Routes to User
- Activity
- User claims the Activity or Task
- Complete Task
- Activity User Interaction
- Invokes specific task functions
- Form
- Business transaction
- Desktop document
Execution of Business Task Management

**TASK MANAGEMENT UI** (Universal Worklist)

- Task 1
- Task 2
- Task x

**Events trigger tasks (workitems, notifications)**

**User Interaction with BPM Runtime**

**BPM RUNTIME**

- Interfaces for Data Integration
- Process Integration
- Process Communication

**Integration Process**

**Application Process**

- System A
- System B

**Human Interaction**

- Collaborative Processes
- Ad Hoc Processes

**Dynamic Processes**

**Stable Processes**
Functional Areas

Universal Worklist
- Single point of access for managing your work
- Can be personalized to suit each user’s working style
- Process-specific views can be customized for expert users

Collaboration Tasks
- Enables end-users to create their own ad hoc processes and drive collaboration
- Includes various types of collaboration tasks including actions, approvals, and feedback
- Users track progress of their delegated task

Guided Procedures
- Designed to implement process flows with greater ease and speed across multiple applications
- Integrates backend system transactions
- Includes process templates that can be easily re-used or copied and easily changed

Interactive Forms
- Generate forms that contain data extracted from core systems
- Use dynamic or static forms
- Accelerate forms-based business processes

Business Workflow
- Structured, repeatable, simple to complex business process
- Manages the tasks that need to be performed and who should perform the tasks
- Ensures business process deadlines, compliance regulations, and service agreements are appropriately monitored and enforced

Alerts
- Exception-triggered notifications
- Define follow-on activities
- Inter-System alerting
Business Task Management

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Appendix: Details for adding a new system to UWL and user personalization
Traditionally users had to access a variety of inboxes to view and act on important tasks

- The large number of applications and tasks make it difficult to understand and prioritize work

The Universal Worklist simplifies the user’s work

- Single consistent interface
- Easy to use
- Easy to access
Universal Worklist Features at a Glance

Give users a unified and centralized access to their work and relevant information. Users do not have to search for their work.

Aggregate task items from multiple and different systems into one list.

- SAP Business Workflow
- Collaboration Tasks
- Alert Management System
- Knowledge Management Notifications
- Guided Procedure Actions

Custom worklists enable specific views for specific tasks

Enable users for direct decisions and actions

Users can personalize appearance to suit their individual working styles

Can function as an application-specific inbox – applications can bypass having to implement their own inbox
First look at the Universal Worklist

UWL is part of the standard user end role, accessed via **Home - Work**

**Hint:** To Refresh your lists of tasks, use the drop down menu near the **Hide Preview** link.
UWL provides task list, execution, and context

Task List

Task Execution

Task Context
Launch Work Transaction

Parameterized launching for:
- BSP
- iView
- URL
- Web Dynpro
- SAP GUI (for HTML)
Business Task Management

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Collaboration Task Features at a Glance

- End-users can easily create their own processes without any prior experience with workflow systems.

- Gives users the power to deal with quickly changing business conditions. Users use collaboration tasks to spontaneously collaborate without needing to wait for company-wide business process change.

- Makes it easy to define one-time processes. The minimal effort required means that users will use collaboration tasks to deal with many one-time situations.

- End-users can check the status of processes they have created and ensure that work is completed on time.

- Users can link new processes to work items they receive. This provides them with an easy way to perform and track additional work that may be required in response to a work request.
Collaboration Task Wizard to create Tasks

The following figure shows the type of collaboration tasks available and the applications that use collaboration tasks.

Collaboration Launchpad (CLP)

New Task

Universal Worklist (UWL)

New Task
Create Ad Hoc Request

Collaboration Room (CR)

New Task

Single-Step Task
Multiple-Step Task
Request for Feedback
Request forNomination
Collaboration Tasks Wizard – Task based on an existing work item

<table>
<thead>
<tr>
<th>Subject</th>
<th>From</th>
<th>Sent</th>
<th>Priority</th>
<th>Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>what should we do next? jonahin</td>
<td>Gating, Ginger</td>
<td>Jul 26, 2005</td>
<td>Normal</td>
<td>Today</td>
<td>New</td>
</tr>
<tr>
<td>First step in workflow verification</td>
<td>Workflow system</td>
<td>Today</td>
<td>Normal</td>
<td>Today</td>
<td>New</td>
</tr>
<tr>
<td><strong>Do you want to change material T-BBD18?</strong></td>
<td>Gating, Ginger</td>
<td>Today</td>
<td>Normal</td>
<td>Today</td>
<td>New</td>
</tr>
<tr>
<td>Display absence notification no. 000004008</td>
<td>Gating, Ginger</td>
<td>Jul 22, 2005</td>
<td>Normal</td>
<td>1</td>
<td>New</td>
</tr>
<tr>
<td>ActionForApproval</td>
<td>Gating, Ginger</td>
<td>Jul 22, 2005</td>
<td>Normal</td>
<td>1</td>
<td>New</td>
</tr>
<tr>
<td></td>
<td>Gating, Ginger</td>
<td>Jul 14, 2005</td>
<td>Normal</td>
<td>1</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

Create Task Subprocess

Add a series of tasks as a subprocess

- **Title:** Do you want to change material T-BBD18?
- **Priority:** Normal
- **Due:** ASAP 8/8/2005 1:00 PM

You can also:
- View Preview
- Send an Email to a CC/CC Out
- Create Ad-Hoc Request

Do you want to change material T-BBD18?:
- Continue Processing
- Stop Processing
- Cancel Sub-Processes
- View Subprocess
- Forward
- Reserve

Original task is locked until collaboration task completes
Business Task Management

Introducing Universal Worklist

Collaboration Tasks

**UWL System Configuration**

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Substitution and Attachments in UWL

Appendix: Details for adding a new system to UWL and user personalization
Add the system to UWL Configuration (1)

System Administration -> System Configuration-> Universal Worklist & Workflow

**Universal Worklist Systems**

Here you can define connections to systems as Item providers for the Universal Worklist. The 'Connector Type' indicates the type of items retrieved through the connection. The 'System Alias' is an alias for the system as defined in the system landscape. For connector types 'WebFlowConnector' or 'AlertConnector' item types have to be registered with the UWL service after defining a new system on a WAS which is different from the WAS of the system alias, then that's system alias should be spec.

<table>
<thead>
<tr>
<th>System Alias</th>
<th>Connector Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>AdHocSystem</td>
<td>AdHocWorkflowConnector</td>
</tr>
<tr>
<td>ActionInbox</td>
<td>ActionInboxConnector</td>
</tr>
</tbody>
</table>

- **AdhocSystem** is for collaboration tasks.
- **ActionInbox** is for KM notifications.

Item type retrieval and registration requires a connection to the systems and may take a couple of minutes. Please be patient.

For each system they are generated as the configuration named 'uwfl_webflow.<systemalias>' or 'uwfl_alert.<systemalias>'

After configuration changes on the backend, the system has to be re-registered.

**Universal Worklist Content Configuration**

Click to administer item types and view definitions

After configuration changes, it is recommended to clear the persistent cache on the Cache Administration Page.
Add the system to UWL Configuration (2)

System Administration -> System Configuration-> Universal Worklist & Workflow

Universal Worklist Systems
Here you can define connections to systems as item providers for the Universal Worklist. The 'Connector Type' indicates the type of items retrieved through the connection. The 'System Alias' is an alias for the system as defined in the system landscape. For connector types 'WebFlowConnector' or 'AlertConnector' item types have to be registered with the UWL service after defining a new system connection. If Web Dynpro applications are configured on a WAS which is different from the WAS at the system alias, then that system alias should be specified as a Web Dynpro system.

System Alias: *E70CLNT000*
Connector Type: *WebFlowConnector*

Universal Worklist Content
Click to administer item types and view
After configuration changes, it is recommended to save changes.
Web Dynpro Launch System: Enter System Alias for a system definition with J2EE port defined in the WAS system attribute.*

User Roles: Delimit who can get work items via the user role. For example, you can assign a portal role here, such as “buyer”. Only users with the role “buyer” will see items from B7QCLNT000 in UWL.*

System Configuration Groups: Option to have various tabs that point to UWL. UWL items for B7QCLNT00 will only appear in portal navigation tabs that are mapped to a specific configuration group.

Pull Channel Delta Refresh Period: How often we should check to see if new items have entered the user’s inbox.*

Snapshot Refresh Period: How often we should retrieve all items from the backend system.*

Asterik items (*) denote items that are new in NW2004s.
Register the Work Item Types

Universal Worklist Systems

Here you can define connections to systems as item providers for the Universal Worklist. The ‘Connector Type’ indicates the type of items retrieved through the connection. The ‘System Alias’ is an alias for the system as defined in the system landscape. For connector types ‘WebFlow/Connector’ or ‘AlertConnector’ item types have to be registered with the UAL service after defining a new system connection. If Web Dynpro applications are configured on a VAS which is different from the VAS of the system alias, then that system alias should be specified as a Web Dynpro system.

<table>
<thead>
<tr>
<th>System Alias</th>
<th>Connector Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>AdHocSystem</td>
<td>AdHoc/Workflow/Connector</td>
<td></td>
</tr>
<tr>
<td>ActionInbox</td>
<td>ActionInbox/Connector</td>
<td></td>
</tr>
<tr>
<td>B7QCLNT000</td>
<td>WebFlow/Connector</td>
<td>Register</td>
</tr>
</tbody>
</table>

Look at each workflow step and ask “How should I launch this step”
- TS30000016 = SAPGui for HTML
- TS99700023 = ITS MiniApp
- TS99700034 = BSP
- TS99700087 = URL
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Customized Application Specific Views

User can look at all tasks, or select a view for specific tasks.
Types of UWL Optional Configurations

You can create custom worklists

- View for specific task
- View for user decision
- View for to make multiple choices simultaneously

You can configure how the work item launches

- SAP Transaction (SAPGUI for HTML or ITS MiniApp or IAC)
- iView or Portal Page
- Business Server Page
- WebDynpro Application
Add a custom view for a specific task

Standard view – no custom view

Custom View
Two different custom views for the same work item
Steps to create a custom view for a specific task

1. Identify the actual task number that correlates to the exact step you want to customize.

2. Determine the exact attributes you want to use as columns.

3. Create a XML file with your custom view.

Identify the task to be customized

Transaction code: SWDD
Workflow: WS74500036
Determine the exact attributes

- Name:
  - Absr.:
  - Name:
  - Release status:

- Work Item Text:
  - Work Item Text:

- Object Method:
  - Category:
  - Type:
  - Method:

- Object type: FORMABSEN
  - Interfaces
  - Key fields
  - Attributes
    - AbsenceForm Object Type
    - AbsenceForm Creator
    - AbsenceForm Approver
    - AbsenceForm ApprovDate
    - AbsenceForm ApproBy
    - AbsenceForm CreateDate
    - AbsenceForm CreateBy
    - AbsenceForm FirstDayOfAbsence
    - AbsenceForm PersonnelNo
    - AbsenceForm Name
    - AbsenceForm Department
    - AbsenceForm CostCenter
    - AbsenceForm HoursAbsent
    - AbsenceForm LastDayOfAbsence
    - AbsenceForm Description

- Workflow verification: Approve notification of absence & Workflow ID:

- Details:
  - Description:
Create an XML file: Major components

XML File has two major components:

- Item type: Identifies the exact task and lists each attribute that will be used.

- View: Defines the name of the view, how it will work, and the custom columns for the view.
Create an XML file: Define the Item Type

```xml
<ItemType name="uwl.task.webflow.TS74507936"
  connector="WebFlowConnector"
  defaultView="myApprovalView"
  defaultAction="viewDetail"
  executionMode="pessimistic">
  <CustomAttributeSource id="ABAP_BOR"
    objectIdHolder="externalObjectId"
    objectType="FORMABSENC"
    cacheValidity="final">
    <Attribute name="DEPARTMENT" type="string" displayName="Department"/>
    <Attribute name="LASTDAYOFABSENCE" type="date" displayName="Last day of absence"/>
    <Attribute name="FIRSTDAYOFABSENCE" type="date" displayName="First day of absence"/>
    <Attribute name="COSTCENTER" type="string" displayName="Cost Center"/>
  </CustomAttributeSource>
</ItemType>
```
Create an XML file: Define View

```xml
<View name="myApprovalView" width="98%" supportedItemTypes="uwl.task.webflow.TS74507936"

columnOrder="attachmentCount, detailIcon, subject, createdDate, Department,
FIRSTDAYOFABSENCE, LASTDAYOFABSENCE"

sortBy="createdDate" visibleRowCount="10" headerVisible="yes"

selectionMode="SINGLESELECT"

tableNavigationFooterVisible="yes"

emphasizedItems="new"

displayOnlyDefinedAttributes="no">

<Descriptions default="Vacation Requests to Approve">

<ShortDescriptions>

<Description Language="en" Description="Vacation Requests to Approve"/>

</ShortDescriptions>

</Descriptions>
```
<Actions>

<Action reference="removeFromNavigation" />

<Action reference="addToNavigation" />

<Action reference="personalize" />

<Action name="launchSAPAction" handler="SAPTransactionLauncher" />

</Actions>
Upload XML file (1)

1. Select **System Administration->System configuration->Universal Worklist & Workflow** and select **Click to Administer Item types and view definitions**.

   Universal Worklist Content Configuration
   
   Click to administer item types and view definitions
   
   After configuration changes, it is recommended to clear the persistent cache on the Cache Administration Page.

2. Select **Upload New Configuration** and enter your file name and upload for the appropriate system.

   Universal Worklist Configuration Content
   
   Universal Worklist Configuration Content (in XML) can be administered here. Provider systems and connectors can be setup in Universal Worklist Systems Configuration
   
<table>
<thead>
<tr>
<th>Current Configurations</th>
<th>Upload New Configuration</th>
<th>Reset Personalizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML Configuration can be uploaded on this page.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Configuration Name:</td>
<td>myCustomXML</td>
<td></td>
</tr>
<tr>
<td>Choose valid XML or ZIP file:</td>
<td>customfile.xml</td>
<td>Browse...</td>
</tr>
<tr>
<td>High Priority:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adapt to System:</td>
<td>BTQCLNT000</td>
<td></td>
</tr>
<tr>
<td>Upload</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. You should receive a successful message.
4. Clear the cache.

### Universal Worklist Configuration

#### Universal Worklist Items Cache

Maintain the Persistent Items Cache of the Universal Worklist. Cache needs to be cleared when itemType customizations are done.

<table>
<thead>
<tr>
<th>System Alias: *</th>
<th>All Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Cache</td>
<td>Removes all items from the cache. The items will be re-retrieved from the providers. Use with caution.</td>
</tr>
<tr>
<td>Clear Expired Items</td>
<td>Removes only expired items from UML Cache</td>
</tr>
</tbody>
</table>

[Return to UML Configuration Page]
Workflow verification: Approve notification of absence 0000001965

**Description**
Process the notification of absence. This task has terminating events and must be completed when you approve or reject the notification of absence.

**Attachments (1)**
The user can submit **multiple decisions** at once if the applications provides a corresponding view for the item type.

Technically, the UWL can execute the selected decision as:

- Business Workflow User Decision
- Function Module call (any)
- Item completion with update of (name, value) pair in the workflow container
- Terminating Event

No coding required, this can be configured in the view XML.
Example of customized user decision step

Example of XML required for this decision based on a Business Workflow user decision step:

```
<Action name="goCol" groupAction="yes" handler="UserDecisionHandler">
  <Properties>
    <Property name="decisionKey" value="0001"/>
  </Properties>
  <Descriptions default="Continue"/>
</Action>
```
Example of decision using the workflow container

Results from UWL are evaluated in the workflow.
Launch Customization: ITS MiniApp for SRM

Launches a MiniApp

XML Example

```xml
<Action
  name="launchSAPAction"
  handler="SAPMiniAppLauncher"
/>
```
Launch Customization: BSP for Business Workflow

XML Example

```xml
<Action name="launchWsHandler" handler="XhandlerLauncher"/>
```
Launch Customization: ABAP Web Dynpro

XML Example

```xml
<Action name="launchWebDynProABAP"
handler="SAPWebDynproABAPLauncher"/>
```
Business Task Management

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Appendix: Details for adding a new system to UWL and user personalization
Substitution via dropdown menu

Hint: Manage Substitution Rules is accessed via the dropdown menu near the Hide Preview link.
Substitution requires NW2004s for BOTH UWL and your backend system.
Create a Substitution Rule

You can define which tasks you want to assign to an assignee. You can either make the assignee receive your tasks (e.g., when you go on vacation), or you can allow the assignee to fill in for you (e.g., in case you're getting ill).

1. Define Rule
2. Set Rule Activation

Assignee: Jorit, Nicolas
Assign these tasks: All

The assignee will substitute for all tasks

I want the assignee to:

- receive my tasks
- fill in for me

You hand over tasks to the assignee for the duration of your planned absence; in the next step, you can set a start date for this rule. In case of your becoming unavailable unexpectedly, you need to notify the assignee; she then can take over your tasks. This rule will be turned on upon save.

Next ▶ Cancel
Create a Substitution Rule

You can define which tasks you want to assign to an assignee. You can either make the assignee receive your tasks (e.g., when you go on vacation), or you can allow the assignee to fill in for you (e.g., in case of your getting ill).

Upon saving, turn the rule:

- **on** - the rule will be enabled
- **at once**
- **on**

You can turn off the rule at any time from the Substitution Rules Maintenance screen.

- **off** - the rule will not be enabled. You can turn it on from the Substitution Rules Maintenance screen at any time
Substitution (3)

Maintain Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (e.g., in case of your being ill). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if you have been allowed to 'fill in' by this user).

My Substitution Rules

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Assignee</th>
<th>What To Do</th>
<th>Status</th>
<th>Rule Activation</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Kruse, Matthias</td>
<td>receives my tasks</td>
<td>ongoing</td>
<td>---</td>
</tr>
<tr>
<td>All</td>
<td>Brown, Charlie</td>
<td>fills in for me</td>
<td>ongoing</td>
<td>problems reported</td>
</tr>
</tbody>
</table>

Other Users' Substitution Rules

<table>
<thead>
<tr>
<th>Task Owner</th>
<th>Tasks</th>
<th>What To Do</th>
<th>Status</th>
</tr>
</thead>
</table>

THE BEST-RUN BUSINESSES RUN SAP™
<table>
<thead>
<tr>
<th>Subject</th>
<th>From</th>
<th>Sent</th>
<th>Priority</th>
<th>Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for vacation leave</td>
<td>Administrator, null</td>
<td>Mar 10, 2005</td>
<td>High</td>
<td></td>
<td>In Progress</td>
</tr>
<tr>
<td>Request for vacation leave</td>
<td>Administrator, null</td>
<td>Mar 10, 2005</td>
<td>Normal</td>
<td></td>
<td>In Progress</td>
</tr>
<tr>
<td>Request for vacation leave</td>
<td>Administrator, null</td>
<td>Mar 10, 2005</td>
<td>Normal</td>
<td></td>
<td>In Progress</td>
</tr>
<tr>
<td>Employee YUE: Approve notification of absence</td>
<td>Administrator, null</td>
<td>Jan 20, 2005</td>
<td>Normal</td>
<td></td>
<td>In Progress</td>
</tr>
<tr>
<td>Employee YUE: Approve notification of absence</td>
<td>Administrator, null</td>
<td>Dec 15, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Employee YUE: Approve notification of absence</td>
<td>Administrator, null</td>
<td>Dec 15, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Create notification of absence</td>
<td>Administrator, null</td>
<td>Nov 10, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Create notification of absence</td>
<td>Administrator, null</td>
<td>Nov 10, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Create notification of absence</td>
<td>Administrator, null</td>
<td>Nov 10, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Create notification of absence</td>
<td>Administrator, null</td>
<td>Nov 10, 2004</td>
<td>Normal</td>
<td></td>
<td>New</td>
</tr>
</tbody>
</table>

Request for vacation leave

Escalated: High
Sent: Mar 10, 2005 by Administrator, null
Status: In Progress

Dear Manager,
This is my vacation schedule. Please approve my request.

Open Task | Follow-up | Forward | replace
## Follow Up (Resubmit)

**Choose future date**

### Follow up: Request for vacation leave

You can set a follow-up date to any work item. The work item will not be displayed in your Worklist until the follow-up date has arrived.

Start Follow-up date: [Apr 18, 2006]  
Choose date: [

<table>
<thead>
<tr>
<th>March 2005</th>
<th>April 2006</th>
<th>May 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Su</td>
<td>Mo</td>
<td>Tu</td>
</tr>
<tr>
<td>10</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>17</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>24</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td>31</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Submit | Cancel
Follow Up – Task for Resubmission

Item gone

Pull the item back to current time

End follow-up
Manage Attachments

You can remove existing attachments here, or you can upload further files.

To upload an attachment, press "Browse" and select the file from your file system. Then press "Upload".

Request for vacation leave

Escalated: Sent: Mar 10, 2005 by Administrator, null
Priority: High Status: In Progress

Dear Manager,

This is my vacation schedule. Please approve my request.

Openn Task | Follow-up | Forward | replace

You can also

View Preview
View Memo
Create Ad-Hoc Process
Manage Attachments

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Summary

- Business Task Management enables you to have central access to all your tasks via NetWeaver.

- The tasks can include alerts, business workflow items, knowledge management notifications, collaboration tasks, and guided procedures tasks.

- The Universal Worklist can be customized via XML and personalized for each user.
Questions?

Q&A
Feedback

Please complete your session evaluation.

Be courteous — deposit your trash, and do not take the handouts for the following session.

Thank You!
Business Task Management
Introducing Universal Worklist
Collaboration Tasks
UWL System Configuration
Customizing UWL, adding a new view
Substitution and Attachments in UWL
Appendix: Details for adding a new system to UWL and user personalization
This information in this appendix is for student reference. This information will not be covered during the TechEd session.
Before configuring UWL ensure that:

- You have administration rights for the Portal.

- Each person who will be using UWL must have a user account defined on the portal and in the backend system. They must have access to transaction code SWK1 and access to function group SWK1.

- Users should have current work items in their Business Workplace on the backend system.
Required steps to configure UWL

1. Define your SAP system
2. Create a System Alias to uniquely identify the system
3. Define exact settings for technical connections
4. Define how users are mapped
5. Test system connections
6. Add the new system to UWL configuration
7. Register work item types
Define your SAP system (1)
Define your SAP system (2)

Type of system. For UWL this will normally most likely be a Load Balancing system. We will use a dedicated application server.
Define your SAP system (4)

System Wizard

Step 3: Summary

Based On: Dedicated Application Server for R/3 System
Description: Backend SAP ERP system
Master Language: English
System ID: com.sap.te3clnt001
System Name: TE3CLNT001

16:41:06: Object created successfully

Choose your next step:
- Open the object for editing
- Restart the wizard to create a new object using the same template
- Close the wizard
Create a System Alias

NOTE:
System Alias links SAP system to UWL. UWL will not work correctly without the System Alias.
### Update Connector Information (1)

**Example of fields for “Dedicated Application Server”**

<table>
<thead>
<tr>
<th>Property Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application Host</strong></td>
<td>lwsf9004-wolf.sap.corp</td>
</tr>
<tr>
<td><strong>Gateway Host</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Gateway Service</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Logical System Name</strong></td>
<td>DOCLNT804</td>
</tr>
<tr>
<td><strong>Remote Host Type</strong></td>
<td></td>
</tr>
<tr>
<td><strong>SAP Client</strong></td>
<td>801</td>
</tr>
<tr>
<td><strong>SAP System ID (SID)</strong></td>
<td>TE3</td>
</tr>
<tr>
<td><strong>SAP System Number</strong></td>
<td>00</td>
</tr>
<tr>
<td><strong>Server Port</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Example of fields for “R/3 system with load balancing”**

- **Group**
- **Logical System Name**
- **Message Server**
Update Connector Information (2)

Transaction code SCC4

1) Select to edit the Object.
2) Select Connector.
3) Provide the actual host name for the backend system.
4) The Logical System name MUST be the exact same as the backend logical system name.
5) Provide the exact backend Client, System ID, and System number.
Update the WAS Information: WAS Host Name

Transaction code SMICM

iwdf9004.wdf.sap.corp:1081
Transaction code SICF
Update the ITS Information

Please log on to the SAP System

Service: webgui
Client: 800
Login: 
Password: 
Language: English
Accessibility: 

Logon  Logoff  New Password
Update the User Management Information

USIDPW means each Portal user must be mapped to a backend user.
Test System Connections

System Administration -> System Configuration -> System Landscape -> Portal Content

1. Display Object
2. Display Connection Tests
3. Select System Connection Tests
   - SAP Web AS Connection
   - ITS Connection
   - Connection Test for Connectors

4. Test URL
Add the system to UWL Configuration (1)

System Administration -> System Configuration-> Universal Worklist & Workflow

Universal Worklist Systems

Here you can define connections to systems as item providers for the Universal Worklist. The 'Connector Type' indicates the type of items retrieved through the connection. The 'System Alias' is an alias for the system as defined in the system landscape. For connector types 'WebFlowConnector' or 'AlertConnector' item types have to be registered with the UWL service after defining a new system alias on a WAS which is different from the WAS of the system alias, then that system alias should be specified here.

- **AdhocSystem** is for collaboration tasks.
- **ActionInbox** is for KM notifications.

Item type retrieval and registration requires a connection to the systems and may take a couple of minutes. Please be patient.

For each system they are generated as the configuration named 'uwl.webflow.<systemalias>' or 'uwl.alert.<systemalias>'.

After configuration changes on the backend, the system has to be re-registered.

Universal Worklist Content Configuration

Click to administer item types and view definitions

After configuration changes, it is recommended to clear the persistent cache on the Cache Administration Page.
Add the system to UWL Configuration (2)

System Administration -> System Configuration-> Universal Worklist & Workflow

Universal Worklist Systems

Here you can define connections to systems as item providers for the Universal Worklist. The 'Connector Type' indicates the type of items retrieved through the connection. The 'System Alias' is an alias for the system as defined in the system landscape. For connector types 'WebFlowConnector' or 'AlertConnector' item types have to be registered with the UWL service after defining a new system connection. If Web Dynpro applications are configured on a WAS which is different from the WAS at the system alias, then that system alias should be specified as a Web Dynpro system.

Create new system connection

System Alias: ^

Connector Type: ^

WebFlowConnector

Universal Worklist Context

Click to administer item types and view

After configuration changes, it is recommended to save the configuration.
**Add the system to UWL Configuration (3)**

- **Web Dynpro Launch System**: Enter System Alias for a system definition with J2EE port defined in the WAS system attribute.*

- **User Roles**: Delimit who can get work items via the user role. For example, you can assign a portal role here, such as “buyer”. Only users with the role “buyer” will see items from B7QCLNT000 in UWL.*

- **System Configuration Groups**: Option to have various tabs that point to UWL. UWL items for B7QCLNT00 will only appear in portal navigation tabs that are mapped to a specific configuration group.

- **Pull Channel Delta Refresh Period**: How often we should check to see if new items have entered the users inbox.*

- **Snapshot Refresh Period**: How often we should retrieve all items from the backend system.*

Asterik items (*) denote items that are new in NW2004s.
# Register the Work Item Types

## Universal Worklist Systems

Here you can define connections to systems as item providers for the Universal Worklist. The 'Connector Type' indicates the type of items retrieved through the connection. The 'System Alias' is an alias for the system as defined in the system landscape. For connector types 'WebFlow/Connector' or 'Alert/Connector' item types have to be registered with the UAL service after defining a new system connection. If Web Dynpro applications are configured on a VAS which is different from the VAS of the system alias, then that system alias should be specified as a Web Dynpro system.

<table>
<thead>
<tr>
<th>System Alias</th>
<th>Connector Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>AdHocSystem</td>
<td>AdHoc/WorkflowConnector</td>
<td></td>
</tr>
<tr>
<td>ActionInbox</td>
<td>ActionInboxConnector</td>
<td></td>
</tr>
<tr>
<td>B7QCLNT000</td>
<td>WebFlow/Connector</td>
<td>Register</td>
</tr>
</tbody>
</table>

- **New**
- **Edit**
- **Delete**

- **Register Item Types for All Systems**
- **Register Item Types for New Systems Only**

---

Look at each workflow step and ask “How should I launch this step”

- TS30000016 = SAPGui for HTML
- TS99700023 = ITS MiniApp
- TS99700034 = BSP
- TS99700087 = URL

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End User Personalization Choices

- **Columns:** Which columns and the order
- **Sorting preferences**
- **Data properties**
  - How many items per page
  - How often to refresh the page
  - Date range of items
  - Warnings for Ad Hoc due dates
- **Create their own custom filters within custom views**
**View Personalization**

<table>
<thead>
<tr>
<th>New Task</th>
<th>Refresh</th>
<th>Personalize View</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Subject</th>
<th>Due</th>
<th>Priority</th>
<th>From</th>
<th>Sent</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow verification Approve notification of absence 000001 961</td>
<td>Sep 1, 2004</td>
<td>Normal</td>
<td>Goodwin, Penny</td>
<td>Aug 31, 2004</td>
<td>![Actions Icon]</td>
</tr>
<tr>
<td>Requisition release 10019903 00010</td>
<td>Sep 7, 2004</td>
<td>Normal</td>
<td>Goodwin, Penny</td>
<td>Aug 31, 2004</td>
<td>![Actions Icon]</td>
</tr>
<tr>
<td>Requisition release 10019903 00010</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>![Actions Icon]</td>
</tr>
<tr>
<td>Workflow verification Approve notification of absence 000001 961</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>![Actions Icon]</td>
</tr>
<tr>
<td>Employee GATING: Approve notification of absence</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>![Actions Icon]</td>
</tr>
<tr>
<td>Complete 0001 notify notification 264</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>![Actions Icon]</td>
</tr>
</tbody>
</table>

**Personalize “Tasks”**

**Attribute and their orders**

In the list, you can determine what attributes are available to you and what attributes you want the system to display for you. To change the display order, follow the example.

- ![Attribute Display Order](AttributeDisplayOrder.png)

**Currently displayed attributes**

<table>
<thead>
<tr>
<th>Status Icon</th>
<th>Subject</th>
<th>Due</th>
<th>Priority</th>
<th>From</th>
<th>Sent</th>
<th>![Actions Icon]</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="RemoveFromCurrentView.png" alt="Remove From Current View" /></td>
<td>Available attributes not displayed</td>
<td><img src="AddAttribute.png" alt="Add Attribute" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Properties of “Status Icon”**

- Horizontal Alignment
- Vertical Alignment
- Column Width

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User requires custom filter to only see requests from the Athletic Department

To add custom view with a filter
1. Select Personalize View
2. Select Duplicate
End user creating views with filters (2)

To add custom view with a filter
3. Name your custom view
4. Add your filter criteria

Data Properties
You can define the number of items to be displayed on each page

- Items To Be Displayed Per Page: 10
- Page Refresh Rate: None
- Query Date Range: None
- Indicate as 'Severe' Before Due Date: None
- Indicate as 'Warning' Before Due Date: None
- Table Design Mode: Standard
- View Filter: myOwnFilter

myOwnFilter
Department Contains Athletic
AND
Select One... Contains Keywords here
Add this filter
- User now has a custom view, MyOwnApprovals
- User also has a custom filter, myOwnFilter
- Only requests from the Athletic Department appear
Launch Work Transaction

Parameterized launching for:
- BSP
- iView
- URL
- Web Dynpro (Java or ABAP)
- SAP GUI (for HTML)
Launch Customization: ITS MiniApp for SRM

Launches a MiniApp

XML Example

```xml
<Action
  name="launchSAPAction"
  handler="SAPMiniAppLauncher"
/>
```
Launch Customization: BSP for Business Workflow

XML Example

```xml
<Action name="launchWsHandler" handler="XhandlerLauncher"/>
```
Launch Customization: ABAP Web Dynpro

XML Example

```
<Action name="launchWebDynProABAP" handler="SAPWebDynproABAPLauncher"/>
```
Details of XML for Web Dynpro Launch

```xml
<ItemTypes>
  <ItemType name='uwl.task.webflow.TS65507956' connector='WebFlowConnector' 
    defaultView='myABAPWebdynpro' defaultAction='viewDetail' 
    executionMode='pessimistic'>
    <ItemTypeCriteria externalType='TS65507956' connector='WebFlowConnector'/>
  <Actions>
    <Action name='launchWebDynProABAP' handler='SAPWebDynproABAPLauncher'>
      <Properties>
        <Property name='WebDynproApplication' value='ZTECHED2005FORM_ENTRY'/>
        <Property name='WebDynproNamespace' value='sap'/>
        <Property name='DynamicParameter' value='WI_ID=${item.externalId}' />
      </Properties>
    </Action>
  </Actions>
</ItemType>
```

Important details: TS number, action handler, actual web dynpro application, work item ID, and system (if web dynpro will be called on a different system)