Using Guided Procedures “End User Design Time”: Personal Templates
## Typographic Conventions

<table>
<thead>
<tr>
<th>Type Style</th>
<th>Represents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Text</td>
<td>Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation.</td>
</tr>
<tr>
<td>Example text</td>
<td>Emphasized words or phrases in body text, graphic titles, and table titles.</td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.</td>
</tr>
<tr>
<td>Example text</td>
<td>Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.</td>
</tr>
<tr>
<td>Example text</td>
<td>Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.</td>
</tr>
<tr>
<td>&lt;Example text&gt;</td>
<td>Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.</td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Keys on the keyboard, for example, F2 or ENTER.</td>
</tr>
</tbody>
</table>

## Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>⚠️</td>
<td>Caution</td>
</tr>
<tr>
<td>📊</td>
<td>Example</td>
</tr>
<tr>
<td>📌</td>
<td>Note</td>
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<tr>
<td>🏷️</td>
<td>Recommendation</td>
</tr>
<tr>
<td>☑️</td>
<td>Syntax</td>
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Scenario

The Guided Procedures end-user design time and the Personal Templates workset is a tool with which the end-user can define processes in a simplified environment.

Using this workset, the GP User designs simple processes. The workset is part of the simplified GP User design time accessible to the GP User portal role (along with GP runtime). Compared to the GP regular design time it is a restricted workset providing an easier to use but more limited environment.

The system stores all development objects belonging to the action and the process template types in this Personal Templates workset.

In particular, if the only role you have is the GP User portal role, you can only use a specific selection of Callable Objects in the GP User design time when creating your actions. You can only use those Callable Objects which have been assigned the basic permission level. Users who have the GP Expert User portal role, however, can see all elements, that is, all elements from the basic, advanced, and expert levels. For more information, see the GP documentation.

Functions of the Workset

Work in the Personal Folder

As in the regular design time gallery, you can create your own folders here. You are the only user with access to this area, where your own items are stored.

Create Action

You can use this function to create individual actions including a Callable Object. This function is an integral part of the Create Process function.

Create Process

You can use this function to create your own simple processes without having to use the highly complex GP design time functionality.

You create your processes simply by using the Action development object type. This means you do not have to bother about integrating further types (blocks, callable objects); Callable objects are automatically integrated by the system.

You do not have to pay attention to the versioning aspects which are valid for GP development objects in the design time.

You do not have to activate your development objects - that is your actions and process templates manually.

Two wizards are available for creating simple Process template objects (see Types of Processes for details):

- Check List Wizard - a single phase process with parallel activities and a single processor
- Simple Sequence Wizard - a single phase sequential process with multiple processors

When creating a process, you always create an action as well. Both wizards include the step **Defining Activities** that is identical to the Create Action function.

This Create Process function in the Personal Templates workset is identical to the **Design and Start a Simple Process** function in the Runtime environment.

**Publish your personal items**

By choosing *Publish* you can make your items generally available in the *Public Folder area* of the regular design time.

**User interface structure of the workset**

The following figure illustrates the tools that are available in this workset.

- **Contextual Navigation Panel**
  Using the links available in the contextual navigation panel, you can create the objects that are stored in the Personal Templates workset.

- **Filters and Content Management**
  Using the available filters, you can choose to display only the selected types of objects that are stored in the Personal Templates – Actions or Processes. In addition, you can create and edit folders, delete and publish objects.

- **GP Content**
  The content of the Personal Templates is displayed in the central frame. Here you can browse the available folders and manage them or their content.
About This Document

This tutorial will describe all the possible functionality available in the Personal Templates workset.

We will start with content management, and then continue with creating an action. The process creation will be demonstrated by going through the steps of the Simple Sequence wizard. This solution is a very simple process: one processor inputs a message in a Data input form and the other sees it on a Data display form.

Finally we will publish our Process stored in the Personal Folder in the public area.

General prerequisites

- You should hold at least the portal role GP User, better still, the GP Export User role.
- Another portal user with the role GP User who will be the second processor. For more information, see the portal documentation on user management.

Applicable Releases

This tutorial is compatible with the release "Beginning with SAP NetWeaver 2004s SPS6".

Disclaimer

Any software coding and/or code lines / strings ("Code") included in this documentation are only examples and are not intended to be used in a productive system environment. The Code is only intended better explain and visualize the syntax and phrasing rules of certain coding. SAP does not warrant the correctness and completeness of the Code given herein, and SAP shall not be liable for errors or damages caused by the usage of the Code, except if such damages were caused by SAP intentionally or grossly negligent.
The Step By Step Solution

This section gives you a step by step explanation of the available functionality. You should carry out this solution scenario sequentially to achieve a successful result – a published Process.

Open your Enterprise Portal via http://<Server>:<Port>/iri/portal, navigate to the tab Guided Procedures and then to the Personal Templates tab.

Work in the Personal Folder

1. In the content area you can see your Personal Folder.

Create a new folder with the Create Folder button.
2. In the screen that appears, provide the following attributes:
   - Language (for example, English)
   - Name of the folder (for example, myPersonalItems)
   - Description (some meaningful text)

   Click **Create**.

3. You should see your folder in the content area.

4. To filter your items you can check or uncheck the Action and Process checkboxes.

5. By default you will see the list view in the content area. To switch to the other view click on the **Switch to detail view** icon.

   Click on **Switch to list view** icon to switch back to the previous view.
6. You can Cut, Copy, or Paste folders or items with the relevant buttons.

7. To edit the attributes of a folder select the target folder and click Edit Folder.

   On the screen that comes up you can modify the value of the attributes belonging to the selected folder (see step 2.)

8. Should the content shown not be up to date, you can use the Refresh button.

   To select all items use the Select all button.

9. If you want to delete a folder or an item, first select it, then click Delete.

   You are not able to delete a folder that is not empty and you are not allowed to delete an item that is referenced to by another item (for example, an action that is integrated into an existing process).

Create Action

Be aware that once you have created an Action you cannot edit it, you can only delete and create again with modified attributes. Once it is integrated into a process you cannot delete it either.
1. Click the Create Action link in the “You Can” section of the contextual panel.

2. From the list of action types choose the one which you want to be executed by this new action.

   In our example, it is the Data input form from the Data Forms group.

3. Fill in the attributes:

   - Name, for example, “DataInput”
   - Description, for example, “Data input action”
   - Original Language, for example, “English”
   - Folder: click Choose to define the location
4. Choose the folder where you want to store this action by selecting it and clicking **Choose**.

5. Click **Next**.

6. Because the action of type Data input form does not have an input we get the Define Output screen. You should define an output parameter that will hold the value of the text entered on this form.

   Click **Insert New…**

7. Enter a value for the **Context parameter**, for example, “Message” – this will be the label for the edit-box on the Data input form. For the **Technical Name** enter “message”, for example.

   When you have finished, click **Next**
8. In the last step of the Action creation click Finish.

9. You can see your new action in the selected folder in the gallery.

Create Process – Simple Sequence

Our process integrates the previously created action, and needs another action that will be created during the process creation.

1. Click the Create Process link in the “You Can” section of the contextual panel.

2. Choose Simple Sequence Wizard by clicking the link.
3. There is still no activity in the table on this Define Activities screen, so we define a new one by clicking `Create`.
4. Select the *Data display form* from the *Data Forms* group to be the type of this new action created “on the fly”.

5. Enter the *Name* - “DataDisplay”, for example.

Provide a meaningful *Description*, such as “Data display action”.

Choose the *Original Language* - “English”, for example.

Select a location for storing this Action by clicking *Choose*.

6. Choose the folder where you want to store this Action by selecting it and clicking *Choose*.
7. Click Next.

8. This type of action has only input parameters and we need to add one whose value will be shown on the Data display form.

   Click Insert New…

9. Enter “Your message” as the label for the displayed message into the Context parameter column.

   Enter “message” for the Technical Name.

   Click Next.

10. In this last Activity / Action creation step click Finish.
You should see your created action in the Activities table.

Now we insert the existing DataInput Action into our Process. Click **Add**.

11. In the Choose Activities screen select **Personal Folder** by clicking its icon.

12. Select the folder containing the DataInput Action and then select the Action itself.

Click the **Choose** button **Choose**
13. You have to declare the order of the activities (actions) that will be executed in the process properly. To put the Data display form after the Data input form, select the DataDisplay activity and click on Move Down.

14. The order is correct now.

Click the Next button

15. We have now arrived at the “Define Parameter Mapping” step in the Process creation.

Here you can see the input parameters belonging to the actions in the process. In our case we have only one with the contextual name “Your message” – as the input for the Data display form.

We have the following possibilities:

- **Define Mapping** – we can map output parameters to the selected input parameter
- **Set Default** – we can define a default value to the selected input parameter (in this case the parameter is not mapped)
- **Clear Mapping / Default** – we can undo the mapping or delete the default value
- **Propose Mappings** – based on the technical name of the parameters we can ask for proposed mappings
16. Select the “Your message” parameter from the list and click Define Mapping button (we could use the Propose Mapping button as well)

Another table “Suitable Parameters” should appear on the right of the “Input Parameters” table.

17. As you select the “Message” parameter (output of the Data input form) the mapping is immediately shown in the row of the “Your message” input parameter – see the text in the Mapped To column: “DataInput: Message”

The mapping is defined this way. We can now continue with the process creation. Click the Next button.

18. The last step is involves entering some basic data for our new process.

- Give a Name - “MessagePassingProcess”, for example.
- Provide some meaningful Description, such as “Process for passing message”
- Define the location by clicking the Choose button.
19. Select the folder in which you would like to store the process and click Choose.

20. The Start Process After Save checkbox is checked by default – this means that when you click Save the process will be initiated immediately.

21. If this checkbox is unchecked the process is stored but will not start. You can start it later by selecting the process in the gallery, opening it (Open...) and starting it with the Start button.

You can also modify the Process here with the Edit button or making it available in the public area with the Publish button.

As in our case we have decided that the process should start on saving, we now see the “Initiate Process” screens.
22. You can choose whether the process is started in a single instance or should it be initiated separately for every user in the selected process role.

We need the Single Instantiation this time, (checked by default).

You can see two roles for this Process: Processor of DataDisplay and Processor of DataInput.

Assign a user to both activities with the Add User button.

23. To find a user enter his / her name in the Find edit-box and click Go. As we search for users we leave the “Users” selected in the Within checkbox (other possibilities are “Roles” and “Groups”)

Select the user you intend to be the processor of the previously selected activity and click Add.

Carry out this step for both activities. It is recommended that you define the processor of the DataInput to be the same user with which you are currently logged in, and choose another user to be the processor of the DataDisplay.

When you are finished click the Next button.
24. In the last process initiating step you can define the Initiator (it is your currently logged in user by default).

Leave it as it is, and click **Initiate**.

![Initiate Process](image)

**Initiate Process**

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Roles</td>
<td>Edit Basic Data</td>
</tr>
</tbody>
</table>

Initiator: * Administrator, All |

Process Name: * Message Passing Process |

![Previous] [Initiate] [Cancel]

25. The runtime screen will appear. Here you, as the processor of the DataInput activity, can enter your message and send it with the **Submit** button on the form.

![Message Passing Process](image)

26. As you see in the “Process Activities” contextual panel, the DataInput is successfully finished and the “Action is ready for processing by another user or role.” Message has appeared.

![Process Activities](image)

27. Open another browser window and log in as the other user whom you selected to be the processor of the DataDisplay activity.

Use the URL: [http://<portalserver>:<port>/irj/portal](http://<portalserver>:<port>/irj/portal)

Alternatively you can log off with the current user and log in with the other.
28. Click the link **Tasks Where Action is Required to Continue Process Flow.**

29. From the Open Tasks list click the **DataDisplay.**

30. You should see the message sent by the processor of the DataInput activity.

   Finish this Process by clicking the **OK** button on the Data display form.

31. This Action has been completed as well as the Process.

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**Publish your personal item**

For this last task you may need to log in again with your original user with which you created the Process.

32. In the gallery find and select the process created.
33. You can either click on the Publish button in the Content Management area.

34. Or open the Process with the Open button and click on the Publish button in that screen.

35. You have to define the folder into which you want to publish.

   Click the Choose button next to the Location input field.
36. Select the folder and click **Choose**.

37. You can restrict the group of users with whom you want to share the published Process.

To define grantees who can access the published item, click the Add button **Add**.

For the purposes of this example, we will make our process available to everyone. Instead of selecting a user, we make a search on **Groups** (in the **Within** dropdown-box), use the "*" wildcard in the edit-box **Find**, and click **Go**.
38. From the results, select the group “Built-in Group Everyone” and click Add.

39. Finish the publishing by clicking the Publish button.
40. On successful publishing you should receive the portal message:

- Template has been published

You will find the process in the Public Folder in the Guided Procedures gallery.
Appendix

Types of Processes Supported

Check List

The processes you create using this wizard have the following properties:
- Exactly one phase
- Parallel activities
- Exactly one processor (the initiator)

If you want to use the Check List Wizard to create a simple process, you must perform the following steps:

1) Define activities:
   Any number of Actions can be integrated into the Process to be created. You can add existing Actions or create new ones.

2) Define input parameters:
   If required, you define the default values of those input parameters which are part of the actions involved in the process to be created. You can also specify which parameters are displayed at runtime, and whether these values may be changed again when the process is started.

3) Start process:
   Before saving the Process template you can choose whether the Process should be started/initiated right after the template has been saved or whether it should be started later manually.

Simple Sequence

The processes you create using this wizard have the following properties:
- Exactly one phase
- Sequential activities
- Several processors: you can assign a separate processor to each action which you determine either in the design time or later during initiation.

If you want to use the Simple Sequence Wizard to create a simple process, you must perform the following steps:

1) Define activities:
   Any number of Actions can be integrated into the Process to be created. You can add existing Actions or create new ones.
   As the selected Actions are not executed simultaneously but one after another, you must determine the sequence of the Actions.
Assigning a processor to each Action is necessary. You can determine whether assignments are allowed at the time the process is initiated.

2) **Define input parameters:**
   You can assign input parameters either to output parameters or to other input parameters. You have the following options:
   - Define Mapping: the system displays all appropriate parameters you can use.
   - Set Default: you can enter a default value for the selected input parameter.
   - Clear Mapping / Default
   - Propose Mappings: by including the types and names of the individual parameters, the system checks all input parameters to see whether they can be assigned to other parameters.

3) **Start process:**
   Before saving the Process template you can choose whether the Process should be started/initiated right after the template has been saved or whether it should be started later manually.