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SAP® CRM Web Client—
Customizing and Development

Galileo Press
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Users log on to the CRM system and then use a predefined business role to access all applications assigned to this role. Therefore, the business role is the central object for controlling the navigation bar.

2 Role Concept

Due to the complexity of the role definition and profile definition in the CRM Web Client environment, we have decided to devote an entire chapter to this subject. At the beginning of this chapter, we will, once again, briefly describe the general business scenario (Customer Interaction Cycle) and its role concept. We will then focus on the roles and profiles used to control the CRM Web Client.

2.1 General Information about the Role Concept

When SAP launched version CRM 2006s, the SAP CRM application was based on a simple role concept. In its standard delivery, the user interface of the CRM Web Client is already adjusted to the role used and with version CRM 2007, SAP delivered more than 35 predefined business roles in the standard system. Sample business roles include marketing, sales, and service employees as well as IC agents. You can adjust the business roles that SAP delivers in the standard system to your individual business processes, and thus incorporate your typical business requirements into the system. We recommend that before making any adjustments, you always copy the standard business role to the customer namespace first. Often, the business roles delivered in the standard system provide a good basis for subsequent adjustment to your business requirements.

SAP CRM 2007 provides a range of business scenarios and business processes that describe end-to-end business processes involving several SAP and non-SAP components. Figure 2.1 shows a universally valid business scenario with the following four standard business roles: Marketing Professional, Sales Professional, Service Professional, and IC Agent.
The navigation bar in the CRM Web Client is tailored to the specific employee tasks and roles within an enterprise. While an employee who has been assigned the business role *Marketing Professional* has a menu option entitled *Marketing* so that he can create campaigns or segment target groups, this menu option is missing for employees who have been assigned the business role *Sales Professional*, *Service Professional*, or *IC Agent*. The same goes for employees who have been assigned the business role *Service Professional*. The navigation bar for such employees contains additional menu options (e.g., *Service Orders* and *Service Contracts*) that are not required for employees who have been assigned other business roles. For this reason, these menu options are not displayed in their navigation bar. On a day-to-day basis, users of CRM applications specialize in one area within the value chain. Accordingly, they see only a specialized extract of the business scenario. In the standard delivery of the CRM Web Client, however, this extract has already been adjusted to their precise task within the enterprise. Before we discuss the various types of roles and profiles used to control the CRM Web Client, we will take another look at the central roles in the general business scenario from a CRM perspective.

Even though this book does not focus on mapping the different scenarios available in SAP CRM 2007, we want to briefly bring your attention to some...
theoretical aspects that will help your understanding of the CRM Web Client role concept. We also recommend that you read the book *mySAP CRM* [by Buck-Emden/Zencke, SAP PRESS 2004], which provides you with detailed information about the CRM Business Scenario.

**Note**

A detailed description of the functions used in the SAP CRM business scenarios and business processes is available in SAP Library under SAP CUSTOMER RELATIONSHIP MANAGEMENT • COMPONENTS AND FUNCTIONS and on the SAP Service Marketplace at service.sap.com/okp.

### 2.1.1 Marketing Professional

To enable enterprises to fulfill complex marketing tasks, SAP's CRM Web Client provides CRM applications with a comprehensive, open, modular, and customizable solution for the entire Marketing process.

The marketing solution works very closely with the other areas within the general business scenario (sales and service). Interaction channels are used to make existing data available to other enterprise areas for further processing. Let's take a closer look at the user interface for the *Marketing Professional* role, which is contained in the standard delivery (see Figure 2.2).

**Figure 2.2** Business role: Marketing Professional
The navigation bar of the user interface is tailored to marketing tasks and their areas of application. Consequently, an employee in the marketing department can quickly process the operational marketing tasks that have been assigned to him.

As is the case for all other business roles, you can always customize the business role delivered in the standard system (see Section 2.5).

### 2.1.2 Sales Professional

**Sales at a glance**

The second phase in the general business scenario is dedicated to sales (see Figure 2.3). Information acquired from marketing activities is transferred to the sales department for further processing, that is, in order to establish business relationships with new customers and to strengthen existing relationships with old customers [Emden/Zencke, *mySAP CRM*, 2004]. For these tasks, the CRM Web Client makes planning, implementation, and control activities available to sales employees.

![Home Page](image)

**Figure 2.3** Business role: Sales Professional

For special sales tasks, we recommend that you use existing, specialized business roles such as the Leasing Manager or Sales Manager business role. Because the steps that comprise the daily sales process are highly complex and
rarely processed in a linear fashion, the sales user interface usually requires the most adjustment.

The navigation bar of the Sales Professional business role has already been tailored to sales-related areas of application. The key CRM activities for sales are grouped together under the relevant menu options in the navigation bar.

### 2.1.3 Service Professional

In the general business scenario, service is key to ensuring long-term customer retention. Of all enterprise areas, customers have the most contact with the service enterprise area. For this reason, SAP has acknowledged the importance of service by introducing a wide range of functions into its integrated CRM solution. In addition to the classic Service Professional business role, which takes care of the entire service process (from the initial contact through to rendering services, shipping spare parts, and billing), there are other specialized service business roles.

The service functions are therefore closely coupled with the other application components in the general business scenario. Existing interfaces can also be used to establish links with external systems (see Figure 2.4).
Once again, the navigation bar of the user interface has already been adjusted to the requirements of the employee role within the enterprise. Here, there are no menu options that are particularly necessary for the sales or marketing roles.

### 2.1.4 IC Agent

**IC Agent at a glance**

In many enterprises, the IC employee (also known as an IC agent) is the direct interface to the customer. Both orders and complaints are received via this user interface. An IC agent may be employed anywhere within the general business scenario. In marketing, he can perform telemarketing tasks, while in sales, his activities relate to telesales. You should make use of the many business roles delivered in the standard system, for example, IC Agent – Insurance, IC Agent – Leasing, or IC Manager.

**IC Agent: task areas**

Figure 2.5 shows the user interface of an IC Agent. This user interface clearly differs from the other role-dependent user interfaces. Here, the header area has been adjusted to the needs of the IC Agent.

![IC Agent User Interface](image)

**Figure 2.5** Business role: IC Agent
In addition to the information box for messages if a caller contacts the IC, functions for controlling the call have also been defined in the header area of the user interface. We will not continue our discussion of the IC scenario in the chapters that follow. Instead, we refer you to the book entitled *Maximizing Your SAP CRM Interaction Center* by John Burton, which is also published by SAP PRESS.

### 2.2 Technical Description of the Role Concept

To display individual user interfaces for your employees, you need a well-devised role concept. The role concept for the CRM Web Client ensures that all of the enterprise areas in the general business scenario can be mapped via a user interface. Before we actually implement the role concept in the CRM system, we will first introduce you to the specific terms used in conjunction with the CRM role concept. If you are already familiar with this terminology, you can skip the sections that follow.

Roles are collections of activities that enable a user to participate in one or more business scenarios within an organization. The navigation bar in the CRM Web Client is used to access the transactions, reports, or web-based applications contained in the roles. The navigation bars should contain only those functions generally used by a particular user in his daily work.

Role assignment also ensures the integrity of business data. Authorization profiles that limit the range of actions that can be performed by individual users in the SAP CRM system are created in accordance with the activities contained in roles. We will now take a look at the tasks of the various roles and profiles available to you when devising a role concept for the CRM Web Client.

**Definition: User Master Record**

A user master record (SAP logon user) is a prerequisite for logging on to the SAP system. It is used to assign a role to a user, that is, to determine the activities intended for a particular user and the authorizations granted to that user.

**Definition: Business Partner**

This generic term stands for partners in which an enterprise has a business interest. Partners also include organizations (e.g., enterprises) and persons in different roles (e.g., contact partners within an enterprise).
Definition: Business Role
The business role is a role in the CRM system that contains business content from CRM applications (e.g., marketing, sales, and service). This content is then displayed in the CRM Web Client. The user logs on to the CRM Web Client and uses a defined business role to access the CRM applications assigned to him. Business roles are the central unit of the role concept.

Definition: Authorization Role
The authorization role (also known as the PFCG role) is created using a profile generator. An authorization role is used to automatically or manually generate an authorization profile for users. This role can then be assigned to the user master record or business role by using the report CRMD_UI_ROLE_ASSIGN. You can create authorization roles as single roles or composite roles, which comprise two or more single roles.

Definition: Authorization Profile
The authorization profile is a technical container for authorized functions (e.g., SAP transactions) and the organizational area (e.g., plant or cost center) in which the functions must be executed (limited organizational level). Therefore, the profile contains authorizations that can be identified using the name of an authorization object and the name of an authorization.

Definition: Navigation Bar Profile
The navigation bar profile contains the logical structure for calling internal and external applications from the CRM Web Client. It describes the navigation bar of the user interface, and its structure is specifically designed for individual business roles.

Definition: Technical Profile
The technical profile is assigned to the business role. The call for the Internet page loaded after you log off from the CRM Web Client is defined here. For downward compatibility reasons, SAP recommends that you retain all other settings. It is possible to adjust the settings for browser navigation (SAP Note 1002385). However, SAP advises against using browser navigation.
Definition: Function Profile

The function profile activates functions for the IC agent user interface, among others. Configurations that belong to the functions are generally defined and processed in separate Customizing activities (e.g., Personalization). Parameters and Runtime are examples of function profiles that the framework has validated for non-IC scenarios. The function profile is assigned to the business role.

Definition: Layout Profile

The layout profile defines the navigation frame of the CRM Web Client. This navigation frame can be used to define the header area, footer area, work area, and navigation bar. The layout profile, on the other hand, is assigned to the business role.

2.3 Role and Profile Dependencies

The roles and profiles defined in the CRM Web Client depend on each other, and the business role is at the core of this role dependency. Business roles are used to encapsulate the content defined for a user interface. Figure 2.6 shows the dependencies between profiles, roles, and the organizational model for the business role.

Figure 2.6 Business Role and Dependencies

The business role is the central object for controlling a user interface with a navigation bar, logical links, and authorizations (1 in Figure 2.6). The following profiles or keys are assigned to the business role:
You access the business role configuration in the SAP Implementation Guide under the path **CUSTOMER RELATIONSHIP MANAGEMENT • BUSINESS ROLES • DEFINE BUSINESS ROLES** or in Transaction CRMC_UI_PROFILE.

In the sections that follow, we will show you the structure of the business role and the assigned profiles in detail. We will then assign this business role to the organizational model (2 in Figure 2.6; see also Section 2.4). As a result of this assignment, each employee in the enterprise obtains his own business role and therefore his specific user interface for his daily work with the CRM Web Client. In a final step, the SAP logon user or a business partner with the role **Employee** is assigned to the organizational model (3). The necessary Customizing settings for creating a business role are shown in the practical example discussed in Section 2.5.

### 2.3.1 Navigation Bar Profile

When starting the Customizing activities for setting up a separate user interface, you should create a new navigation bar profile or copy a navigation bar profile that already exists in the standard system. The navigation bar contains links to all work centers that belong to a role and the work centers contain links to the search pages of the business objects that belong to each work center. The navigation bar also contains direct links to the user’s calendar or work list. After the navigation bar profile has been configured, it is assigned to a new or copied business role.
You start the navigation bar profile configuration in the SAP Implementation Guide under the path CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • TECHNICAL ROLE DEFINITION • DEFINE NAVIGATION BAR PROFILE or in Transaction CRMC_UI_NBLINKS.

Figure 2.7 Navigation Bar Profile

Figure 2.7 shows the navigation bar profile configuration and sample user interface for the business role Service Employee. All of the logical links, direct links, and work center pages for the navigation bar are defined here. Logical links are found under the direct links in the navigation bar, on the lower-level navigation, and in the info blocks for the work center pages (1 in Figure 2.7). Logical links are also used to call the work center pages themselves. You can group logical links into link groups (2). Such link groups are found, for example, in the info blocks for the work center pages. In addition to the logical links, you also use the navigation bar profile to define the work center page for the navigation bar. 3 also shows that you can group logical links into groups known as work center link groups, which you can then assign to one or more work center pages. These result in the context menus provided in the navigation bar, for example. The direct links are created under 4, that is, in the dialog structure of the navigation bar profile. Direct links are found in...
the lower part of the navigation bar. They can call both internal and external applications either directly in the work area or in an external window.

After you have defined the logical links, direct links, and work center pages, you must assign them to the navigation bar profile. In this way, you can determine the sequence in which the work center pages and direct links appear on the navigation bar. Finally, the navigation bar profile you have just created is assigned to your business role.

### 2.3.2 Technical Profile

You can use the technical profile to disable Internet browser navigation and frame swapping in an effort to reduce screen flickering. Here, you also reserve the corresponding memory requirement for business processes.

You start the technical profile configuration in the SAP Implementation Guide under the path **CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • TECHNICAL ROLE DEFINITION • TECHNICAL PROFILE**.

![Technical Profile](image)

**Figure 2.8** Technical Profile

Figure 2.8 shows a standard profile for the Channel Manager business role. You can define the memory threshold under 1. This value represents the server memory space requirement in megabytes (MB) and determines when a new application session is started. A check is performed to determine whether the current memory consumption is higher than the threshold specified in the technical profile of the business role. If memory consumption is higher than the threshold, the system ends the current session and starts a new session. We recommend that you define a higher threshold for business scenarios that have high memory requirements. We recommend a threshold of 70MB...
for standard business scenarios and 100MB for business scenarios associated with marketing or trade promotions.

For information about assigning a new default skin (2 in Figure 2.8), see SAP Note 1137677. You can also adjust the cookie settings here. In very general terms, cookies are information sent by a web server to an Internet browser or information generated on the client side. Client-side cookies comprise persistent/saved data. Here, the session information is defined as a session cookie or coded as part of the URL (mangling). If you enable this checkbox in the technical profile, a URL parameter is set and the use of cookies is not permitted.

You can use the technical profile to specify which Internet page is called when a user logs off from the CRM Web Client (3 in Figure 2.8). Here, you define a new URL, which is called when a user logs off from the CRM Web Client. In the standard system, the Internet page for SAP AG (www.sap.com) is entered by default.

After you have configured all of the settings, you add the technical profile to your business role. In business scenarios, the technical role is primarily used with the IC.

2.3.3 Layout Profile

You can use the layout profile to design or control the structure of the entire navigation frame. Various different layouts are delivered in the standard system, even for the IC.

You start the layout profile configuration in the SAP Implementation Guide under the path Customer Relationship Management • Business Roles • Define Navigation Frame.

1 in Figure 2.9 shows the configuration overview of the layout profile. You use the layout profile to define the navigation frame for your user interface, which comprises the header, footer, and work areas as well as the navigation bar. The header area is a static area within the user interface. You cannot scroll here and only one header area is provided for all applications in the CRM Web Client.

This layout, which is used to structure the header area, is the standard implementation. You can customize your own header area for your layout profile. The layout components for customizing the header area are available in the SAP Implementation Guide under the path Customer Relationship Management • UI Framework • Technical Role Definition • Define Layout Components. 2 in Figure 2.9 shows an extract from the layout configura-
You can reconfigure parts of the layout here or you can create new individual parts for the navigation frame.

Figure 2.9  Layout Profile

### Tip

We recommend that you access standard layout profiles because these layout profiles, which are delivered in the standard system, will satisfy most of your requirements. Do not forget to assign your newly created layout profile to the business role.

### 2.3.4 Role Configuration Key

In addition to the navigation bar profile, the technical profile, and the layout profile, you also assign a role configuration key to the business role. The use of a role configuration key ensures that you do not have to change any standard SAP views. You use the UI Configuration Tool to assign a role configuration key to a copied view. Later on, you will also use the UI Configuration Tool to design the user interface for a particular business role (see Chapter 5, Section 5.1). To identify the screen configuration you have created, the role configuration key is assigned to your business role.

You define the role configuration key in the SAP Implementation Guide under the path CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • UI FRAMEWORK DEFINITION • DEFINE ROLE CONFIGURATION KEY or by using the view CRMV_UI_CONFIG (Transaction code SM30).
After you have created a role configuration key (1 in Figure 2.10), you assign this key to your business role (2). If you now want to make changes to the user interface for this business role, you select your new role configuration key in the UI Configuration Tool (3) and copy the configuration for the standard SAP view to the namespace for the configuration key you have created. You can now make changes to the layout, while the standard view remains unchanged. If a user in the business role you have created uses the assigned role configuration key to log on to the CRM Web Client, this key is used to determine the new layout. The standard role configuration key is <*, which always uses the standard view. SAP Note 1248281 uses an example to describe this scenario.

2.3.5 Authorization Role

The authorization role, also known as the PFCG role, is also assigned directly to the business role. It contains the authorizations required to perform the business functions that comprise the business role. Most authorizations do not have a direct impact on the CRM Web Client (aside from the authorization object UIU_COMP). You start the authorization role configuration in the SAP Implementation Guide under the path CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • TECHNICAL ROLE DEFINITION • DEFINE AUTHORIZATION ROLE or in Transaction PFCG.

In general, SAP recommends that you define the CRM Web Client functions in Customizing. If Customizing does not serve your purposes, you can use report CRMD_UI_ROLE_PREPARE and Transaction SU24 to determine the necessary authorization objects. Report CRMD_UI_ROLE_PREPARE supports you in generating and assigning authorization objects to an authorization role. After you have created the authorization role, it is assigned to the business role. The defined authorizations are active the next time the user uses
the modified business role to log on to the system. For additional information about determining the correct authorization objects, see Chapter 6, Section 6.3 and SAP Notes 551478 and 449832. In addition, general information about creating authorizations is available in the SAP Library at help.sap.com under the path SAP R/3 and R/3 ENTERPRISE • SAP R/3 and R/3 ENTERPRISE 4.70 • SAP NetWeaver Components • SAP Web Application Server • Security • Users and Roles • First Installation Procedure and Upgrade Procedure and in the documentation for the IMG activity under the path Customer Relationship Management • UI Framework • Technical Role Definition • Define Authorization Role or Transaction code PFCG.

**Note**

If, while copying a business role, the system issues an error message indicating that one PFCG role cannot be assigned to several business roles, please refer to SAP Note 1155828.

### 2.4 Organizational Model and Role Assignment

Now that we have taken a detailed look at the structure of the business role, the next step involves assigning the business role to the organizational model.

You start the organizational model in the SAP Implementation Guide under the path Customer Relationship Management • Business Roles • Define Organizational Assignment or in Transaction PPOMA_CRM.

**Figure 2.11** Organizational Model Within an Enterprise
Organizational Model and Role Assignment

2.4

Figure 2.11 shows the organizational structure of an enterprise in organizational units. The structure of the organizational model reflects the regional structure of the enterprise. The model is created using the elements outlined in Table 2.1.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Organizational</td>
<td>Branch office or department</td>
</tr>
<tr>
<td></td>
<td>Position</td>
<td>Available position within a</td>
</tr>
<tr>
<td></td>
<td>Employee</td>
<td>Business partner</td>
</tr>
<tr>
<td></td>
<td>User</td>
<td>User master record</td>
</tr>
</tbody>
</table>

Table 2.1 Icons Used in the Organizational Model

In the first step, you replicate the structure of your enterprise. Organizational units enable you to depict the structure of your enterprise in detail. For each enterprise unit, you define the address and function, which comprises sales, service, or marketing. Here, you can also define attributes for each scenario (sales, service, or marketing). Therefore, each scenario depicts a different view of the organizational structure. In addition to the defined attributes, which are valid for the relevant scenario, you must also decide whether each organizational unit is to be considered in the scenario. If so, you must define an indicator here.

Note
The Web Client UI framework will still operate successfully if you do not explicitly define an address or describe a function for each enterprise unit. However, we have mentioned both for the sake of completeness.

In the next step, you assign positions to each organizational unit. Here, you can assign several positions to one organizational unit. You define the validity period for a position and identify a manager for the organizational unit. You can also maintain a function (sales, service, or marketing) for each position. If this does not happen, the position inherits the attributes of the parent organizational unit. Note that performance problems may occur if you create too many positions (see SAP Note 389869).

After you have assigned the positions to the organizational units, the employees are assigned to the positions. To do this, you can assign a user (user master record, Transaction SU01) or business partner with the role Employee.
(Transaction BP) to the position. Both settings are possible and there are no disadvantages to either when logging on to the CRM Web Client. Before you assign a business partner with the role Employee, check the following:

1. Start Transaction BP.
2. Select a business partner that has the role Employee.
3. Select the IDENTIFICATION tab. Is the user master record (SAP logon user) defined?

Figure 2.12 shows the assignment of a business partner with the role Employee. You can use the menu bar above the organizational model to edit organizational units, and you can use the context menu to assign the business partner with the role Employee or to assign the user. The drag-and-drop function is also supported here.

How are business roles assigned to employees within your enterprise? In general, it is possible to assign the business role at the organizational unit level. All employees below this organizational unit then obtain the assigned user interface.
Select the location in the organizational model to which you want to assign the business role. In Figure 2.12, the position is in the Service North position. Then, use the menu path GOTO • DETAIL OBJECT • ENHANCED OBJECT DESCRIPTION to assign the business role to the position. Select the entry BUSINESS ROLE for the position and store the business role you have created for the position within the SERVICE NORTH organizational unit. Finally, log on to the CRM Web Client and check whether the system calls your business role.

For information about assigning authorizations when creating users or business partners (report CRMD_UI_ROLE_ASSIGN), see Section 2.3.5.

You have already created the authorization profile in the PFCG role and maintained authorizations there. However, they have not been assigned to the users/business partners that require the PFCG role (based on the business roles assigned to them in the organizational model). This is done using report CRMD_UI_ROLE_ASSIGN, which also assigns PFCG role SAP_CRM_UIU_FRAMEWORK (required by the Web Client) to users. According to SAP Note 1282024, you can also run report CRMD_UI_ROLE_ASSIGN via central user administration.

**Note**
If you want to upgrade your CRM system from CRM 5.0 to CRM 2007 or CRM 7.0 and want to migrate existing authorization roles (PFCG), you can check SAP Note 1259665 for additional information.

### 2.5 Practical Example: Business Role

The practical example in this section describes the following steps:

1. Creating an authorization role
2. Creating a business role (service)
3. Using the organizational model to assign the business role
4. Logging on and testing the new business role

#### 2.5.1 Creating an Authorization Role

We recommend that you create the authorization role (PFCG role) before you create a new business role.
1. **Call the authorization role.**
   To call an authorization role, access the path **CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • TECHNICAL ROLE DEFINITION • DEFINE AUTHORIZATION ROLE** in the SAP Implementation Guide or call Transaction PFCG.

2. **Copy an authorization role.**
   In role maintenance, select authorization role **SAP_CRM_UIU_SRV_PROFESSIONAL** and copy it to the customer namespace (ZCRM2007_UIU_SRV_PROFESSIONAL). In the standard system, authorization role **SAP_CRM_UIU_SRV_PROFESSIONAL** is used for service business role **SERVICEPRO** (see Figure 2.13).

![Figure 2.13 Copying the Authorization Role](image)

### 2.5.2 Creating a Business Role (Service)

After you have created the authorization role, the next step is to create a new business role. In the example that follows, we chose to create a service business role. Once again, we will access the business roles already created in the standard system and customize them accordingly.

1. **Call the business role.**
   You are already familiar with the path used in the SAP Implementation Guide to call the business role: **CUSTOMER RELATIONSHIP MANAGEMENT • BUSINESS ROLES • DEFINE BUSINESS ROLE**. Alternatively, you can use Transaction CRMC_UI_PROFILE.

2. **Copy the business role.**
   Select the standard business role **SERVICEPRO** and copy it to the customer namespace (ZCRM2007SPRO), as shown in Figure 2.14 (1).
You already know the definition of business role ZCRM2007SPRO, which comprises the Role Configuration Key, Navigation Bar Profile, Layout Profile, Technical Profile, and Authorization Role assignments. These entries have already been maintained for the copied standard business role SERVICEPRO.

3. **Assign the authorization role.**
   After you have copied business role ZCRM2007SPRO, authorization role ZCRM2007_UIU_SVR_PROFESSIONAL is assigned to the newly created business role ②.

![Dialogue Structure](image)

**Figure 2.14** Creating a Business Role

### 2.5.3 Using the Organizational Model to Assign the Business Role

The business role you have created (ZCRM2007SPRO) will now be assigned to one or more employees within your enterprise. You must then call report CRMD_UI_ROLE_ASSIGN to assign the PFCG role.

1. **Call the organizational model.**
   Use the now familiar path for calling the organizational model (CUSTOMER RELATIONSHIP MANAGEMENT • BUSINESS ROLES • DEFINE ORGANIZATIONAL ASSIGNMENT), or call Transaction PPOMA_CRM.

2. **Create an organizational unit.**
   Find the organizational unit US OFFICE. Under the service unit SERVICE WEST, create the new position SERVICE WEST PL ① in Figure 2.15.

---

**Assigning the authorization role to the business role**

**Creating the organizational unit and position**
3. **Create a position.**
After you have created the SERVICE WEST PL position, you can enter an additional description. Activate the SERVICE function for the position.

4. **Assign a business partner.**
Assign 1 to n business partners with the role Employee (Transaction BP) or User (Transaction SU01) to the SERVICE WEST PL position. To do this, right-click the position and select the ASSIGN (3) option from the context menu.

```
Assigning a Position and Business Partner
```

5. **Assign the business role.**
After you have assigned the business partner or user to the organizational model, the next step is to assign the business role you created (ZCRM-2007SPRO). You can assign the business role to organizational units or to positions. In this case, select the position you created (SERVICE WEST PL) and follow the menu path GOTO • DETAIL OBJECT • ENHANCED OBJECT DESCRIPTION to assign the business role to the position SERVICE WEST PL (1 in Figure 2.16).

6. **Create a business role.**
Select the business role you created (ZCRM2007SPRO, 2) and assign it to the position you have selected (SERVICE WEST PL, 3).
Practical Example: Customizing the Corporate Identity

2.6

Assigning the Business Role

Figure 2.16 Assigning the Business Role

2.5.4 Logging On and Testing the New Business Role

After you have assigned business role ZCRM2007SPRO to the position Service West PL, log on to the CRM Web Client (see Chapter 1, Section 1.4) and test the settings.

Tip

To check whether the correct business role is determined after you have logged on to the CRM Web Client, you can move the mouse pointer over the PERSONALIZE system link in the header of the user interface. The business role will then be displayed in the lower status bar of the Internet browser. The name of the business role is shown at the end of the URL.

2.6 Practical Example: Customizing the Corporate Identity

The practical example in this section describes the following steps:

1. Localizing the data on SAP NetWeaver AS
2. Replacing the company logo
3. Customizing the color and font
4. The content of important files at a glance

2.6.1 Localizing the Data on SAP NetWeaver Application Server

Before adjusting the user interface to include a new corporate identity design, you should familiarize yourself with NetWeaver AS, which controls the structure of the browser pages.

1. **Create the network path.**
   Start Windows Explorer and select **My Network Places** (1 in Figure 2.17). Then select **ADD NETWORK PLACE** to add a new network address (2).

![Creating the network path](image)

**Figure 2.17** Creating the Network Path

2. **Define the network path.**
   In the HELP window, define the path in which information about the CRM Web Client is stored (3) and then enter a meaningful description for the network drive you have created. The standard system uses the following path:

   http://<server>:<port>/sap/bc/bsp_dev/sap/thtmlb_styles/?sap-client=<client>

   Important information about the server name and port is available in Transaction SMICM (or under the menu path GOTO • SERVICE).
All of the layout templates that can be selected via PERSONALIZE (system links) are available under the network drive you have just created. For a new layout, we recommend that you make a local copy of this folder and edit the copy offline. We do not recommend online editing because it can be very slow.

2.6.2 Replacing the Company Logo

It goes without saying that the company logo, which you can customize as follows, is an integral part of the corporate identity:

1. **Create a local copy.**
   Copy the Default folder to a local hard disk. This may take several minutes.

2. **Change the company logo.**
   There are two ways in which you can adjust the company logo. You can create a new company logo (111 × 42 pixels) and assign it a relevant file name (e.g., logo_sap.gif). You then copy the company logo to the directory …/styling/lshape for your local copy. In this case, you must adjust the style sheets in the file thtmlb_stand.css in accordance with the new file name for the company logo (logo_sap.gif).

   This brings us to the second way in which you can adjust the company logo: Replace the old company logo with a new logo that has the same file name. In this case, you do not have to adjust the program code. You then copy the modified files back to SAP NetWeaver AS.

3. **Activate the layout profile.**
   You make the layout profile known in table CRMC_THTMLB_SKIN (Transaction SM30). Define the new skin name ZSAP_PRESS, the description, and the source path of the layout profile.

4. **Test the application.**
   Now test the application. The new entry, SAP PRESS, is now available under PERSONALIZE (system links).

Additional information about customizing the corporate identity for the CRM Web Client is available at http://help.sap.com (search word: SKIN).

2.6.3 Customizing the Color and Font

You can use the file thtmlb_stand.css to customize the colors for the navigation bar, header, and work area. This file is very well documented. Find the HTML program code that describes the part of the user interface you want to customize, and change the color accordingly.
You can also use the file `thtmlb_stand.css` to customize the font. In the standard system, the fonts Arial and Helvetica are defined for the DEFAULT user interface. You can supplement the HTML program code with your own preferred fonts. A great deal of additional information about customizing the font and color is available in the SAP Help Portal (http://help.sap.com).

### 2.6.4 Content of Important Files at a Glance

Table 2.2 provides an overview of key file names and their properties when personalizing the user interface.

<table>
<thead>
<tr>
<th>CSS File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>thtmlb_core_stand.css</code></td>
<td>Launch file for all layout applications</td>
</tr>
<tr>
<td><code>generic.css</code></td>
<td></td>
</tr>
<tr>
<td><code>thtmlb_stand.css</code></td>
<td>The settings for background color, browser-independent colors, and the position of the company logo are defined here. There are also files for special browser versions.</td>
</tr>
<tr>
<td><code>main.css</code></td>
<td></td>
</tr>
<tr>
<td><code>thtmlb_visuals_stand.css</code></td>
<td>Controls effects in the navigation bar (e.g., mouse-over movements).</td>
</tr>
<tr>
<td><code>printpreview.css</code></td>
<td>Screen display for printers</td>
</tr>
</tbody>
</table>

Table 2.2 Overview of Important CSS Files
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