

SAP Business Workplace Vs SAP WebUI Worklist



Applies to:

CRM 6.0 and CRM 7.0. For more information, visit the [Customer Relationship Management homepage](#).

Abstract

This document provides essential information that a consultant should know before he migrates workflows from the CRM 5.0 system to CRM 7.0 system. This document gives the consultant an insight about the behavior of CRM 7.0 Work-list by comparing it with CRM 5.0 GUI Business workplace. This document explains all the features not available in CRM work-list which were available in CRM Business Workplace.

This piece of information could be utilized for the following:

- 1) Understanding the limitations that CRM 7.0 Work-list has and to figure out the workaround or a concrete solution to the limitation.
- 2) Understanding the functional Behavior of CRM 7.0 Work-list Vs CRM 5.0 Business Workplace (GUI)
- 3) Developing workflows definition from the scratch in CRM 7.0, as the workflow developer would develop these workflow definitions keeping in mind restrictions/limitations that users face while using CRM 7.0 Work-list.

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Author Bio



Hi, Let me introduce myself – I am Anand and I am working with SAP Global Delivery, Bangalore. I have been a part of SAP CRM consulting for more than four years now and it has been an amazing journey so far. I have had the privilege of working on multiple SAP products including SAP Solution Manager, SAP CRM 5.0 and SAP CRM 7.0. I started my SAP journey with an ABAP certification in 2006. I have been working on WRICEF components of SAP (Workflows, Reports, Interfaces, Classes, Enhancements, and Forms) for quite some time now. Post my stint with WRICEF, I moved on to working with SAP Solution Manager, and have been responsible for configuring scenarios like Support Desk and Change Request Management. Recently, i was involved in SAP CRM Technical work on SAP CRM 5.0 and CRM 7.0. I have also had the privilege to understand the new SAP CRM 7.0 architecture and thus am aware of SAP CRM WebUI Enhancement framework. I am a certified SAP CRM consultant, certified on SAP CRM 6.0 platform with a good amount of know-how on SAP CRM Marketing. I have extensively worked on SAP CRM Worklist (WebUI) which is similar to SAP Business Workplace in GUI, I have also worked on integrating Social Media (Twitter, Facebook etc..) into SAP CRM 7.0.

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Summary

The CRM 7.0 Work-list is not an exact replica of SAP Business Workplace. CRM Work-list doesn't have all the functionality that SAP Business Workplace had. This document would list out all the difference between Business Workplace and UI work-list. This will also explain the features and drawbacks of CRM work-list over SAP Business Workplace.

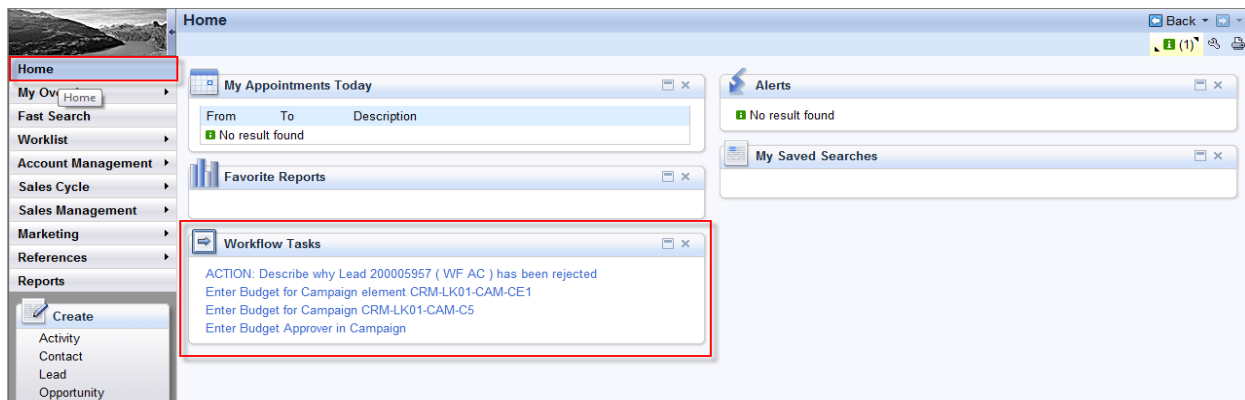
Detailed Description

Here is the detailed Comparison of SAP GUI Business Workplace and the CRM 7.0 UI Work-list:

A) Where do I find the work-items in the CRM 7.0 Web client UI?

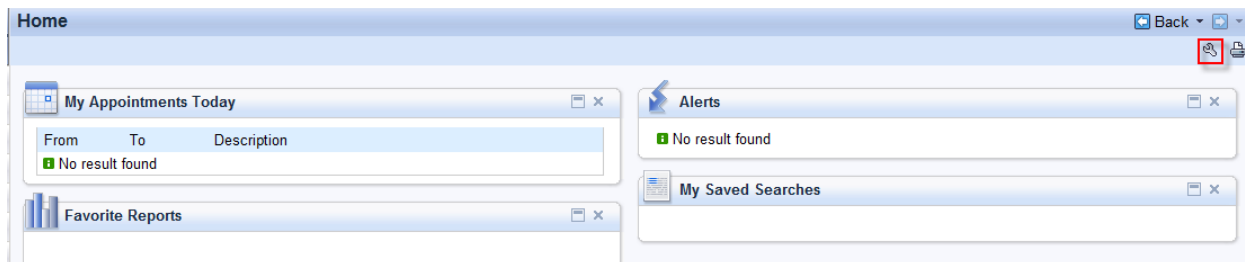
There are two ways of spotting the work-item in CRM 7.0 UI:

- Via the 'Home' Work-centre under 'Work-flow tasks' assignment Block

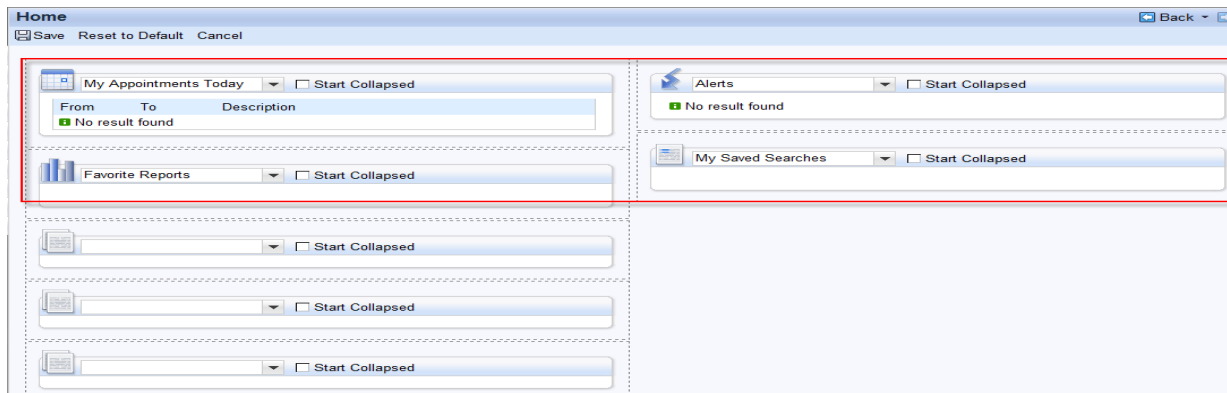


Please follow the below mentioned steps if you are not able to view the Workflow Tasks Assignment Block under 'Home' Work-centre.

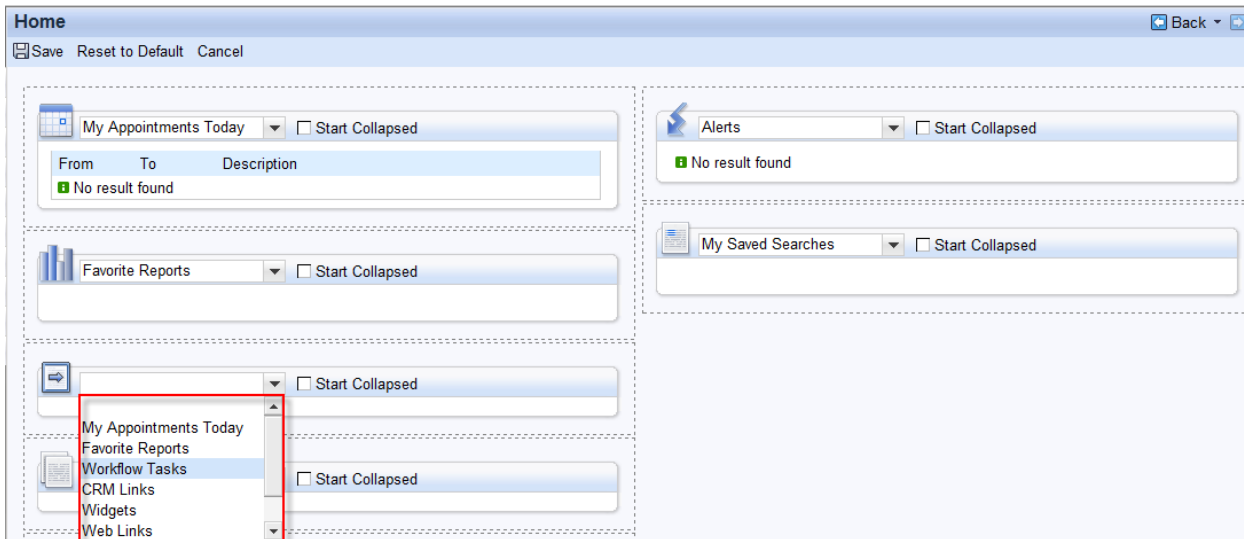
- Click on 'Personalize' Button as indicated



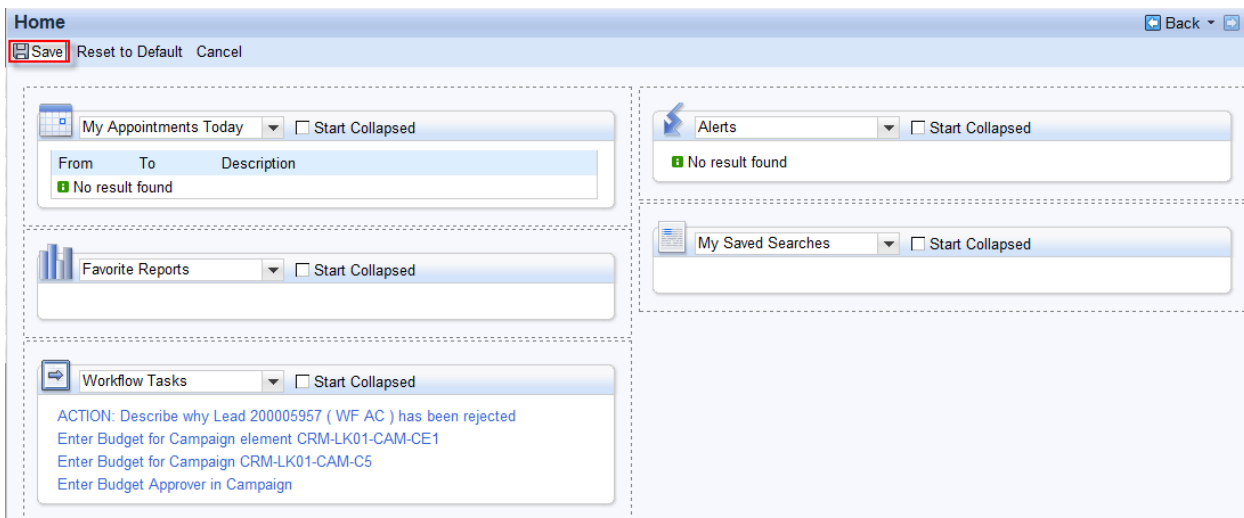
- The marked ones are all the available assignment blocks under the 'Home' Work-centre.



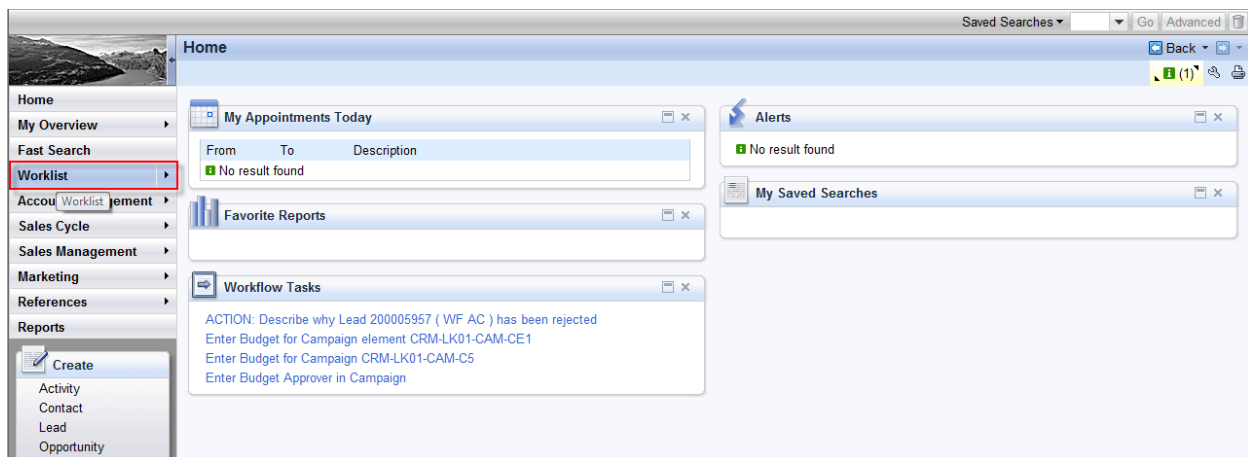
iii) Please select the drop-down the 'Workflow Tasks' as indicated below.



iv) Click on 'Save' as indicated. Now you should have the 'Workflow Tasks' assignment block under the Home Work-Centre.



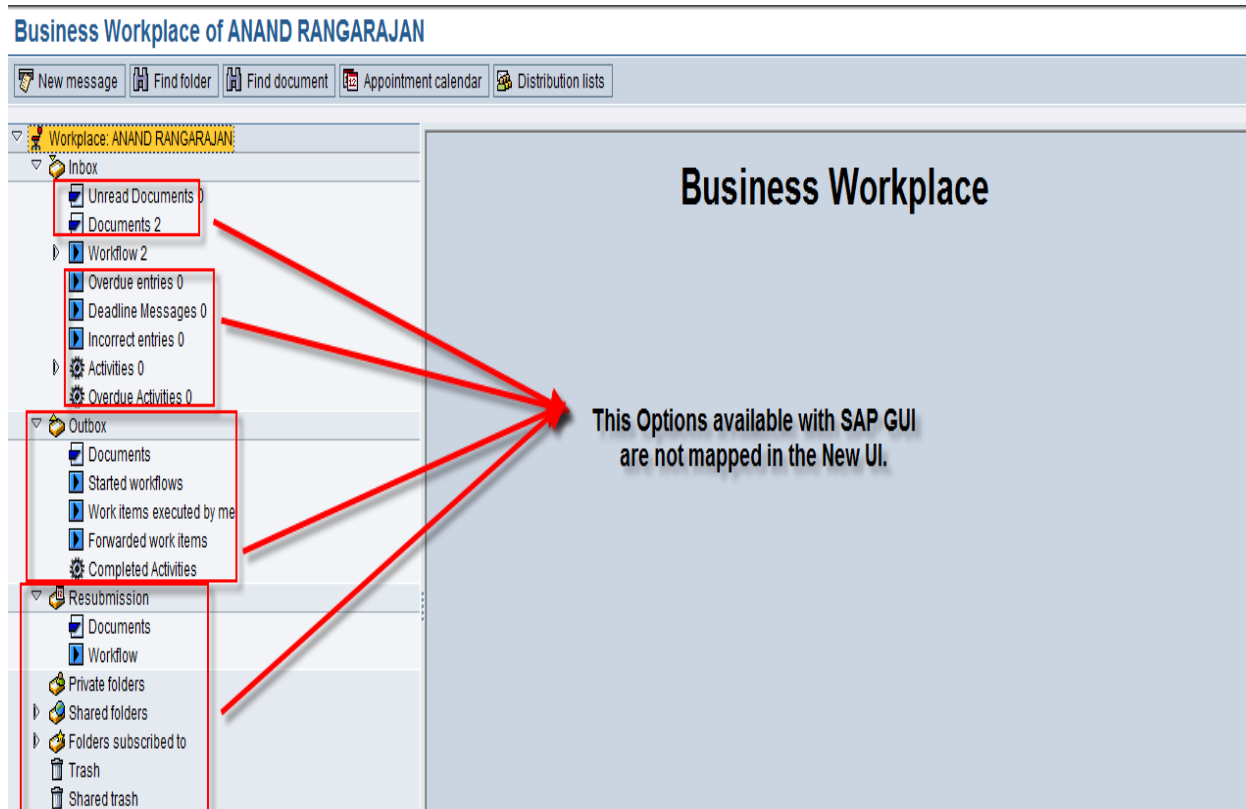
- Via the 'Work-list' Work-Centre



B) Following are not available:

- a) SAP Inbox
- b) SAP Outbox
- c) Resubmission Folder
- d) Private Folders
- e) Shared Folders
- f) Subscribed Folders

These are illustrated as below:

**Impact: Unavailability of SAP Inbox**

Unavailability of SAP Inbox will be a major drawback as the document sent via Email to the SAP Inbox of the user will not be seen from the CRM UI work- list.

Possible Workaround:

- 1) Tweak the Application which sends out an email to the SAP Inbox in such a way that it sends out an email to the MS Outlook instead sending it to the SAP Inbox
- 2) Alternative workaround which is close to the best possible solution would be to request all SAP Users to Maintain their Private Office Settings in such a way that any email sent to their SAP Inbox is automatically forwarded to their MS Outlook Inbox. This is illustrated as below:

Maintain Private Office Settings

SAP

Menu System

Private office settings for Anand Rangarajan

Documents Send/print Substit. Automatic forwarding Automatic reply

Forward to	Frn	To	Actv.	Details
Anand Rangarajan	25.10.2009	26.10.2011	●	

To be able to the Maintain Private Office Settings (Tcode SO13) from the UI as shown above, we need to perform custom configuration and the steps to do this is mentioned in [this](#) document. This opens up a transaction launch of Transaction code SO13 in CRM UI.

Impact: Unavailability of SAP Outbox

With the unavailability of SAP Outbox, it will no longer be possible to track the documents which were sent by us from SAP Business workplace to other users, it not possible to track the work-item executed/Forwarded by us to other SAP users. There is no solution or workaround suggested for this at present and it is considered to have negligible business impact.

C) Work-items in GUI Vs the Work-items in CRM UI Work-list

From an end users perspective, work-items can be categorized into three categories

- 1) Executable Work-items
- 2) Decision Work-items
- 3) Deadline Work-items

Let's now compare how these work-items are placed from the UI Work-list perspective

- 1) Executable Work-items

We can navigate to the work item from the CRM work-list by clicking on the 'Subject' Hyperlink.

a) Possibility of Forwarding and Reserving the Work-items from the Work-list as shown below:

The screenshot shows a workflow task window titled "Workflow Task: Enter Budget for Campaign element CRM-LK01-CAM-CE1". The toolbar at the top includes buttons for "Back", "Execute", "Reserve", "Forward", and "Cancel". The "Reserve" and "Forward" buttons are highlighted with red boxes. Below the toolbar, the task details are displayed:

Subject	Enter Budget for Campaign element CRM-LK01-CAM-C	Status	Ready
Sent Date	21.10.2009	Priority	5 Medium
Due Date		Confirmation Required	<input checked="" type="checkbox"/>

Description

Dear Anand,

You requested the budget to be approved for Campaign element CRM-LK01-CAM-CE1 (crm-lk01-cam-ce1), however no budget has been entered for this campaign.

Please enter a budget OR reset the status BUDGET TO BE APPROVED.

After entering a budget the Budget Approver will be informed automatically.

When resetting the status BUDGET TO BE APPROVED the workflow will be ended.

After you are done please confirm the end of the work item with COMPLETE WORK ITEM. By Choosing CANCEL the work item will remain in your inbox and you may finish your work later.

Possibility of resetting reservation:

The screenshot shows the same workflow task window, but the status has changed to "Reserved". The toolbar now includes a "Reset" button, which is highlighted with a red box. The task details are:

Subject	Enter Budget for Campaign element CRM-LK01-CAM-C	Status	Reserved
Sent Date	21.10.2009	Priority	5 Medium
Due Date		Confirmation Required	<input checked="" type="checkbox"/>

Description

Dear Anand,

You requested the budget to be approved for Campaign element CRM-LK01-CAM-CE1 (crm-lk01-cam-ce1), however no budget has been entered for this campaign.

Please enter a budget OR reset the status BUDGET TO BE APPROVED.

After entering a budget the Budget Approver will be informed automatically.

When resetting the status BUDGET TO BE APPROVED the workflow will be ended.

After you are done please confirm the end of the work item with COMPLETE WORK ITEM. By Choosing CANCEL the work item will remain in your inbox and you may finish your work later.

Workflow Task: Enter Budget for Campaign element CRM-LK01-CAM-CE1 Back

Back Execute **Reset** Forward Cancel

Workflow Task Reset Reservation

Subject: Enter Budget for Campaign element CRM-LK01-CAM-CE1 Status: Reserved
 Sent Date: 21.10.2009 Priority: 5 Medium
 Due Date: Confirmation Required:

Description

Dear Anand,

You requested the budget to be approved for Campaign element CRM-LK01-CAM-CE1 (crm-lk01-cam-ce1), however no budget has been entered for this campaign.

Please enter a budget OR reset the status BUDGET TO BE APPROVED.

After entering a budget the Budget Approver will be informed automatically.

When resetting the status BUDGET TO BE APPROVED the workflow will be ended.

After you are done please confirm the end of the work item with COMPLETE WORK ITEM. By Choosing CANCEL the work item will remain in your inbox and you may finish your work later.

The above button is only visible if you had earlier reserved a work-item.

b) Possibility of executing a Work-item as indicated below:

Workflow Task: Enter Budget for Campaign element CRM-LK01-CAM-CE1 Back

Back **Execute** Reset Forward Cancel

Workflow Task

Subject: Enter Budget for Campaign element CRM-LK01-CAM-CE1 Status: Reserved
 Sent Date: 21.10.2009 Priority: 5 Medium
 Due Date: Confirmation Required:

Description

Dear Anand,

You requested the budget to be approved for Campaign element CRM-LK01-CAM-CE1 (crm-lk01-cam-ce1), however no budget has been entered for this campaign.

Please enter a budget OR reset the status BUDGET TO BE APPROVED.

After entering a budget the Budget Approver will be informed automatically.

When resetting the status BUDGET TO BE APPROVED the workflow will be ended.

After you are done please confirm the end of the work item with COMPLETE WORK ITEM. By Choosing CANCEL the work item will remain in your inbox and you may finish your work later.

If the Work-item is flagged as 'Confirmation required', then the button 'Confirm' is only visible if the work-item is executed at least once by clicking on the 'Execute' button.

Workflow Task: Action: Advise New Opportunity 300010415 test Le lead for Lead Back

Back Execute **Confirm** Reset Forward Cancel

Workflow Task Confirm Completion of Workflow Task

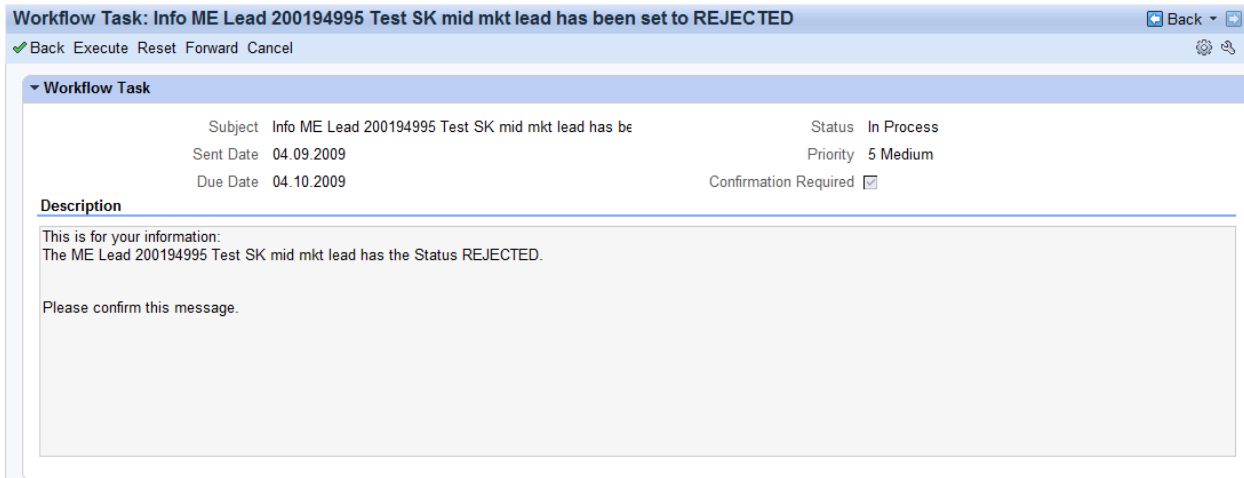
Subject: Action: Advise New Opportunity 300010415 test Le lead Status: Executed
 Sent Date: 12.11.2009 Priority: 5 Medium
 Due Date: Confirmation Required:

Description

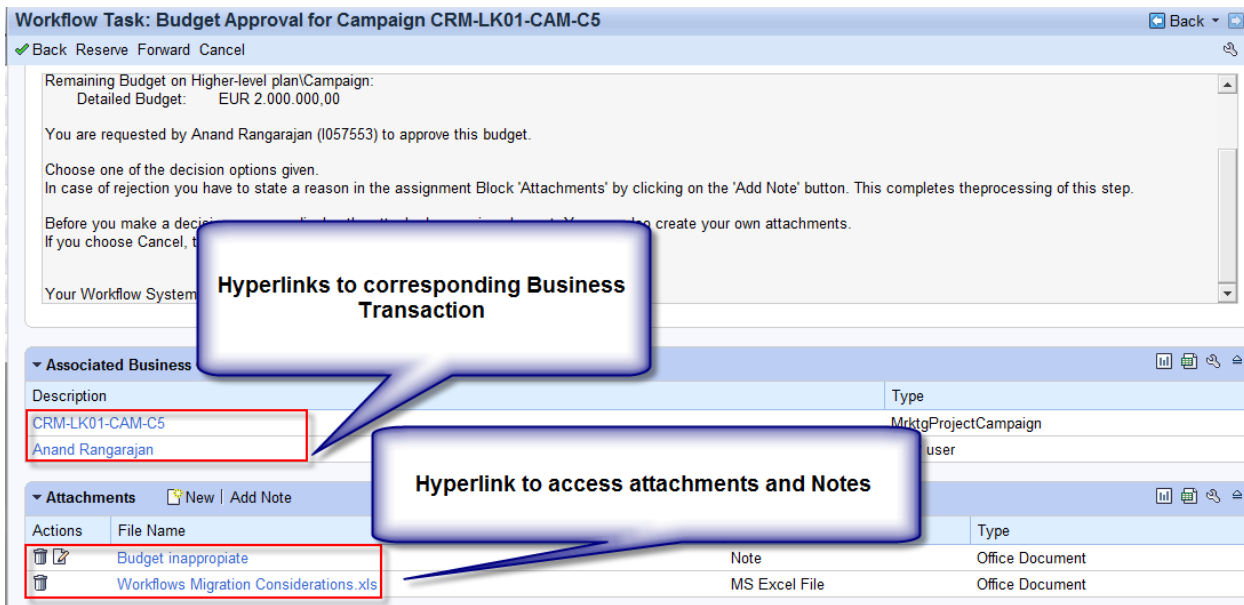
A new Opportunity 300010415 test Le lead has been created for Lead 200005936 test Le lead
 Please be advised that you are the owner of this Opportunity.

Associated Business Objects

Description	Type
0200005936 test Le lead	CRM Lead
0300010415 test Le lead	CRM Opportunity



c) Possibility of navigating to the business transaction\attachments from the CRM Work list.



2) Decision Work-items

The Decision Work item in UI is represented as follows: The User is expected to select the option from the drop-down and click on 'Execute Decision'.

Workflow Task: Budget Approval for Campaign CRM-LK01-CAM-C5 Back

Back Reserve Forward Cancel

Decision: Budget approved Execute Decision

Workflow Task: Budget approved
Budget NOT approved

Subject: Budget Approval for Campaign CRM-LK01-CAM-C5 Status: Ready
Sent Date: 27.01.2010 Priority: 5 Medium
Due Date: 01.02.2010 Confirmation Required:

Description

Dear Anand,

For campaign CRM-LK01-CAM-C5 (CRM-lk01-cam-C5) the following budget has been entered:
Detailed Budget: EUR 100.000,00

Remaining Budget on Higher-level plan\Campaign:
Detailed Budget: EUR 2.000.000,00

You are requested by Anand Rangarajan (I057553) to approve this budget.

Choose one of the decision options given.
In case of rejection you have to state a reason in the assignment Block 'Attachments' by clicking on the 'Add Note' button. This completes the processing of this step.

Associated Business Objects

Description	Type
CRM-LK01-CAM-C5	MrktgProjectCampaign
Anand Rangarajan	SAP user

New Feature in CRM 7.0 Work-list: Possibility of addition of a 'Note' Directly to the Workflow. This could be used by the approver of a business transaction to comment on why he/she had rejected the Business transaction before the work-item is sent back to the Initiator for correction

Workflow Task: Budget Approval for Campaign CRM-LK01-CAM-C5 Back

Back Reserve Forward Cancel

Decision: Budget NOT approved Execute Decision

Workflow Task

Subject: Budget Approval for Campaign CRM-LK01-CAM-C5 Status: Ready
Sent Date: 27.01.2010 Priority: 5 Medium
Due Date: 01.02.2010 Confirmation Required:

Description

Dear Anand,

For campaign CRM-LK01-CAM-C5 (CRM-lk01-cam-C5) the following budget has been entered:
Detailed Budget: EUR 100.000,00

Remaining Budget on Higher-level plan\Campaign:
Detailed Budget: EUR 2.000.000,00

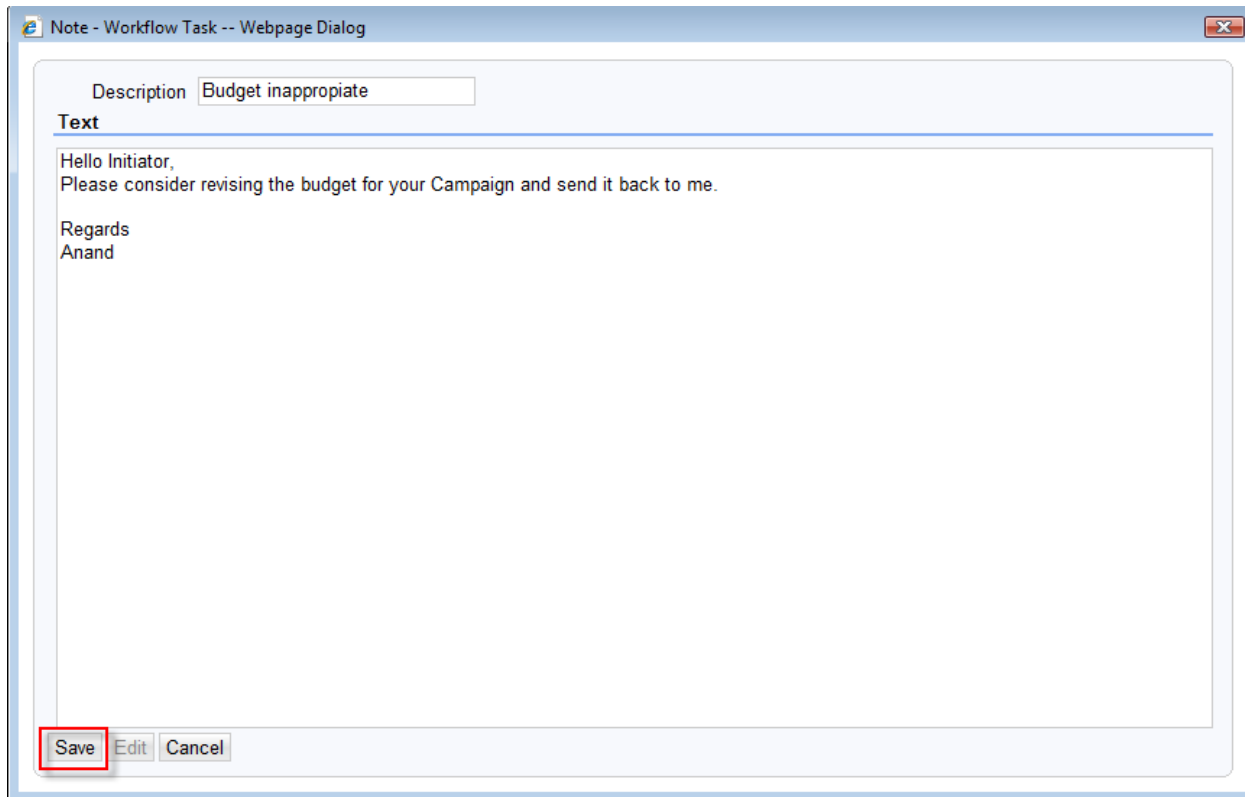
You are requested by Anand Rangarajan (I057553) to approve this budget.

Choose one of the decision options given.
In case of rejection you have to state a reason in the assignment Block 'Attachments' by clicking on the 'Add Note' button. This completes the processing of this step.

Attachments Add Note

No result found

Recipients



Note - Workflow Task -- Webpage Dialog

Description

Text

Hello Initiator,
Please consider revising the budget for your Campaign and send it back to me.

Regards
Anand

This note is attached to the work-item container and thus can be accessed by the initiator or subsequently anyone who gets the work-item after the approver adds the note to the work-item. The note is now the part of the workflow container.

For both Decision Work-item and the Executable work-item, it's possible to navigate to the corresponding business transaction by clicking on the hyper-link as shown below. For most standard BOR objects, the hyperlink will take them to the corresponding business transaction in the display mode.

Workflow Task: Budget Approval for Campaign CRM-LK01-CAM-C5

Back Reserve Forward Cancel

Remaining Budget on Higher-level plan\Campaign:
Detailed Budget: EUR 2.000.000,00

You are requested by Anand Rangarajan (I057553) to approve this budget.

Choose one of the decision options given.
In case of rejection you have to state a reason in the assignment Block 'Attachments' by clicking on the 'Add Note' button. This completes the processing of this step.

Before you make a decision, you can create your own attachments.
If you choose Cancel, the workflow will be terminated.

Your Workflow System

Hyperlinks to corresponding Business Transaction

Hyperlink to access attachments and Notes

Associated Business		Type
Description	CRM-LK01-CAM-C5	MktgProjectCampaign
	Anand Rangarajan	user

Attachments			Type
Actions	File Name		
	Budget inappropriate	Note	Office Document
	Workflows Migration Considerations.xls	MS Excel File	Office Document

3) Deadlines Work-items:

- The Deadline work-items are shown on the work-list with the subject- Missed Deadline ... As soon as the work-item reaches the deadline, there will be a deadline work-item send to the apt recipient

Below screenshot shows a missed deadline work-item:

Decision	Due	Subject	Se...	Du...	Priority	Associated Bus...
		Missed Deadline:Lead: 200005955 : test ac	10...		5 Me...	No Object Asso...
		ACTION: Describe why Lead 200005957 (WF AC) has been rejected	05...		5 Me...	0200005957 W...
		Enter Budget for Campaign element CRM-LK01-CAM-CE1	21...		5 Me...	CRM-LK01-CA...

- The screenshot below shows the traffic light indicator which gives the idea to the user about the nearing deadline. If green then user has two or more days for the deadline to be elapsed, if yellow, then the user has only one day for the deadline to be elapsed, if red, then the deadline has already elapsed.


Task Text	Priority	Decision	Due	Sent Date	Due Date	Associated Business Object
Display Campaign	5 Medium			13.04.2009		Service Order / 8000001011 / Service ...
Display Campaign	5 Medium			11.04.2009		No Object Associated
Display Campaign	5 Medium			11.04.2009		No Object Associated
Display Campaign	5 Medium			11.04.2009		No Object Associated
Port * does not exist in the table of port descri...	5 Medium			03.04.2009		Message for IDoc Error Handling
EDI: Partner profile not available	5 Medium			03.04.2009		IDoc
Port * does not exist in the table of port descri...	5 Medium			03.04.2009		Message for IDoc Error Handling
Port * does not exist in the table of port descri...	5 Medium			03.04.2009		Message for IDoc Error Handling
EDI: Partner profile not available	5 Medium			03.04.2009		IDoc
Port * does not exist in the table of port descri...	5 Medium			03.04.2009		Message for IDoc Error Handling

Related Notes Pertaining to Deadlines Work-items

- Note 1311125: UIU WFI-Work item due date missing in the worklist
- Note 1388337: Deadline Notification in CRM Workflow Inbox

Deadline Work-items are not shown on the CRM Work-list without the implementation of the above notes. However the deadline work-items functionality is not fully functional the way its done via the SAP Business Workplace, for instance unlike SAP Business Workplace, there is no option to Set the Deadline Work-item to 'Done' from CRM UI Work-item. Hence as off BBPCRM 7.0 patch level 5, the functionality of deadline work-

item in CRM work-list is not stable and doesn't match the behavior it had in SAP Business Workplace and lot is still desired in this area.

Note: The 'Cancel' button shown on the screenshots above is not provided by the Standard CRM, it's a custom button which functions similar to the standard  button.

Results

CRM 7.0 Work-list can be also utilized for processing work-items from the CRM Web-client UI, however the features and the drawbacks it has over the classic SAP Business workplace should be considered before you eventually start using CRM work-list as the tool for processing work-items.

Conclusions

- a) It's possible to execute the following types of Work-items from the CRM Work-list
 - 1) Executable Work-item
 - 2) Decision Work-item
 - 3) Deadline Work-item
- b) It's possible to forward\ Reserve\Reset Reservation of Executable and Decision Work-items.
- c) Navigation possible from the Work-item to the relevant business transaction\ attachment from the CRM work-list.
- d) New Feature is available within CRM 7.0 Work-list which helps addition of ' Notes' to the workflow container
- e) Folders like SAP Inbox and SAP Outbox which were available in SAP Business Workplace are no longer available in CRM 7.0 Work-list. Best possible solution lies in providing Transaction Launch of SO13 in CRM UI Work-list.
- f) Deadline Work-item functionality can be realized within CRM 7.0 Work-list by application of certain Notes. However the behavior of Deadline Work-item in CRM 7.0 work-list is not as it was in SAP Business Workplace and hence it's possibly unstable.

Related Content

My Project experience

For more information, visit the [Customer Relationship Management homepage](#).

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