

How-To Guide  
SAP Business One, version for SAP HANA  
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PUBLIC

# Working with Workbench Editor

SAP Business One 9.1, version for SAP HANA and Later

# Typographic Conventions

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

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# Document History

Version	Date	Change
1.0	2014-11-24	First Version
1.1	2020-05-14	Minor updates

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# 1 Introduction

Workbench is a widget that standardizes and visualizes the most common business processes. It not only simplifies the complex functions by grouping common functions together according to different business purposes, but also provides you with a consolidated entry to perform various kinds of jobs. In SAP Business One, version for SAP HANA, we provide 4 standard templates, however the standard templates may not precisely meet the business requirements of your company.

In order to enhance the customized functionalities of the workbench widget, Workbench Editor is introduced. With Workbench Editor, you can customize the standard templates based on your own business requirements.

The editor promotes the efficient performance of the Workbench widget and enables you to do the following:

- Flexibly create, edit and delete entities
- Freely change the layout of the entities in the working pane
- Focus on your responsibilities with customized information

You can download the Workbench Editor from [SAP Note 2097429](#).

## Note

Make sure you download the Workbench Editor to the machine where DI API is installed.

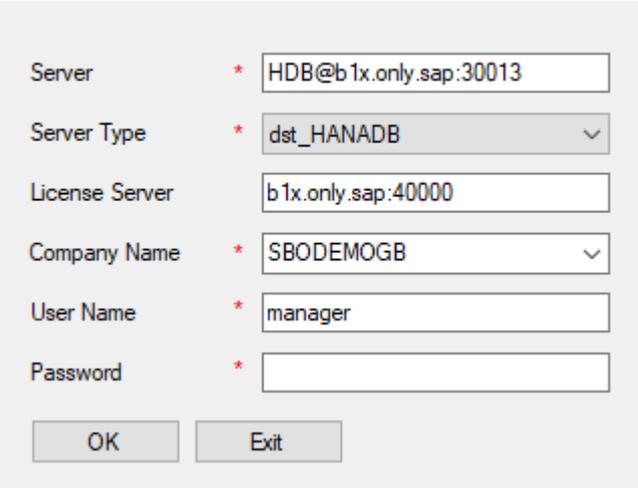
## 2 Working with Workbench Editor

### 2.1 Running Workbench Editor

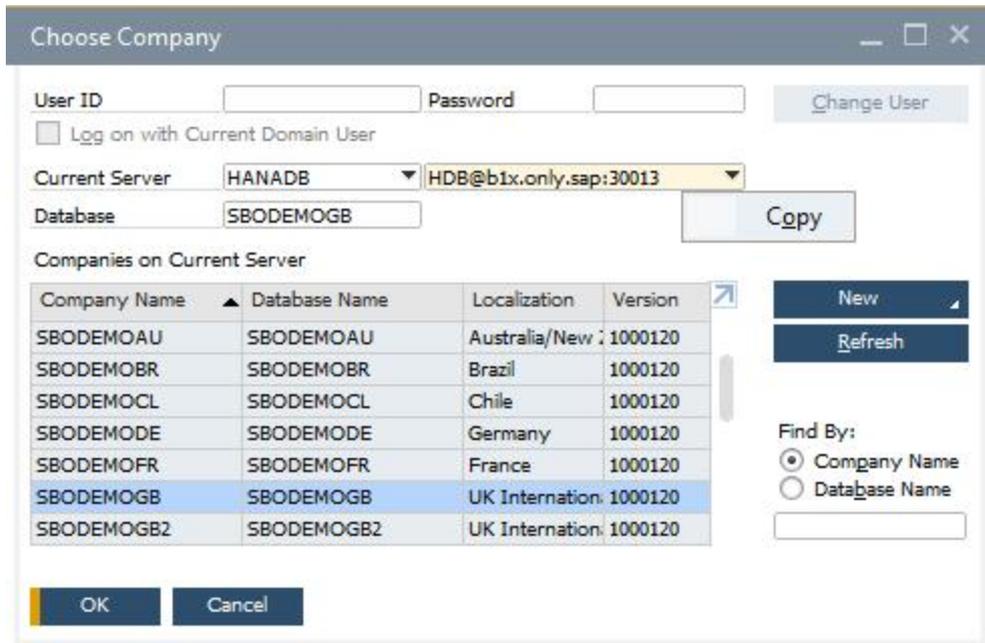
To run the Workbench Editor, choose *All Programs* → *WorkbenchEditor.exe*.

#### Procedure

1. In the toolbar, choose  (*Load workbench data from database*).  
The *Login* window appears.
2. In the *Login* window, specify all mandatory information correctly.
  - o *Server*: Copy the connection string from the System Landscape Directory (SLD) or SAP Business One client (see the screenshot)
  - o *License Server*: Add the System Landscape Directory address
  - o *Company Name*: Select a company database from the dropdown list
  - o *User Name*: Enter a SAP Business One user with professional license assigned
  - o *Password*: Enter the password of the SAP Business One user



Server	*	<input type="text" value="HDB@b1x.only.sap:30013"/>
Server Type	*	<input type="text" value="dst_HANADB"/>
License Server		<input type="text" value="b1x.only.sap:40000"/>
Company Name	*	<input type="text" value="SBODEMOGB"/>
User Name	*	<input type="text" value="manager"/>
Password	*	<input type="text"/>



Copy the Connection String from the SAP Business One Client



Or Copy the Connection String from the Server Name Column of the System Landscape Directory

- In the *WorkbenchListView* window, choose the template you want to edit.  
The template opens and is displayed in Workbench Editor.

## 2.2 Toolbar

The toolbar is a collection of icons that provide easy access to different functions. Active functions are shown in color, while inactive ones are greyed out.

Toolbar Icon	Description
 (Load workbench data from database)	Opens the <i>Workbench List View</i> window and lets you choose following predefined workbench templates:

Toolbar Icon	Description
	<ul style="list-style-type: none"> <li>• WB_Sales_Process</li> <li>• WB_Inventory_Process</li> <li>• WB_Purchase_Process</li> <li>• WB_Financial_Process</li> </ul>
 (Save workbench data to database)	Saves the changes to the current template.
 (Configure database connection)	Connects to the database of the company for which you are editing the workbench process templates.
 (About workbench editor)	Displays general information about Workbench Editor.

## 2.3 Entities List

The *Entities* list displays all the entities that are included in the current template.

To add new icons to the template, create an entity node in the *Entity* list first, then drag and drop it on the working pane.

## 2.4 Working Pane

The working pane displays the representative icons of the entities included in the workbench template in a visualized way. You can perform the following actions on the working pane:

- Determine the locations of the icons in the graphical way presented in the template
- Change or adjust the flow sequence between the icons included in the template

### Determining the Location of a Selected Icon

You can determine the location of the selected icon in one of the following ways:

- By dragging and dropping:  
Drag the entity or icon and drop it at the appropriate location on the working pane.

- By specifying the icon coordinates:

In the *Properties* window of the selected icon, specify the appropriate abscissa and vertical axis of the location in the working pane.

## Changing the Flow Sequence Between Icons

### Procedure

1. In the working pane, select the representative icon of the entity to be performed first. An arrow appears on the upper right corner of the icon.



2. Click and drag the arrow towards the next icon.
3. Drop the sequence flow after it reaches the next icon.

To delete a flow sequence between icons, select the arrow and press `Delete` on your keyboard.

## 2.5 Property window

The *Property* window lets you specify detailed and customized information for the selected entities or icons. Fields displayed in the *Property* window differ according to whether you select an entity from the *Entities* list, or an icon from the working pane.

### Properties of Entities

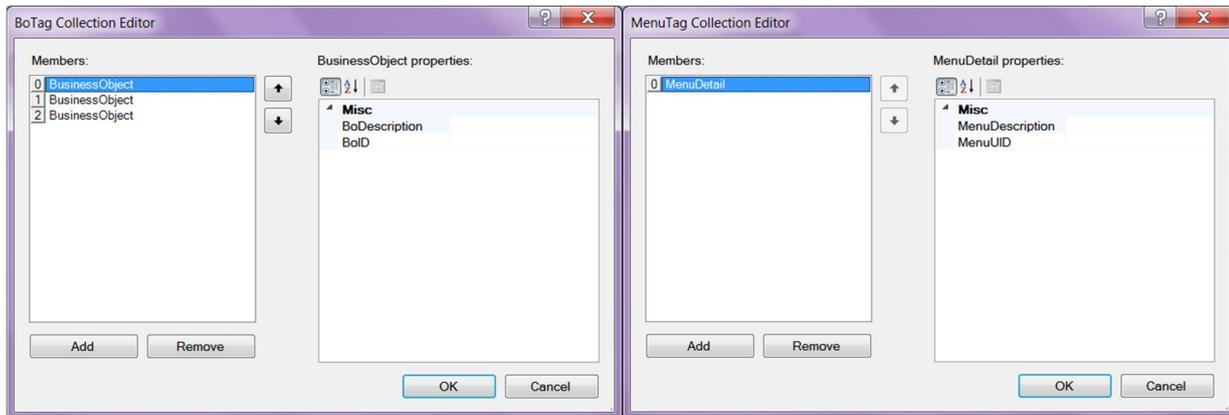
The following table displays each field that appears in the *Property* window for entities selected from the *Entities* list.

Property Name	Description
<i>BoList</i>	Specify the predefined Count widgets you want to include in the content menu opened from the selected entity.
<i>CustomizedDescription</i>	This field only appears if the type of the selected entity is <i>WB_CustomizedType</i> . Specify the description for the selected entity.
<i>FormUID</i>	Specify the Menu UID for the selected entity.
<i>Menus</i>	Specify the menu items you want to include in the content menu opened from the selected entity.
<i>Type</i>	From the dropdown list, select the type for the current the entity.

Windows Opened from the Property window:

- The *BoTag Collection Editor* window appears after you choose  to the right of the *BoList* field.

- The *MenuTag Collection Editor* window appears after you choose  to the right of the *Menus* field. The *BoTag Collection Editor* window and the *MenuTag Collection Editor* window have the same layout and functions, except one is for defining the linked Count widgets, and the other is for defining menu items.



### Members Section

The Members Section displays the Count widgets or menu items added to the content menu opened from the current entity.

**Add:** choose to add a new Count widget

**Remove:** choose to delete the selected Count widget

: choose to move the selected Count widget up

: choose to move the selected Count widget down

### BusinessObject/MenuDetail Properties Section

**BoDescription:** specify the description for the current Count widget

**BoID:** specify the ID for the current Count widget

Currently, the workbench widget supports the following 3 Count widgets:

- **-1:** My Open Sales Order
- **-3:** My Open Purchase Order
- **-5:** My Open Inv. Transfer Request

**MenuDescription:** specify the description for the current menu item

**MenuUID:** specify the Menu UID for the current menu item

### Properties of Icons

The following fields are displayed in the *Properties* window when you select an icon from the working pane:

<b>Misc</b>	
ContentImage	Marketing_Document.png
ID	node5
Type	WB_Process_External_Bank_Statement
X	<b>406</b>
Y	<b>10</b>

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*ContentImage*, *ID* and *Type*: displays the relevant information of the selected icon

*X*: displays the abscissa axis of the location of selected icon in the working pane

*Y*: displays the vertical axis of the location of the selected icon in the working pane

## Properties of Sequence Flow

The following fields are displayed in the *Properties* window when you select a sequence flow from the working pane:

*ID*: displays the ID of the selected flow

The ID is displayed in the form of *linkAB*. Where A and B are the node numbers of the icons that the selected sequence flow connects.

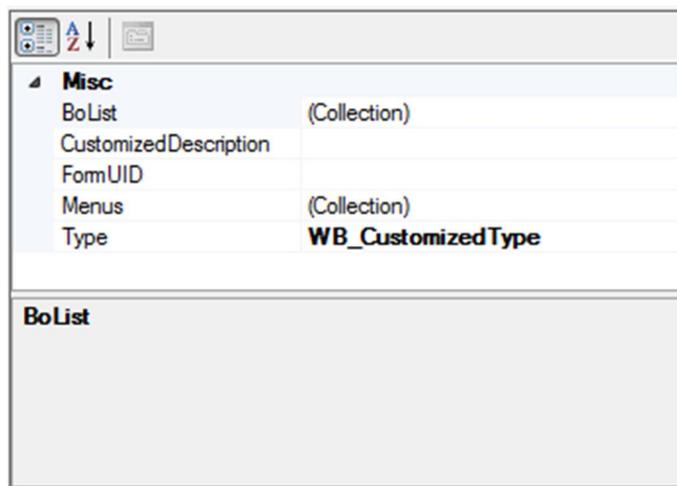
## 3 Working with Workbench Templates in Workbench Editor

Workbench Editor enables you to visualize and customize the standard templates. You can add new entities to the template, delete existing entities from the template, as well as change the template layout in the working pane.

### 3.1 Adding New Entities

#### Procedure

1. Open a workbench process template.
2. In the *Entities* list, right-click on *Entities* and choose *Create Entity Node*.  
The newly added entity appears on the bottom of the *Entities* list.
3. Select the newly added entity.  
In the *Properties* window, specify the relevant customized information for the entity.



4. Drag the entity and drop it at the appropriate location on the working pane.  
[Optional]: Set the flow sequence for it.
5. In the toolbar, choose  (*Save workbench data to database*) and save the template.

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## 3.2 Deleting Existed Entities

### Procedure

1. In the working pane, select the representative icon of the entity you wish to delete.
2. Press `Delete` on your keyboard.
3. In the *Entities* list, select the entity you want to delete.
4. Press `Delete` on your keyboard.

#### Note

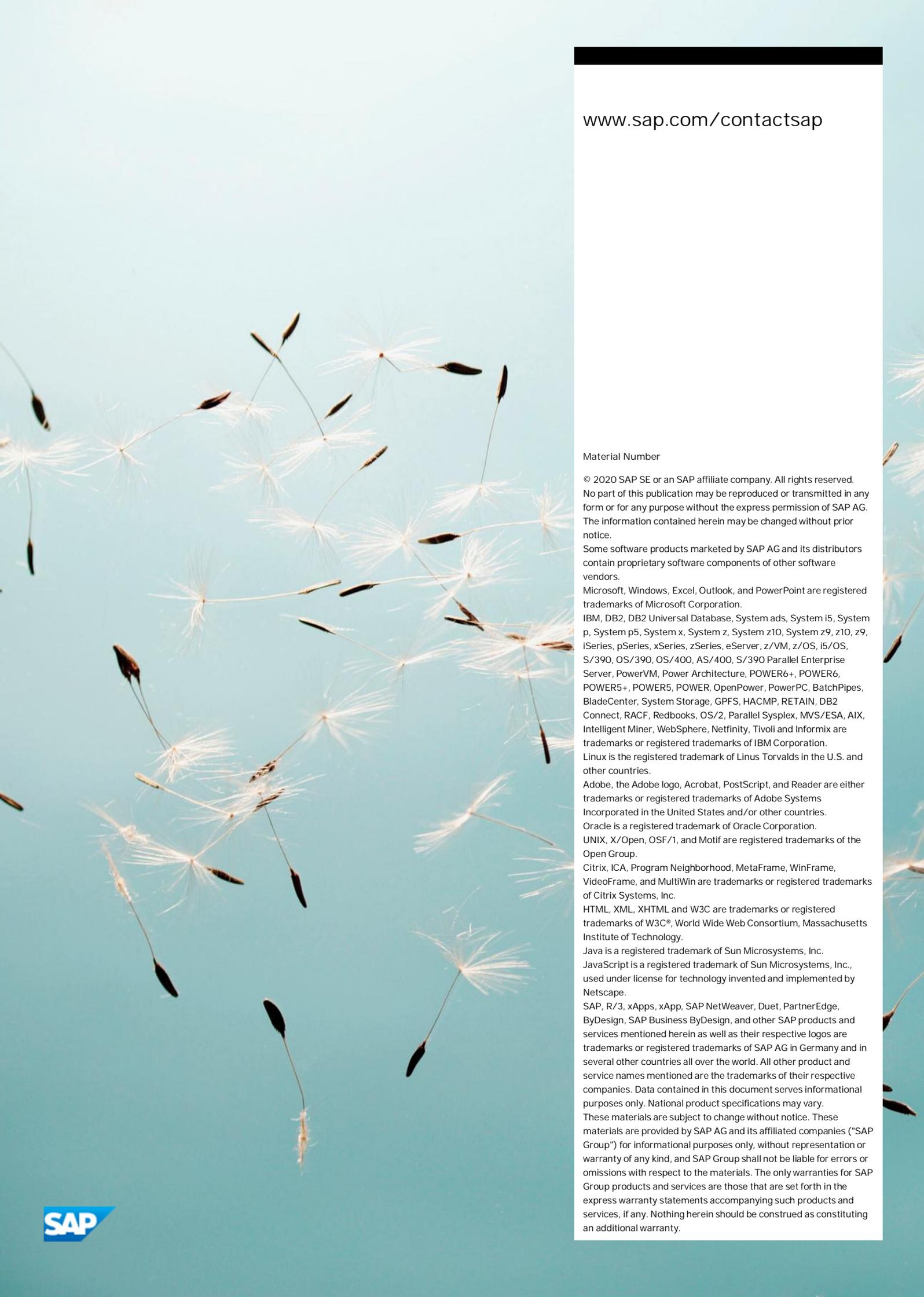
To delete an entity successfully, you must delete its representative icon from the working pane first.

## 3.3 Changing Template Layouts in the Working Pane

You can change the template layouts by performing the following actions, individually or in aggregation:

- adding new entities
- deleting existing entities
- adjusting the locations of the representative icons of entities
- changing the flow sequence between representative icons

To perform the actions above, refer to the procedures described in relevant sections.



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Material Number

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