

# ReadSoft PROCESS DIRECTOR for use with SAP Fiori®

## Installation and Configuration Guide

Date: 2019-12-19



© 2019 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

# Table of Contents

|  |           |
|--|-----------|
| <b>Overview .....</b>  | <b>6</b>  |
| Prerequisites.....   | 6         |
| <i>Frontend</i> .....  | 6         |
| <i>Backend</i> .....   | 6         |
| ReadSoft PROCESS DIRECTOR for use with SAP Fiori® transports ..... | 7         |
| <i>Location</i> .....  | 7         |
| <i>Importing the transport</i> .....                               | 7         |
| Checking the namespaces .....                                      | 7         |
| Licensing.....   | 8         |
| Supported user types .....   | 9         |
| <b>Configuration.....</b>  | <b>10</b> |
| Authorizations and roles .....                                     | 10        |
| <i>Assign the Web Service to user roles</i> .....                  | 10        |
| SAP launchpad designer .....                                       | 11        |
| <i>Starting the launchpad designer</i> .....                       | 11        |
| <i>Dynamic tiles</i> .....   | 12        |
| Worklist.....  | 13        |
| <i>Open the Worklist configuration</i> .....                       | 13        |
| <i>Create the top level node</i> .....                             | 13        |
| <i>Create the subnodes</i> .....                                   | 14        |
| <i>Generate the Worklist</i> .....                                 | 15        |
| View model .....   | 15        |
| SAP Internet Communication Framework.....                          | 15        |
| <i>Activate the service element tree node</i> .....                | 15        |
| Activate and maintain services .....                               | 16        |
| SAP Gateway troubleshooting .....                                  | 16        |

## Overview

Kofax ReadSoft PROCESS DIRECTOR™ supports the process of document entry into SAP.

The aim is to facilitate automatic posting of error-free data records, as well as to support Accounts Payable personnel in the process of identifying and amending documents that contain errors. Kofax ReadSoft PROCESS DIRECTOR Accounts Payable™ is like an invoice entry ledger.

SAP Fiori® is a platform that provides the porting of applications on mobile devices. It is based on SAP's technology platform, NetWeaver. SAP Fiori® enables applications to be used on desktop computers, tablets, and smartphones, and supports HTML5.

You can configure the ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-ons to suit the requirements of your organization.

For more information on configuring ReadSoft PROCESS DIRECTOR and ReadSoft PROCESS DIRECTOR Accounts Payable, refer to the following guides.

- PROCESS DIRECTOR Accounts Payable Configuration Guide
- PROCESS DIRECTOR Import Guide
- PROCESS DIRECTOR Configuration Guide
- WORK CYCLE Configuration Guide
- PROCESS DIRECTOR Web Application Configuration Guide

## Prerequisites

To import the ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-ons into SAP, the following prerequisites need to be met.

### Frontend

For information on the tested and supported SAP Fiori and PROCESS DIRECTOR releases, see the document *ReadSoft PROCESS DIRECTOR Accounts Payable, PROCESS DIRECTOR, and PERFORMANCE ANALYTICS Tested and Supported SAP Releases*.

### Backend

SAP software component SAP\_GWFND 740, Support Package level 015 or higher.

## ReadSoft PROCESS DIRECTOR for use with SAP Fiori® transports

The ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-ons have two transports.

- Front End (FE)
- Back End (BE)

| Product  | Transport  | Description                                 |
|--|------------|---|
| ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-ons        | D67K900972 | Front End (FE): Imported into the gateway   |
| <b>ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-ons</b> | D67K900949 | Back End (BE): Imported into the ERP system |

### Location

The ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-on transport is available on request. For partners and customers, please contact your local representative to place an order.

### Importing the transport

See the *PROCESS DIRECTOR Import Guide* for more information on how to import a transport into SAP.

## Checking the namespaces

The namespaces should have already been created and activated, but it is recommended that you check their settings. To check the settings of the namespaces, complete the following steps.

1. Start the SE03 SAP transaction.
2. In the **Administration** folder, double-click **Display/Change Namespaces**, and then click the **Execute** button.
3. The namespaces should be defined as follows:

|                    |   |
|--------------------|---|
| Namespace          | /COCKPIT/   |
| Namespace role     | C – Recipient   |
| Correction license | 13375972671823267744                                  |
| Short text         | PROCESS DIRECTOR - ReadSoft AG - Germany, Frankfurt/M |
| Owner              | ReadSoft AG   |

**Note:** The /COCKPIT/ namespace is required only for Accounts Payable.

|                    |   |
|--------------------|---|
| Namespace          | /EBY/   |
| Namespace role     | C – Recipient   |
| Correction license | 05790374410114137903                                  |
| Short text         | PROCESS DIRECTOR - ReadSoft AG - Germany, Frankfurt/M |
| Owner              | ReadSoft AG   |

4. In the **Administration** folder, double-click **Set System Change Option**, and then click the **Execute** button.
5. The namespaces should be defined as follows:

|                      |   |
|----------------------|---|
| Namespace/Name Range | PROCESS DIRECTOR - ReadSoft AG - Germany, Frankfurt/M |
| Prefix               | /COCKPIT/   |
| Modifiable           | X - Modifiable  |

|                      |   |
|----------------------|---|
| Namespace/Name Range | PROCESS DIRECTOR - ReadSoft AG - Germany, Frankfurt/M |
| Prefix               | /EBY/   |
| Modifiable           | X - Modifiable  |

## Licensing

The ReadSoft PROCESS DIRECTOR for use with SAP Fiori® add-on is free of charge and no license is required. However, for the main product, namely ReadSoft PROCESS DIRECTOR Accounts Payable, a license is required.

## Supported user types

|                 | <b>SAP GUI</b> | <b>PD Web App</b> | <b>ReadSoft Mobile</b> | <b>PD AP Fiori App</b> |
|-----------------|----------------|-------------------|------------------------|------------------------|
| <b>SAP User</b> | Yes            | Yes               | Yes                    | Yes                    |
| <b>WC User</b>  | No             | Yes               | Yes                    | No                     |

## Configuration

### Authorizations and roles

For transactional applications, ABAP backend users with corresponding roles and authorizations are necessary. The roles provide authorizations for the OData service of the apps. The roles for the transactional apps do not comprise any authorization for the business data that needs to be displayed in the app. It is assumed that these authorizations will be provided by the customer.

For every role, authorizations need to be granted according to the customer's roles and authorization concept. To assign the ReadSoft PROCESS DIRECTOR for use with SAP Fiori® application to users, complete the following steps.

1. Go to the PFCG transaction.
2. Create a new role or select an existing role.
3. Switch to the **Menu** tab.
4. From the **Transaction** button, select **SAP Fiori Tile Group**.
5. Assign the **ZEBYFRAP\_PUBLIC\_GROUP** group ID.
6. From the **Transaction** button, select **SAP Fiori Tile Catalog**.
7. Assign the **ZEBYFRAP\_PUBLIC?AUTH\_DEFAU** catalog provider.
8. Assign the **ZEBYFRAP\_PUBLIC?AUTH\_DEFAU** catalog ID.
9. Save the changes.
10. Add the role to the users.

### Assign the Web Service to user roles

Depending on the existing authorization concepts, the Web Service may need to be added to the user roles. To assign the Web Service to a role, complete the following steps.

1. Go to the PFCG transaction.
2. Select the role that you need to modify.
3. Switch to the **Authorizations** tab.
4. Click the **Change Authorization Data** button.
5. From the **Object class AABB** drop-down list, select the **S\_SERVICE** authorization object.
6. Click the edit icon next to the **SRV\_NAME** node.
7. From the **Type** drop-down list, select **TADIR Service**.
8. From the **Object Type** drop-down list, select **IWSG**.
9. From the **Object Name** drop-down list, select **/EBY/FRAP\_WC\_SRV\_0001**.
10. Save the changes.



## SAP launchpad designer

### Starting the launchpad designer

Start the launchpad designer by using the following URLs:

[https://<server>:<port>/sap/bc/ui5\\_ui5/sap/arsvc\\_upb\\_admn/main.html](https://<server>:<port>/sap/bc/ui5_ui5/sap/arsvc_upb_admn/main.html)

[https://<server>:<port>/sap/bc/ui5\\_ui5/sap/arsvc\\_upb\\_admn/main.html?sap-client=<client>&scope=<CONF/CUST>](https://<server>:<port>/sap/bc/ui5_ui5/sap/arsvc_upb_admn/main.html?sap-client=<client>&scope=<CONF/CUST>)

Launchpad tiles are created in Catalogs. Catalogs are collections of tiles that have similar technical or business functionality (much like the development packages in ABAP).

You can then add the tiles to Groups. Groups are collections of tiles for specific end users and can mix tiles from different Catalogs.

You can grant independent access to Catalogs and Groups.

### Adding a new tile to a group

To add a new tile to a group, complete the following steps.

1. Choose an existing group or add a new group.
2. Select the target mappings. A target mapping defines what to execute when the tile is selected.
3. In the footer, click **Create Target Mapping**. A new form opens.
4. Enter the following information:
  - Semantic Object: Fiori Application
  - Action: <action> (e.g. frap)
  - Application Type: SAP UI5 Fiori App
  - Title: PROCESS DIRECTOR AP
  - URL: Example: */sap/bc/ui5\_ui5/eby/frap/webapp*
  - ID: EBY
  - Device Types: Desktop, Tablet, Phone
5. Activate the **Allow additional parameters** setting.
6. Save the changes and go back to the Tiles view in the Launchpad designer.
7. Add a new tile by clicking the + sign.
8. Select **App Launcher – Static**.
9. Enter the following information.
  - Title: Example: *ReadSoft PROCESS DIRECTOR Accounts Payable*
  - Subtitle: Fiori App
  - Icon: Select an icon (e.g. sap-icon://Fiori2/F0102)
  - Action: The action entered in an earlier step (e.g. frap)
10. Activate the **Use semantic object navigation** setting.

- Semantic Object: Fiori Application

11. Save the changes. The tile is now added to the group.

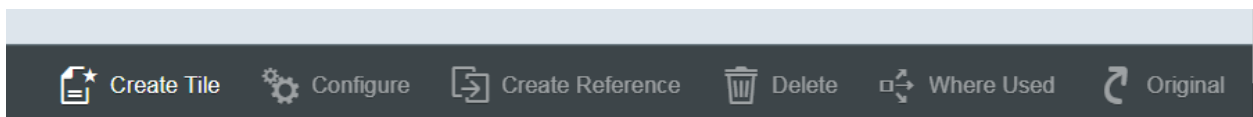
## Dynamic tiles

In dynamic tiles, the data is updated from the database in near real-time.

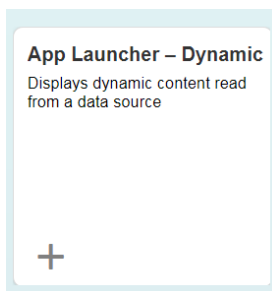
### Creating a dynamic tile

To create a dynamic tile, complete the following steps.

1. Go to the standard Launchpad configuration and click **Create Tile**.



2. On the next screen, select **App Launcher – Dynamic**.



3. In the **General** tab, enter the following information.

- Title: Example: *ReadSoft PROCESS DIRECTOR Accounts Payable*
- Subtitle: Example: *Fiori Add-on*
- Keywords: [Optional]
- Icon: Select an icon (e.g. sap-icon://Fiori2/F0102)
- Information: [Optional]
- Number Unit: Documents

4. In the **Dynamic Data** tab, enter the following information.

- Refresh Interval in Seconds: 30
- This is the number of seconds after which the dynamic content is again read from the data source, and the display is refreshed.

**Note:** The Launchpad uses a default of 10 seconds, unless you enter a higher value in this field. If the value entered is >0 and <10, it will fall back to 10 seconds. If the value entered is 0, the dynamic tile is updated only once (on loading). If the value is >= 10, this value is taken as the refresh interval.

Too small an interval will result in the database being read too often, while a large interval will make the dynamic tile similar to a static one.

- To procure the number of invoices, use the following **Service URL**:  
`/sap/opu/odata/EBY/FRAP_WC_SRV/HeaderSet/$count`
- 5. In the **Navigation** tab, enter the following information.
  - Use semantic object navigation: Select the check box to use this option.
  - Semantic Object: Fiori Application
  - Action: The action entered in an earlier step (e.g. frap)
  - **Note**: This is a standard Launchpad configuration option.
  - Parameters: [Optional]
- The entries in the **Tile Actions** tab are optional and not required to be filled in.

## Worklist

To use the PROCESS DIRECTOR Accounts Payable for use with SAP Fiori application, you must create a basic Worklist in PROCESS DIRECTOR for Incoming Invoices.

The PROCESS DIRECTOR Accounts Payable for use with SAP Fiori application displays data in the following tabs.

- The **Inbox** tab displays all the documents that are currently in workflow.
- The **History** tab displays all the documents that have already been processed.

The PROCESS DIRECTOR Accounts Payable for use with SAP Fiori application requires a top level Worklist node and two subnodes - one for documents to display in the **Inbox** tab, and one for documents to display in the **History** tab. You can create other subnodes as needed for the SAP GUI, but the PROCESS DIRECTOR Accounts Payable for use with SAP Fiori application accesses only the Workflow Inbox and Workflow History nodes.


If you do not already have a Worklist, complete the following procedures to create one. For detailed information on creating a Worklist, see the *ReadSoft PROCESS DIRECTOR Configuration Guide*.

### Open the Worklist configuration

To open the Worklist configuration, go to transaction `/N/EBY/PDBO_WLC`.

### Create the top level node

To create the top level node node, complete the following steps.

1. In change mode, click the **Add Business Object node**  button.
2. In the **Change basic data** dialog box, enter the following settings.

| Setting          | Entry   |
|------------------|---|
| Object type      | IV Incoming Invoice   |
| Node description | Incoming Invoices<br>(This is the display name for the node. You can use another name.) |



| Setting | Entry    |
|---------|----------|
| Control | ICS_DOCS |

3. To save, click **Continue** .

A new Worklist node is inserted.

## Create the subnodes

To create each subnode under the top level node, complete the following steps.

1. Right-click the new **Incoming Invoices** node and click **Insert node as a subnode** .
2. In the **Change basic data** dialog box, enter the settings for the subnode.
3. Click **Continue**  to save.

## Workflow Inbox

| Setting          | Entry   |
|------------------|---|
| Object type      | IV Incoming Invoice   |
| Node description | Workflow Inbox<br>(This is a suggestion; you can use another name.) |
| Control          | WC_INBOX  |
| Not visible in   | SAP GUI   |

## Workflow History

| Setting          | Entry   |
|------------------|---|
| Object type      | IV Incoming Invoice   |
| Node description | Workflow History<br>(This is a suggestion; you can use another name.) |
| Control          | WC_HISTORY  |
| Not visible in   | SAP GUI   |

## Generate the Worklist

You must generate the Worklist to make your changes available to users in the PROCESS DIRECTOR Accounts Payable for Fiori application.

To generate the Worklist, complete the following step.

- Click the **Generate**  button.

Messages confirming that the Worklist was successfully generated appear.

## View model

Customer implementations often require that you make changes to the user interface. You can implement most of these changes in the view model.

The view model determines the data that is presented to the user and how it is presented. Only the data that is defined in the view model is available to the user in the user interface.

For more information on the view model, see to the *ReadSoft PROCESS DIRECTOR Configuration Guide*.

## SAP Internet Communication Framework

The SICF (SAP Internet Communication Framework) standard transaction code is used to maintain the services for HTTP communication in the SAP system, using the Internet Communication Manager (ICM) and the Internet Communication Framework (ICF).

### Activate the service element tree node

To activate the service element tree node, complete the following step.

- Right-click the **eby** tree node and select **Activate Service**.



The following is displayed.

| Virtuelle Hosts / Services  | Documentation  |
|---|--|
| <ul style="list-style-type: none"> <li>▼ ui5_ui5</li> <li> <ul style="list-style-type: none"> <li>▼ <b>eby</b></li> <li>frap</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>SAPUI5 Application Handler SAPUI5 Application</li> <li>Kofax Process Director</li> <li>PD AP Fiori</li> </ul> |

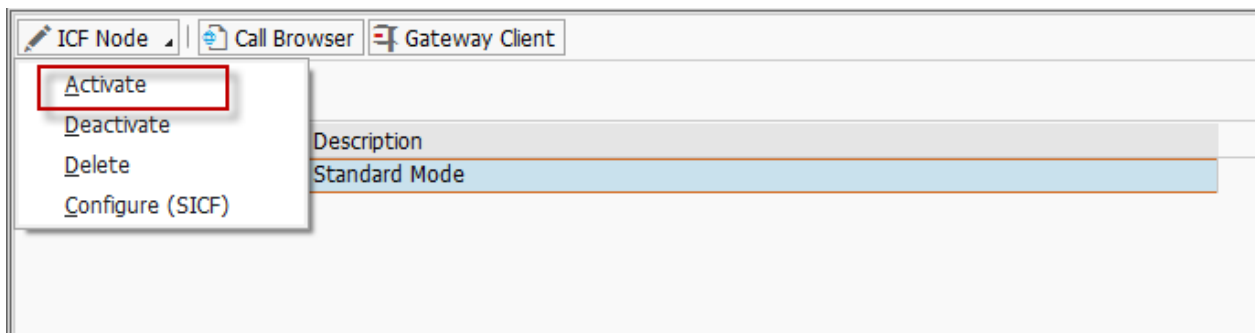
If the customer's SAP runtime environment is set up correctly, you can now start the application.

- Right-click the **eby** entry and select **Test Service**.

## Activate and maintain services

The OData service for the ReadSoft PROCESS DIRECTOR for use with SAP Fiori® application is a part of the transport and should be automatically activated in the customer system. To check this, complete the following steps.

1. Go to the / IWFND/ MAINT\_SERVICE transaction.
2. Select the / EB/ FRAP\_WC\_SRV technical service name.
3. Activate the **ICF Node** for the Odata service.



4. Click **Call Browser**.

A browser window displays the metadata of the OData service, in the XML format.

## SAP Gateway troubleshooting

In case of errors, it is still viable to use the ST22 transaction to check for them. However, this does not cover web-specific errors. Web-specific errors are logged in the / IWFND/ ERROR\_LOG (SAP Gateway Error Log) transaction.