SAP Screen Personas – Provide the right information to the right users in the right context

SAP Screen Personas offers a seamless usability experience, while working with SAP screens without compromising on productivity and timelines. This white paper provides some basic insights about SAP Screen Personas from a business perspective and explores some of its key features and benefits.
Abstract

SAP Screen Personas offers a simple drag and drop approach to modify any common SAP GUI screens to improve user friendliness, visual enhancements and help accomplish an array of tasks within minimal investment in resources.

The primary focus of the white paper is to explore SAP Screen Personas from business users’ perspective, rather than from a technical perspective. Hence, attempt has been made throughout the white paper to ensure that the content is simple and easy to understand with suitable illustrations and screen shots wherever necessary, avoiding the nitty-gritty of technical complexities.

This paper opens with an overview of SAP Screen Personas and slowly explores various key concepts including technological landscape, installation concepts, functional overview, key modules and finally helps you appreciate the beneficial aspects of SAP Screen Personas.

Overview

SAP Screen Personas is a new age UI tool that is redefining the way business processes are being implemented and screens are being designed, taking into consideration the growing expectations from the SAP users. Customers are looking for simple and user-friendly SAP systems that eliminates the clutter and complexity of typical business processes that their users encounter, and at the same time providing a great look and feel for the screens that they encounter on a day to day basis. SAP Screen Personas offers intuitive screens that enhance usability – integrates functionality, performance and user experience. Simply stated, companies can simplify their screens by eliminating fields they don’t use, converting free text entry to pull down menus and automating steps that they use frequently.

With more intuitive SAP screens, organizations can improve user satisfaction, improve training time and optimize resources on screen modifications. SAP Screen Personas offers one of the best methods to enhance SAP usability.

Critical evaluation

Before you embark to work on the SAP Screen Personas project, you need to:

- Understand the needs of the users who will be using the simplified SAP screens.
- Analyze their business needs to assess what information is critical and what can be safely ignored.
- Follow user-centric processes to identify and prioritize where to commence.

SAP Personas complements SAP Fiori

There are many similarities between SAP Screen Personas and SAP Fiori, since both are targeted towards providing an improvised user experience. The following table helps you understand how SAP Personas complements SAP Fiori.
Innovapptive Thought Leadership - SAP Screens Personas

### Core technical requirements

- Unicode
- NetWeaver 7.40 SP3 BASIS or later
- Kernel 7.40 (gets updated to 7.42 at start of the ramp-up process)
- Skilled resources who are experts in SAP Personas to troubleshoot any issues.

### SAP Personas: Scope and limitations

You can modify most classic screens in SAP using SAP Personas. Technically, you can initiate the development of the SAP Screen Personas with the standard SAP transaction screen – modify through a simple drag and drop interface. Subsequently, you can incorporate scripts, buttons, dropdown lists and other elements and at advanced level, you can use information caching and hiding to enhance the processing speed.

Coming to SAP Screen Personas limitations, it doesn't work with CRM and SRM systems, which incorporate different screen rendering technology.
**System Architecture**

**SAP Screen Personas components**

SAP Screen Personas works on 4 components:

- SAP Netweaver ABAP Basis
- Kernel / ITS
- Personas add-on (installs on server)
- Personas app (runs in browser)

**SAP Screen Personas components**

You can install SAP Screen Personas through one of the two server modes, i.e. central server or independent servers.

**Installation process**

The installation process consists of 3 simple steps:

- Install simple add-on
- Apply enablement note
- Assign preconfigured roles to users

One of the main advantages of this installation is it doesn't disrupt an organization's existing IT landscape and also doesn't need additional servers.

**Road map**

The primary roadmap for implementing SAP Screen Personas is as follows:

- Identify processes
- Simplify processes
- Analyze data requirements
- Build screens
- Automate the appropriate processes

There are three types of experts, who would primarily be required to ensure a successful SAP Screen Personas implementation such as:

**Business process expert:** He/she would be primarily involved in understanding the existing business processes of the user; analyze, simplify and design new business processes that are aimed to save time and resources.

**SAP Screen Personas expert:** Once the business processes are defined by the process expert, the SAP Screen Personas expert would configure and customize the screens; eliminate redundant screens or pull information from various screens to be displayed on a single screen.

**Design expert:** At the final stage of implementation, the services of the design expert are undertaken, who would solely be responsible to incorporate the right look and feel elements, thus ensuring a pleasurable user experience.
Functional Overview

The following are the Personas basic functions, which you can perform to enhance the user experience:

- Replace text /update
- Hide/Rearrange data fields
- Add images
- Hide/Combine tabs
- Add text and notes

Core features of SAP Personas 3.0 version*:

- **Themes** let you bring in the look and feel for all screens at one time.
- **Edit mode** enables you to enhance the individual screens.
- **Visual enhancements** improve usability.
- **Merge** lets you pull information from different tabs and incorporate in a single screen.
- **Scripting** enhances user productivity.
- **Administrative settings** provides complete control of which features your users need, based on their respective roles.

* This version is in the ramp up stage and would be released shortly.

SAP Screen Personas 3.0 is now integrated into the Web GUI, which implies a simpler architecture, no separate client application and also eliminates the dependency on Silverlight.

Get started with SAP Screen Personas

SAP Screen Personas application initialization

Once SAP Screen Personas is installed and customized, the Personas administrator provides a URL to the business user to access the application. This URL navigates the business user to the Login screen of the SAP Screen Personas system. Upon successful login, you will see a P icon on the top of your screen.

As a business user, depending on your rights, you can click the P icon to view the Personas Flavor bar. This Flavor bar displays all the flavors available for the user. As a business user, you can:

- Access any flavor shared with you.
- Create a new flavor.
- Work on scripting.
- Edit a flavor.
- Access Flavor Gallery.
- Select/Create themes.
Roles

The following are the Personas basic functions, which you can perform to enhance the user experience:

- **Admin user**: Who has got full rights including creating and editing themes.
- **Editor user**: Who has got full access to the client, but not the admin UI.
- **Consumer user**: Provides only read-only access to the Personas flavors.

Consumer User

If you are a consumer user, you can view and share flavors in the SAP Screen Personas. However, you need appropriate permissions from the admin user to perform these tasks.

![Figure 1: Consumer User Interface](Image Courtesy: SAP)

Admin User

As an admin user, you can manage the following backend operations such as:

- Generic tasks (F4 Help whitelist, URL whitelist, FM whitelist, corporate colors, import clients)
- Flavor maintenance
- User and role Maintenance
- Theme maintenance
- Icon maintenance
- Resource maintenance
- Additional administrative actions (run health check tool, perform cleanup activities, maintain screen ID, overwrite entries, maintain control ID, overwrite entries)

Features at a glance

Flavors Gallery

A flavor in SAP Screen Personas context identifies a specific personalization for a specific SAP transaction in a specific system. A flavor is always linked to a specific SAP transaction (for example VA01). On the other hand, a single SAP transaction can have more than one flavor. You can select any of the available flavors to personalize a specific SAP transaction; however the basic flavor is available to all the users by default. You can create flavors to simplify your work by minimizing buttons, fields etc.

Availability of flavors:

- Flavors are created centrally and are made available to you by the admin user.
- You can create, edit, share or remove flavors, provided you have the right credentials.
Flavors Gallery displays all the flavors, which are available to you as a user. Flavors lists the following information:

- Flavor name
- Owned by
- Last changed date
- Description

All the available flavors defined for varied transactions are listed in the Flavor Gallery. You can choose any flavor to incorporate it to your profile, wherein all flavors in your profile are displayed in the Flavor bar. Apart from that, all flavors, which are shared with you are displayed in the Flavor Gallery.

Enhance business user productivity by offering only the right screen elements and data to process the business transactions faster and more accurately with less data entry fields.

Enhance user satisfaction considerably by automating repetitive tasks and simplifying complex screens through pre-filled fields and pull down menus.

Reduce personalization costs by eliminating the need for ABAP programmers or scripting experts.

Decrease training time for SAP users.

**Value proposition with flavors**

- Enhance business user productivity by offering only the right screen elements and data to process the business transactions faster and more accurately with less data entry fields.
- Enhance user satisfaction considerably by automating repetitive tasks and simplifying complex screens through pre-filled fields and pull down menus.
- Reduce personalization costs by eliminating the need for ABAP programmers or scripting experts.
- Decrease training time for SAP users.

**Process of creating a flavor**

The steps for creating an SAP Screen Personas flavor on an abstract high level is illustrated in the following figure. Of particular relevance is that the actual development of the new screen is only one step of the complete process. You will optimize improvements to your user experience by investing time in the preliminary steps of identifying and analyzing the process for which you wish to build the flavor.
Scripting

Scripting is a powerful tool that lets you perform various actions like skipping screens, pre-filling transactions and executing WEBrFC. Scripting is enabled in the Flavor bar and you have a separate scripting window that can be invoked. Scripting uses JavaScript that includes features such as looping, nested IF conditions and logging capabilities. A script library is maintained independent of the buttons, making it easier to reuse scripts across flavors.

Images

You can upload and use images with the help of the following methods:
1. Home tab – Assign an image or upload an image (Upload button).
2. Insert tab – Image button.

Figure 3: Flavor Creating Process

Figure 4: Insert Image from Image Gallery (Image Courtesy: SAP)
Themes

You can use themes across all flavors to help you implement the same look and feel across every flavor. As per your assigned rights, you can select and edit an existing theme or even create a new theme.

*Figure 5: Upload Image from File* (Image Courtesy: SAP)

*Figure 6: Themes* (Image Courtesy: SAP)

*Figure 7: Insert Icon from Gallery* (Image Courtesy: SAP)
Administrative transactions

Only an admin user can process these administrative transactions, which comprises of managing the configuration and other system activities in order to support the business users.

The admin user can take care of the following functions:

- Flavor maintenance
- Theme maintenance
- Resource maintenance
- User and role Maintenance
- Icon maintenance
- Health check tool
- Maintain screen ID overwrite
- Maintain control ID Overwrite
- Perform cleanup activities
- F4 Help whitelist
- URL whitelist
- FM (Function Module) whitelist

Let’s have a brief overview of some of the core functions as listed above
Flavor maintenance

- Delete unused flavors.
- Assign/remove groups for which the flavors have been assigned.
- Assign/remove users to whom the flavors have been assigned.
- Assign/remove systems for which the flavors have been assigned.
- Copy flavors for reusing them later.
- Share flavors with groups.
- Transport flavors.
- Export flavors.
- Make flavor IT supported.

Theme maintenance

This refers to assigning themes to the roles/transactions and delete unused themes.

Using theme maintenance, you can:

- Delete unused flavors.
- Assign/remove groups for which the flavors have been assigned.
- Assign/remove users to whom the flavors have been assigned.
- Assign/remove systems for which the flavors have been assigned.
- Copy flavors for reusing them later.
- Share flavors with groups.
- Transport flavors.
- Export flavors.
- Make flavor IT supported.

Resource maintenance

Resources refer to the images that you have uploaded to be used in Personas. Using resource maintenance, you can:

- Make the resource public (provides access to everyone).
- See the resource that has used the flavor.
- Remove the resource.
- Upload a new resource.
- Export/transport a resource.

User and role Maintenance

As an admin user, you can maintain users and roles for Personas and process the following tasks:

- Select users and assign them to appropriate groups.
- View user details.
- Manage flavors.
- Maintain user roles that launches the SU01 transaction for the user.
- Manage role assignments.
Shortlink maintenance

As an admin user, you can manage the ShortLink that is provided to the business users that helps to access the required flavors directly. You can create new shortlinks or delete existing shortlinks.

Transport

Using the Transport feature, you can incorporate flavor sharing and assignments in the transport request, letting you to define these in the test environment, provided the user setup in test matches with what you have defined in production.

Using this feature, you can:

- Select users and assign them to appropriate groups.
- View user details.
- Manage groups.
- Manage systems.

Mass user maintenance

Using this feature, you can assign SAP Screen Personas systems and roles to a group of users in the Mass User Maintenance Screen. Accordingly, you can assign systems to groups of users as well as assign roles to the users.
**Group management**

You can use this feature to manage various groups of users, including assigning systems to the group, assigning users to a particular group or even sharing flavors with users of a particular group.

**Group maintenance**

As an admin user, you can manage groups of business users for this application. You can accordingly:

- Create, change or delete a group.
- Assign permissions for different users, based on their role and business needs.
- Add/remove a user from a group.
- Assign specific flavors to a group of users.
- Remove flavors assigned to a group.
- Copy group for reusing it later.

**Mass Group Maintenance**

As the name indicates, you can create groups, based on the profile generated (PFCG) roles and can process the following tasks:

- Create mass groups of users using PFCG roles.
- Delete mass groups.
- Import roles from excel.

**Profile Wide Settings**

You can manage the following profile wide settings:

- Change the control level settings.
- Change the specific type settings.
- Replace all the texts in a particular screen.

**Translation**

This is a unique feature that lets you trigger the translation process of the text in a Personas system. Using this feature, you can prepare for translation as well cleanup excessive translation.
Benefits

Technical Benefits

- Provides a single UX entry point for all SAP application designs:
  - Use SAP Screen Personas to enhance any Dynpro screen into the Fiori design.
  - Launch SAP Screen Personas transactions from any of the platforms: Browser, Fiori Launchpad, NWBC or SAP Portal.
- Provides an intuitive suite on SAP HANA experience:
  - Simplify any of the 10,000+ SAP GUI transaction screens for which no smart Business Cockpit, Factsheet or Fiori app exists.
- Enables seamless migration to cloud:
  - Access any SAP GUI transaction through browser.
  - Eliminate SAP GUI dependency (no need to install any client on desktop systems).

Business Benefits

- Improve employee productivity in terms of percentage of time spent on data entry.
- Simplify the user interaction through SAP – enhance adoption of business processes.
- Reduce the overall employee training costs.
- Minimize rework and ensure data quality.
- Improve your company’s image and branding.
- Minimize personalization costs

Conclusion

This white paper provided some useful insights about SAP Screen Personas from a business perspective covering concepts such as overview, system requirements, functionality and finally discussing about certain core technical & business benefits. We at Innovapptive fondly hope that this knowledge article would provide a perfect platform to get started to appreciate and apply SAP Screen Personas to your SAP screens, taking user experience to the next level – let your users do more with less.
For more information

To learn more about Innovapptive's mPower™ App Suite, Enterprise Mobility Strategy and Consulting, Rapid Deployment Solutions and Custom Development Services, contact your Innovapptive sales representative, visit us at www.innovapptive.com or you can email Innovapptive directly at sales@innovapptive.com

About Innovapptive

Innovapptive is among the fastest-growing enterprise mobile and user experience (UX) solution companies and is an industry leader among rapid mobile application development (RMAD) solution providers. Innovapptive's Rapid App Configurator Engine (RACE) technology redefines traditional approaches to digitize the enterprise and is empowering organizations to rapidly deliver ready-to-run mobile apps across the enterprise. Innovapptive’s portfolio of 100 + mobile solutions that run across a wide array of devices and systems is creating a connected enterprise across employees, customers, and suppliers. Innovapptive was named a 2016 SAP Pinnacle Award winner and has won these recognition three years in a row.