BDEx Release Notes

R4.5 — Last update: Jun 09, 2020

Basis Technologies

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1. Overview

Release 4.5 is available from April 2020.
If you are interested in upgrading please contact support@basistechnologies.com for more details on how an upgrade can be provisioned.

A demonstration session can also be scheduled if you would like to see the features in action or learn more.

The release notes are structured as follows:
Deployment Dependencies – contains the prerequisite system requirements for this release.
Enhancement Details Details contains all of the new features and how/why you would use this.
Implementation Instructions contains the set up and configuration required to activate the features (by feature).

2. Deployment Dependencies

The installation of Mass Data Runtime (MDR) version 8.0 or later is a prerequisite for the implementation of BDEx R4.5
To use UI5 applications you must have these versions (or later) of SAP components installed:
SAP Gateway Foundation 7.40 – SAP_GWFND release 740 SP-Level 0013
User Interface Technology 7.40 – SAP_UI release 740 SP-Level 0010.

3. Enhancement Details

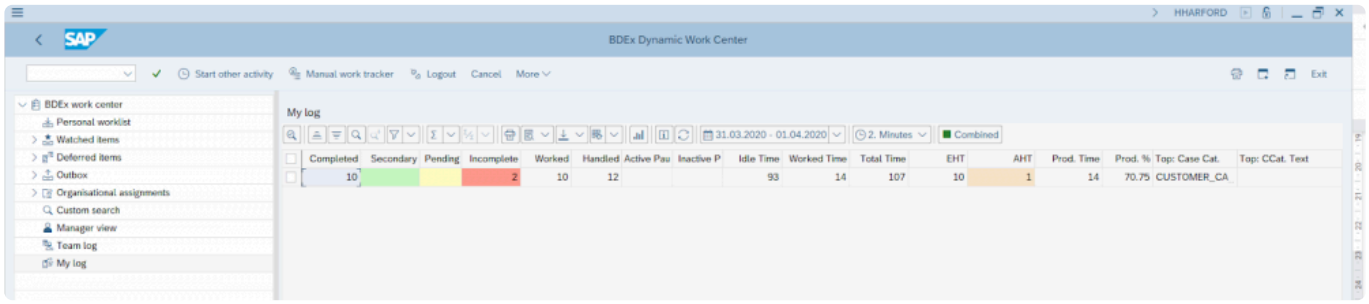
Many features have been added in this release.
This is a summary of the key new features:

- User Log
- User Status in Team Log
- Manual Work Tracker
- Manager – User Administration
- Simulate Get Work for Users
- BPEM Work Dashboard
- Get Work Additional Options
- Closure Control Notes
- Watched Items – Retain completed
- Patches

View each topic to read more details around the new feature and see the implementation requirements topic for the set up and configuration considerations.

3.1. User Log

My Log has been added to the Dynamic Work Center folders. This will enable users to view the productivity report statistics for themselves.



The report will display the following columns:

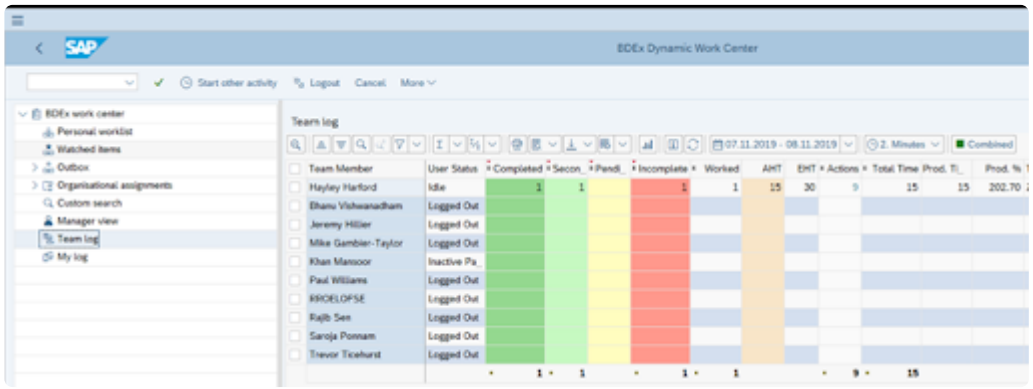
Headings	Description
Sessions	Number of sessions launched from DWC to CCH
Actions	Number of actions processed
Completed	Number of cases Completed when the case was used to launch a CCH session
Secondary	Number of additional cases completed in the CCH (not the primary case used to launch the CCH session)
Pending	Number of cases deferred
Incomplete	Number of cases not completed or deferred when the case was used to launch to CCH session
Worked	Total of completed and deferred cases
Handled	Total of worked and incomplete cases
Active Paused time	total time spent in pause for an active pause reason
Inactive Paused time	total time spent in pause for an inactive pause reason
Idle time	Time spent logged into BDEx but not working or paused
Worked time	Time spent working cases in CCH
Total time	Total logged on time in BDEx
Expected handling time	Total time expected to be spend for all worked cases
Average handling time	Average time took to work cases
Productive time	Total worked time and active pause

Productive %	Calculation of the users productivity, productive time/estimate handle time * 100
Top: Case Category	Which case category was handled the most
Top: CCat. Text	a description of the case category handled the most
Top: Count	Total number of the most handled cases
BDEx Start Date	What date did the user last log in to BDEx
BDEx Start Time	The first time stamp for the user on the above date

3.2. User Status in Team Log

The Team Log is available to Managers to see their team members KPIs. This has been updated to show a real time user status. This will enable managers to understand which of their users are logged in to BDEx, and have visibility of which users are working. paused or idle.

Team Manager will now see a User Status column in the Dynamic Work Center Team Log.



User Status values:
1 Logged Out
2 Idle
3 Working
4 Active Pause
5 Inactive Pause
6 Manual Work

When opening the team log it will determine the user's status at that time, the refresh button will update this.

- User has an active CCH session – status is "Working"
- User has ongoing pause time (either in CCH or not) with an active pause reason – status is "Active Pause"
- User has ongoing pause time (either in CCH or not) with an inactive pause reason – status is "Inactive Pause"
- User has not yet logged into BDEx, or has logged out – status is "Logged Out".
- User is using the Manual Work Tracker to log tasks – status is "Manual Work"
- User is logged in but not paused or working – status is "Idle".

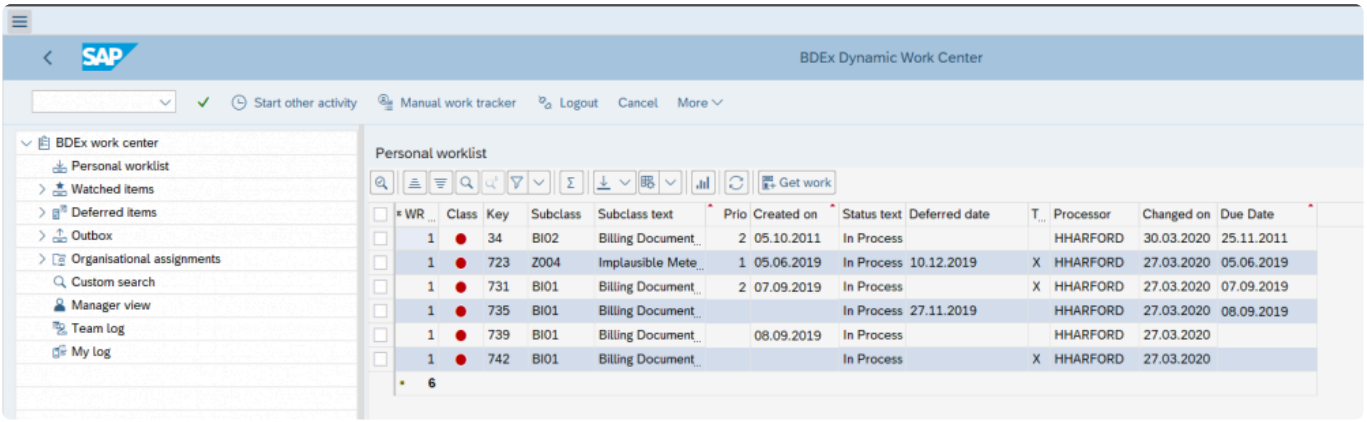
3.3. Manual Work Tracker

Manual Work tasks can now be added and tracked in the Dynamic Work Center to provide managers with a complete day in the life of an agent report.
Any work that is not a BPEM case can be added as a manual work task.

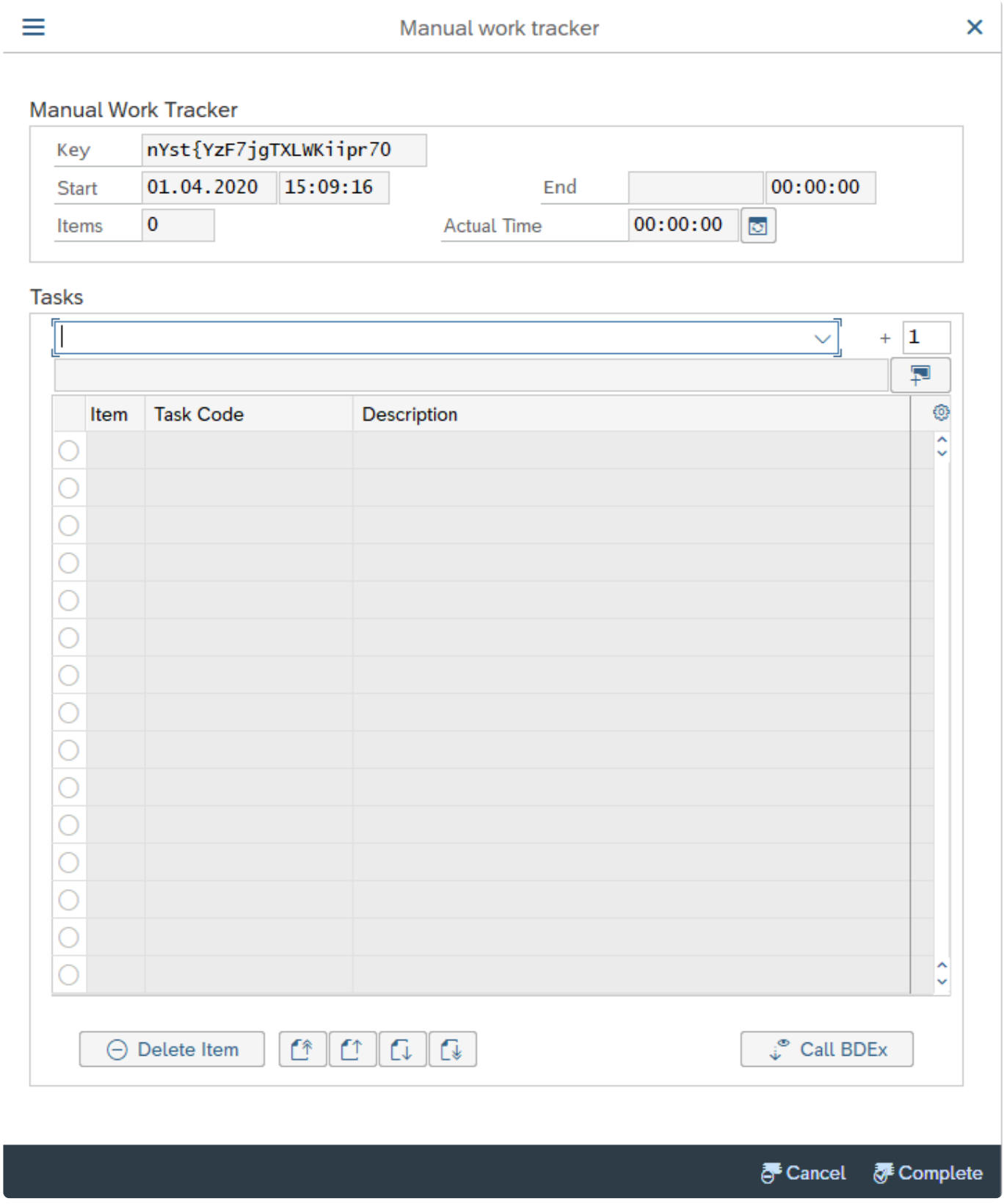
These tasks can then be assigned to a group of users enabling the user to add track their times and the timings will be picked up automatically by the productivity report.

Launching Manual Work

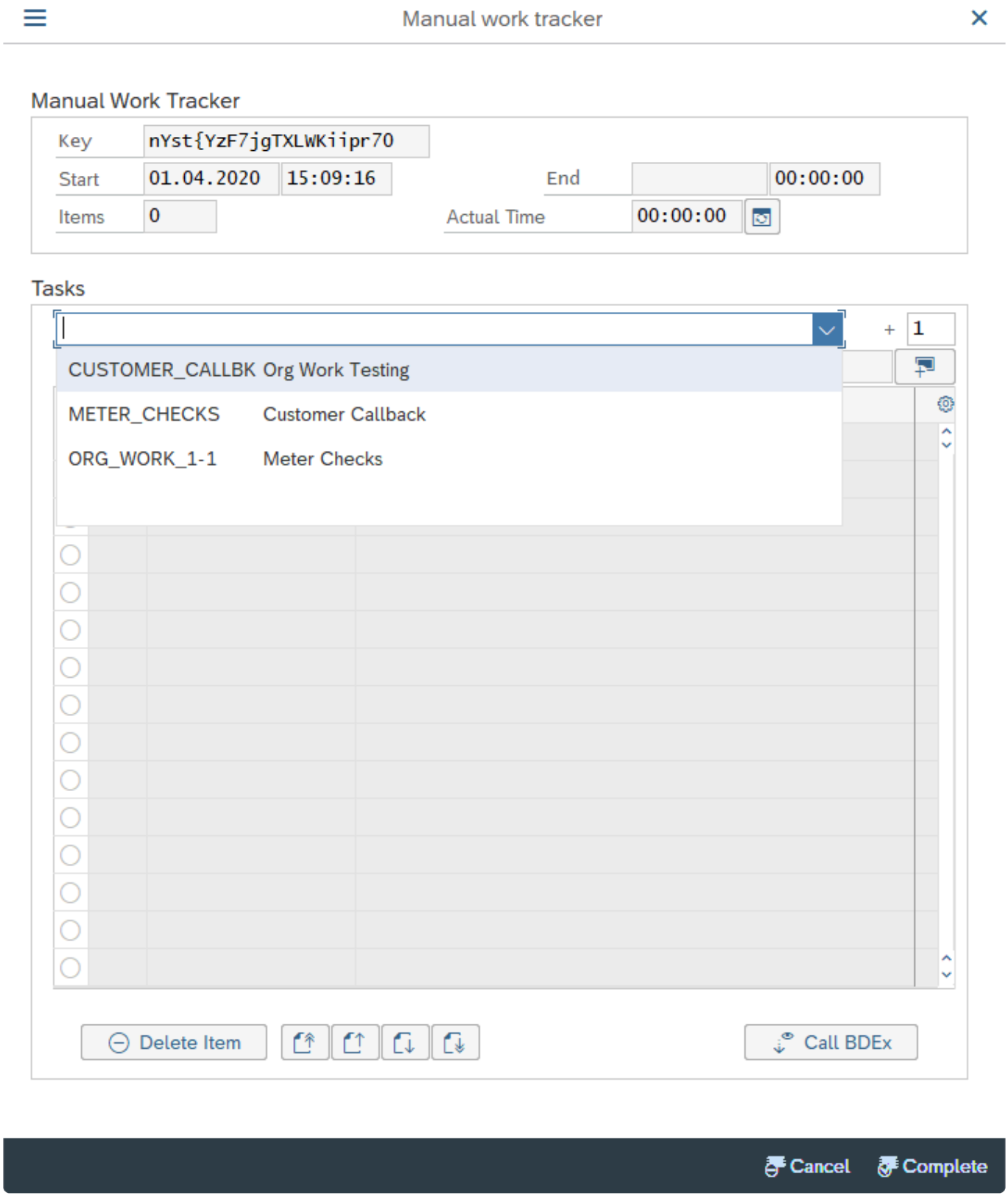
The Manual Work Tracker is a new button that has been added to the Dynamic Work Center menu.



Once click on Manual Work Tracker button a new screen is presented



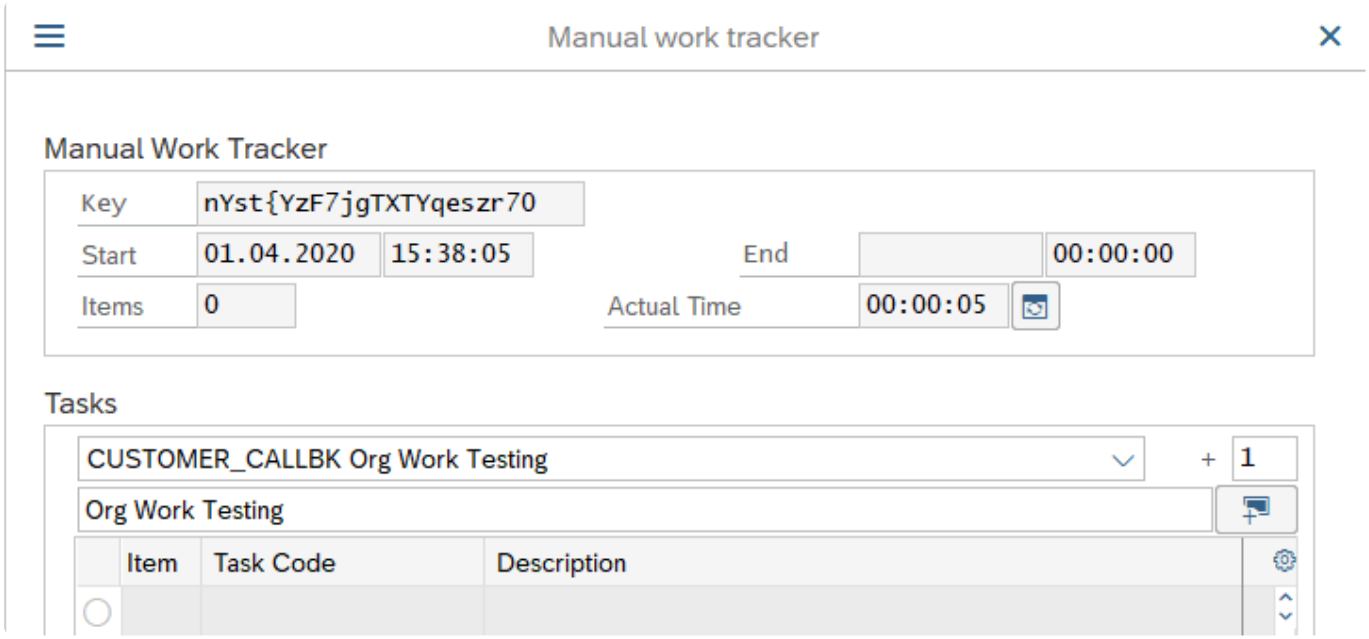
The key is automatically populated, the start date and time is added and the actual time will accumulate whenever an action is taken.



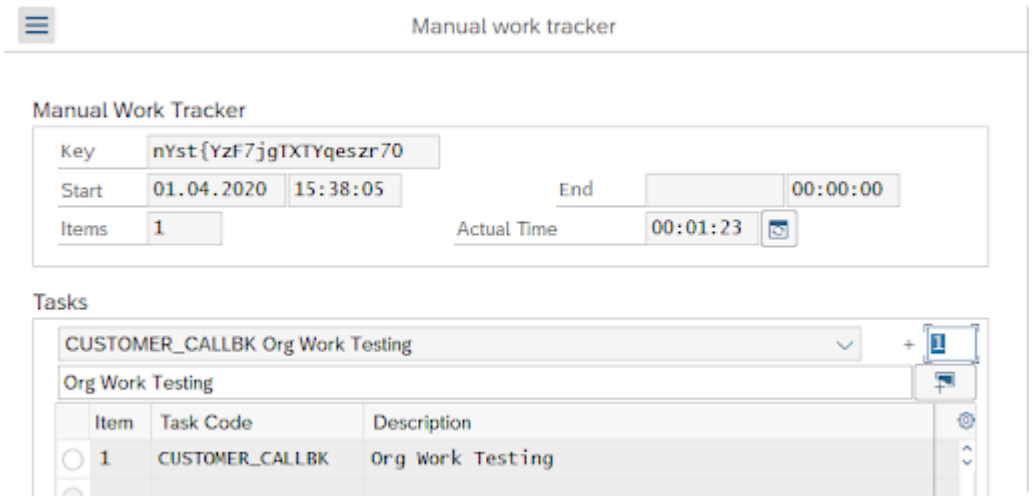
Adding a Task

Tasks can be assigned to a user to ensure only the tasks that are appropriate are selected.

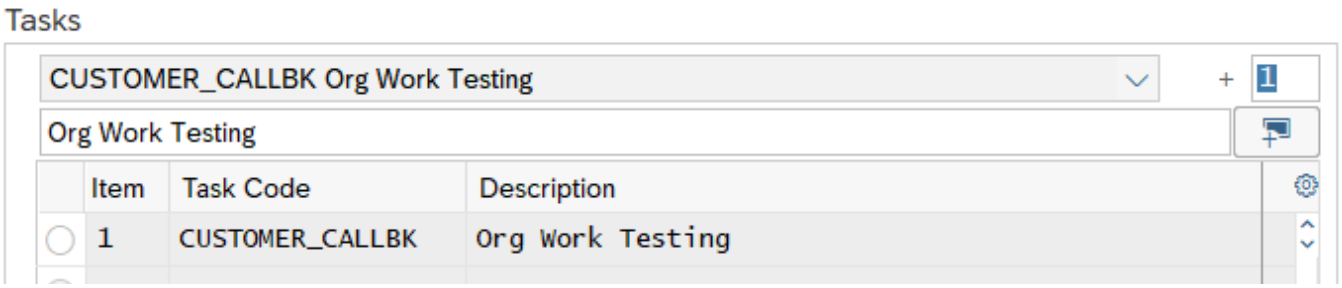
Once a task is selected this is then fixed and cannot be changed.



You can add a task by clicking on the + button and this will add the task to your item list.

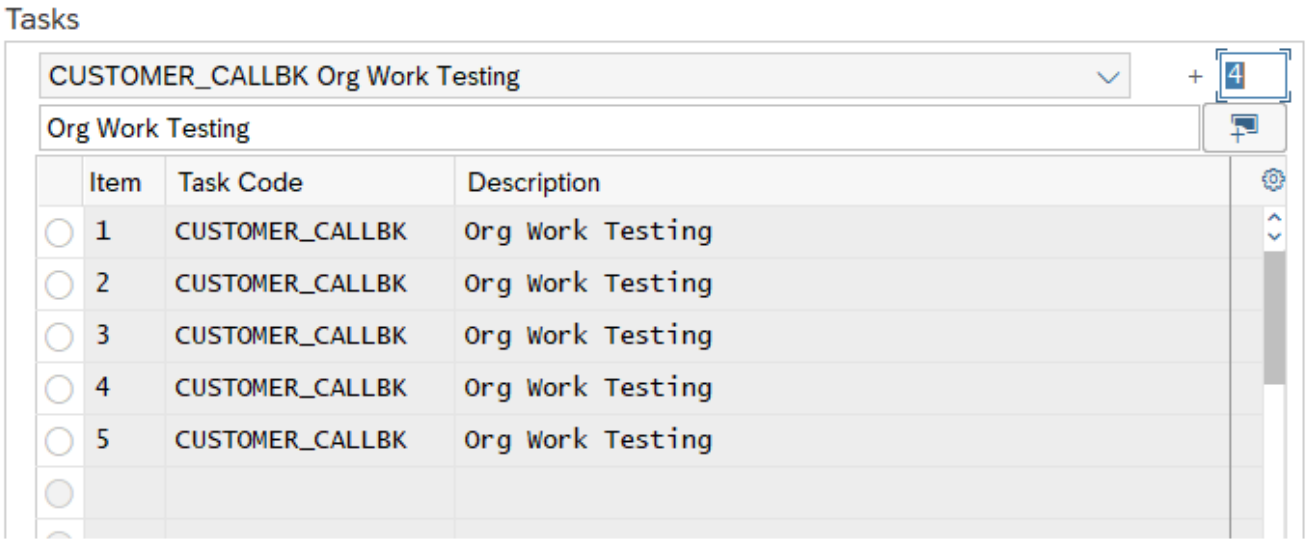


If you want to add more than one item the counter can be updated.

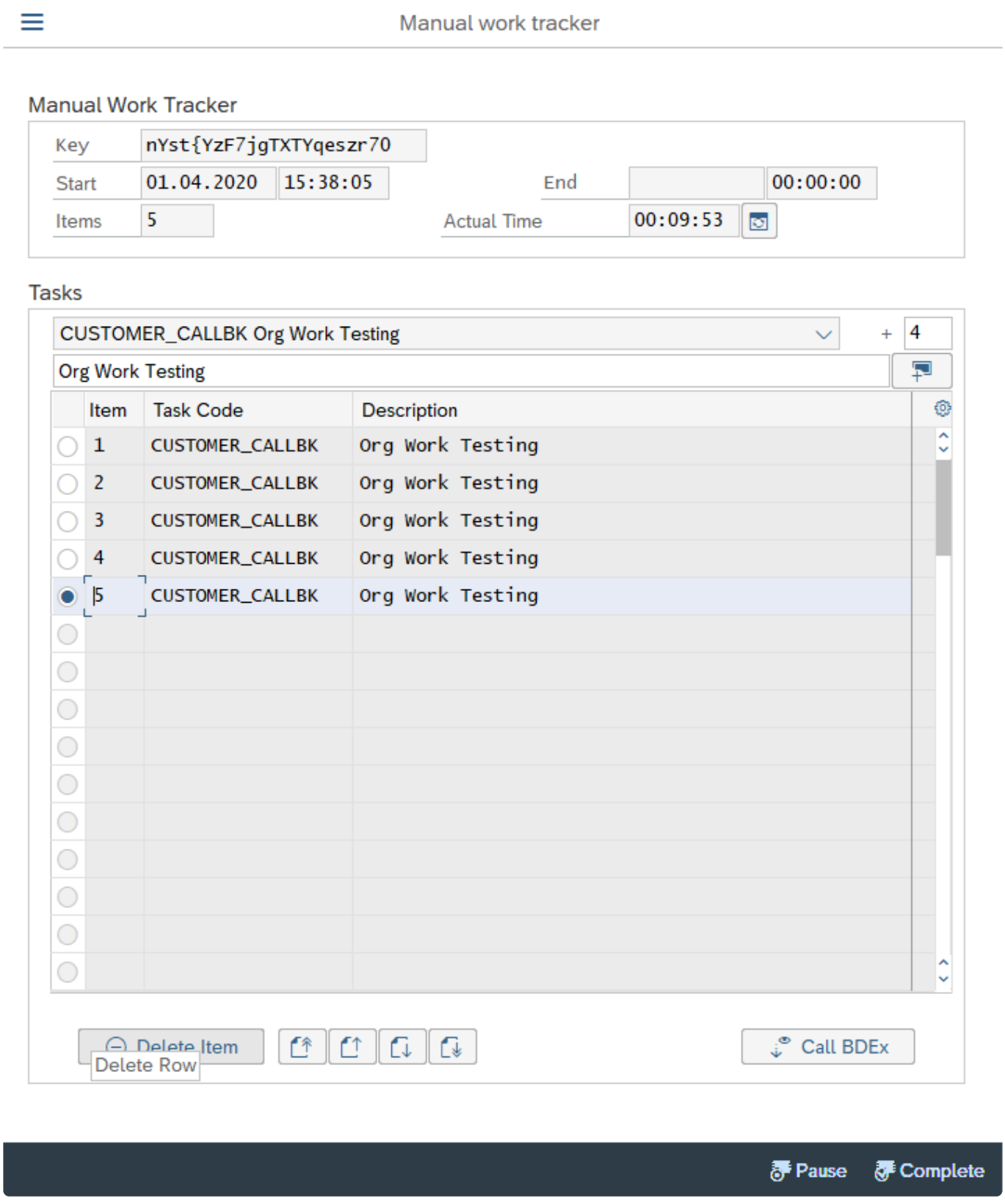


Deleting Tasks

Only 1 task can be removed at a time if a mistake is made – so only add what is needed.



If a mistake is made you can select the item and hit the Delete Item to remove that row.



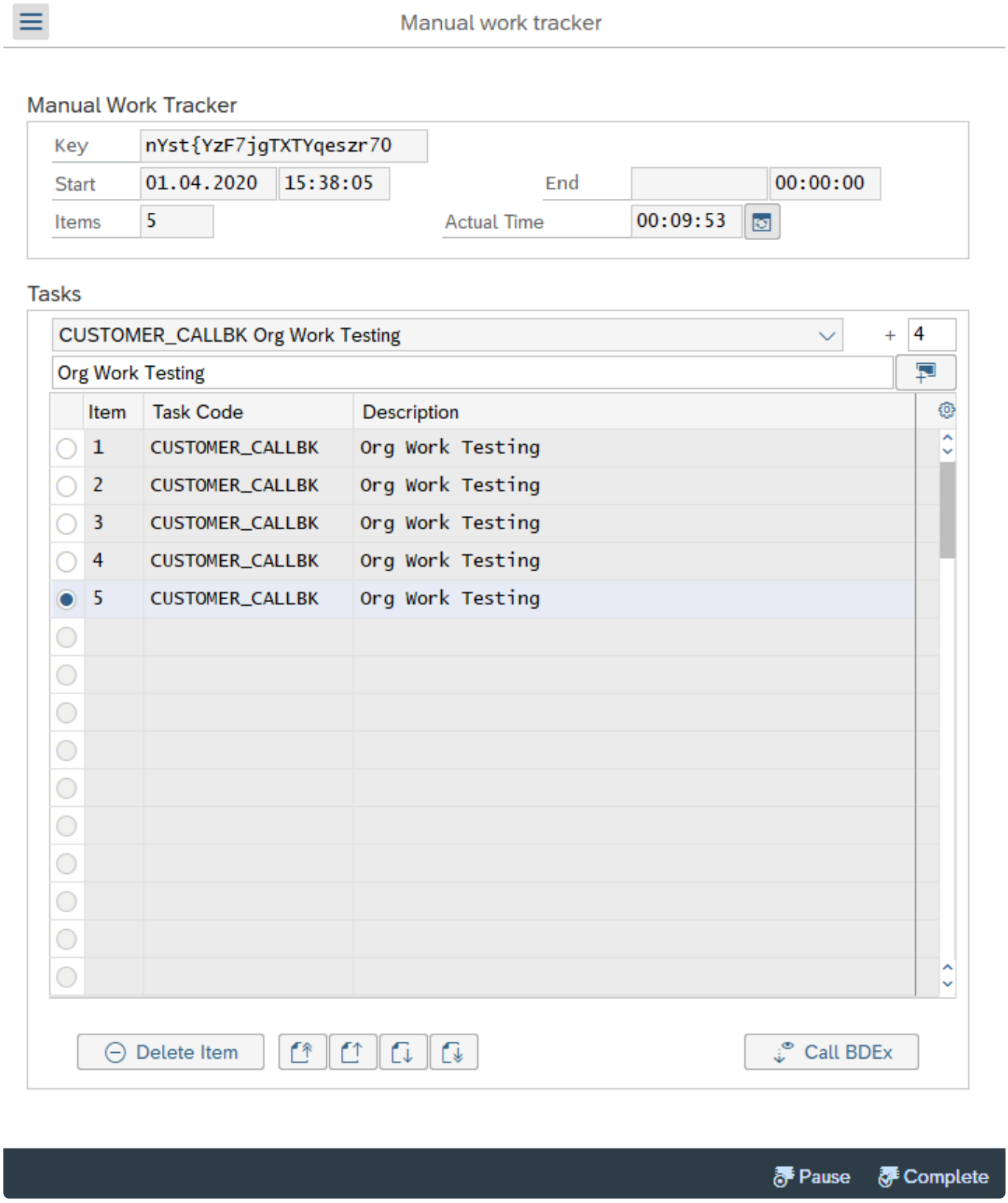
Cancelling out of Manual Work Tracker

Cancel is only available before a task has been selected. Once a task has been input you must complete

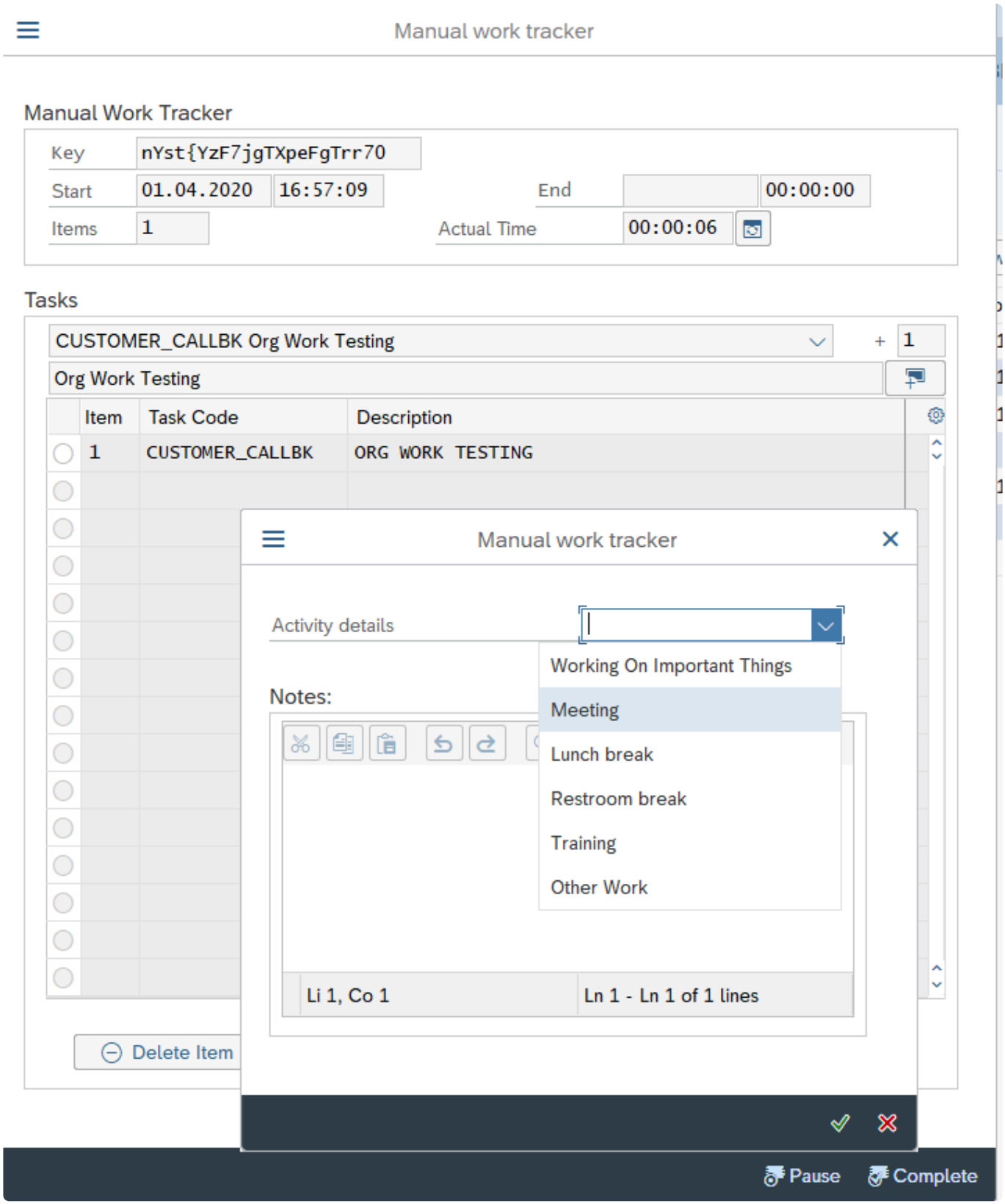
and start the manual task again.

Using Pause in the Manual Work Tracker

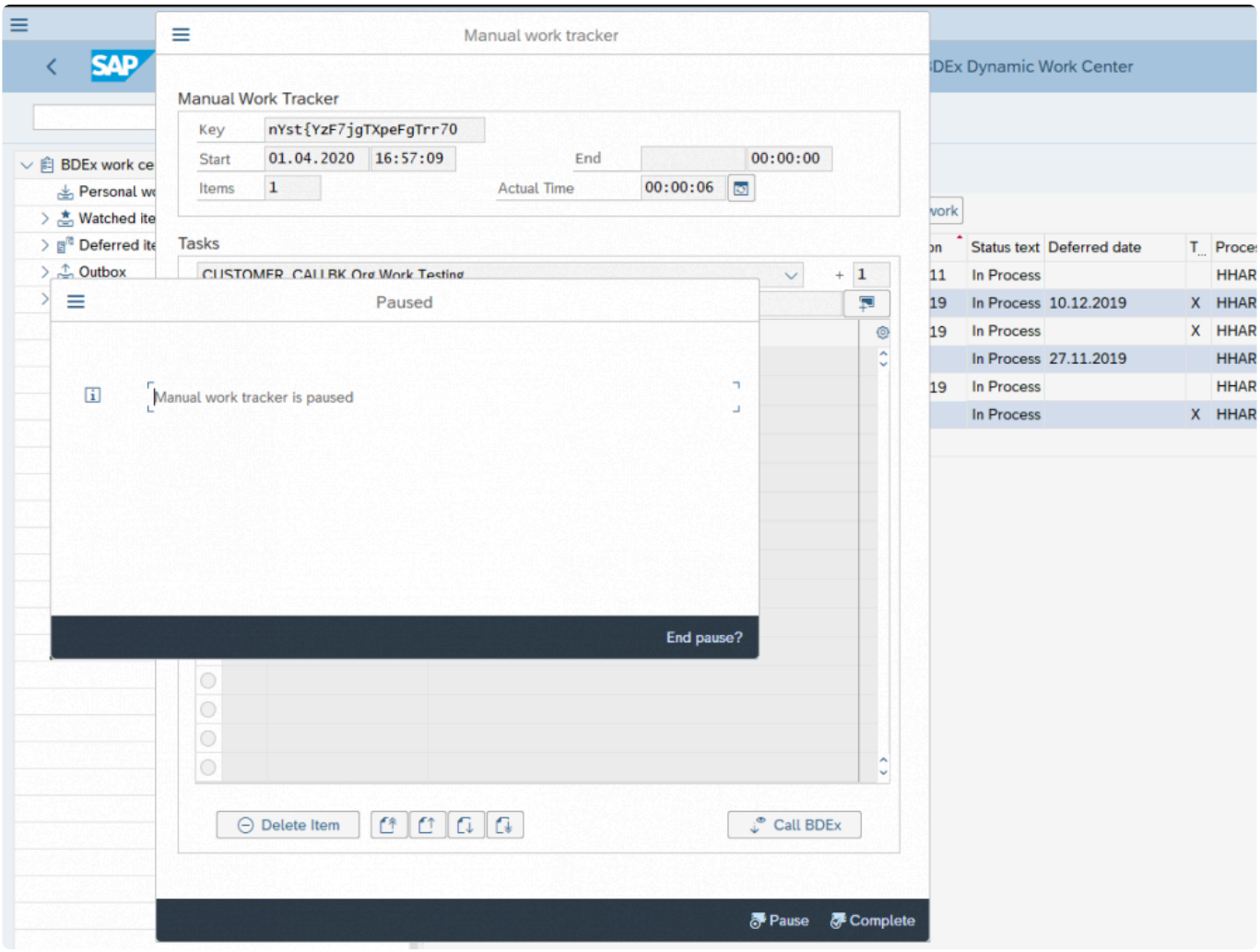
Once a task has been submitted you can now Pause the session if you want to add pause time to the manual work task.



The Pause reason can be selected here and notes can be added to the pause if desired

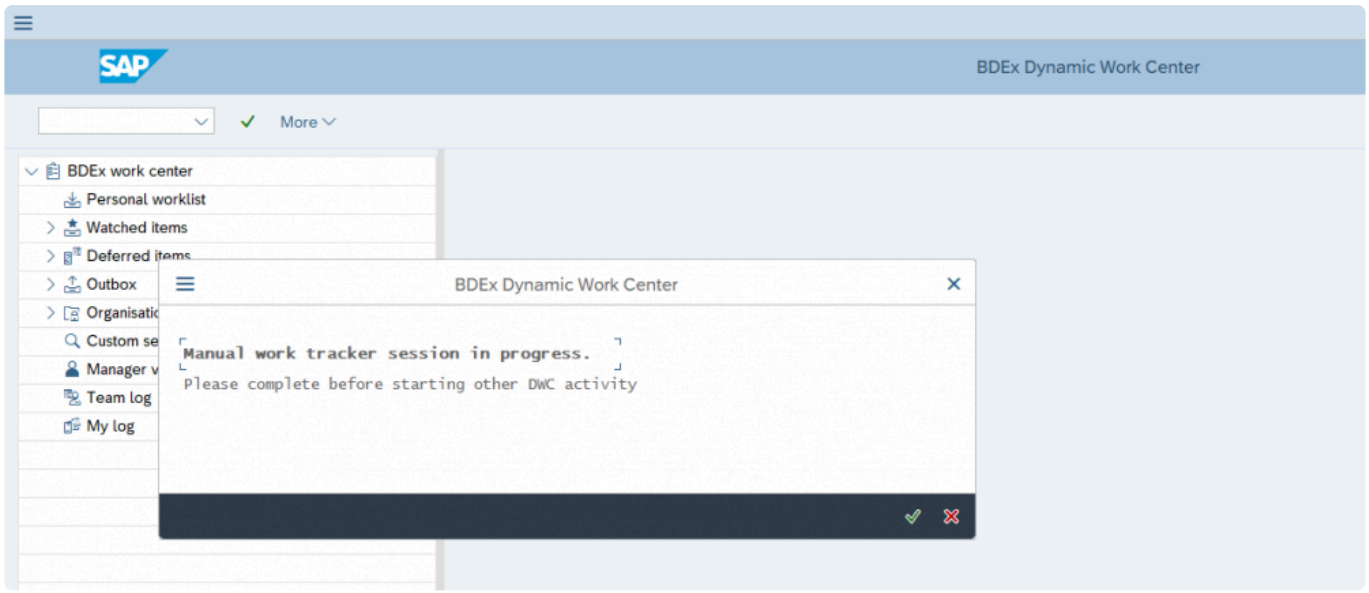


When in pause the screen will lock until the user ends the pause time to prevent the time duplicating.



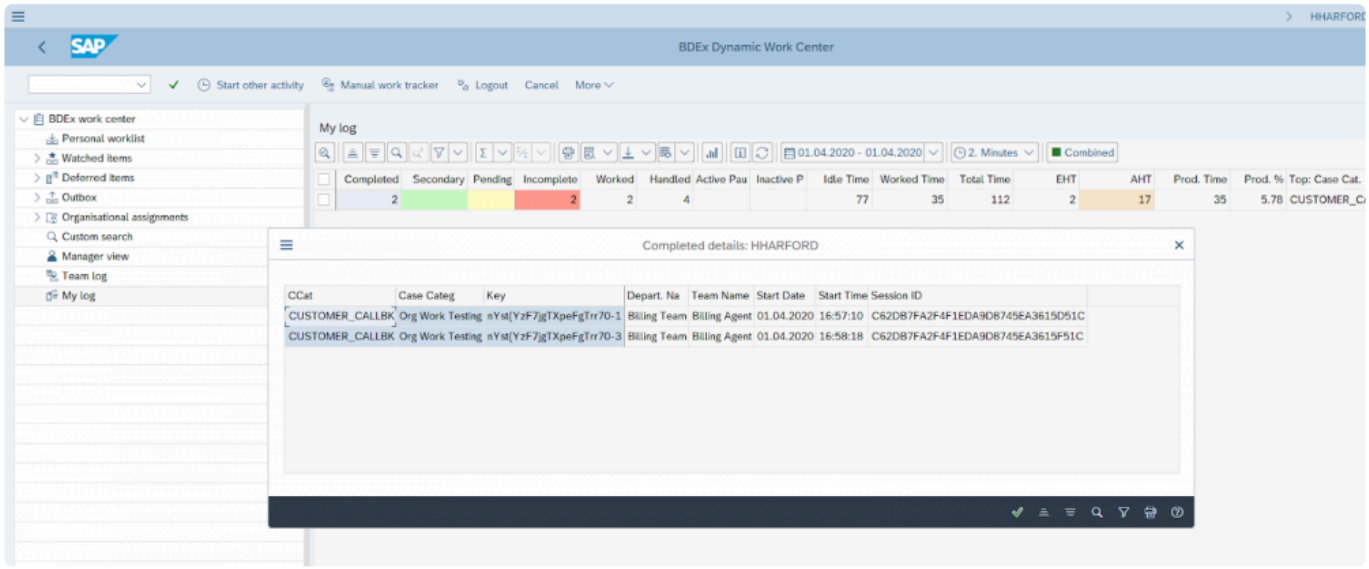
Launching BDEx from Manual Work Tracker

If the user needs to launch the Customer Centric Hub they can use the “Call BDEx” button to do this. However, time spent in the CCH will not duplicate the time entries. You cannot access the DWC whilst you are using the Manual Work Tracker. If you try to launch another DWC session you will see this pop up.



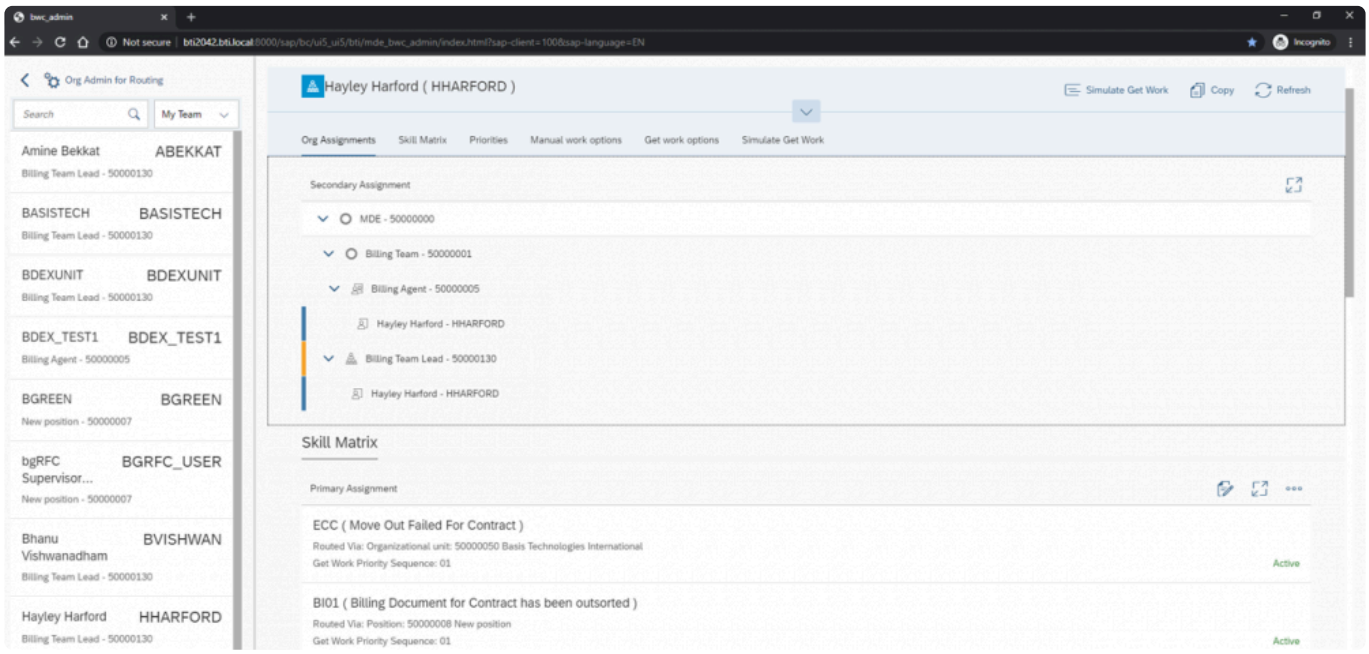
Displaying Completed Manual Work in the Team/User Log

Once completed the items will be added to the activity log to record the time for the user. The time is split equally between all of the tasks added. The tasks can be displayed in the users My Log or the manager can see this in the Team Log for that user. The tasks will accumulate with BPEM cases and the details can be displayed if you click on the number in the Completed/Incomplete values.



3.4. Manager – User Administration

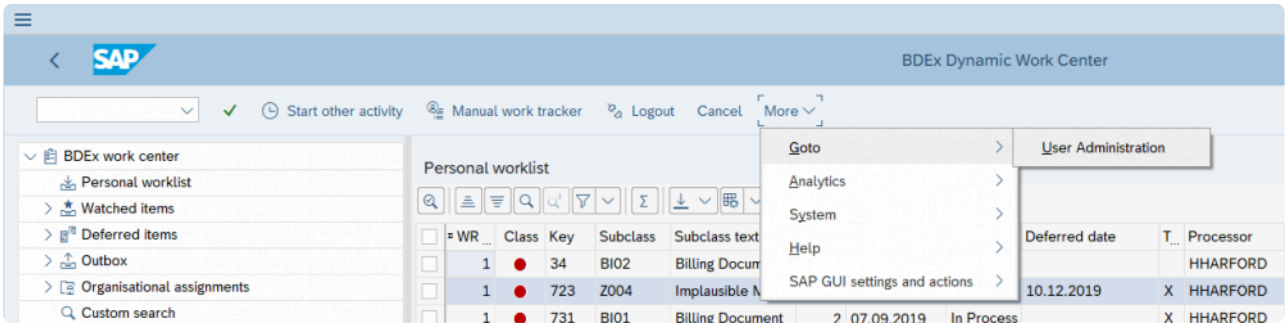
The user administration screen provides a centralised dashboard to manage user and org assignments relevant to BDEx Dynamic work center.
The screen also allows simulation of the get work function for the user.



3.4.1. Launching the app

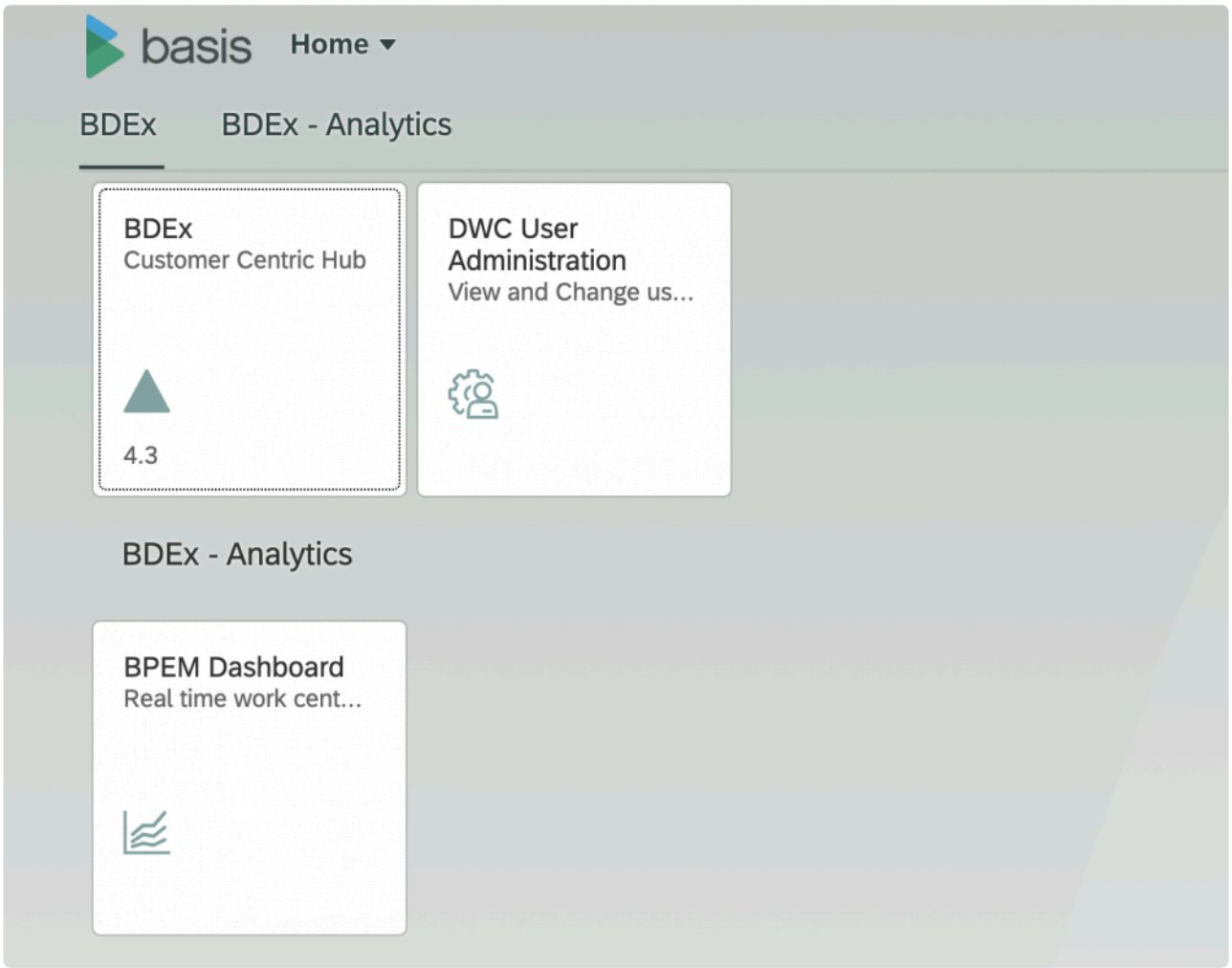
There are three ways to access the app.

- In the dynamic work navigate to menu Goto>user administration.

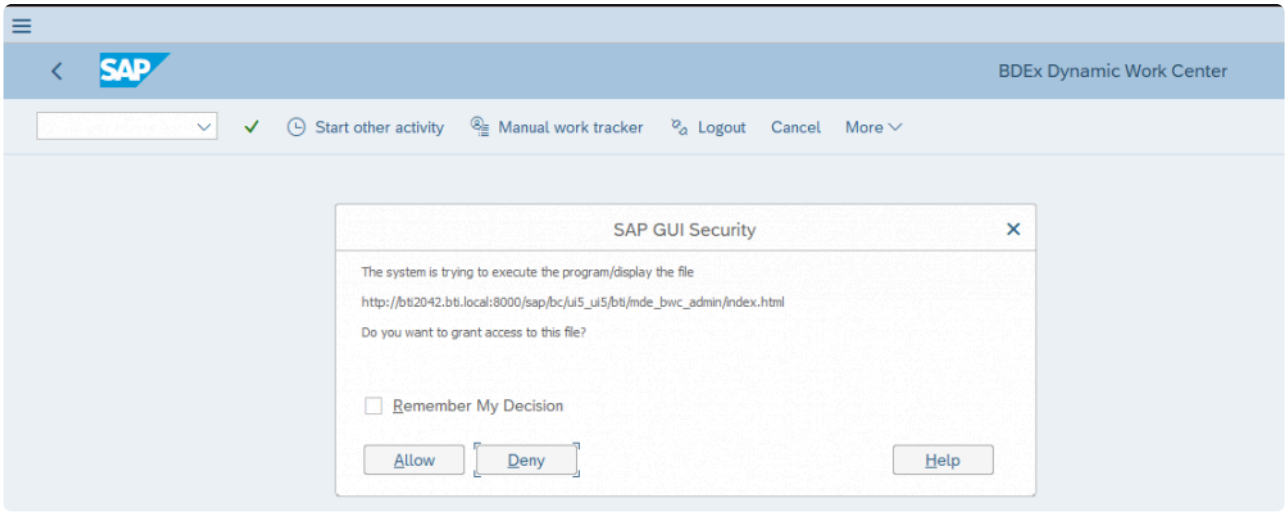


Note: this menu is only available if the app is enabled in option 47
See configuration requirements for more details on how to activate.

- Via FIORI launchpad tile(if available in your system).



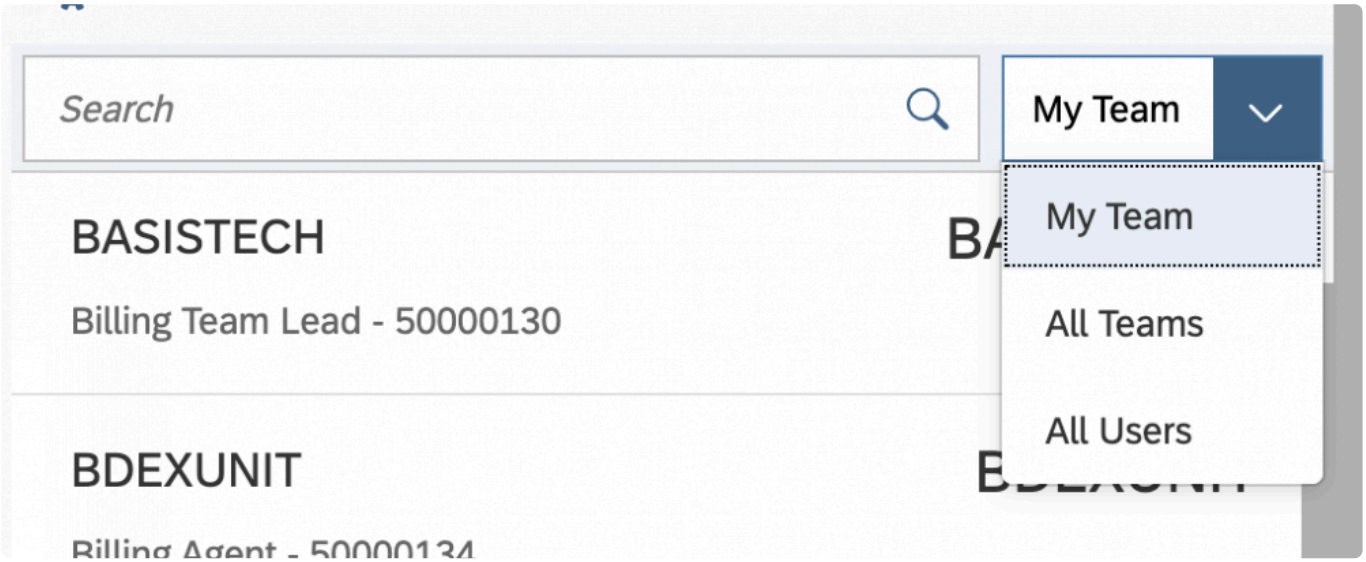
- Using transaction code /BTI/BWC_ADMIN.
  This will launch the URL link



3.4.2. Users List Panel

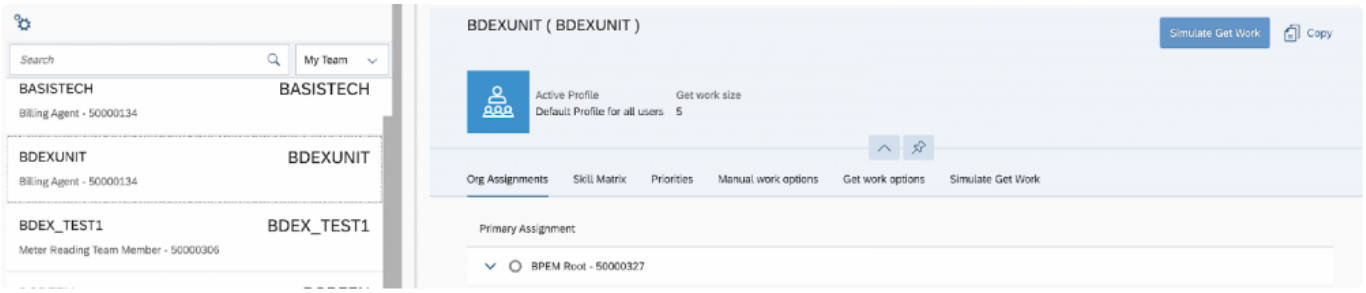
My Team

Provides a list of all users and can be filtered by users in your team/ routing org structure / all users in the system.



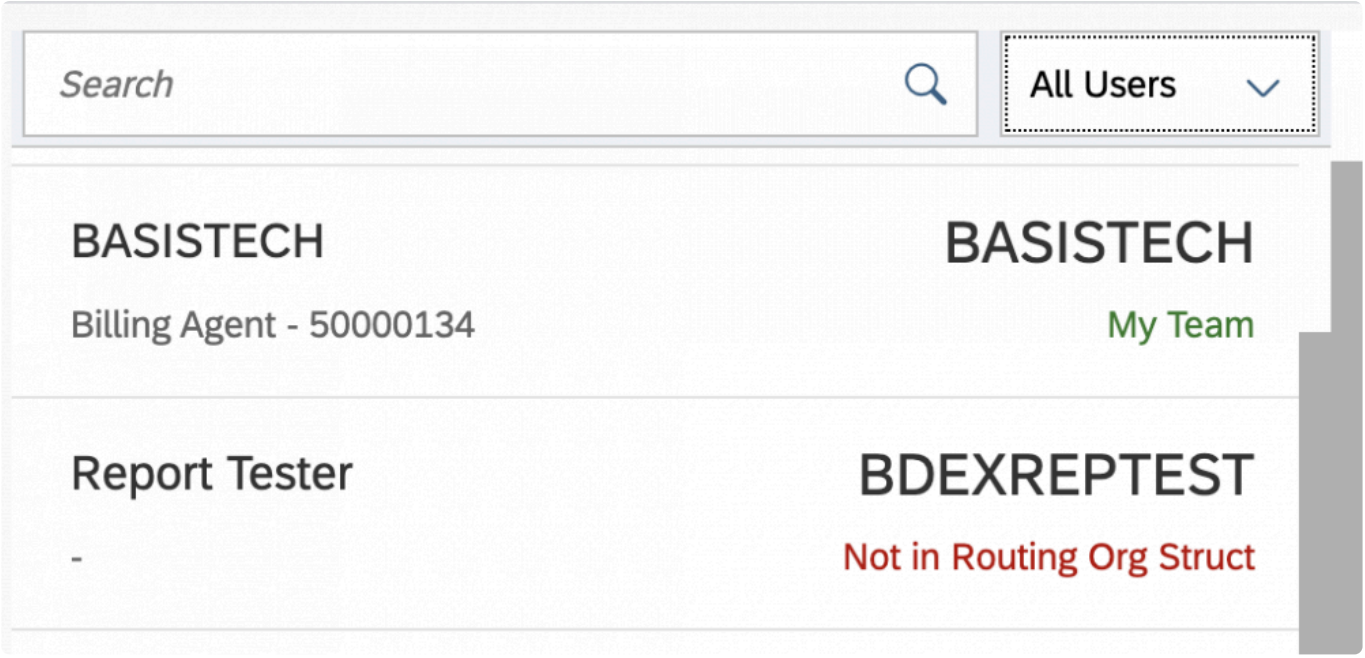
View User Detail

Click on a user to see the detail assignments for that user:



All Users

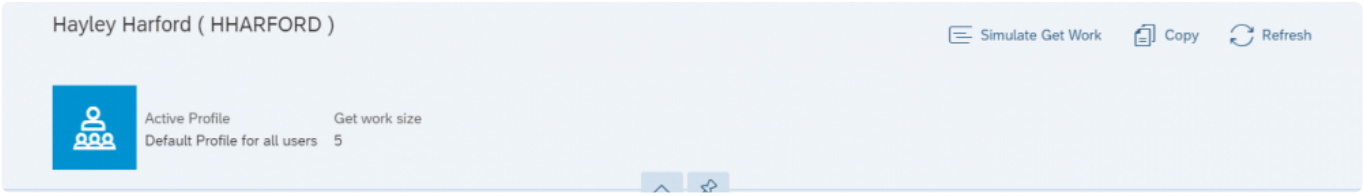
If all teams or all users selected the users team / org assignment status is highlighted based on whether the user is in your team / other team or not in any team.



! this panel is not available if option 47 is set to Own.

3.4.3. Details Panel

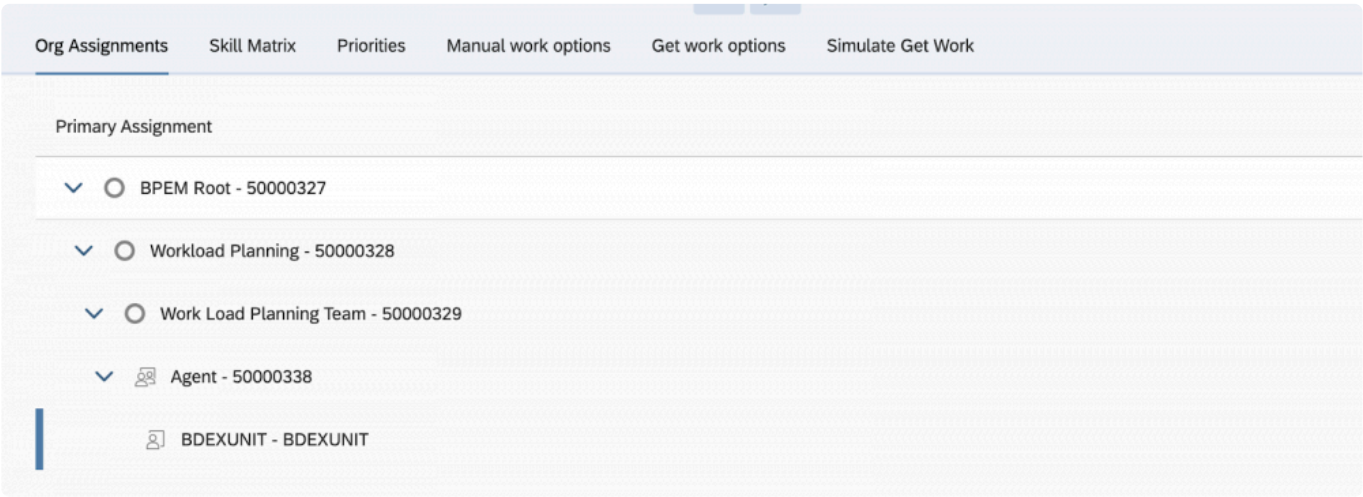
Displays information about various assignments the selected user has.
Header: Gives basic information about the user selected like Name, SAP user id, active profile etc.



Menu options include:
Simulate Get Work
Copy
Refresh – this will update the page.

3.4.3.1. Display Organizational Assignments

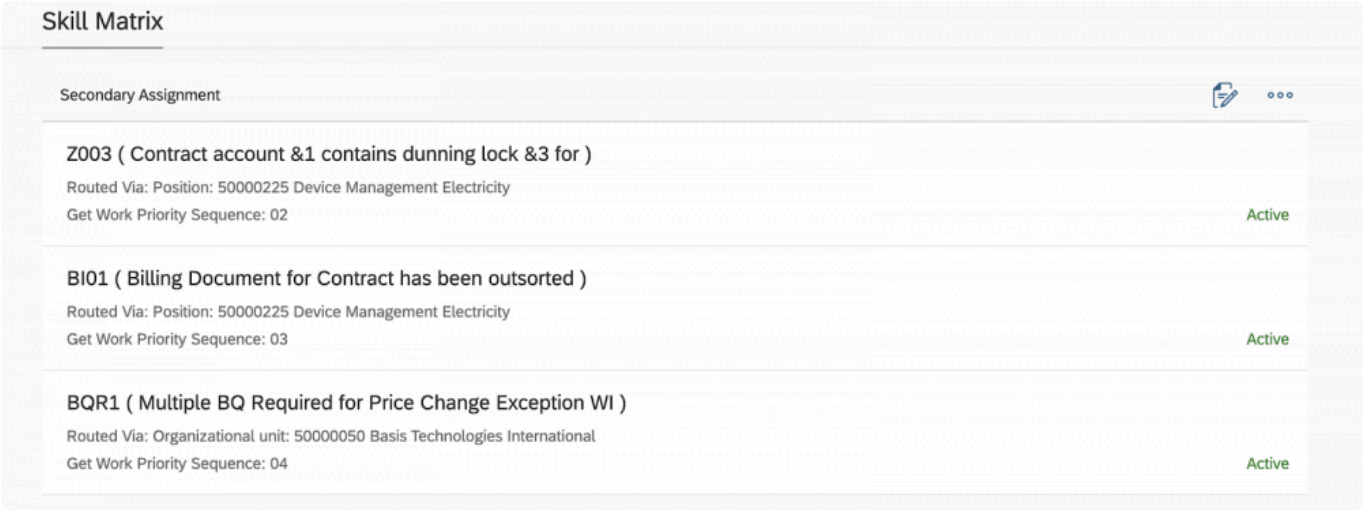
Organisation Assignments: Shows all org units and positions the user is assigned to in the Routing Org structure.



Assignments outside the Routing org structure(s) defined in option 49 cannot be viewed here.

3.4.3.2. Display/Update Skill Matrix

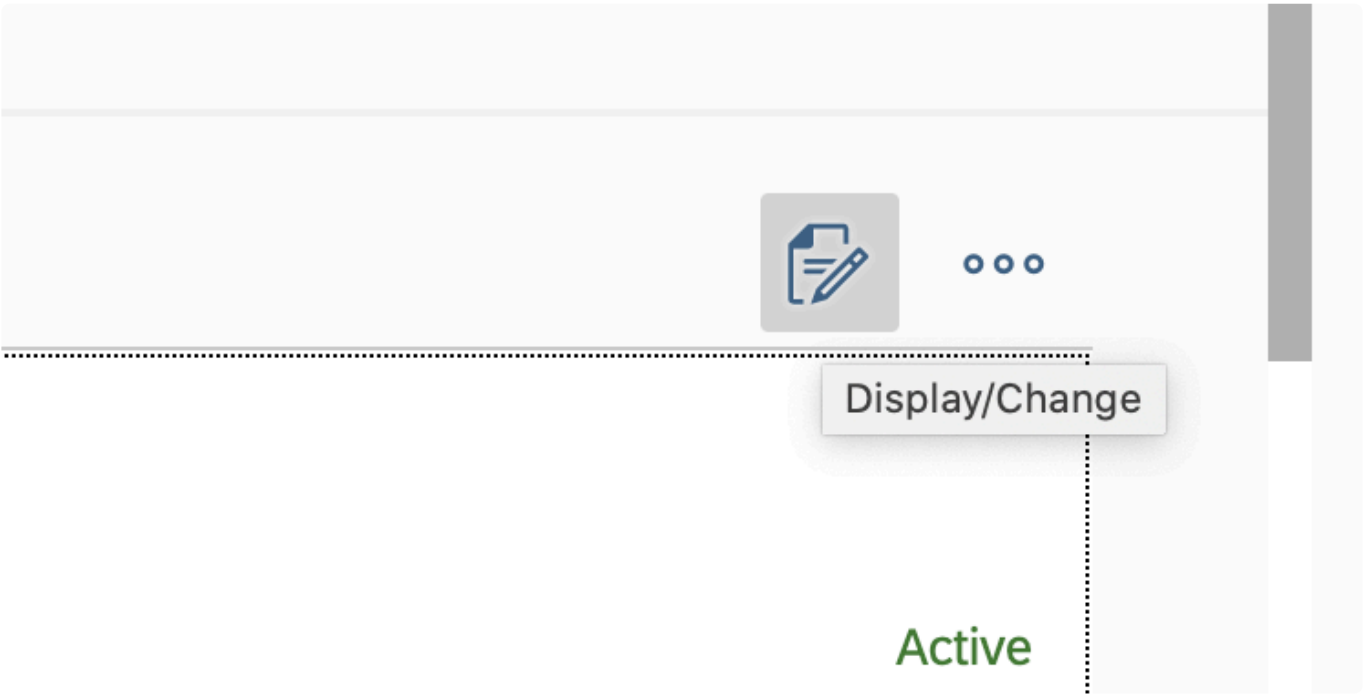
Skill Matrix: Provides an overview of all skill assignments.



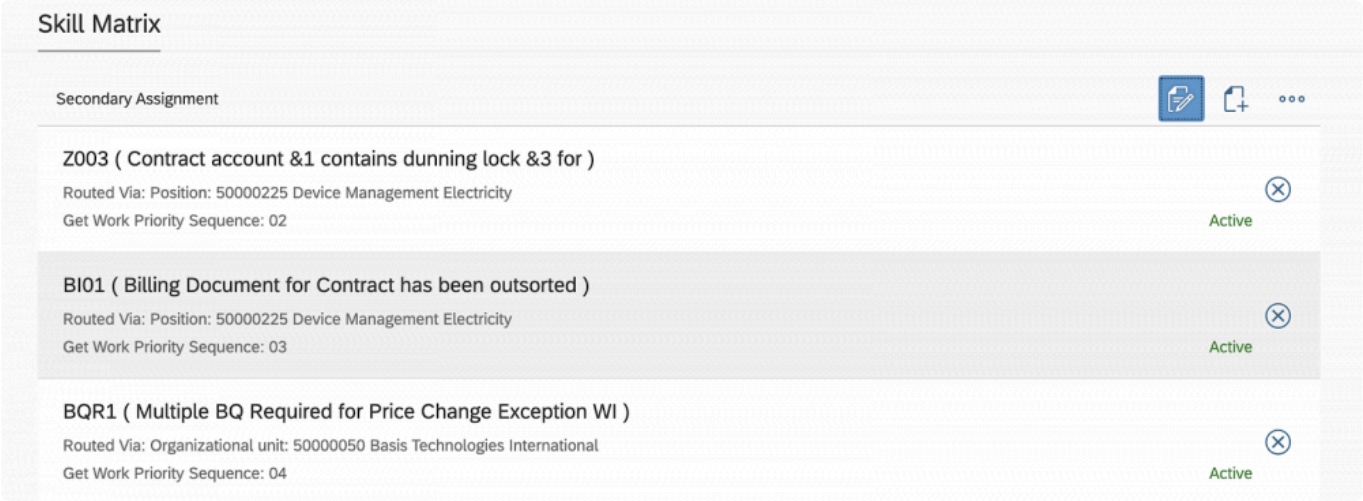
This can be used to record the case categories a user can work that are outside of their usual work queues.
For example if a user is up skilled on a case for another team. Only if the skill matrix is set to active will that user receive those cases.

How to Change Skill Matrix records

Click on display change button for further options.



Change mode enabled.



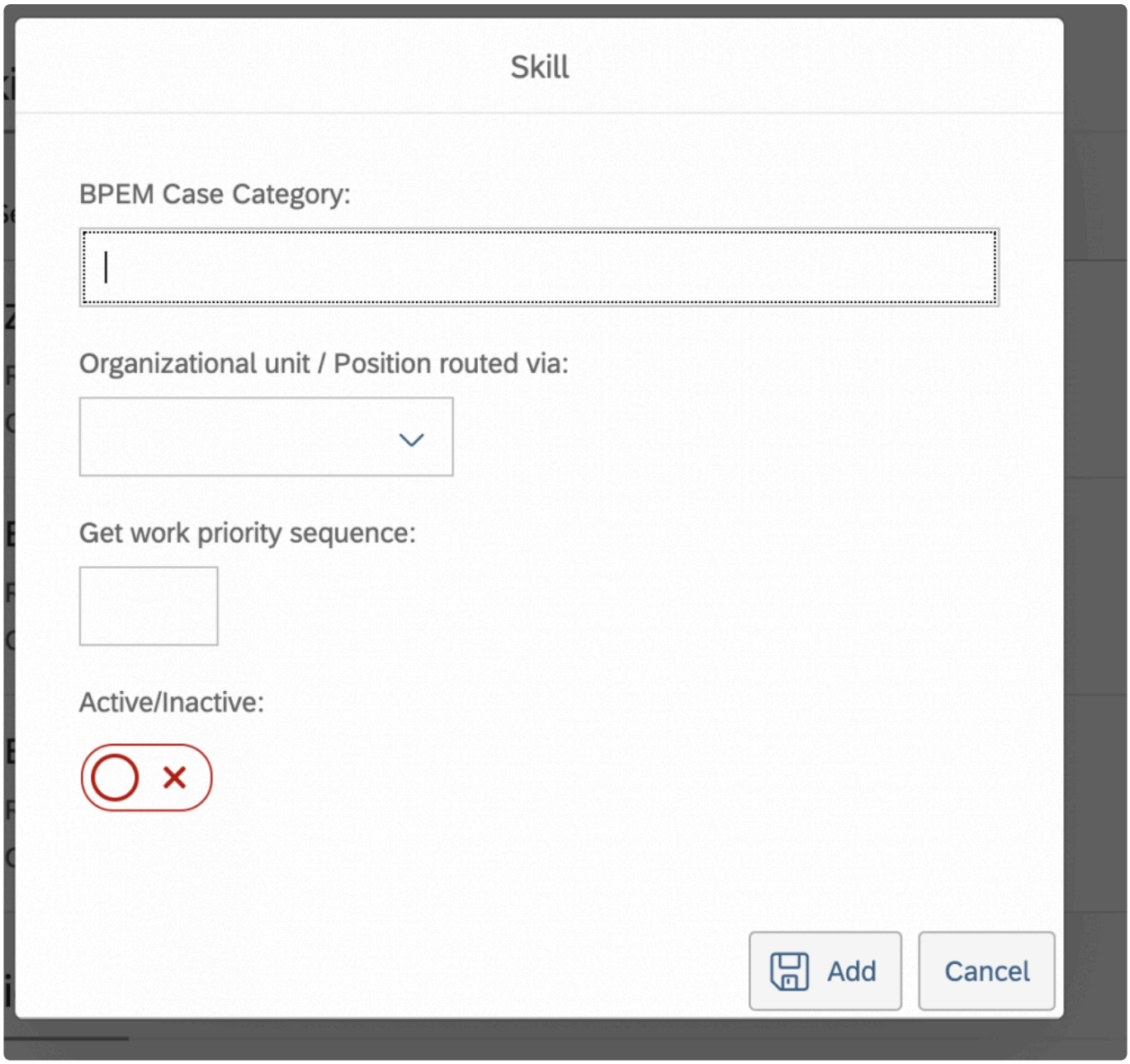
Entries can be deleted using the button.

Adding a New Skill for a User

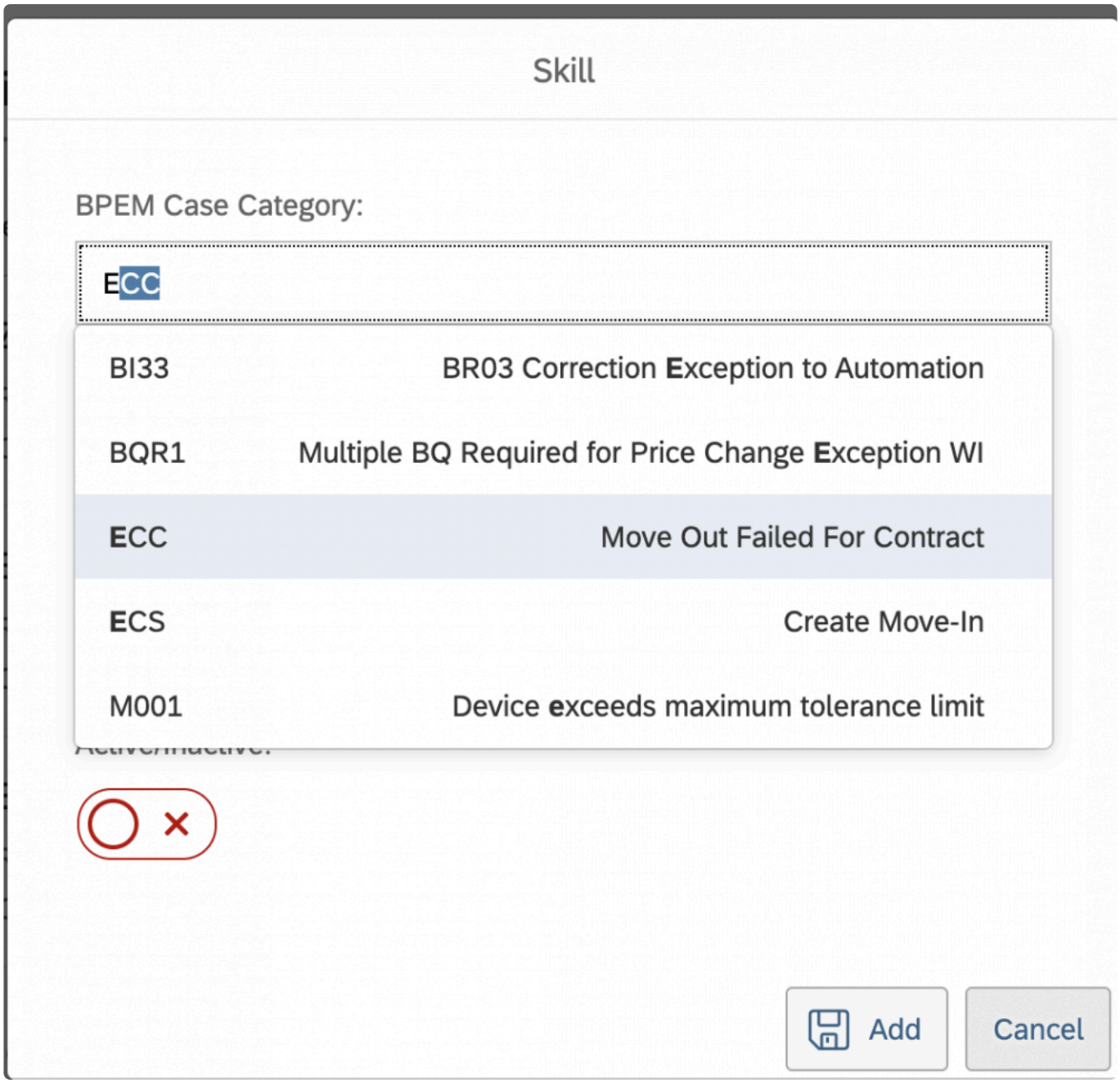
Skills are added for a specific user.
Note: Make sure you have selected the right user before you start.

New entries can be added using button.

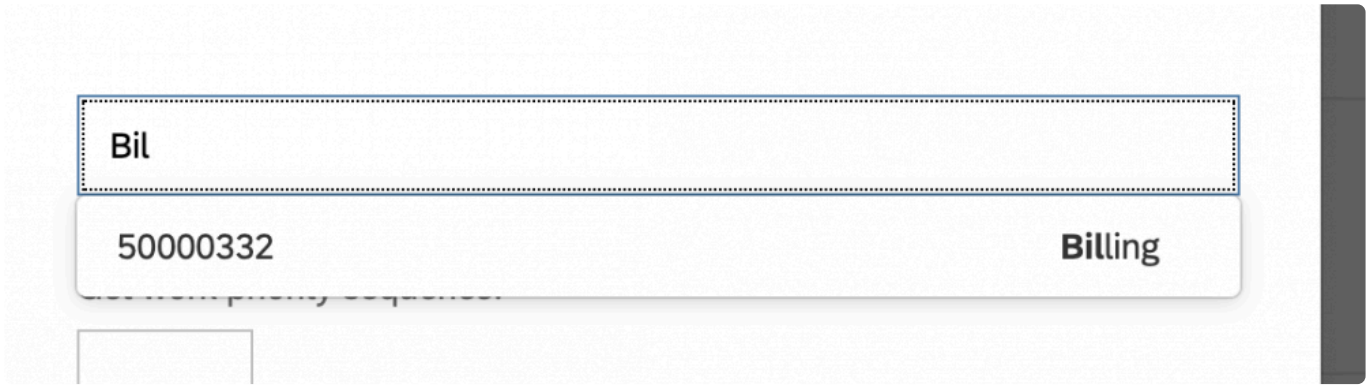
This will open a new selection where the Skill details can be added:



Start typing in the BPEM case category field to get suggestion:

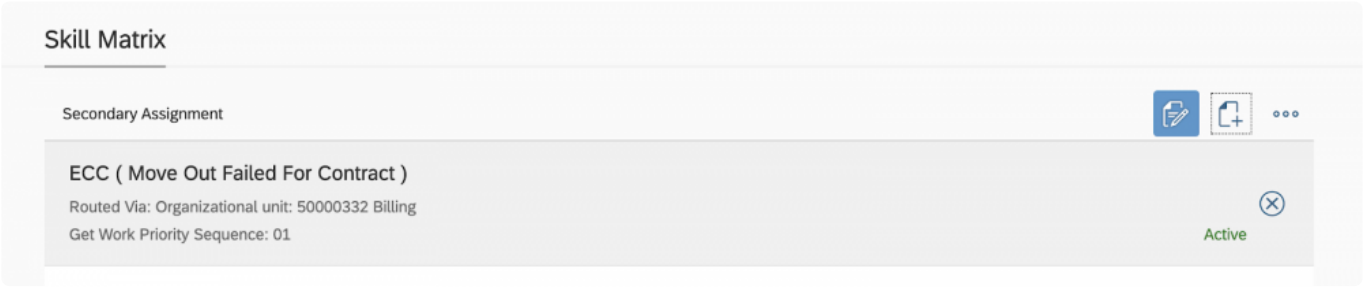


Either the case category or case description can be used to search



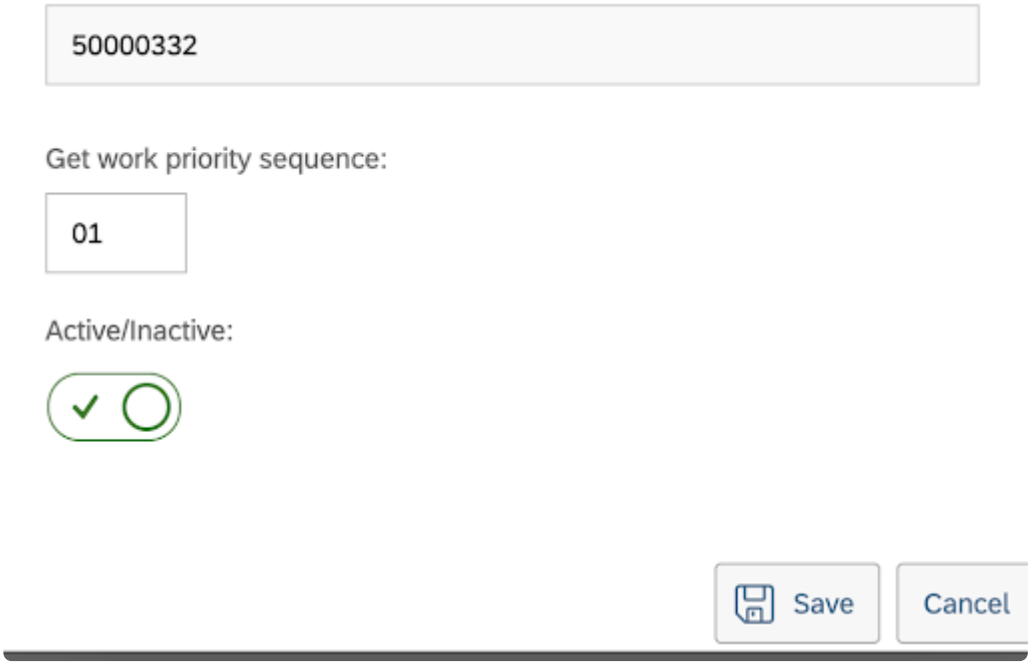
Select active or inactive:

Click on Add. The skill is added:

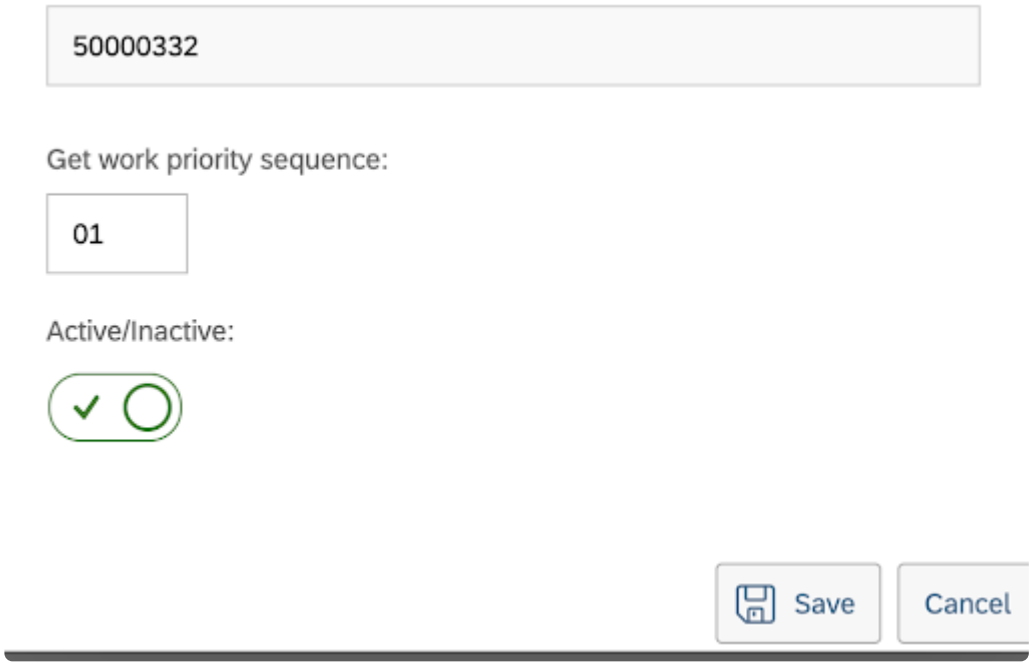


Deactivate Skill Matrix

To deactivate the case click on the item in change mode and toggle the active / inactive switch:



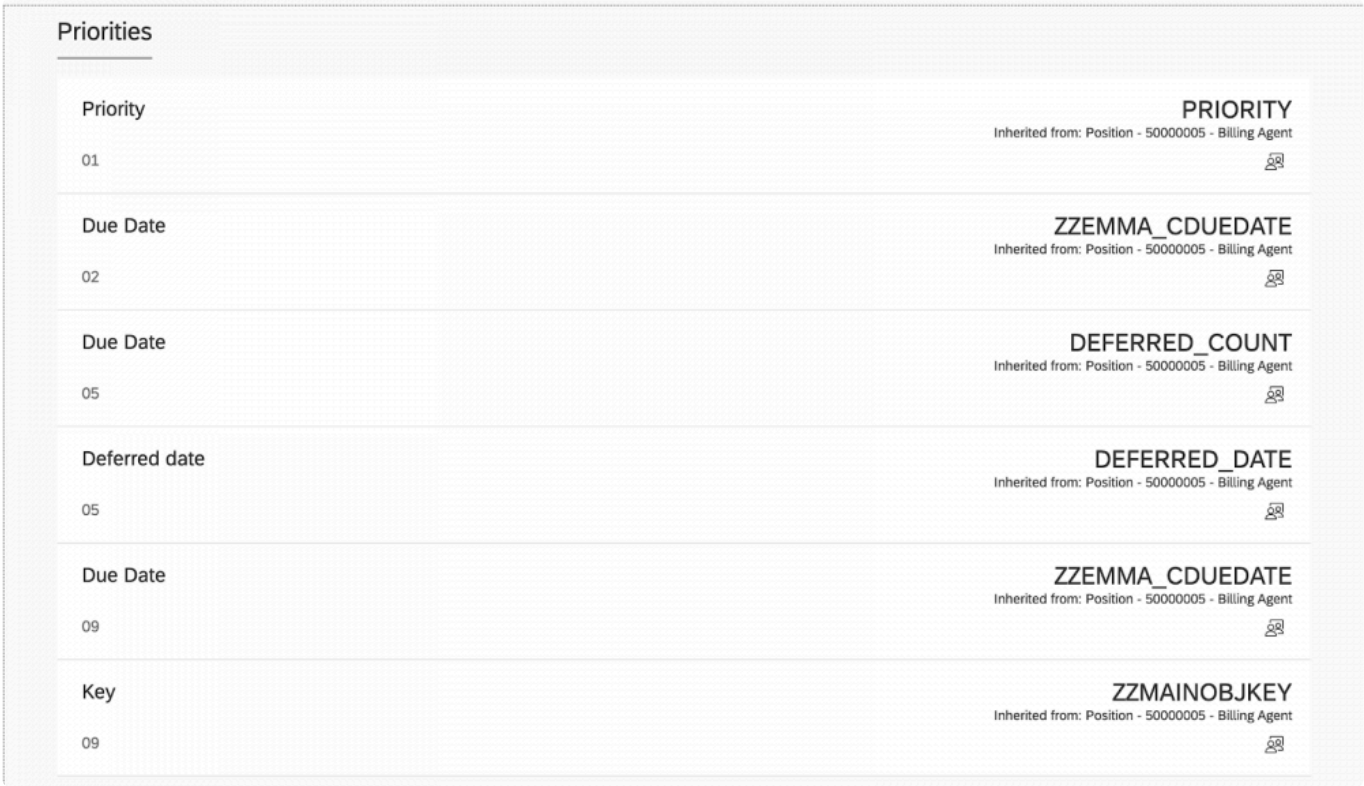
Click Save – the skill matrix entry will be displayed as inactive.



For more details on Skill Matrix refer to the [Release Note 4.3 Skill Matrix]

3.4.3.3. Display Priorities

Priorities are set for an organizational unit, position or user to determine how to select the top priority work when the user hits “Get Work” in the Dynamic Work Center.
By selecting the Priorities heading in the User Admin screen you can view which priorities are being used for that user.

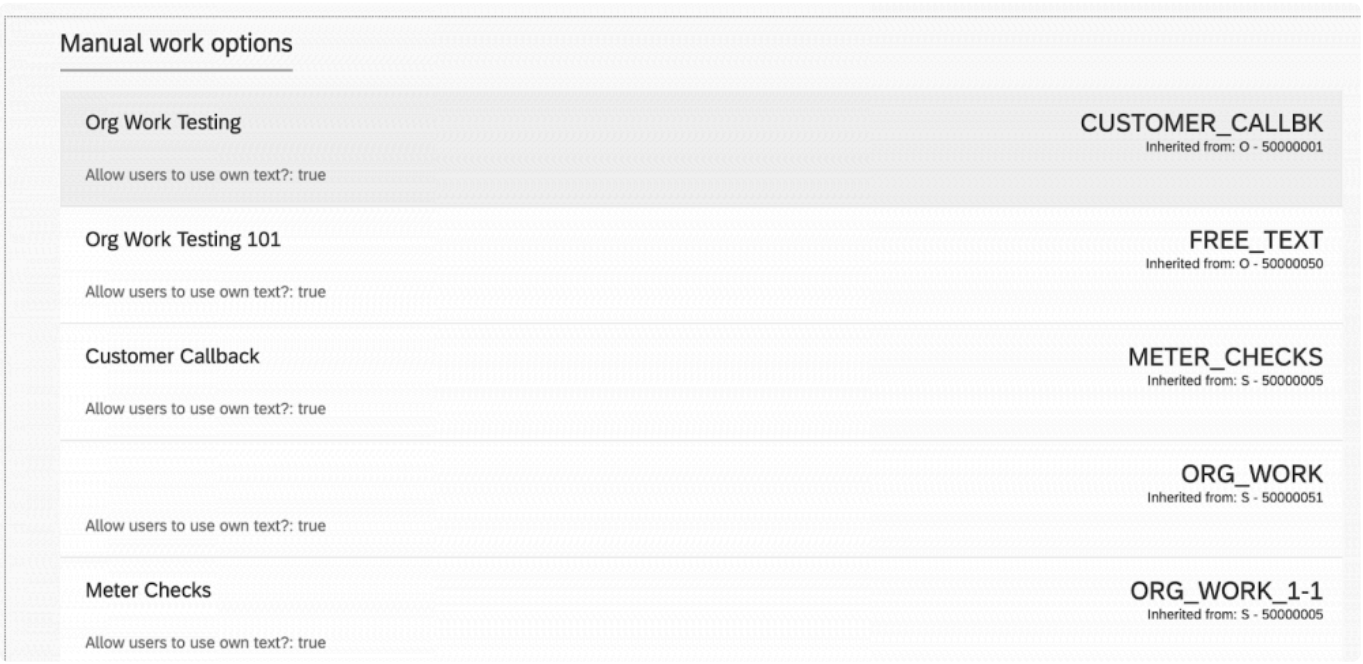


Priorities can only be displayed from this panel.
Changing priorities is possible at the org/ position level.

> For more information on how to change the priorities view within Changing Priorities Topic

3.4.3.4. Display Manual Work Tracker

The manual work tracker options for the user are displayed in this section.

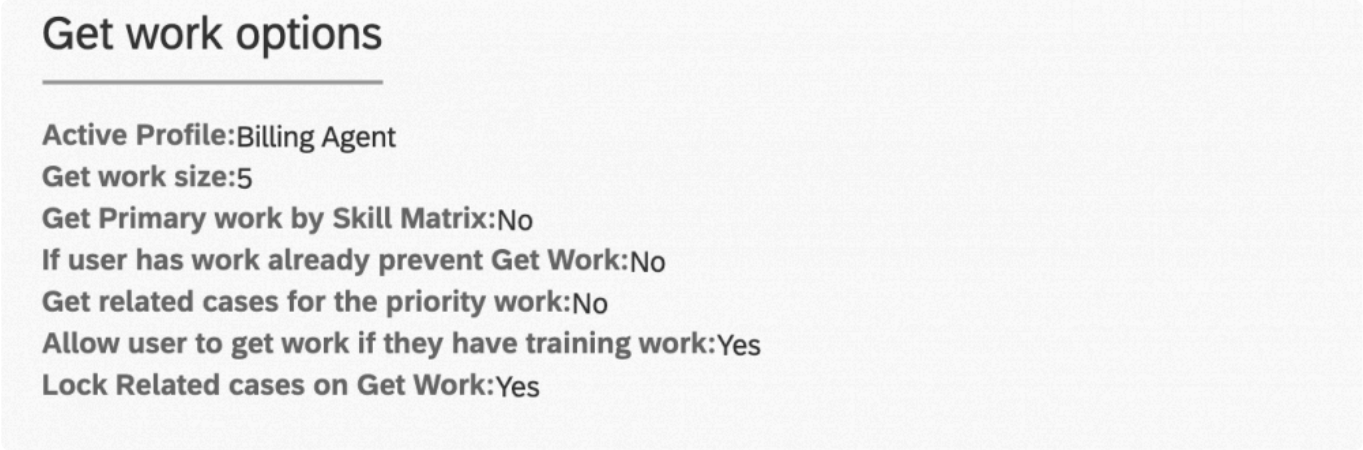


Manual work tasks are assigned to the organization unit or position and therefore cannot be changed in the User display.
Click on the link to see how these can be changed: Changing Manual Work tasks

If the user does not have any manual work tasks assigned this panel will be blank.

3.4.3.5. Display Get Work Options

Get Work Options are displayed for the User.
These options are determined by the option priority which is either user, profile or system setting.



More options are applicable however this is only displaying options relating to “Get Work” functionality.

Related to Get Work are:

Option	Description
Active Profile	This displays the users default profile
Get Work Size	How many primary cases the user will receive when they hit get work
Get Primary Work by Skill Matrix	When this option is active the user gets skill matrix work first and if this work runs out then work is assigned from the work queue
If user has work already prevent Get Work	The user must complete all work in their inbox before new work will be assigned. The only except is deferred cases (are still deferred)
Get Related Cases for the	Once the primary work is identified get work will check if there are related cases to this. A related case is a case that belongs to the same customer (this is determined based upon the settings defined for this option) that is assigned to the work queues for the user and has the same case type as any of the primary cases. Skill matrix cases maybe outside of the users assignments and

priority work	therefore if using this there maybe cases assigned the user cannot work and will need to put back into the queue
Allow user to get work if they have training work	Cases can be assigned as training by a Manager, if this option is activated the user can still “Get Work” when they have training cases in their queue
Lock related cases on Get Work	If this option is activated Get related work must also be activated. This feature will look for related cases to the primary work (that is being assigned) that are not assigned to the users work queue and share the same case type. If cases are identified these cases will be locked from Get Work (means they are temporarily removed from get work queues) until the primary case is completed, cancelled or the processor ID is changed

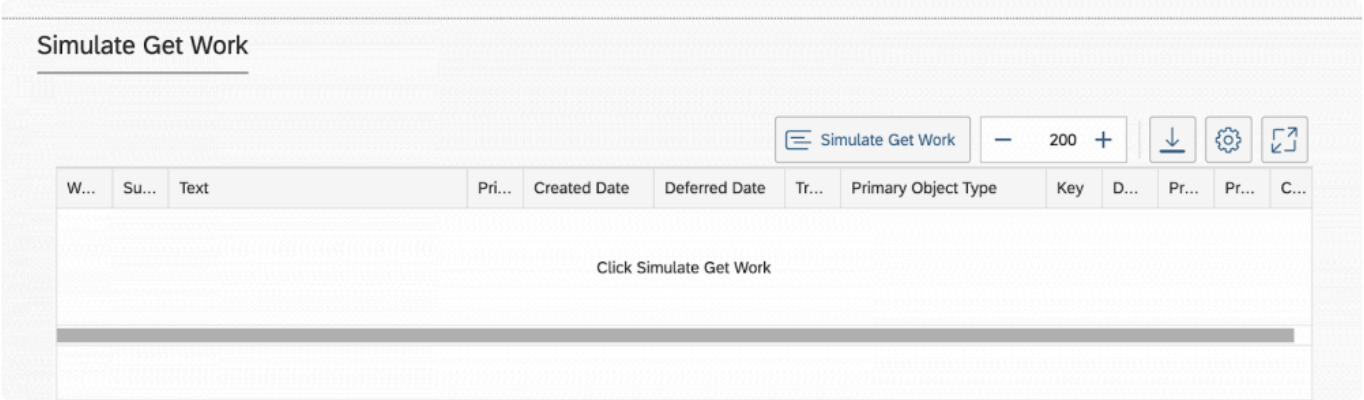
Active Profile – this will display the users

The options cannot be changed here.

If you need to amend the changes to the get work options then you must do this in the Profile Editor using transaction /BTI/MDE_PROF_MGR.
System settings are configurable and changes in the options table: /BTI/MDE_C_OPT.

3.4.3.6. Simulate Get Work

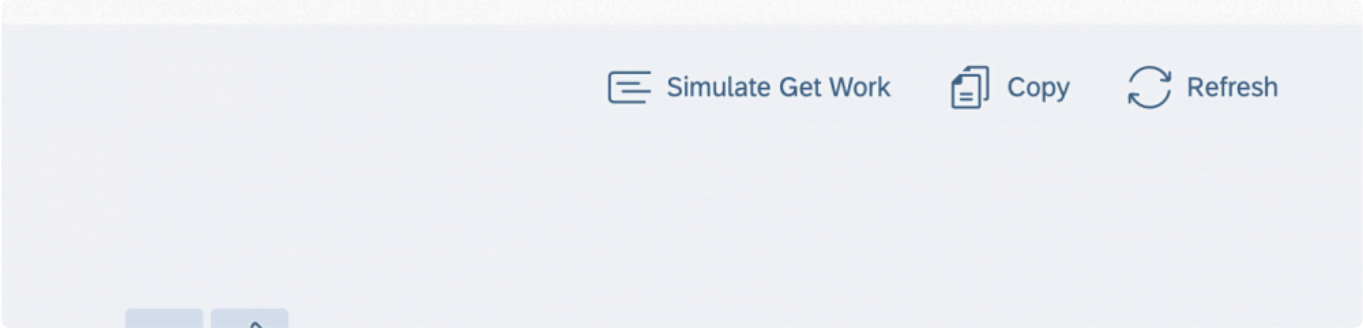
You can simulate get work for the user.
This determines the users work list and the order of which the cases will be assigned to the user.



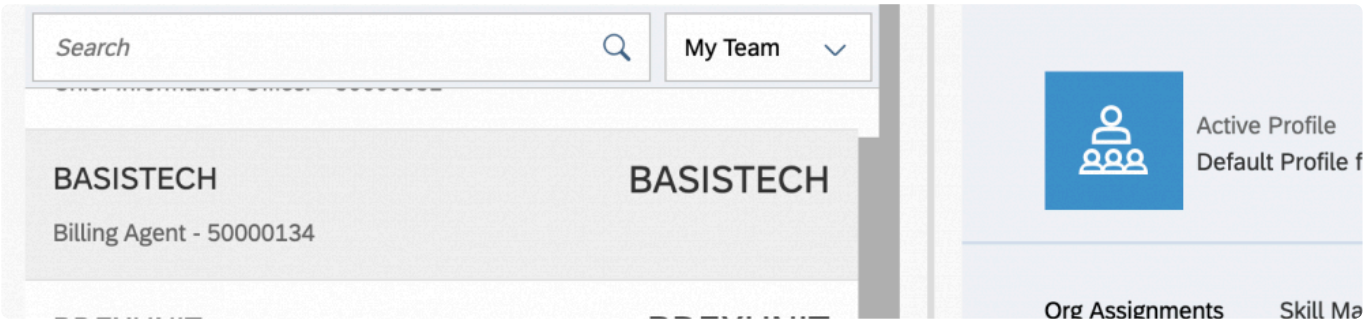
This function can be used to check the user is set up correctly and the right priorities have been determined.
For more information on using this see topic Simulate Get Work for User

3.4.4. Copying of Assignments

The “Copy” feature has been added to enable multiple users to be set up based on a current users settings.

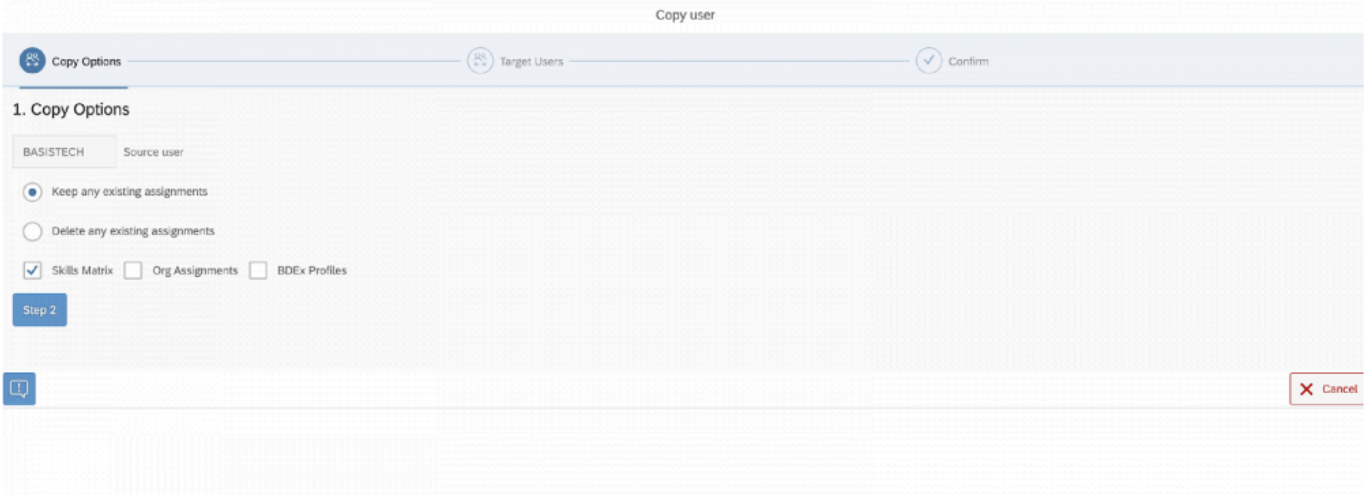


The icon “Copy” enables the coping of a current user assignments to one or more users.
Make sure have selected the user you want to copy from the user panel.



This will open the users assignments and settings in the Details Panel.

Click on the Copy Icon to open the guided wizard tool:

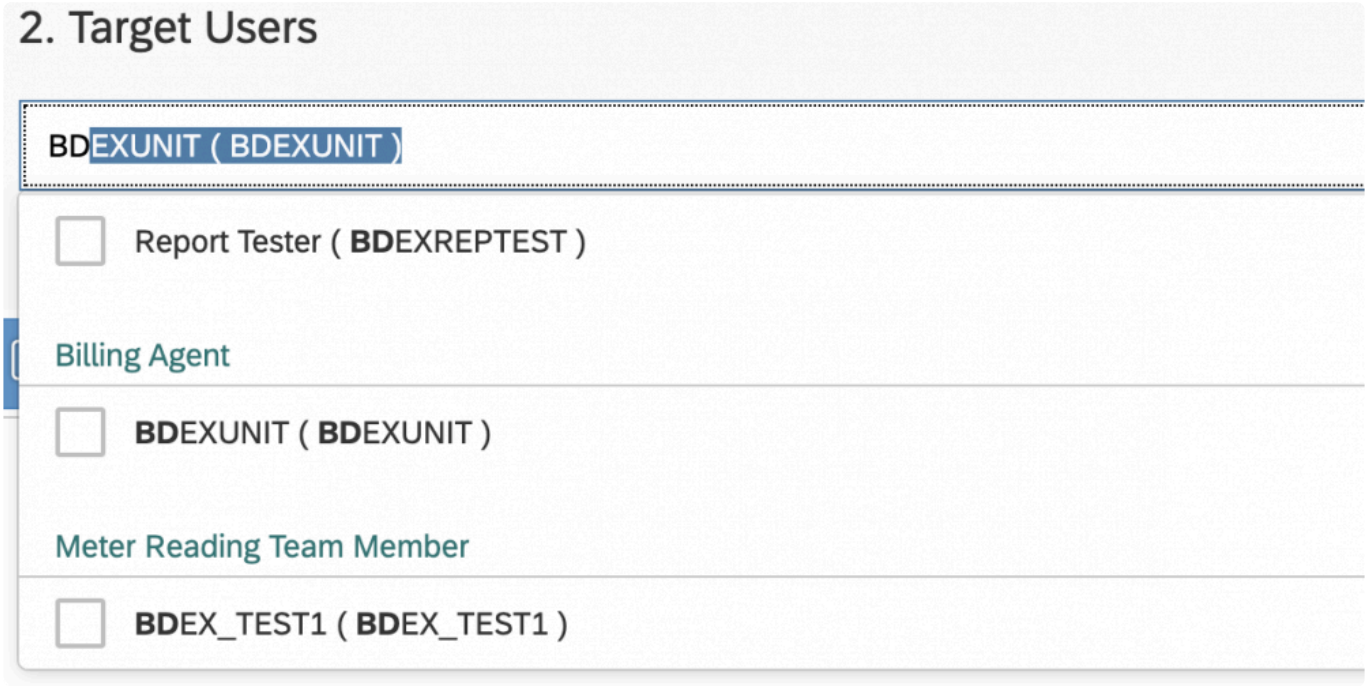


When the copy wizard is launched the source user is automatically filled.
Choose the option to Keep or Delete existing assignments.
Keep existing assignments – will retain the target users current assignments and settings and the source

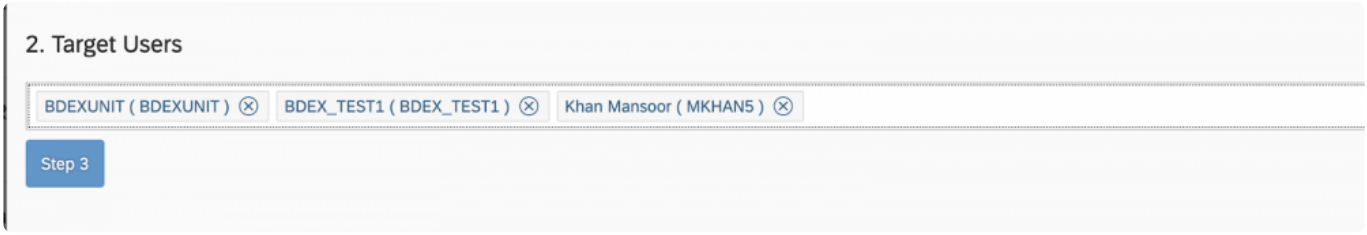
users option will be added to the target.
Delete existing assignments – will remove all of the current assignments and options for the user mapping the target exactly to the source user only.

Check the assignments to be copied. (Skill matrix, Org Assignments (Routing only), BDEx profiles.
You can add one or multiple assignments to be copied for the target user(s).

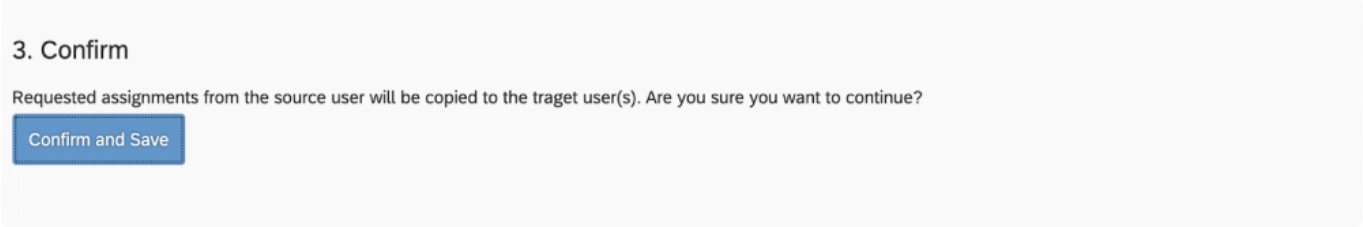
Click on Step 2.
Start typing the user name or user ID in the Target user Box to get suggestions:
One or multiple target users can be added.



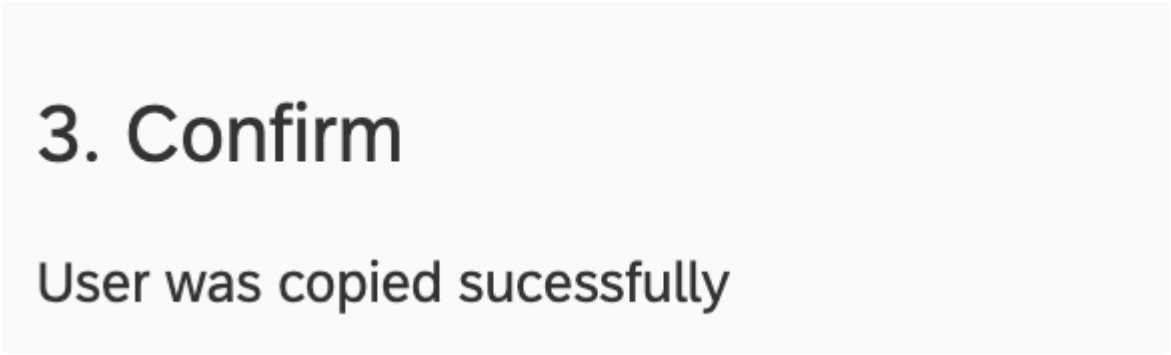
Add one or more target users:



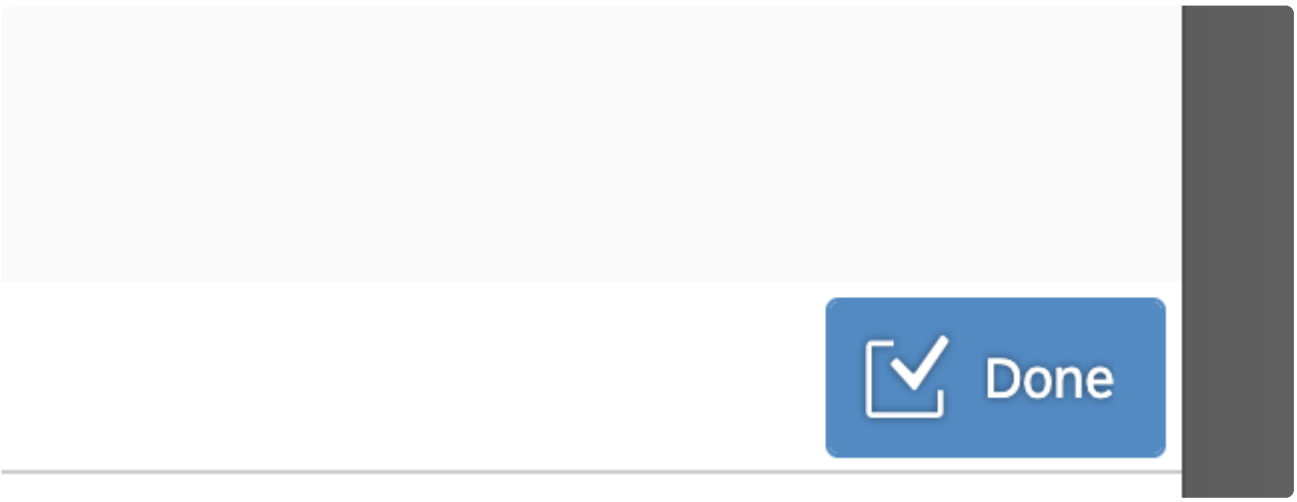
Click on step 3:
Check the information and confirm that you want to proceed with copying the assignments:



Source user assignments are copied to the target users.
You will see that the copy was a success



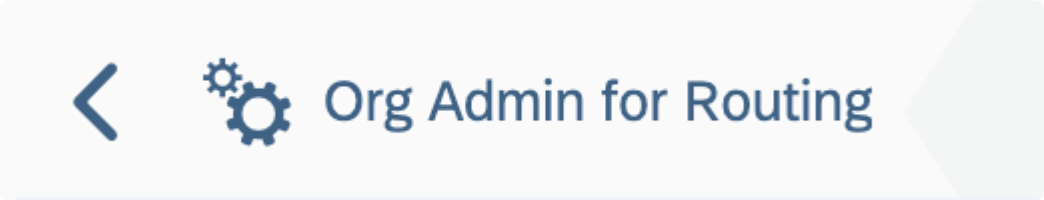
Click on done to exit the wizard:



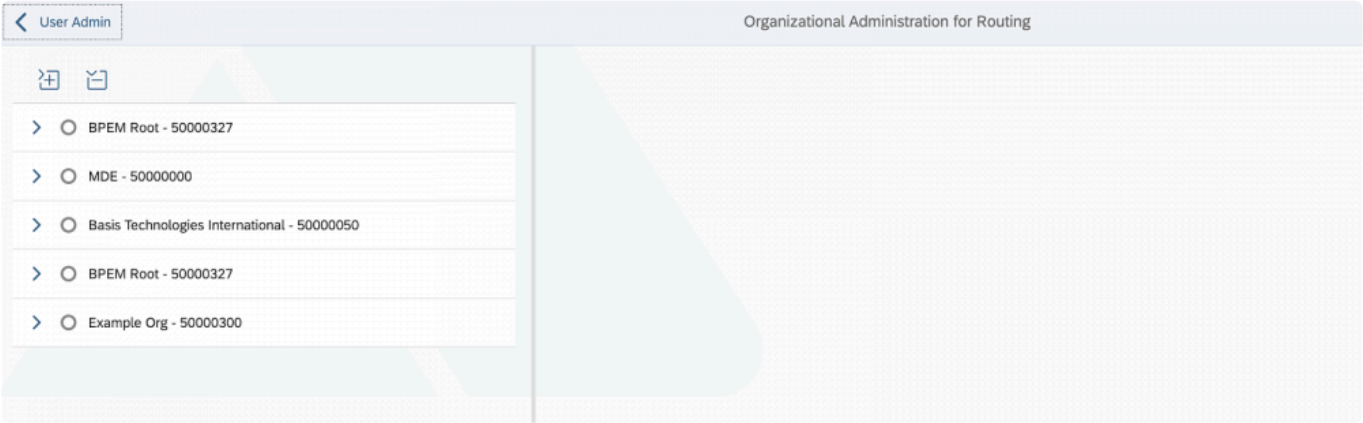
3.4.5. Organizational Administration for Routing

How to Access the Organizational Administration for Routing

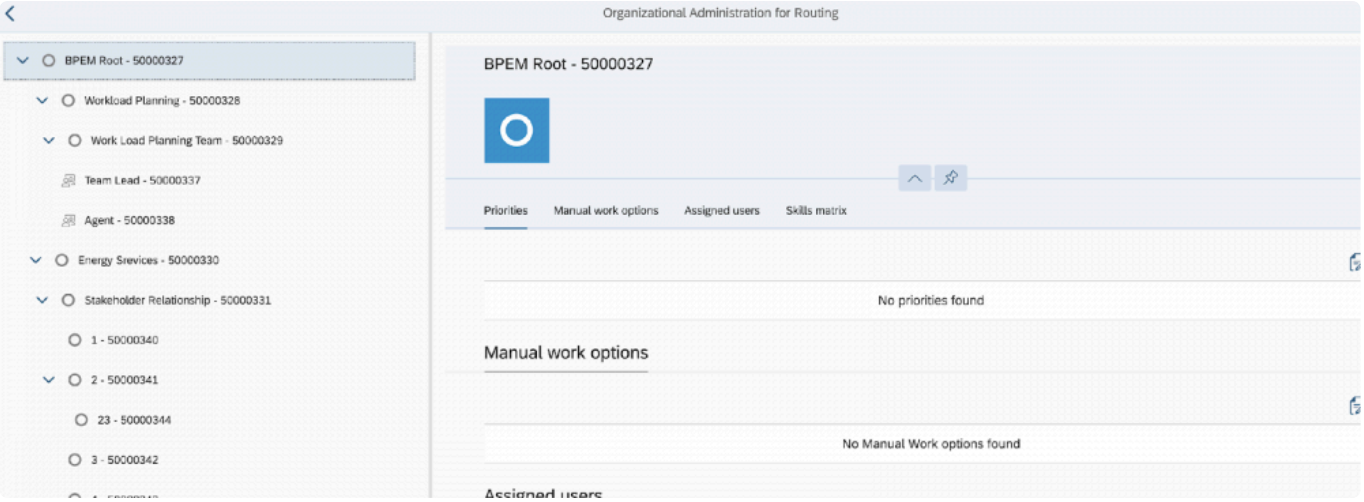
Org Admin screen Org / Position relevant assignments can be maintained by clicking on the icon above the user panel.



This opens up the Org Admin screen



All org units and positions under the routing root nodes are displayed here.
Clicking on the node will open up the details on the right panel.



Org Admin Details Panel

The details panel will show you all the different assignments relevant for the selected org/position selected including:

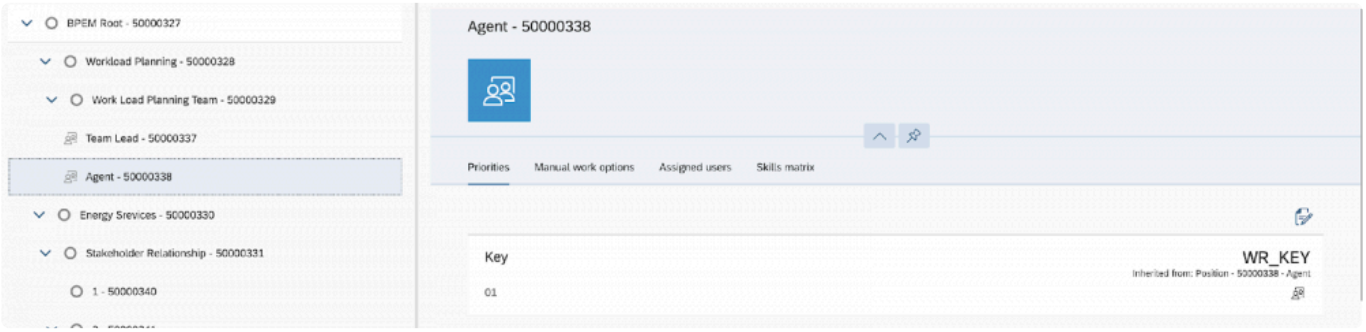
- Priorities
- Manual Work Tasks
- Assigned Users
- Skill Matrix Work.

These assignments can be changed whereby the setting is specific to the org structure org unit/position selected.
For details on how to change these options view these topics:
Changing Priorities
Changing Manual Work Tasks
Assigning Users
Display Skill Matrix Work

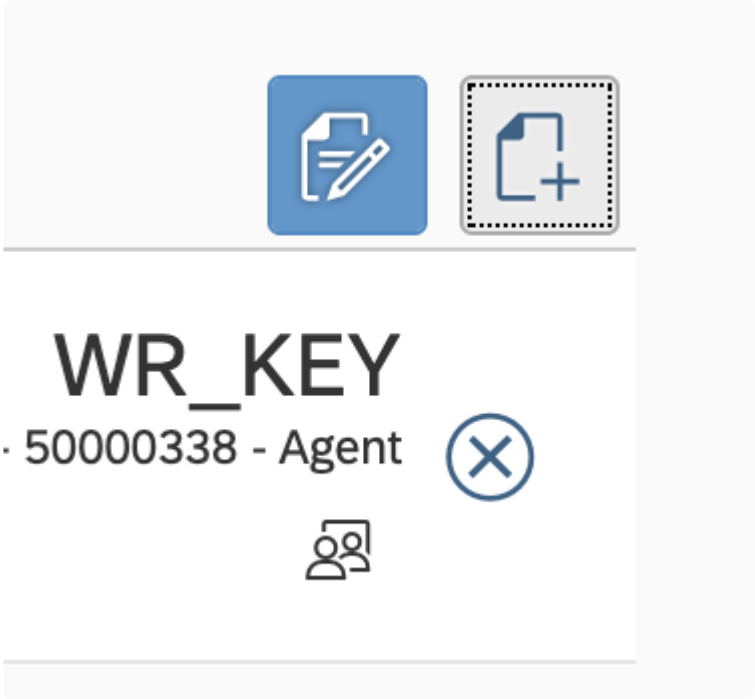
3.4.5.1. Changing Priorities

Display Priorities for Org Level

Priorities can be changed for the specific org unit/position selected.



To amend the priorities you need to select change mode using the edit icon:



Once in edit mode you have the following options

- Changing priority order
- Adding new priorities
- Removing existing priorities

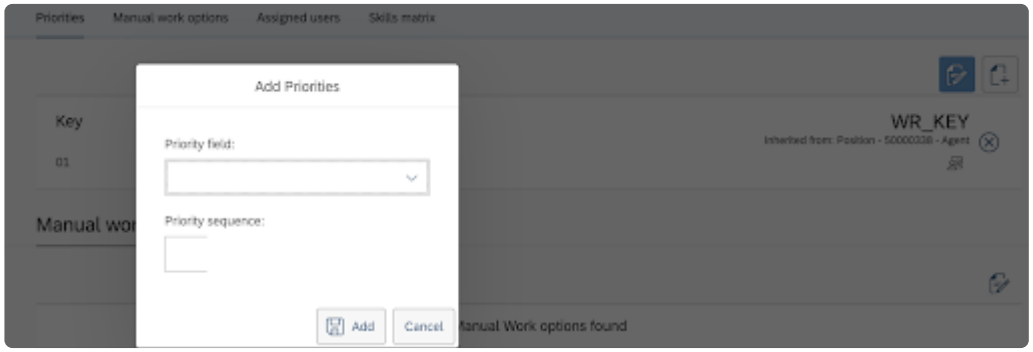
Changing priority order

The priority order can be changed by dragging and dropping the priorities into the position.

i.e. if you have an item that is sequence 2 if you drag this to the top it will automatically become sequence 1 and the top item will be switched to 2.

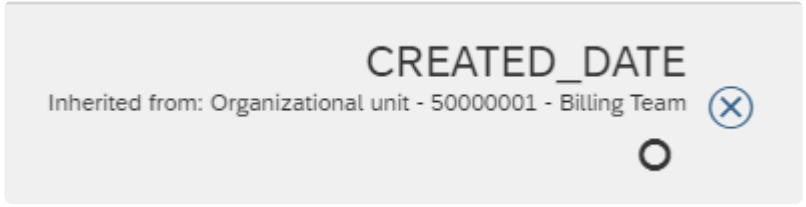
Adding new priorities

Click the New+ icon to add a new priority and input the relevant details in the Add Priorities screen:



Removing existing priorities

In the change mode priorities can be removed by clicking on the remove icon

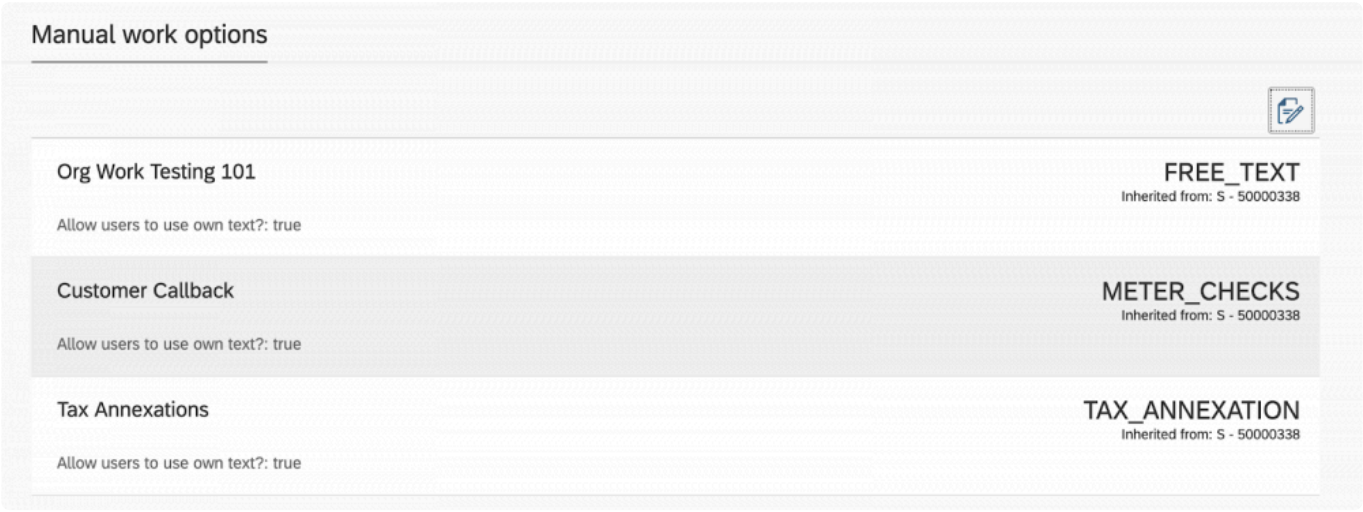


3.4.5.2. Changing Manual Work Tasks

Display Manual Work Options

Manual Work Options can be assigned to an org unit/position and therefore users can only use the manual work tasks that have been assigned against the work queues they are also assigned too. This will prevent users from adding tasks they are not able to complete.

The assignments can be changed for the specific org unit/position selected.



To amend the Manual Work Tasks assigned you need to select change mode using the edit icon:

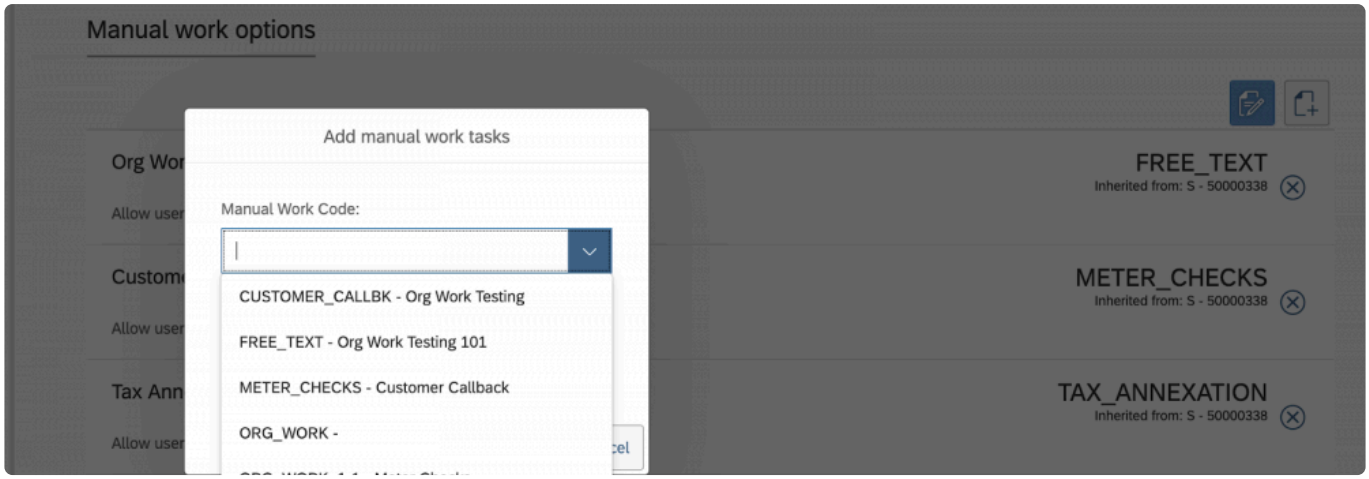
Once in edit mode you have the following options

- Assigning Manual Work
- Removing Manual Work assignments

Assigning Manual Work

Click the New+ icon to assign a new Manual Work Tasks and input the relevant details in

the Add Manual Work screen:



Removing Manual Work assignments

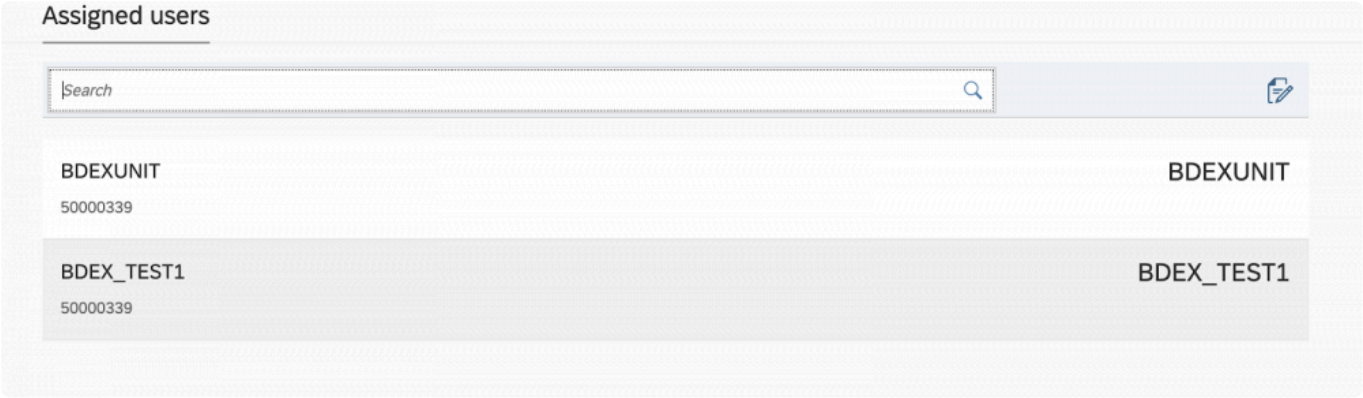
In the change mode manual work can be removed by clicking on the remove icon

! Only existing Manual Work Tasks can be assigned here.
If a new Manual Work Task is required this must be configured first before the task can be assigned to an org unit or position.
For more information on creating new manual work tasks review topic Manual Work Configuration

3.4.5.3. Assigning Users

Display Assigned Users

Users assigned to a position can be viewed / added and removed here.
This can be used instead of updating the assignments directly in the SAP org structure within SAP (transaction code: PPOME).



This will be loaded in display mode and to make changes the Change Mode Icon needs to be selected

In change mode you can

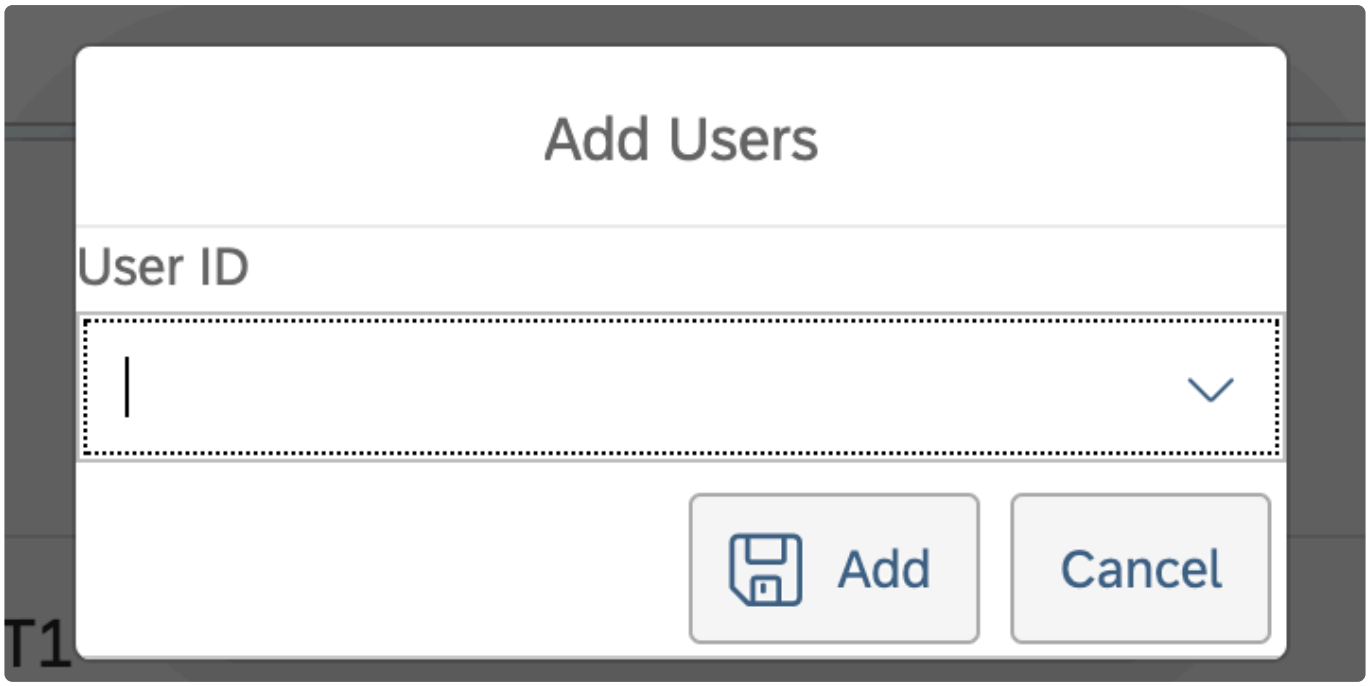
- Add new users
- Delete Users

> Users can only be added or deleted instantly – if you require to add/remove users for a future date (delimit) you must do this directly in SAP org structure transaction PPOME.

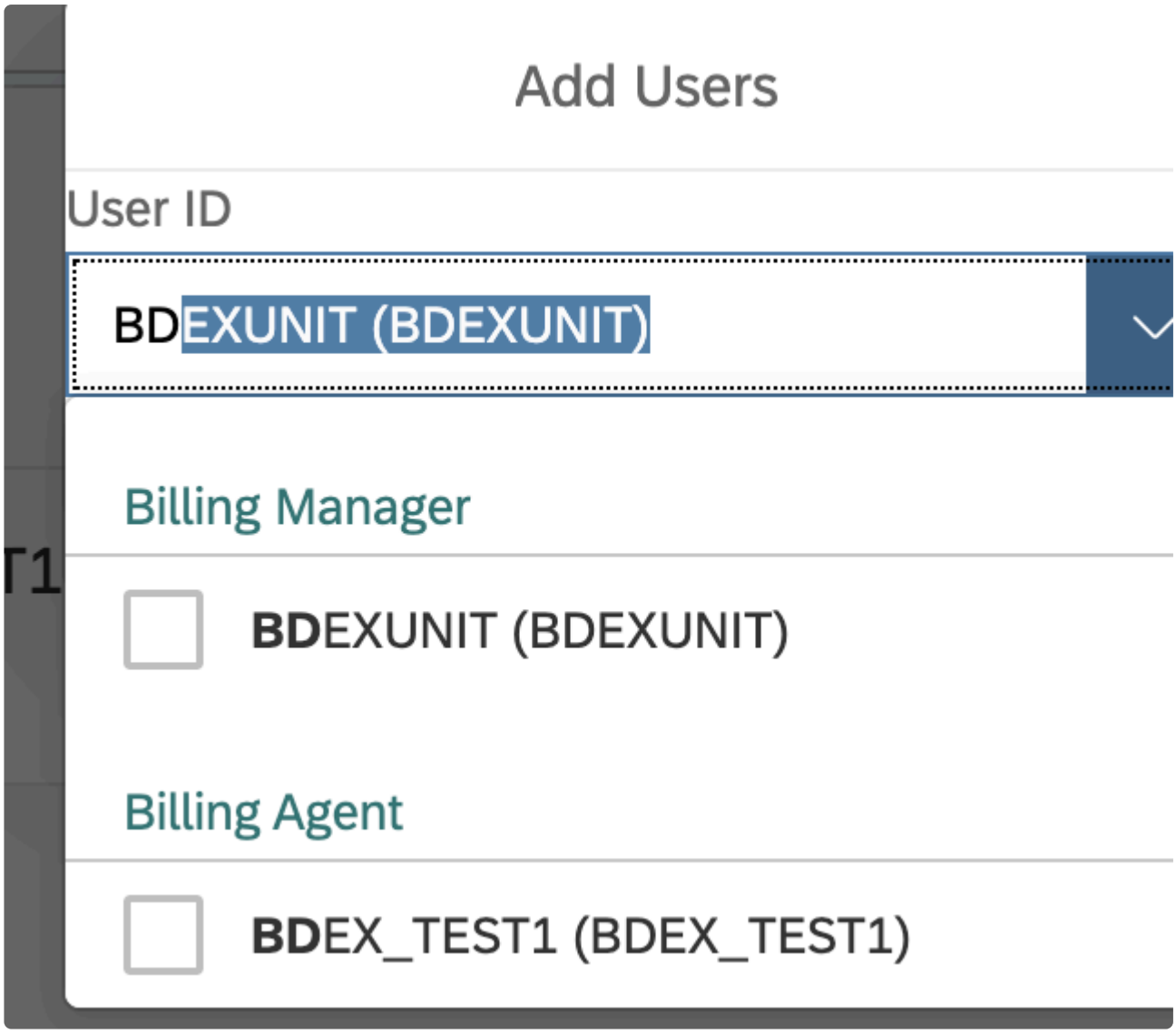
Adding new users

Once in change mode you can now see the Add icon

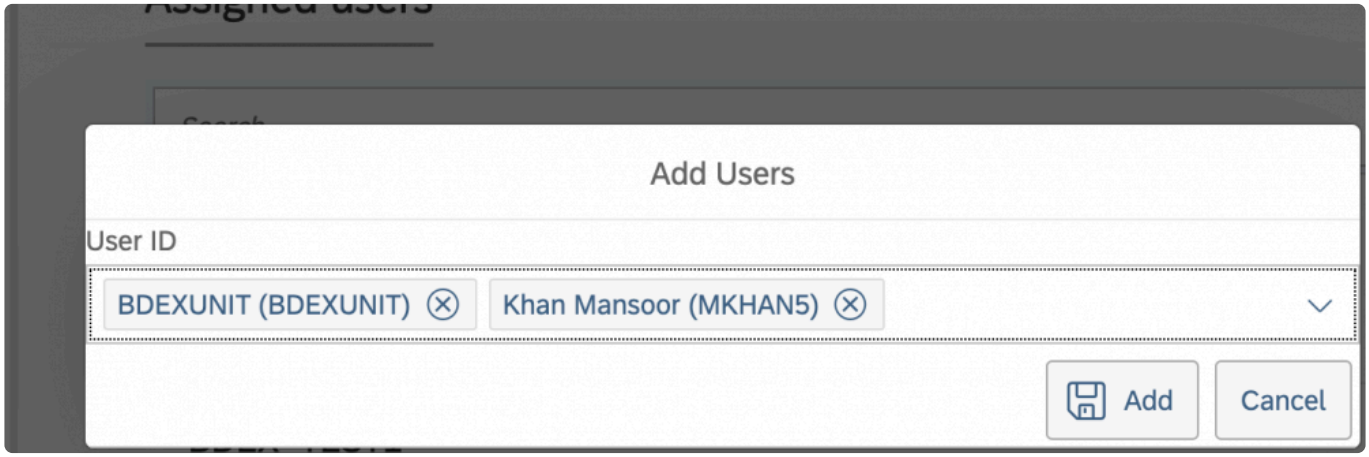
Clicking Add will load a new screen to Add Users:



Start typing the user name / ID to get suggestions

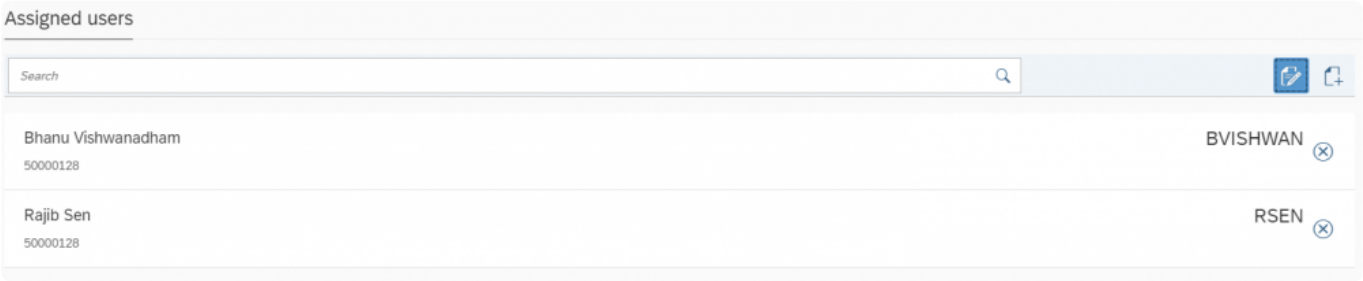


Select one or multiple users



Delete Users

Users can be deleted by selecting the delete icon next to the user you wish to remove

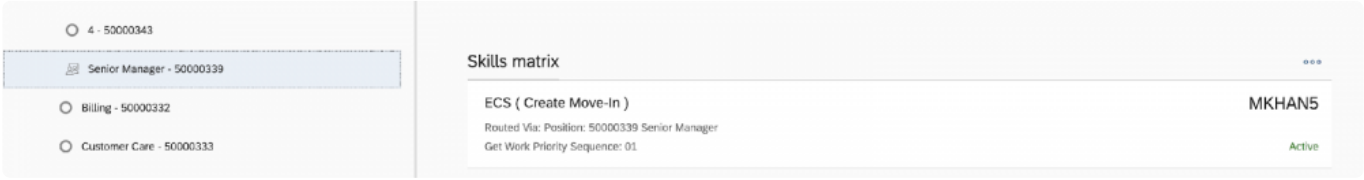


! Change mode icon is only available for a position.
Users are only assigned to Positions and therefore ensure you are viewing a position ID to see the assigned users populated.

3.4.5.4. Display Skill Matrix Work

Skill Matrix Assignments can be added for cases routed to a specific work queue.

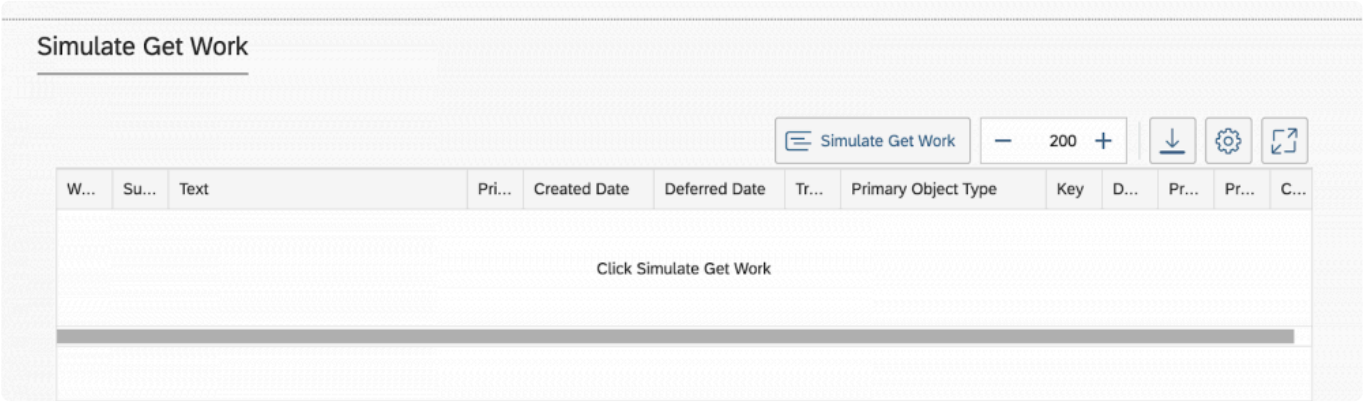
Therefore in this view you can see those skill matrix assignments relating to the org unit or position representing the work queue.



As the skill matrix is added for a user this mode is display only. The assignments can only be changed when viewing this option in the User Panel.
See topic Display/Update Skill Matrix for more details on changing the skill matrix.

3.5. Simulate Get Work for User

Using the simulate get work will display the work in the order it will be assigned to the user.

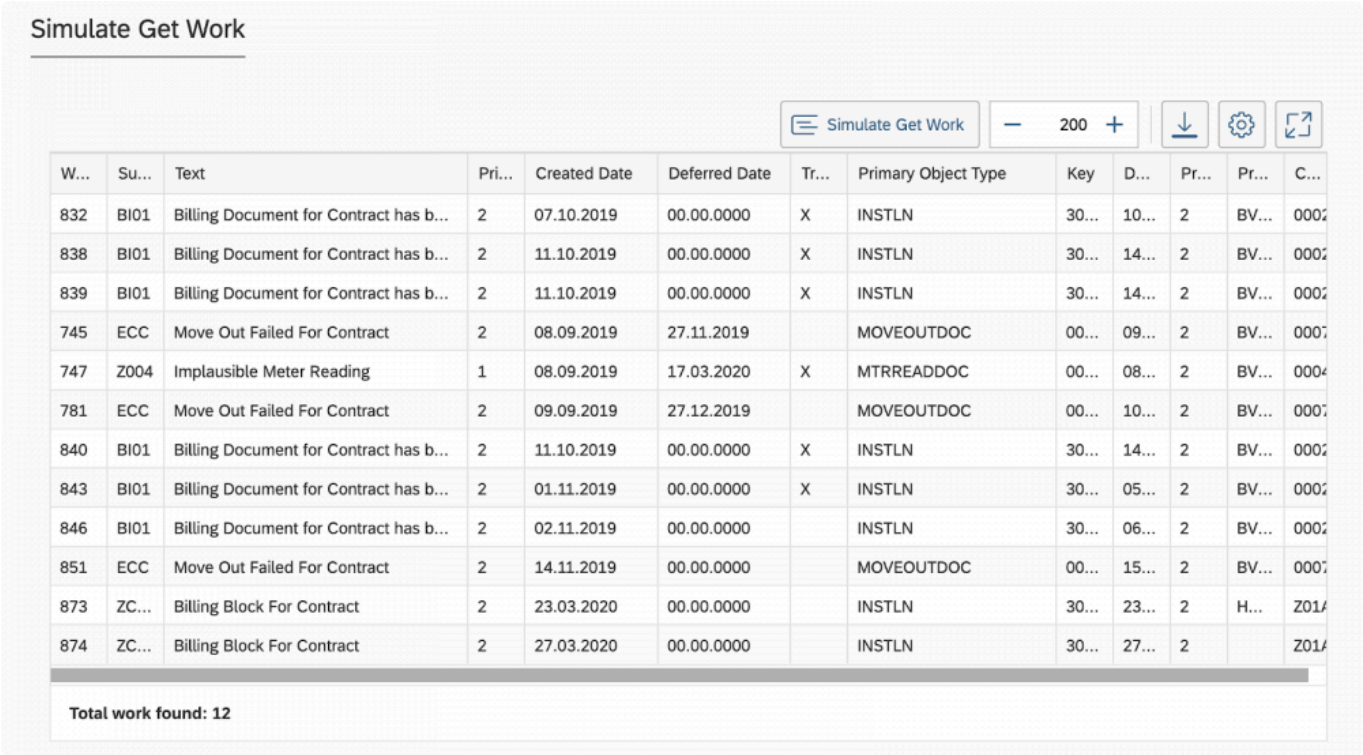


The button is available on at the top of the page as well as on the sub header.

How much work should be displayed is set by the size value that can be increased or decreased using the + – icons

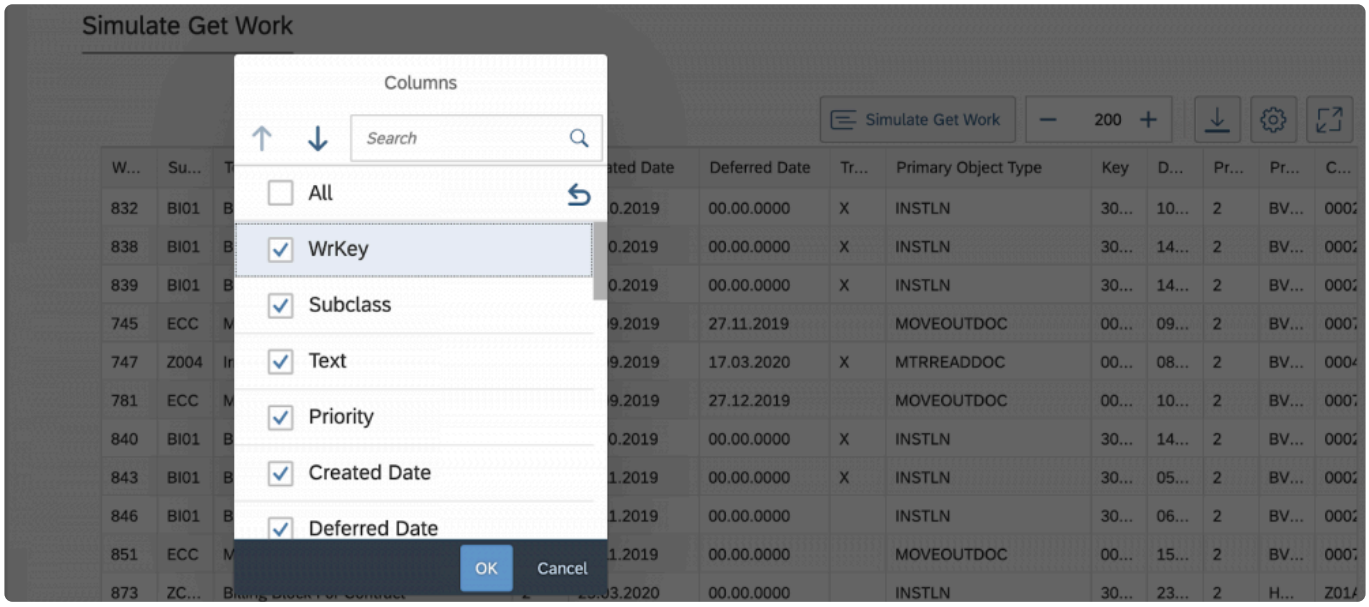
The default is set in configuration see topic for details on how to set up options for Admin screen

Once the button is selected the work list is generated – the max list will be displayed or if less work is available all the cases will be displayed along with the total.



W...	Su...	Text	Pri...	Created Date	Deferred Date	Tr...	Primary Object Type	Key	D...	Pr...	Pr...	C...
832	BI01	Billing Document for Contract has b...	2	07.10.2019	00.00.0000	X	INSTLN	30...	10...	2	BV...	0002
838	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	30...	14...	2	BV...	0002
839	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	30...	14...	2	BV...	0002
745	ECC	Move Out Failed For Contract	2	08.09.2019	27.11.2019		MOVEOUTDOC	00...	09...	2	BV...	0007
747	Z004	Implausible Meter Reading	1	08.09.2019	17.03.2020	X	MTRREADDOC	00...	08...	2	BV...	0004
781	ECC	Move Out Failed For Contract	2	09.09.2019	27.12.2019		MOVEOUTDOC	00...	10...	2	BV...	0007
840	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	30...	14...	2	BV...	0002
843	BI01	Billing Document for Contract has b...	2	01.11.2019	00.00.0000	X	INSTLN	30...	05...	2	BV...	0002
846	BI01	Billing Document for Contract has b...	2	02.11.2019	00.00.0000		INSTLN	30...	06...	2	BV...	0002
851	ECC	Move Out Failed For Contract	2	14.11.2019	00.00.0000		MOVEOUTDOC	00...	15...	2	BV...	0007
873	ZC...	Billing Block For Contract	2	23.03.2020	00.00.0000		INSTLN	30...	23...	2	H...	Z01A
874	ZC...	Billing Block For Contract	2	27.03.2020	00.00.0000		INSTLN	30...	27...	2		Z01A

Columns can be hidden / shown using the button.
Using this will enable you to hide/display fields in the display:



The first 16 custom fields added to the table /BTI/MDE_BWC_WRH include CI_BWC_CUST_INCL are automatically available to select.

The table can be viewed in full screen by pressing the button.

This will open the list in full screen mode so that the views are expanded:

Simulate Get Work − 200 +

WrKey	Subclass	Text	Priority	Created Date	Deferred Date	Training Work?	Primary Object Type	Key	Due Date	Processing Sta...	Previous Proce...	Case Type
832	BI01	Billing Document for Contract has b...	2	07.10.2019	00.00.0000	X	INSTLN	3000000007	10.11.2020	2	BVISHWAN	0002
838	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	3000000006	14.11.2020	2	BVISHWAN	0002
839	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	3000000006	14.11.2020	2	BVISHWAN	0002
745	ECC	Move Out Failed For Contract	2	08.09.2019	27.11.2019		MOVEOUTDOC	000000000042	09.09.2019	2	BVISHWAN	0007
747	ZD04	Implausible Meter Reading	1	08.09.2019	17.03.2020	X	MTRREADDOC	000000000000...	08.09.2019	2	BVISHWAN	0004
781	ECC	Move Out Failed For Contract	2	09.09.2019	27.12.2019		MOVEOUTDOC	000000000062	10.09.2019	2	BVISHWAN	0007
840	BI01	Billing Document for Contract has b...	2	11.10.2019	00.00.0000	X	INSTLN	3000000006	14.11.2020	2	BVISHWAN	0002
843	BI01	Billing Document for Contract has b...	2	01.11.2019	00.00.0000	X	INSTLN	3000000337	05.12.2020	2	BVISHWAN	0002
846	BI01	Billing Document for Contract has b...	2	02.11.2019	00.00.0000		INSTLN	3000000021	06.12.2020	2	BVISHWAN	0002
851	ECC	Move Out Failed For Contract	2	14.11.2019	00.00.0000		MOVEOUTDOC	000000000042	15.11.2019	2	BVISHWAN	0007
873	ZCON	Billing Block For Contract	2	23.03.2020	00.00.0000		INSTLN	3000000018	23.03.2020	2	HHARFORD	Z01A
874	ZCON	Billing Block For Contract	2	27.03.2020	00.00.0000		INSTLN	3000000007	27.03.2020	2		Z01A

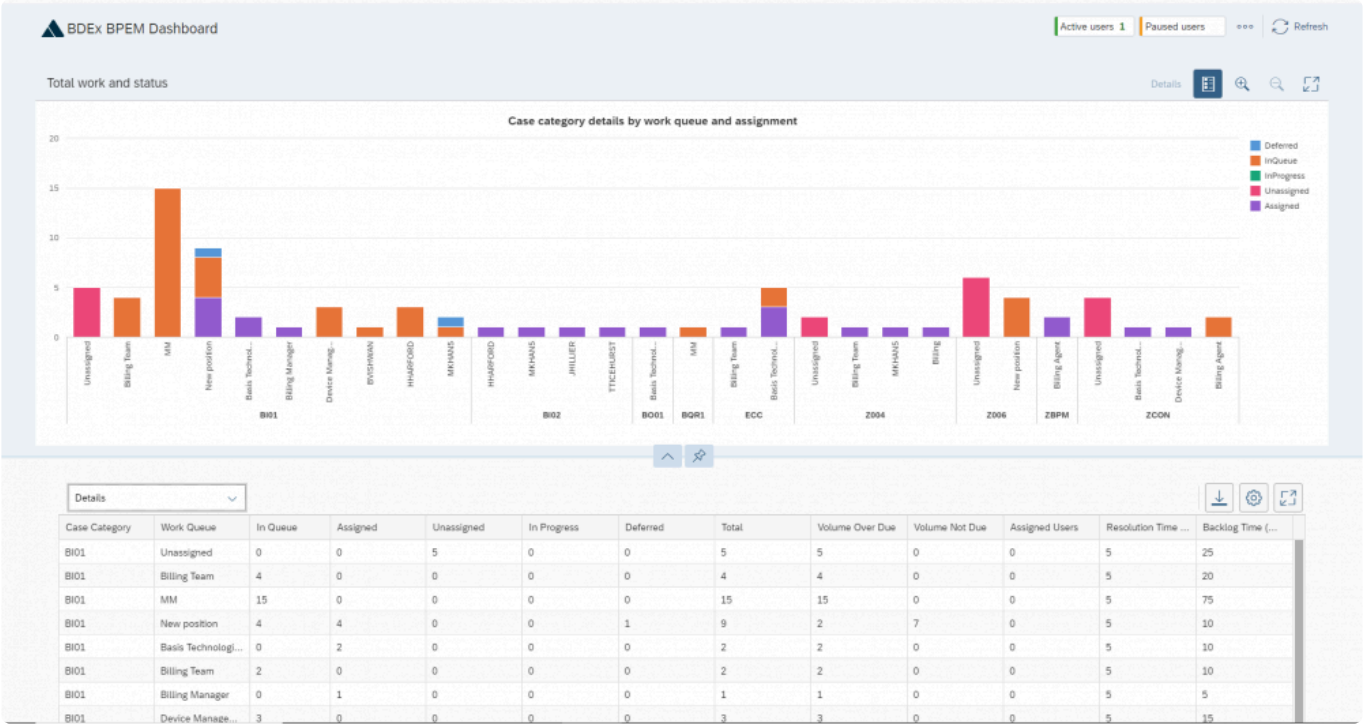
Total work found: 12

Table contents can be downloaded using button.

3.6. BPEM Work Dashboard

Using the Report

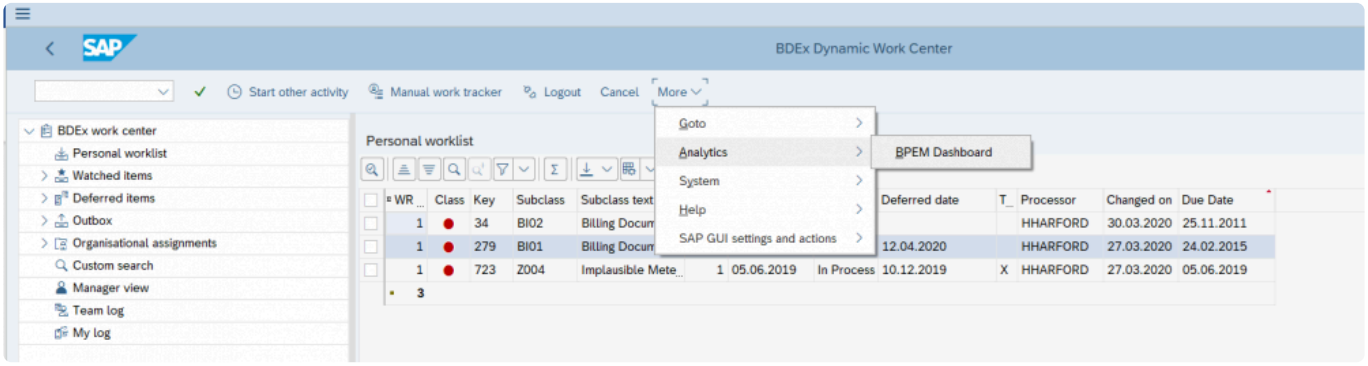
A work dashboard has been created to display the current status of the work.
This will enable managers to see the total workload assigned to their queues, how many cases are in progress vs waiting to be assigned as well as other key stats about BPEM cases.



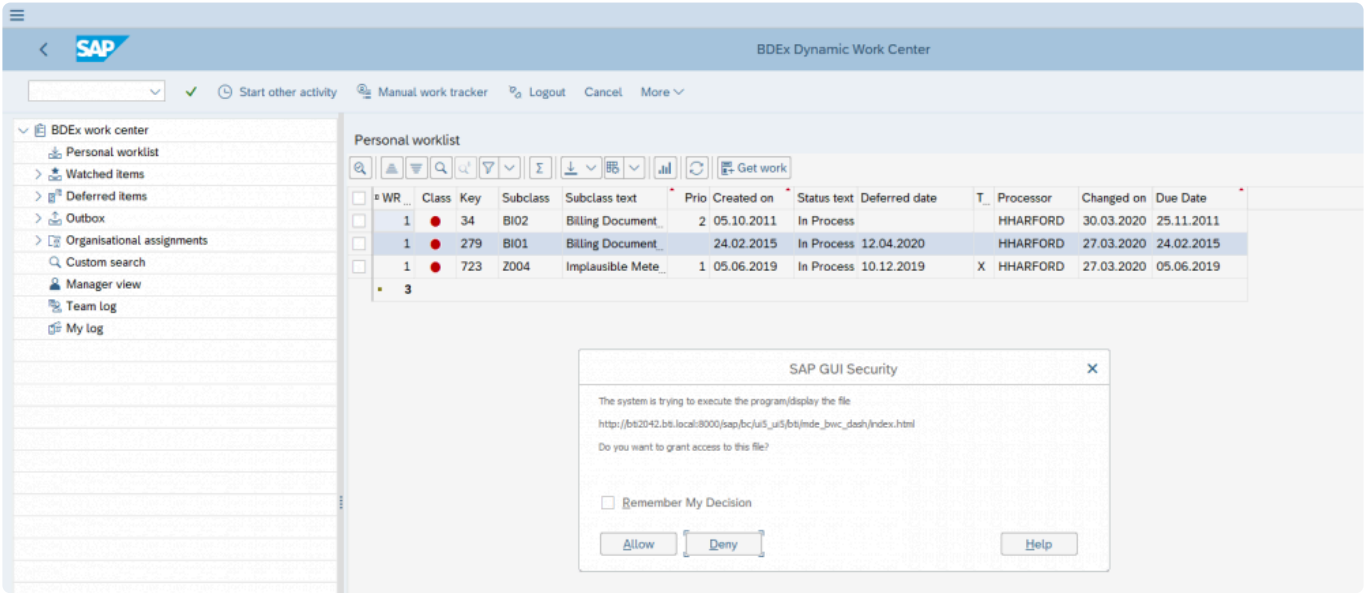
3.6.1. Accessing the report

The report can be accessed from Dynamic Work Center.
To launch the report open the DWC transaction /BTI/BWC

Go to the top menu option and select More->Analytics->BPEM Dashboard



This will open a web launcher for the URL.

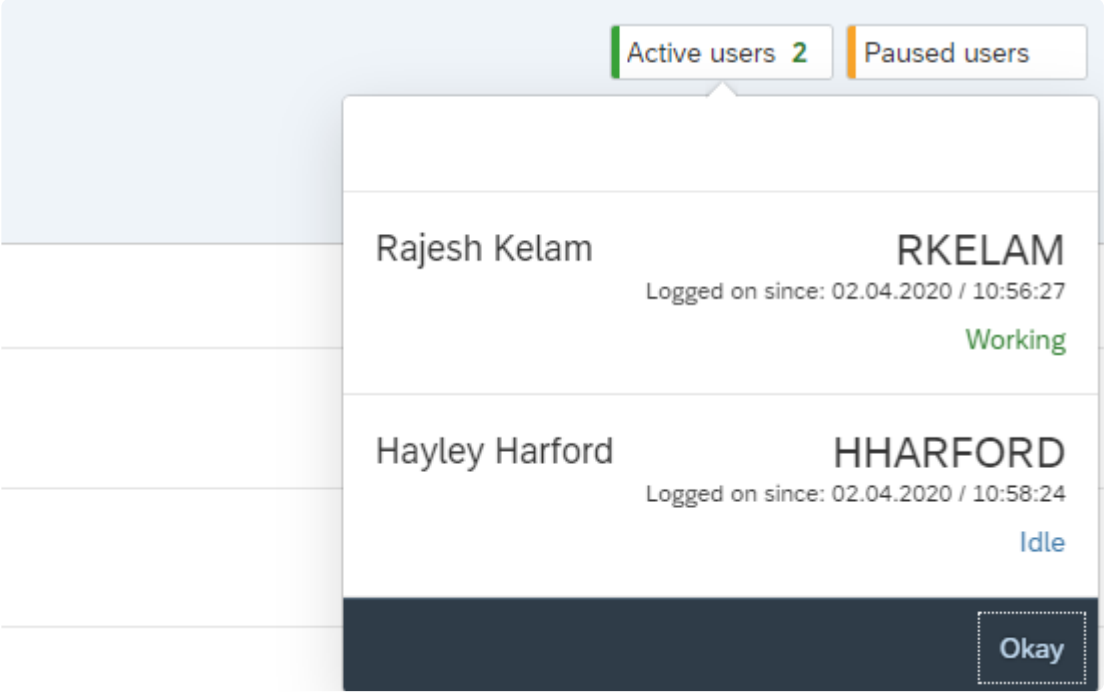


Once launched for the first time – depending upon the option settings you may be asked to login to SAP via the web.
The URL can be saved and launched directly within a web page.

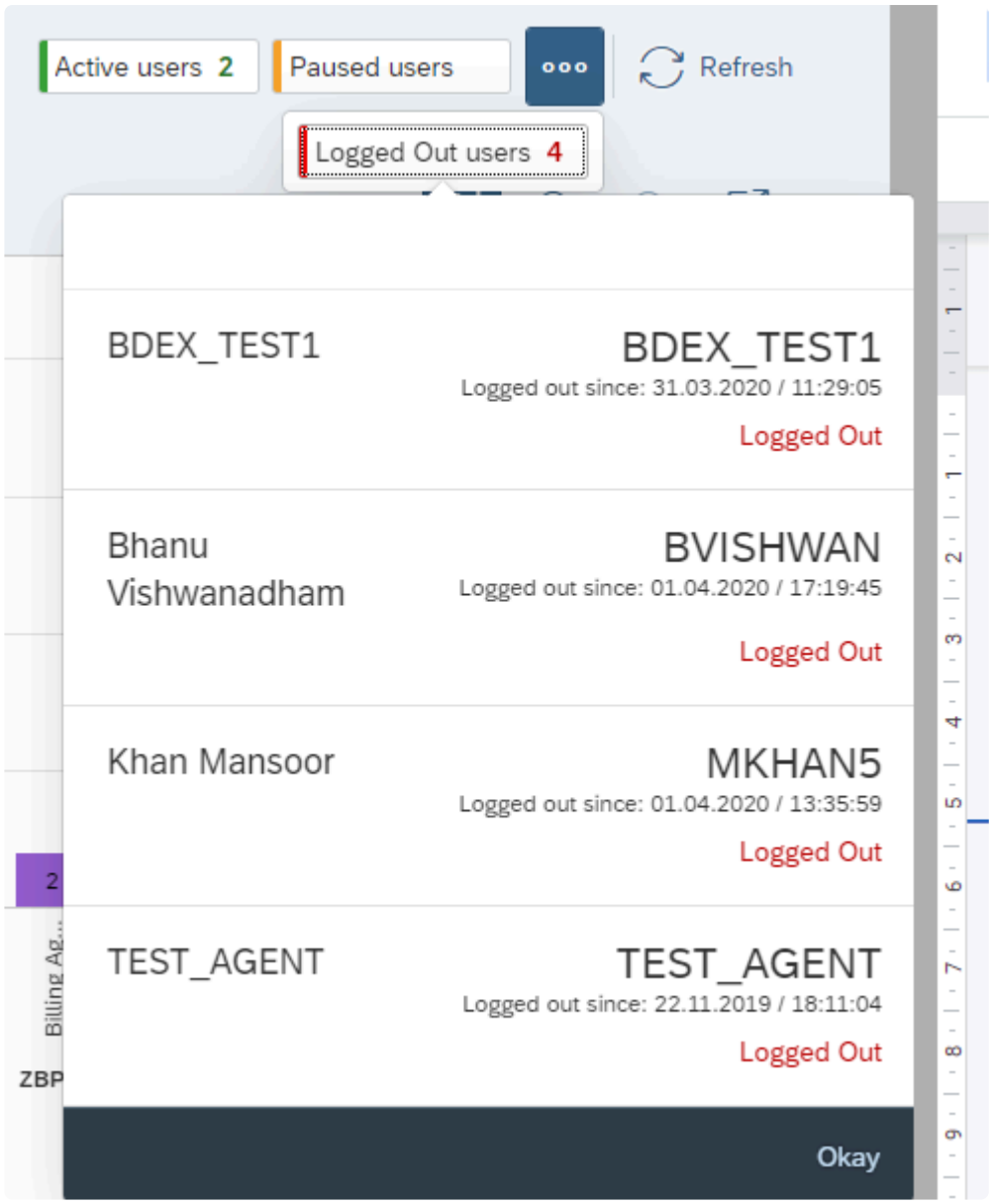
> This navigation path is specific to SAP GUI 7.6 using Belize theme.
> Other themes and older GUI will change the menu option.

3.6.2. Menu Options

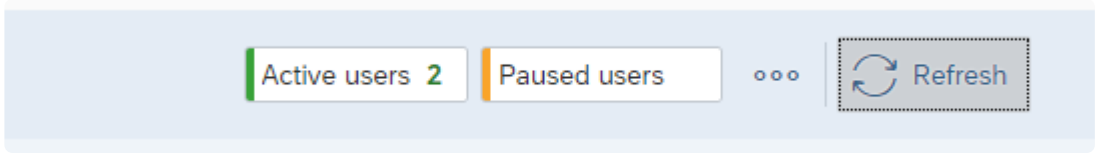
In the header of the screen you will see the number of Active and Paused Users.
If you click on the Active Users a drop down will display the user details including the logged on since date/time and the current status of the user (see user status for more details about the status available).



The additional menu can be accessed by clicking on the three dots.
This will display the Logged out user panel with the details of the last logged out time for all users.

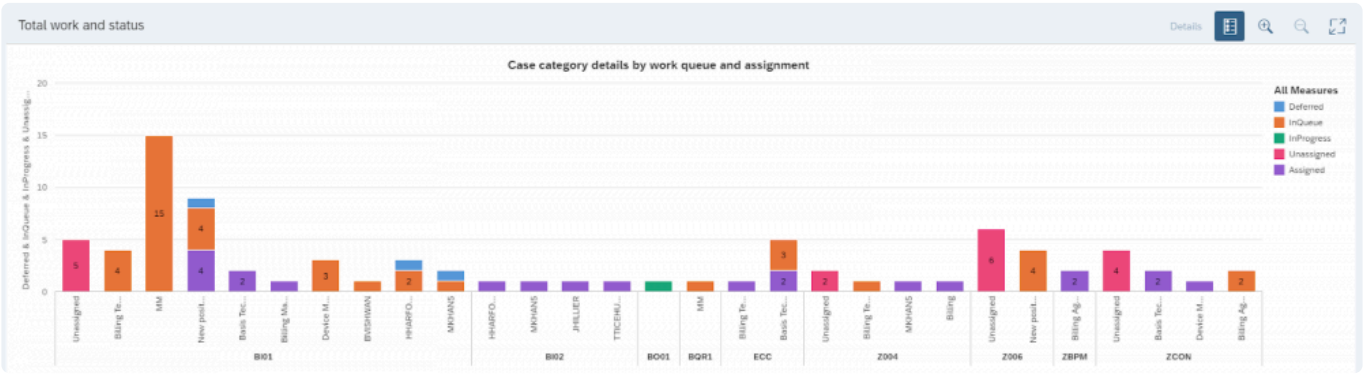


There is also a refresh button to update the screen to real time.



3.6.3. Graphic Display

The graphic is automatically populated based on the summary view selected within the table display.
The default view is Case Category Details by work queue and assignment.
This will plot the status of the cases against both the case category and the current assignment of the case.

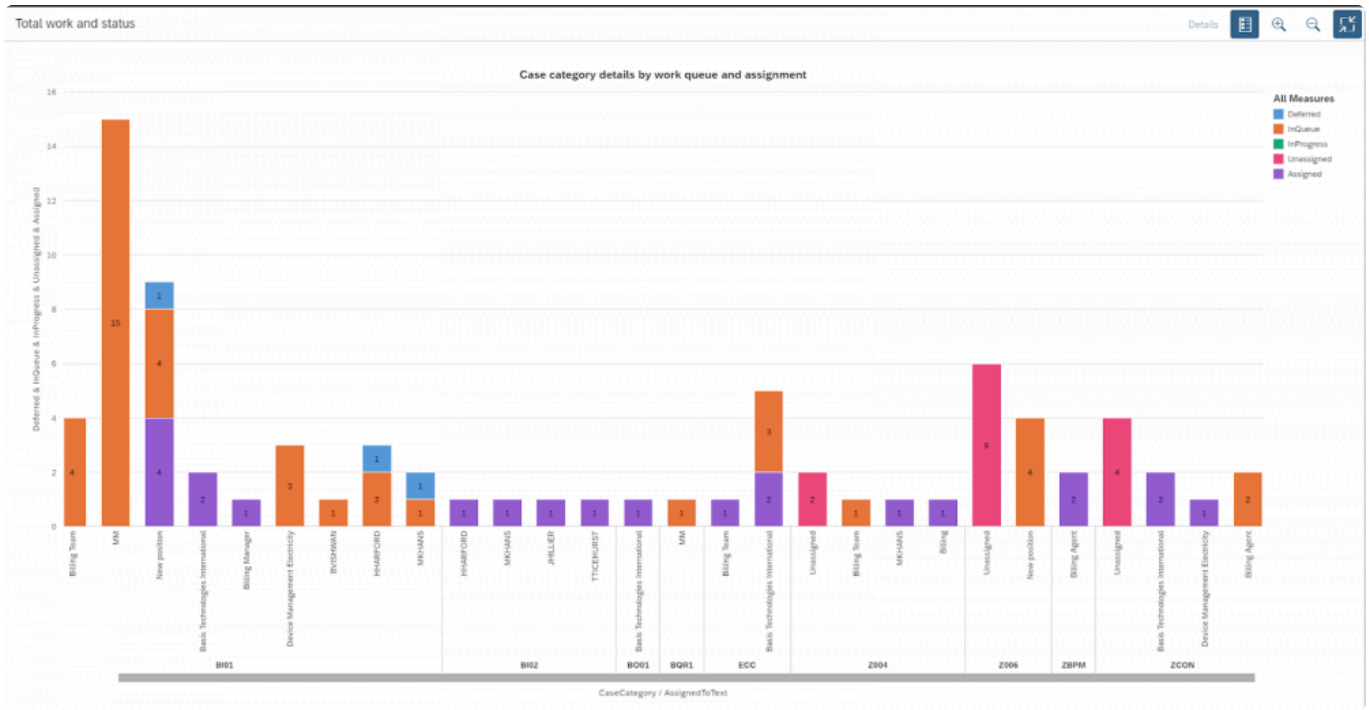


In the menu for the graphic you can display/hide the legend using this icon

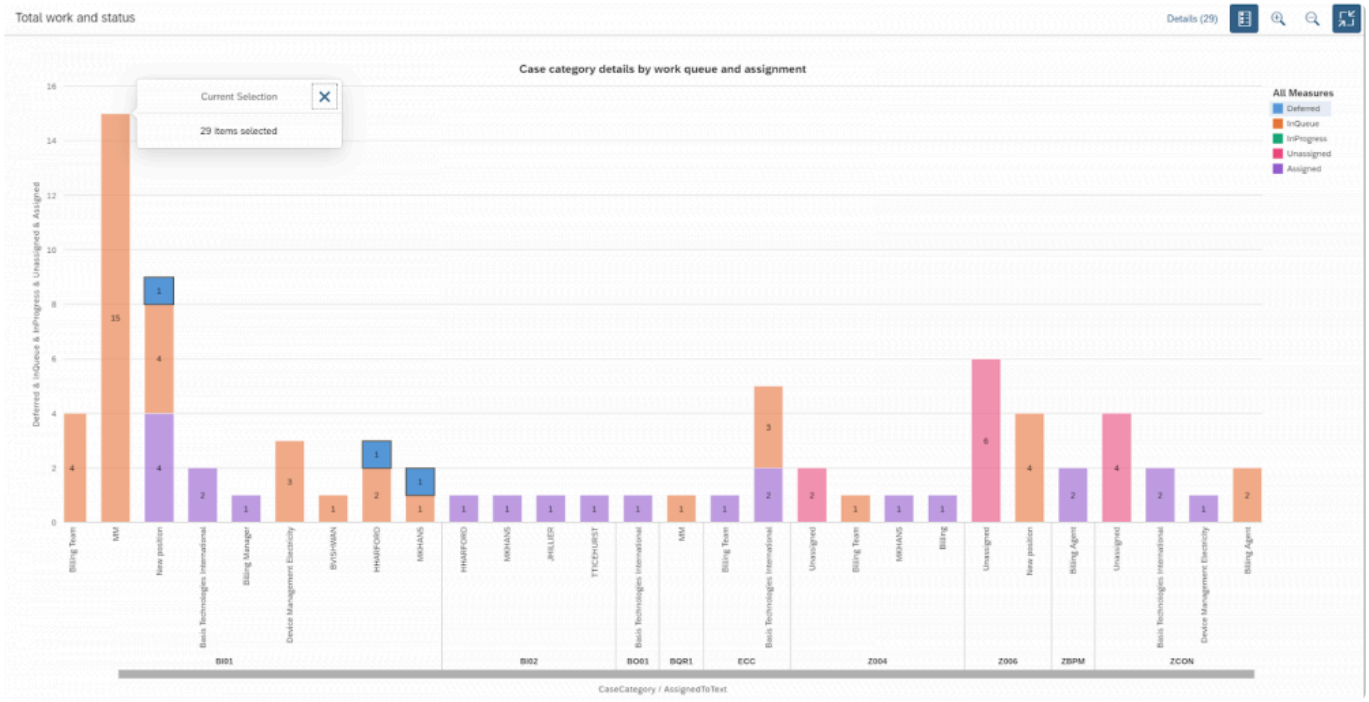
The + and – zoom icon will increase/decrease the size of the graphic.

The expand screen icon enables you to open the graphic in full screen mode (this will provide the best quality of the data)

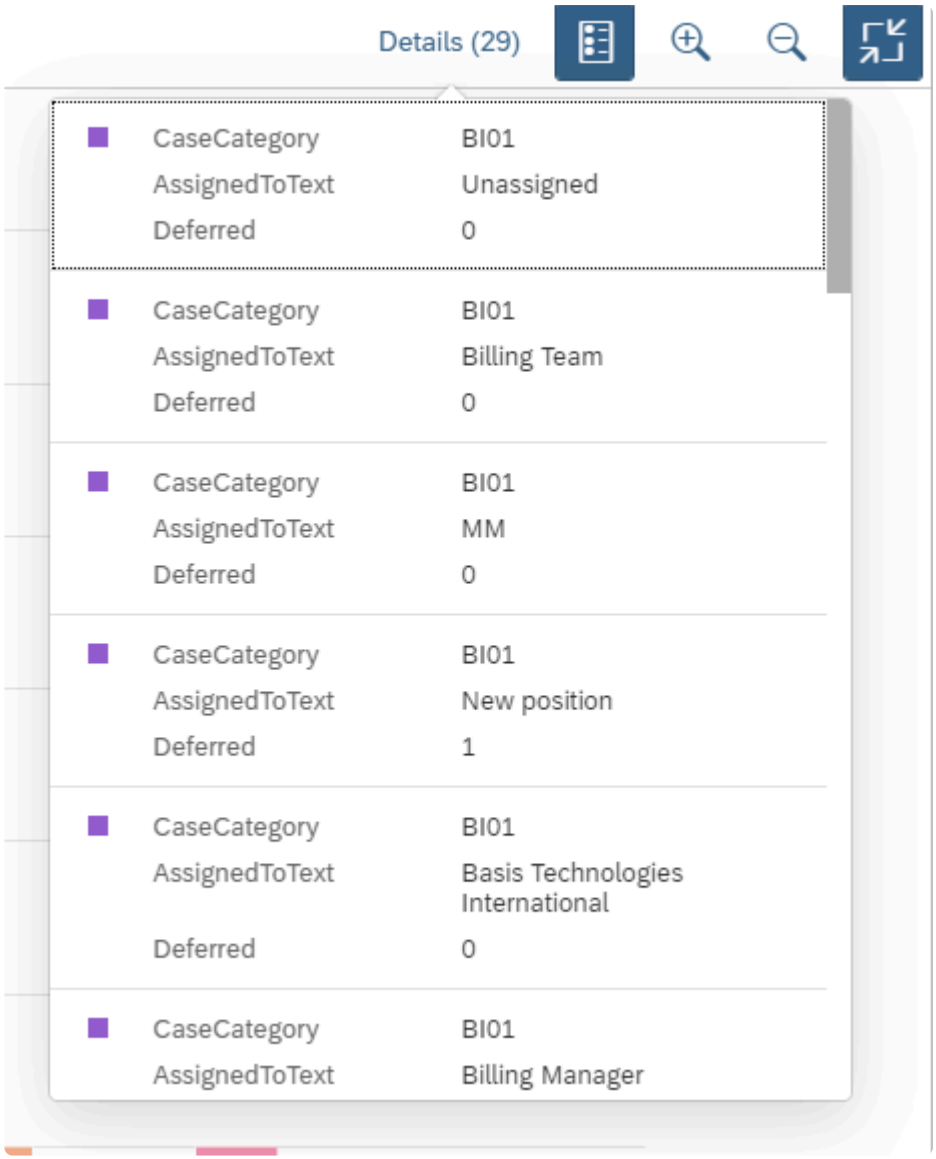
Full screen mode:



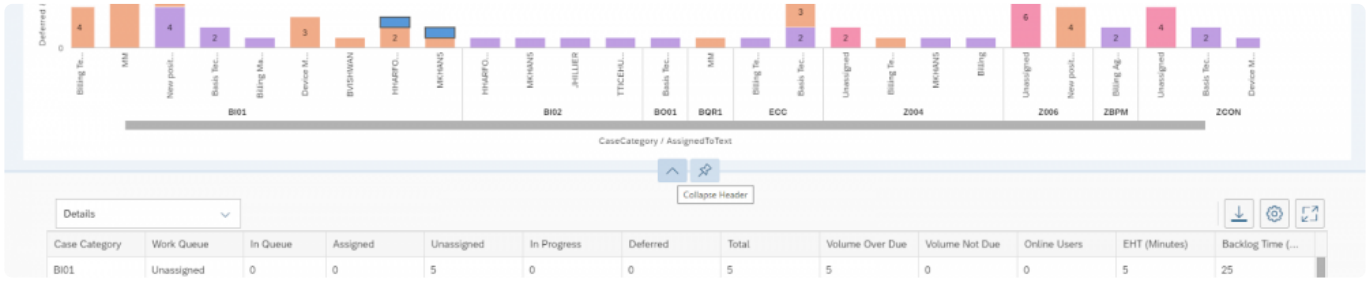
In the graphic you can click on the legend bar to highlight those tabs in the bar chart.



This also brings up a new menu function for Details with the total selected. By clicking this you can see a capture of the data set.

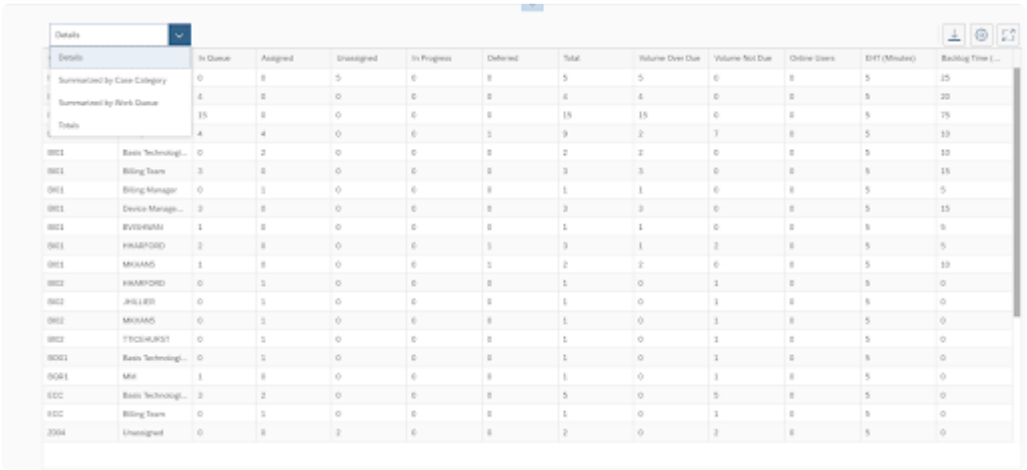


The graphic can be collapsed to provide a full size mode of the table view or pinned to prevent the scroll bar from removing this.



3.6.4. Table Display

A summary options are available to filter the data:



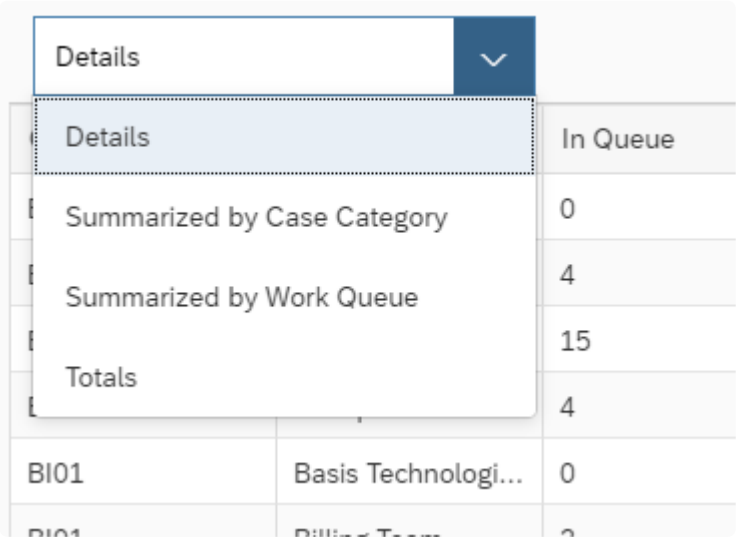
3.6.4.1. Summaries

The following summaries are available in the report:

- Detail
- Case category
- Work Queue
- Totals

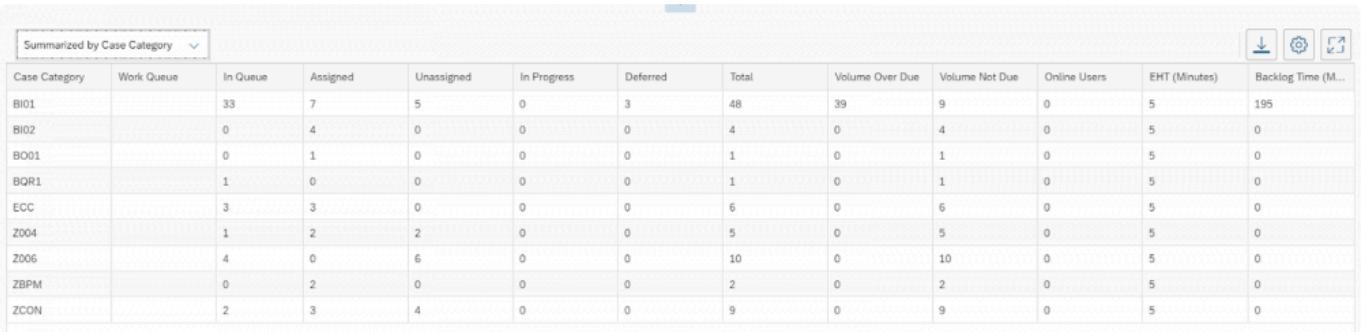
Detail Summary

Details – Shows all the data



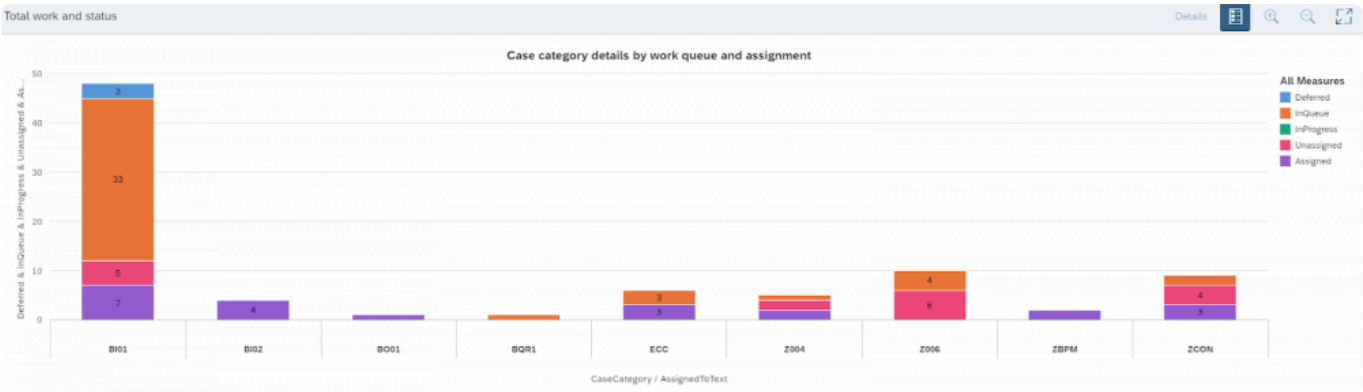
Summarized by Case Category

This filters the report by the Case Category to show you the total work and status by case category only.



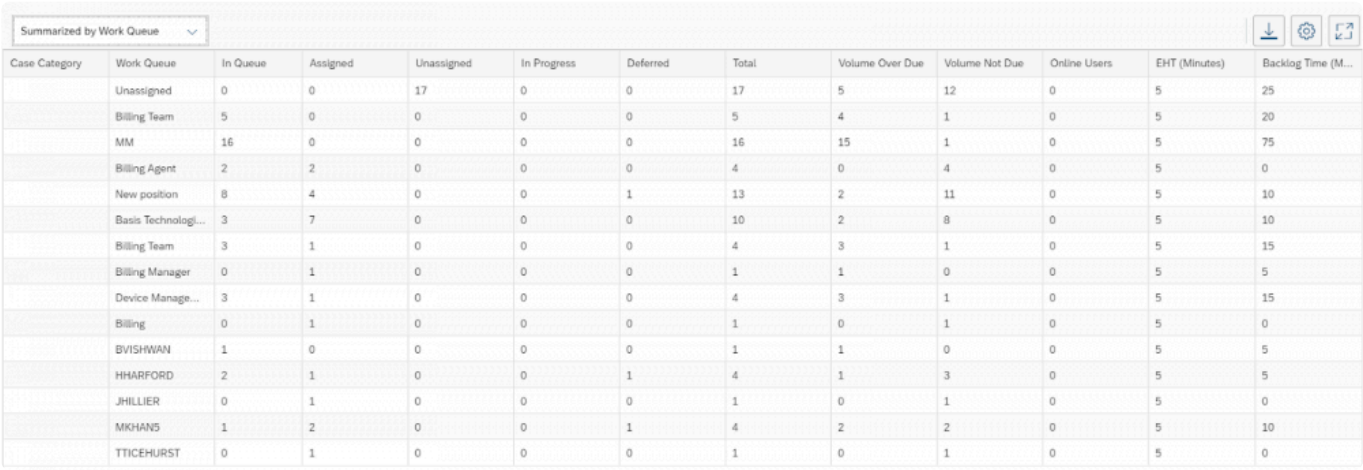
Case Category	Work Queue	In Queue	Assigned	Unassigned	In Progress	Deferred	Total	Volume Over Due	Volume Not Due	Online Users	EMT (Minutes)	Backlog Time (M...
BI01		33	7	5	0	3	48	39	9	0	5	195
BI02		0	4	0	0	0	4	0	4	0	5	0
BO01		0	1	0	0	0	1	0	1	0	5	0
BQR1		1	0	0	0	0	1	0	1	0	5	0
ECC		3	3	0	0	0	6	0	6	0	5	0
Z004		1	2	2	0	0	5	0	5	0	5	0
Z006		4	0	6	0	0	10	0	10	0	5	0
ZBPM		0	2	0	0	0	2	0	2	0	5	0
ZCON		2	3	4	0	0	9	0	9	0	5	0

Once selected the graphic will automatically update to this view



Summarized by Work Queue

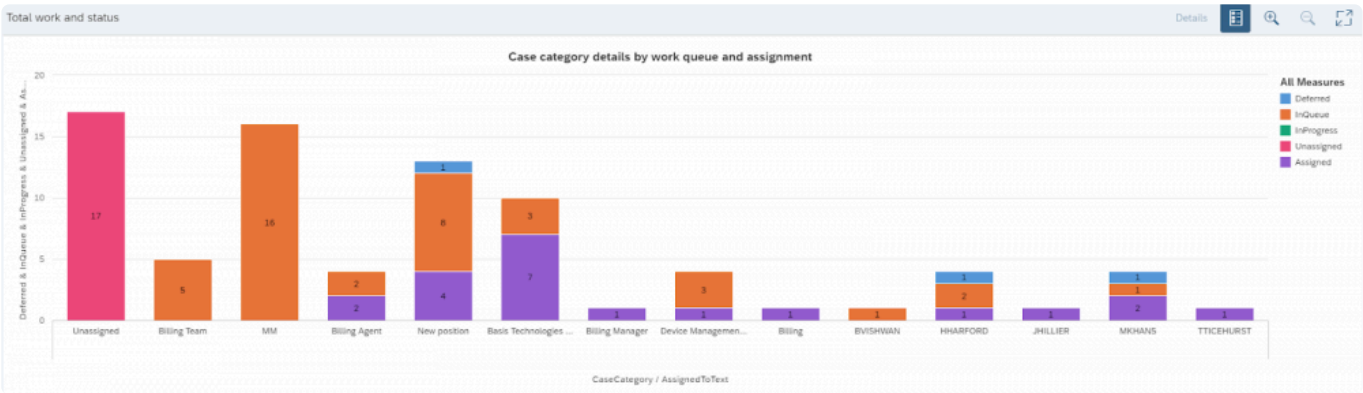
Filters the case category so that you can see the total work assigned to each queue or user.



Summarized by Work Queue

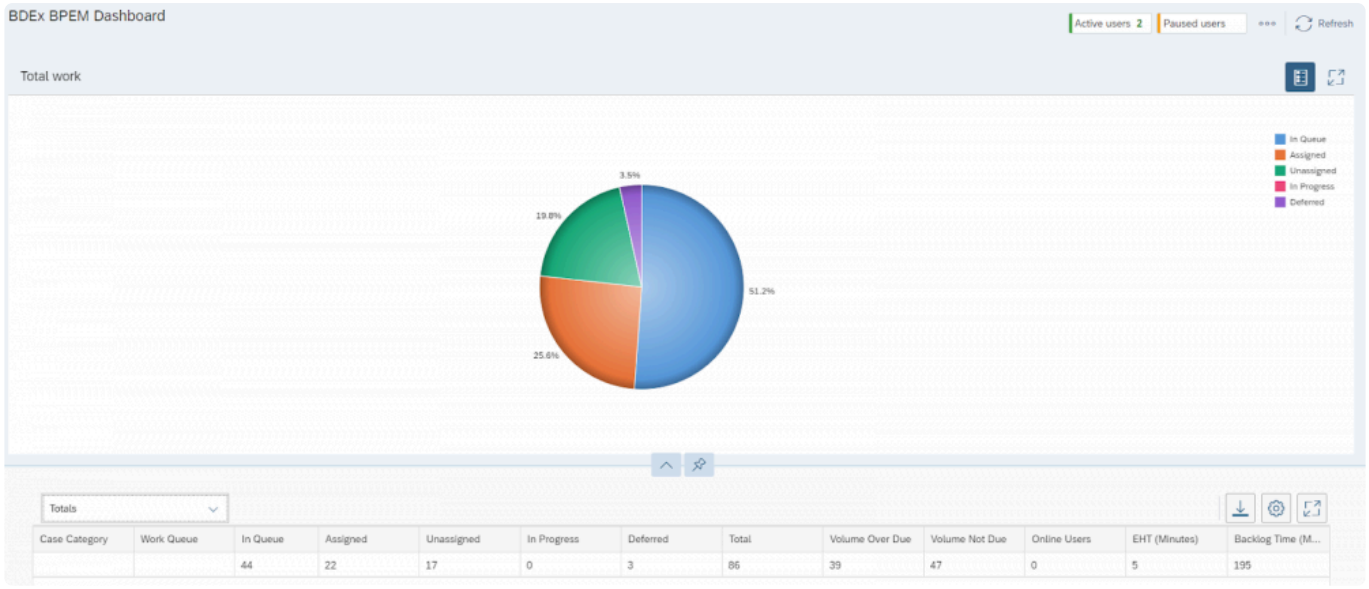
Case Category	Work Queue	In Queue	Assigned	Unassigned	In Progress	Deferred	Total	Volume Over Due	Volume Not Due	Online Users	EHT (Minutes)	Backlog Time (M...
	Unassigned	0	0	17	0	0	17	5	12	0	5	25
	Billing Team	5	0	0	0	0	5	4	1	0	5	20
	MM	16	0	0	0	0	16	15	1	0	5	75
	Billing Agent	2	2	0	0	0	4	0	4	0	5	0
	New position	8	4	0	0	1	13	2	11	0	5	10
	Basis Technologi...	3	7	0	0	0	10	2	8	0	5	10
	Billing Team	3	1	0	0	0	4	3	1	0	5	15
	Billing Manager	0	1	0	0	0	1	1	0	0	5	5
	Device Manage...	3	1	0	0	0	4	3	1	0	5	15
	Billing	0	1	0	0	0	1	0	1	0	5	0
	BVISHWAN	1	0	0	0	0	1	1	0	0	5	5
	HHARFORD	2	1	0	0	1	4	1	3	0	5	5
	JHILLIER	0	1	0	0	0	1	0	1	0	5	0
	MKHAN5	1	2	0	0	1	4	2	2	0	5	10
	TTICEHURST	0	1	0	0	0	1	0	1	0	5	0

Once selected the graphic will update to this view



Totals

This splits the data by just the status only


BDEx BPEM Dashboard
Active users 2
Paused users
Refresh
Total work
In Queue
Assigned
Unassigned
In Progress
Deferred
3.5%
19.8%
51.2%
25.6%
Totals
Case Category
Work Queue
In Queue
Assigned
Unassigned
In Progress
Deferred
Total
Volume Over Due
Volume Not Due
Online Users
EHT (Minutes)
Backlog Time (M...
44
22
17
0
3
86
39
47
0
5
195

3.6.4.2. Table Headings

Table Headings

The following headings are displayed in the table view:

Heading	Description
Case Category	This is the category of the case
Work Queue	Which org unit, position or User the case is assigned to
In Queue	The cases are assigned to an org unit, position or user but the case has no processor and is not in a user's inbox therefore is still waiting to be allocated to a user.
Assigned	The case has a processor ID and therefore is sitting in a user's inbox to be worked
Unassigned	The case is not assigned to any org unit, position or user and therefore will not be picked up by "Get Work" or allocated automatically.
In Progress	The case is being worked in the "Customer Centric Hub" by a user.
Deferred	The case has been deferred by a user and has not yet reached the deferral date to be reviewed.
Total	The total number of cases
Volume overdue	How many cases have passed their due date
Volume Not Due	The number of cases that have a due date in the future.
Online Users	The number of users logged into BDEx that are assigned to the work queue. If users are assigned to multiple queues they will be added to each queue and hence you will see the same user several times. The total view however will reflect the actual number of users.
Resolution Time (EHT Minutes)	The resolution time determined to work 1 case. This is configured in table /BTI/MDE_C_WRRES.
Backlog Time (Minutes)	The time it would take to work all of the overdue cases (volume of overdue X resolution time{EHT Minutes}).

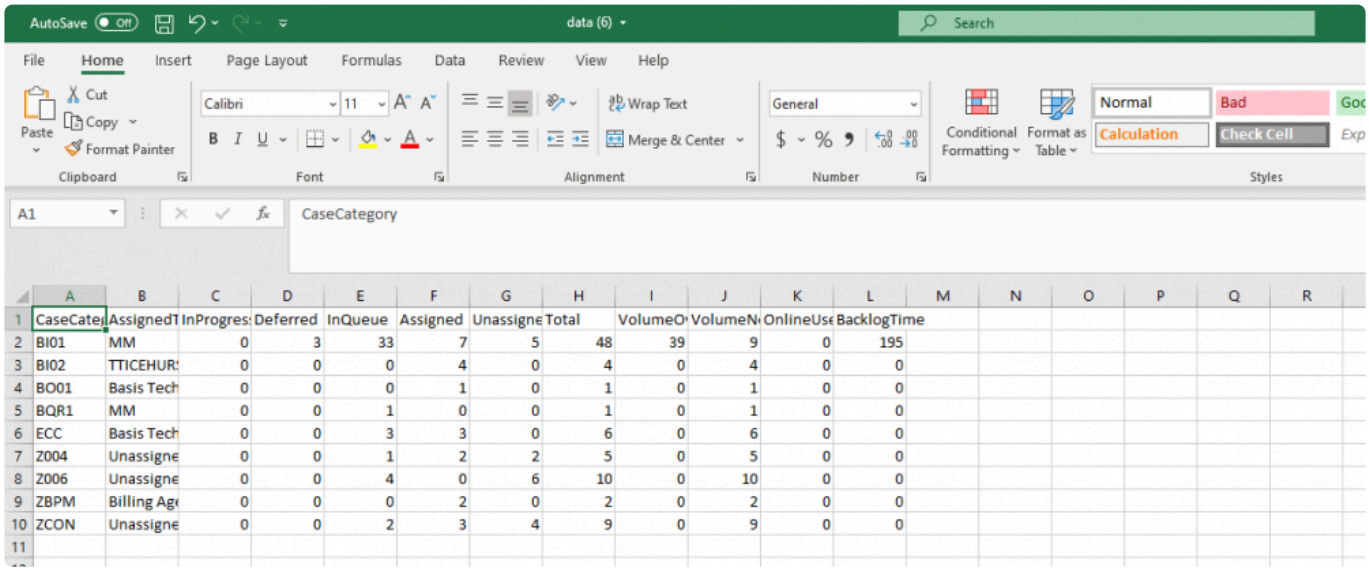
3.6.4.3. Table Options

Table Options

Menu options are available as follows:

Download table to Excel

This button will download the data into a CSV file that can be viewed/saved in Excel.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	CaseCate	AssignedT	InProgres	Deferred	InQueue	Assigned	Unassigne	Total	VolumeO	VolumeN	OnlineUse	BacklogTime						
2	BI01	MM	0	3	33	7	5	48	39	9	0	195						
3	BI02	TTICEHUR	0	0	0	4	0	4	0	4	0	0						
4	BO01	Basis Tech	0	0	0	1	0	1	0	1	0	0						
5	BQR1	MM	0	0	1	0	0	1	0	1	0	0						
6	ECC	Basis Tech	0	0	3	3	0	6	0	6	0	0						
7	Z004	Unassigne	0	0	1	2	2	5	0	5	0	0						
8	Z006	Unassigne	0	0	4	0	6	10	0	10	0	0						
9	ZBPM	Billing Ag	0	0	0	2	0	2	0	2	0	0						
10	ZCON	Unassigne	0	0	2	3	4	9	0	9	0	0						
11																		

The settings icon – will be activated in a later release. At the moment this has no function.

The full screen mode can be used to open the table in full screen to maximise the display of the data.

Full screen mode of Details Table:

Details

Case Category	Work Queue	In Queue	Assigned	Unassigned	In Progress	Deferred	Total	Volume Over Due	Volume Not Due	Online Users	EHT (Minutes)	Backlog Time (Min...
BI01	MM	33	7	5	0	3	48	39	9	0	5	195
BI01	Billing Team	4	0	0	0	0	4	4	0	0	5	20
BI01	MM	15	0	0	0	0	15	15	0	0	5	75
BI01	New position	4	4	0	0	1	9	2	7	0	5	10
BI01	Basis Technologies...	0	2	0	0	0	2	2	0	0	5	10
BI01	Billing Team	3	0	0	0	0	3	3	0	0	5	15
BI01	Billing Manager	0	1	0	0	0	1	1	0	0	5	5
BI01	Device Manageme...	3	0	0	0	0	3	3	0	0	5	15
BI01	BVISHWAN	1	0	0	0	0	1	1	0	0	5	5
BI01	HHARFORD	2	0	0	0	1	3	1	2	0	5	5
BI01	MKHAN5	1	0	0	0	1	2	2	0	0	5	10
BI02	HHARFORD	0	1	0	0	0	1	0	1	0	5	0
BI02	JHILLIER	0	1	0	0	0	1	0	1	0	5	0
BI02	TTICEHURST	0	4	0	0	0	4	0	4	0	5	0
BI02	TTICEHURST	0	1	0	0	0	1	0	1	0	5	0
BO01	Basis Technologies...	0	1	0	0	0	1	0	1	0	5	0
BQR1	MM	1	0	0	0	0	1	0	1	0	5	0
ECC	Basis Technologies...	3	3	0	0	0	6	0	6	0	5	0
ECC	Billing Team	0	1	0	0	0	1	0	1	0	5	0
Z004	Unassigned	1	2	2	0	0	5	0	5	0	5	0
Z004	Billing Team	1	0	0	0	0	1	0	1	0	5	0
Z004	Billing	0	1	0	0	0	1	0	1	0	5	0
Z004	MKHAN5	0	1	0	0	0	1	0	1	0	5	0
Z006	Unassigned	4	0	6	0	0	10	0	10	0	5	0
Z006	New position	4	0	0	0	0	4	0	4	0	5	0
ZBPM	Billing Agent	0	2	0	0	0	2	0	2	0	5	0
ZCON	Unassigned	0	0	4	0	0	4	0	4	0	5	0
ZCON	Unassigned	2	3	4	0	0	9	0	9	0	5	0

3.7. Get Work Additional Options

There are two options in Related Get work:

- Related Get Work
- Lock Related Work

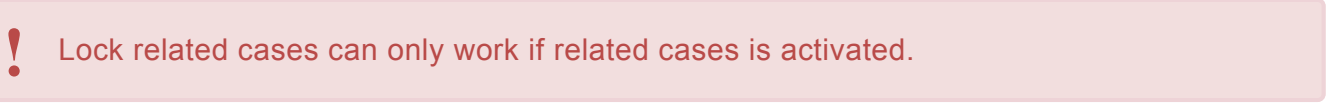
Related Get Work: Related work within the user's skill set can be assigned to a user if this option is enabled. This will enable a user to work via a holistic customer approach rather than working cases in silos. Work is only assigned as related if the cases are within the users skill set (assigned to the same queues as the user) and share the same case type.

Lock Related Work: If related work and locked related work option is enabled, locked related cases would help users to lock cases which are related to the primary case and these cases would not be assigned to any other user. Preventing multiple users from working the same customer at the same time. Primary cases would be linked to the Locked related cases. All the locked related cases are maintained in a table that can be viewed at any time in table view transaction code – SE16 (for those who have access to this transaction).

Once the primary case is reassigned/forwarded/cancelled/completed, all the related Locked cases would be unlocked.
This action would happen via Batch job which should be scheduled to run frequently throughout the day.

For Example: This option will look for related cases which are not assigned to the work queue/s for the Agent and cases which are related (determined by the configuration of the field for the related get work option) and have the same case type. If any cases are found, as these cases are related to Related, get work cases. We would lock the cases and will lock them to the primary case. Once the Primary case is reassigned/forwarded/closed/completed, we will unlock the locked cases and they will be available for get work.

When the user clicks "Get Work" /BTI/BWC would fetch related cases and would lock related cases specific to the cases identified to be assigned to the user.

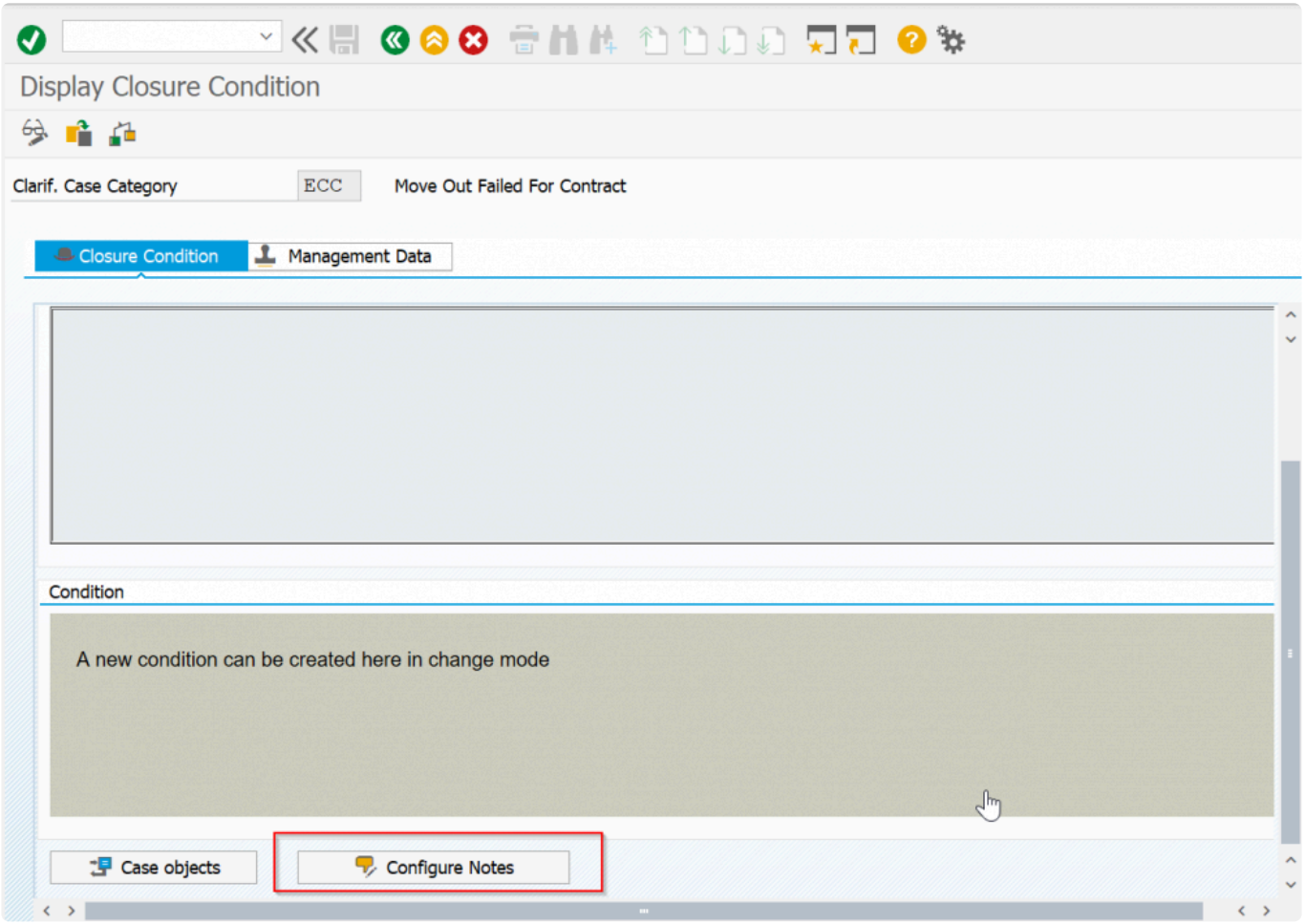


3.8. Closure Control Notes

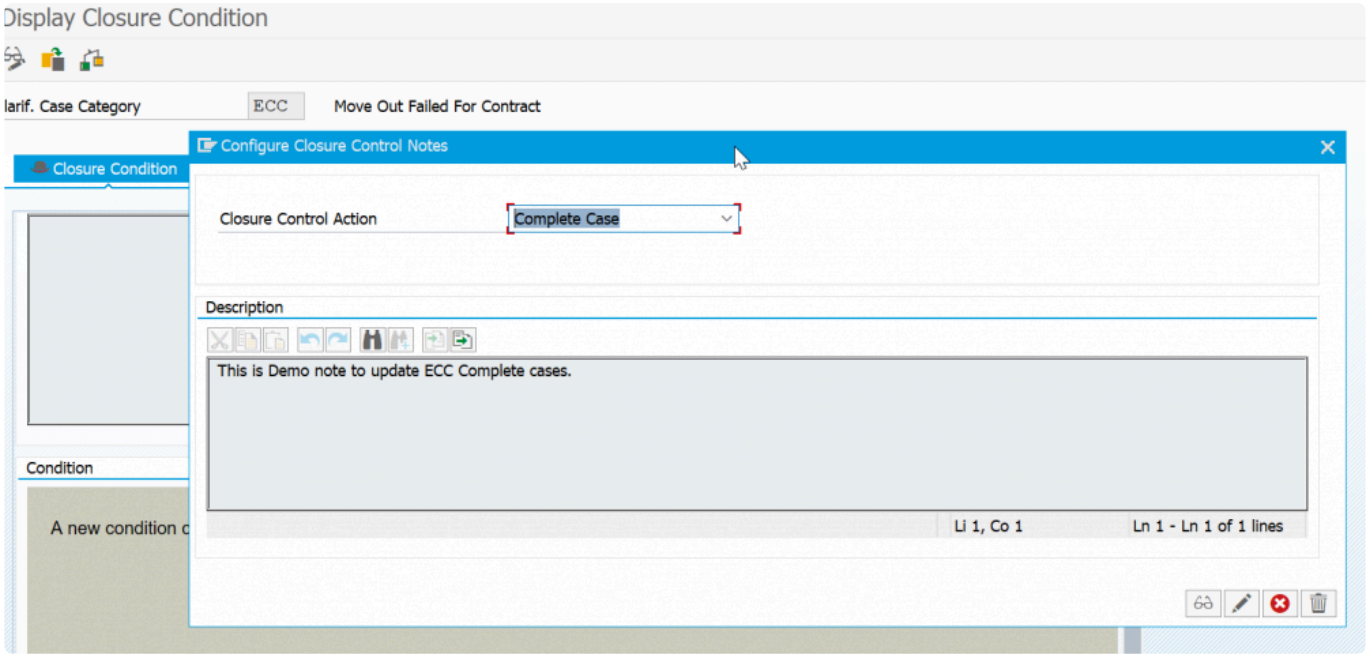
Closure Control Notes would provide an option for user to add pre-configured notes in /BTI/MDE_BPEMCOND.
These notes would be automatically applied for BPEM cases when closed via the closure control job. This job runs the closure control rules to check which cases should be automatically completed by the system. Any cases that are changed by the job can have the pre-configured note applied to the case. The job can be ran in three modes and therefore for each mode you can add a different note. For more information about the closure control job see this topic: “Closure Control – Job”:

Adding Closure Control Notes:

User can Configure Closure Control Notes via /BTI/MDE_BPEMCOND



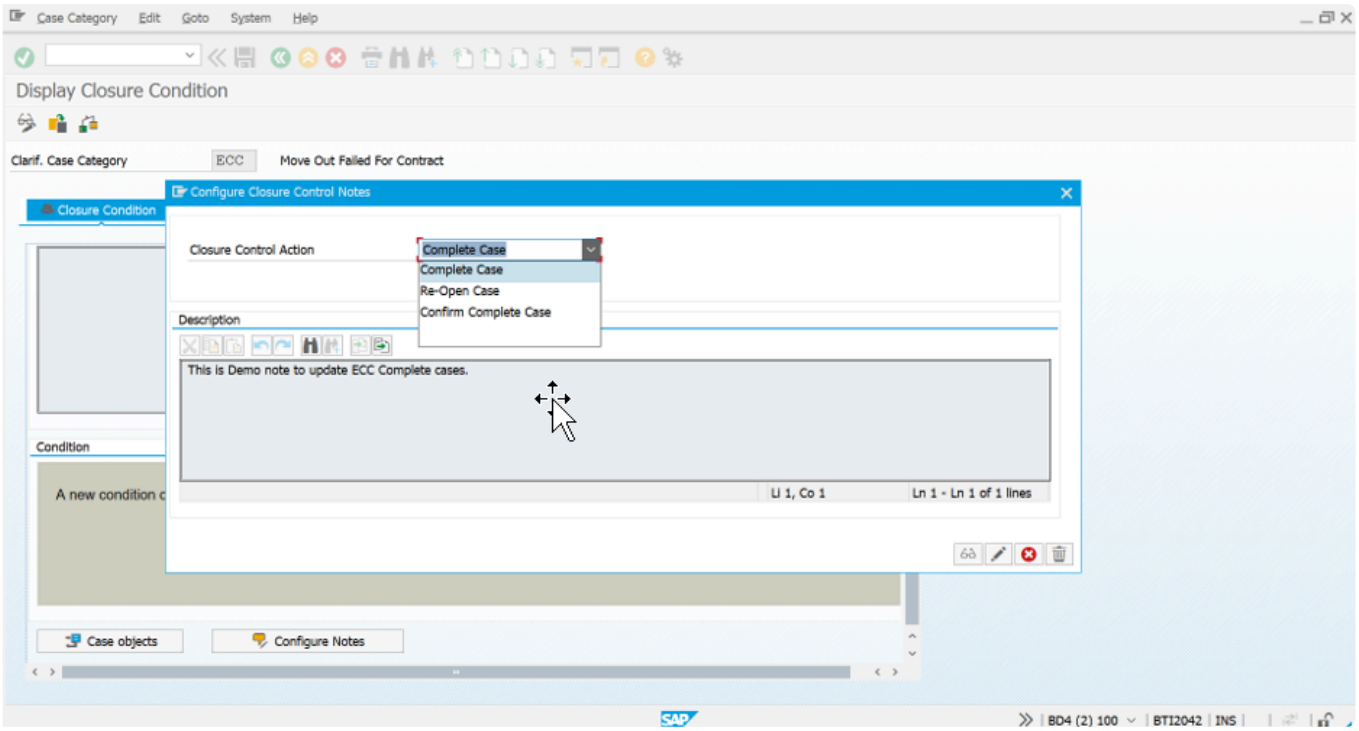
User has ability to Change, Display and Delete Notes.



User can Configure Closure Control Notes for three actions.

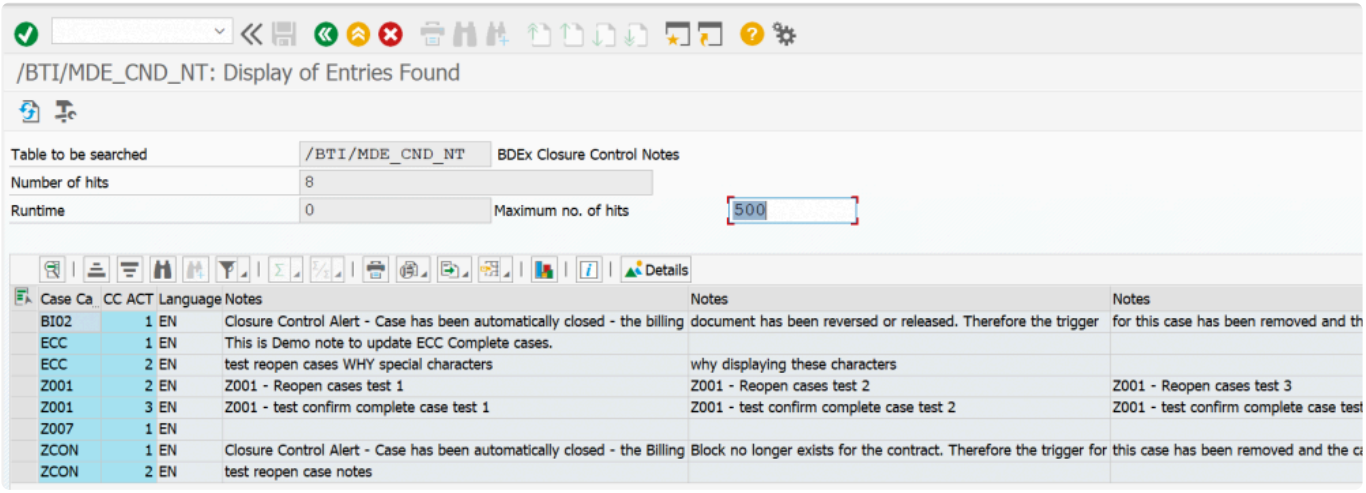
1. Complete Case
2. Re-Open Case
3. Confirm Complete Case.

Complete Case Notes is displayed by default (this is the most commonly used mode for the closure control job).



Where are notes saved?

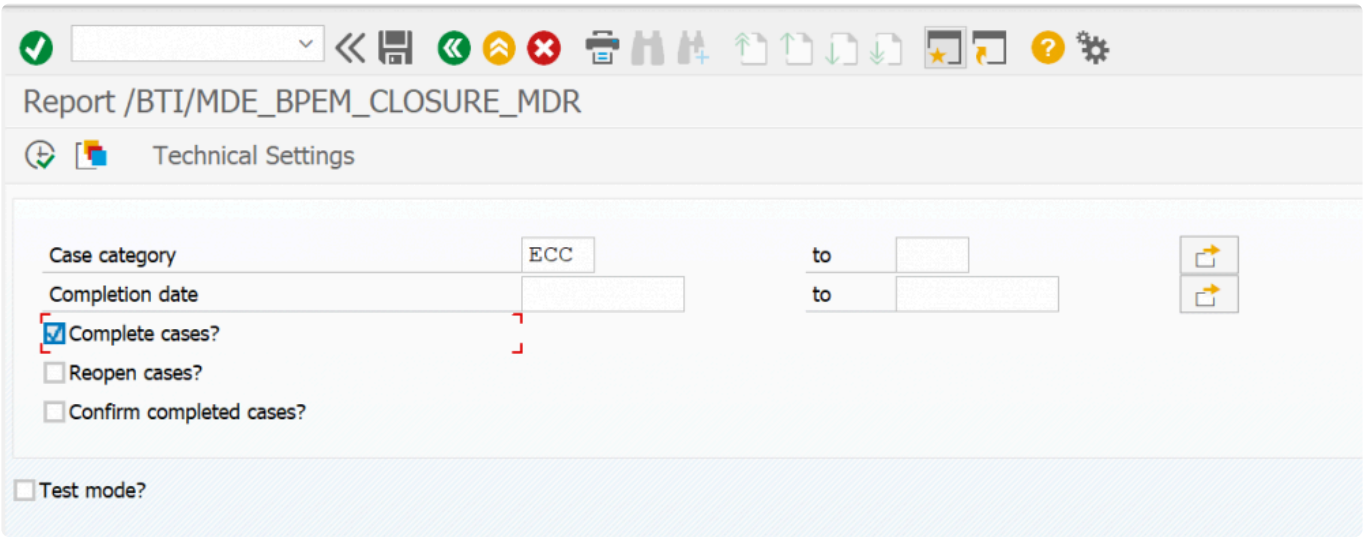
Closure Control Notes are saved in /BTI/MDE_CND_NT table.



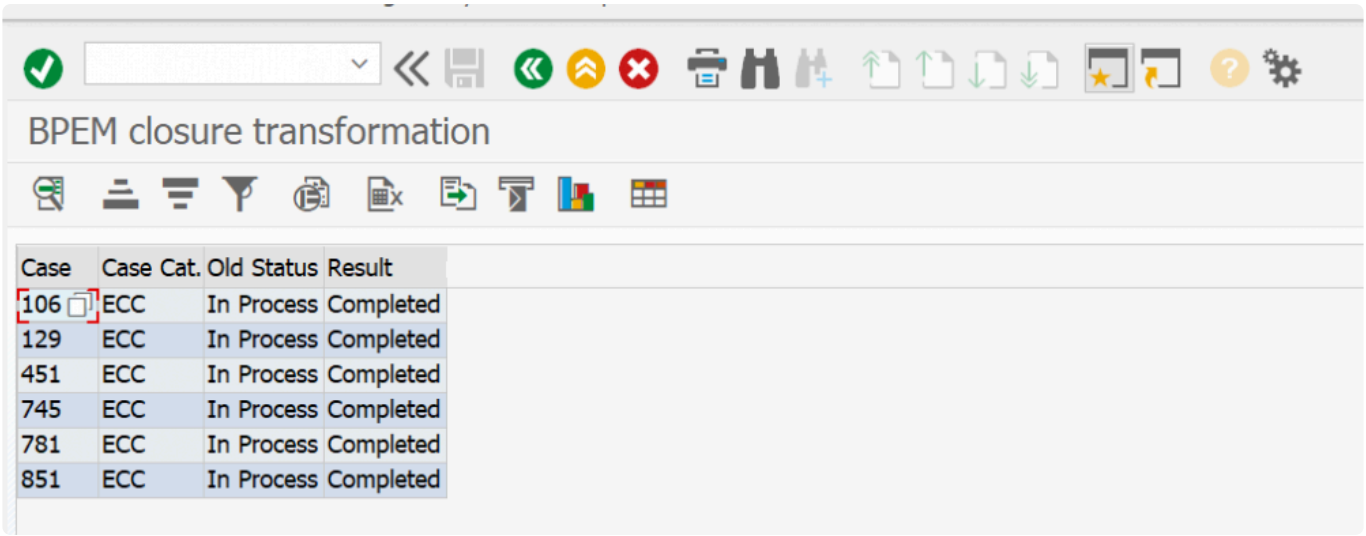
Case Ca	CC ACT	Language	Notes	Notes	Notes
BI02	1	EN	Closure Control Alert - Case has been automatically closed - the billing	document has been reversed or released. Therefore the trigger	for this case has been removed and th
ECC	1	EN	This is Demo note to update ECC Complete cases.		
ECC	2	EN	test reopen cases WHY special characters	why displaying these characters	
Z001	2	EN	Z001 - Reopen cases test 1	Z001 - Reopen cases test 2	Z001 - Reopen cases test 3
Z001	3	EN	Z001 - test confirm complete case test 1	Z001 - test confirm complete case test 2	Z001 - test confirm complete case test
Z007	1	EN			
ZCON	1	EN	Closure Control Alert - Case has been automatically closed - the Billing	Block no longer exists for the contract. Therefore the trigger for	this case has been removed and the c
ZCON	2	EN	test reopen case notes		

How are the notes used?

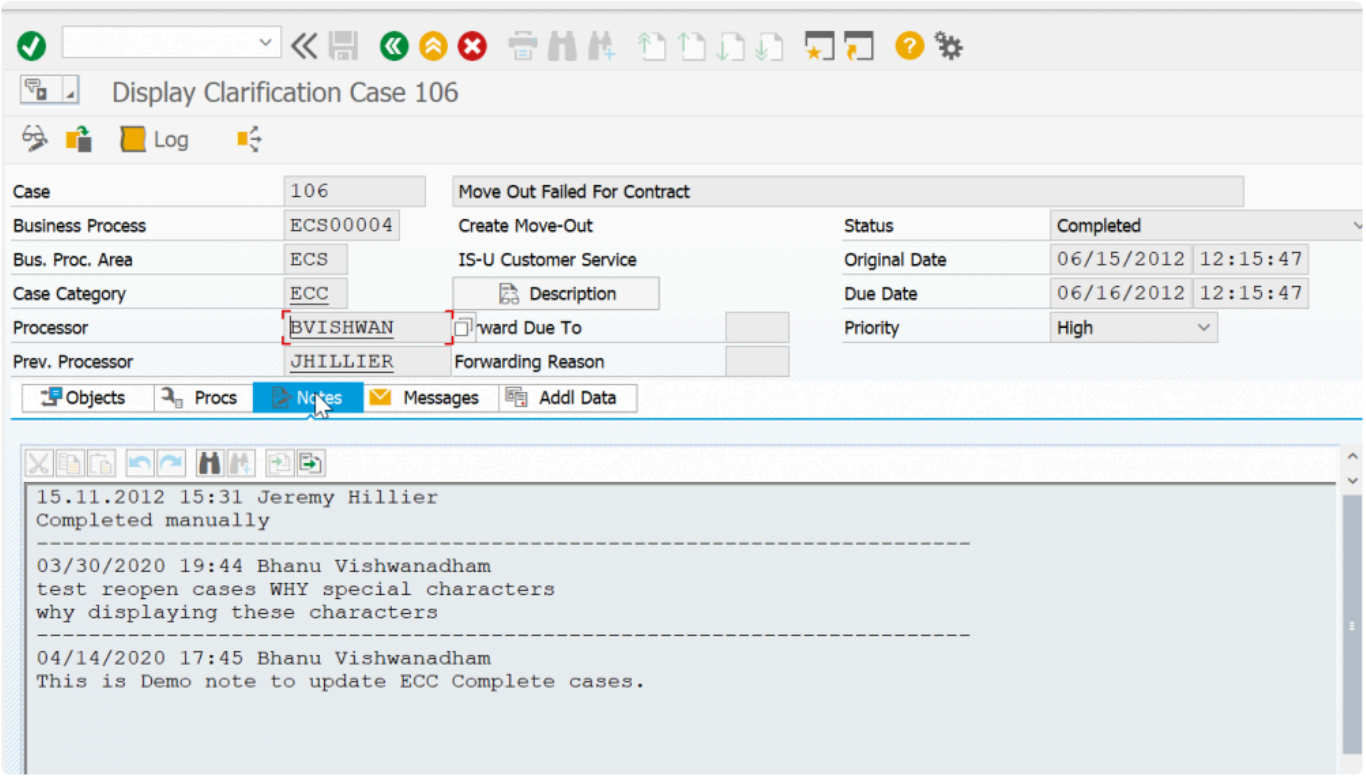
Close case via batch job: /BTI/MDE_BPEM_CLOSURE_MDR.
Notes would be updated in the case notes tab.



Cases closed via Closure Control Job.



Closure Control Notes update in for BPEM case.



Only one note per case category can be added for each mode available.

3.9. Watched Items – retain completed

Watched Items now have two modes to function.

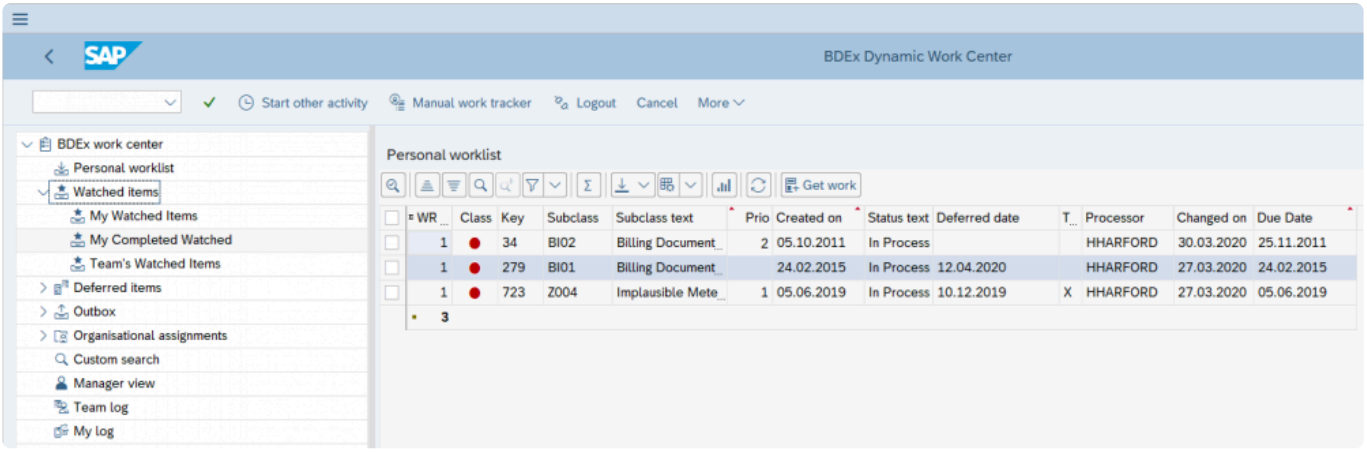
1. Email Notifications
2. Complete Watched Items folder

Email Notifications are issued when a user has Watched and Item and that Item is Resolved.
An alternative function is available to suppress the notification and to retain the completed item in the new folder “My Completed Watched”.
The watched item can be retained for a pre-configured number of days to enable the user to review the cases.
Cases can be removed from the Completed folder once reviewed.

> An option is available to switch between email notifications and completed watched item folder.
> See implementation instructions for details on the configuration steps.

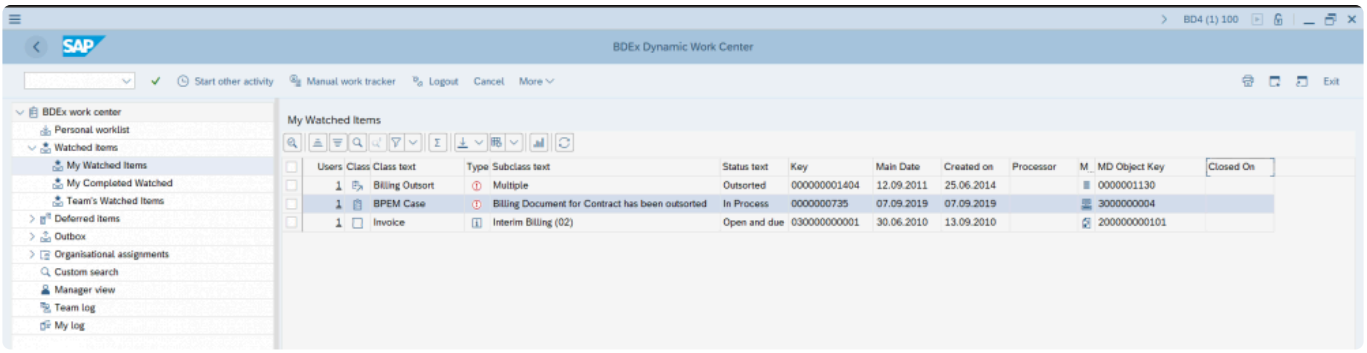
Watched Items Folder

When using Completed Watched Items a new sub folders are available in the Dynamic Work Center.



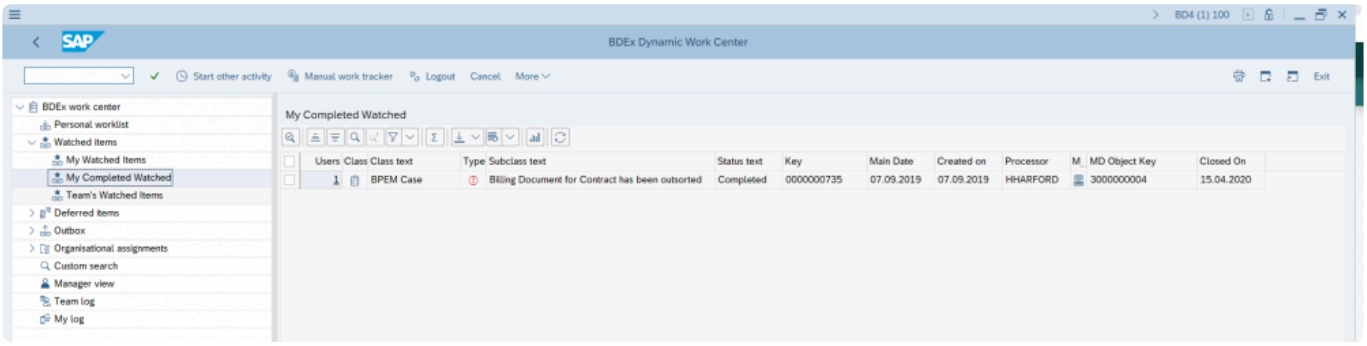
My Watched Items

This folder shows the watched items as previously. Any item the user has watched that is still open will be displayed here.



My Completed Watched

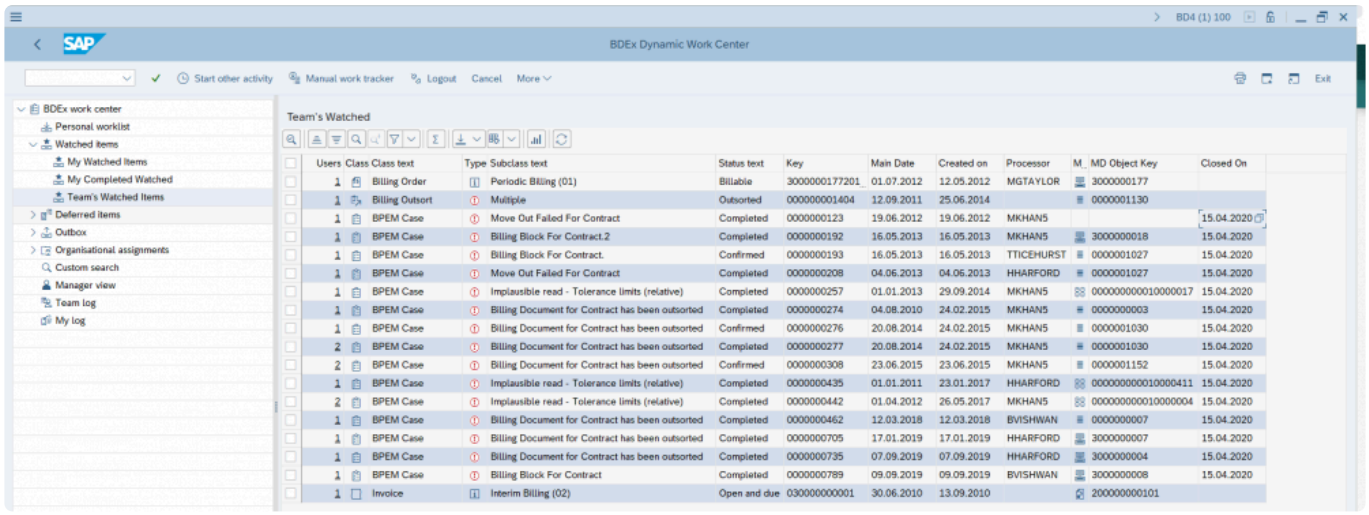
Once a watched item is completed it will move from the “My Watched Items” into the “My Completed Watched”.
The user can review the cases here and remove them from the list once the review has been completed.
The cases will automatically be removed from the watched item list once the retention period has passed.



> Both the Completed Watched Item and Retention period must be configured for this to work.

Team’s Watched Items

If you are a Manager you will also see the “Team’s Watched Items”.
This will show both completed (for as long as the retention period) and open watched items for all the Managers team members.



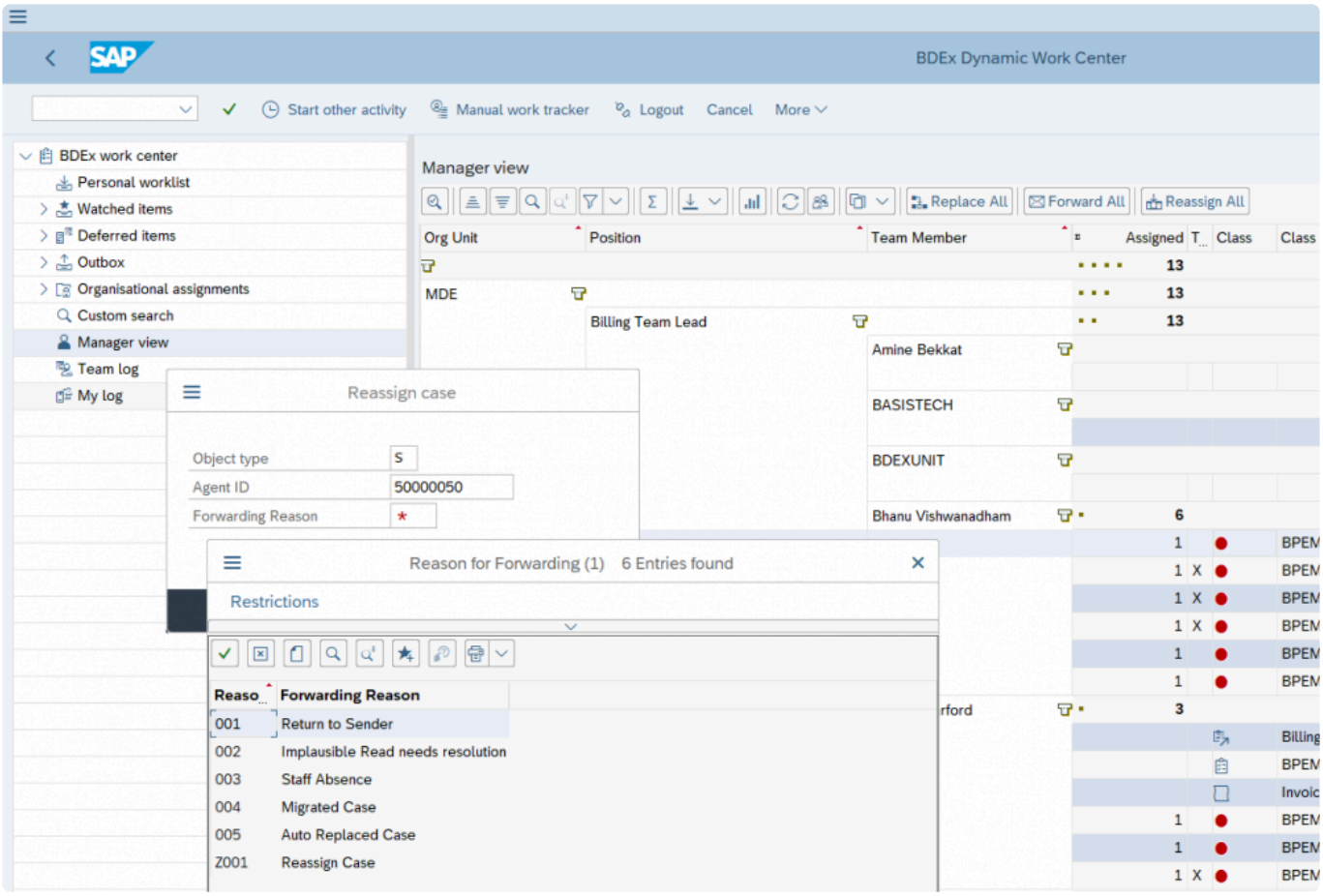
Users	Class	Class text	Type	Subclass text	Status text	Key	Main Date	Created on	Processor	M	MD Object Key	Closed On
1		Billing Order		Periodic Billing (01)	Billable	3000000177201	01.07.2012	12.05.2012	MGTAYLOR		3000000177	
1		Billing Outsort		Multiple	Outsorted	000000001404	12.09.2011	25.06.2014			0000001130	
1		BPEM Case		Move Out Failed For Contract	Completed	0000000123	19.06.2012	19.06.2012	MKHAN5			15.04.2020
1		BPEM Case		Billing Block For Contract.2	Completed	0000000192	16.05.2013	16.05.2013	MKHAN5		3000000018	15.04.2020
1		BPEM Case		Billing Block For Contract.	Confirmed	0000000193	16.05.2013	16.05.2013	TTICEHURST		0000001027	15.04.2020
1		BPEM Case		Move Out Failed For Contract	Completed	0000000208	04.06.2013	04.06.2013	HHARFORD		0000001027	15.04.2020
1		BPEM Case		Implausible read - Tolerance limits (relative)	Completed	0000000257	01.01.2013	29.09.2014	MKHAN5		00000000001000017	15.04.2020
1		BPEM Case		Billing Document for Contract has been outsorted	Completed	0000000274	04.08.2010	24.02.2015	MKHAN5		0000000003	15.04.2020
1		BPEM Case		Billing Document for Contract has been outsorted	Confirmed	0000000276	20.08.2014	24.02.2015	MKHAN5		0000001030	15.04.2020
2		BPEM Case		Billing Document for Contract has been outsorted	Completed	0000000277	20.08.2014	24.02.2015	MKHAN5		0000001030	15.04.2020
2		BPEM Case		Billing Document for Contract has been outsorted	Confirmed	0000000308	23.06.2015	23.06.2015	MKHAN5		0000001152	15.04.2020
1		BPEM Case		Implausible read - Tolerance limits (relative)	Completed	0000000435	01.01.2011	23.01.2017	HHARFORD		00000000001000411	15.04.2020
2		BPEM Case		Implausible read - Tolerance limits (relative)	Completed	0000000442	01.04.2012	26.05.2017	MKHAN5		00000000001000004	15.04.2020
1		BPEM Case		Billing Document for Contract has been outsorted	Completed	0000000462	12.03.2018	12.03.2018	BVISHWAN		0000000007	15.04.2020
1		BPEM Case		Billing Document for Contract has been outsorted	Completed	0000000705	17.01.2019	17.01.2019	HHARFORD		3000000007	15.04.2020
1		BPEM Case		Billing Document for Contract has been outsorted	Completed	0000000735	07.09.2019	07.09.2019	HHARFORD		3000000004	15.04.2020
1		BPEM Case		Billing Block For Contract	Completed	0000000789	09.09.2019	09.09.2019	BVISHWAN		3000000008	15.04.2020
1		Invoice		Interim Billing (02)	Open and due	030000000001	30.06.2010	13.09.2010			200000000101	

3.10. Patches

Patch fixes included in release 4.5 are:

Forwarding Reason – Reassign All

Ability to use F4 to see forwarding reasons when using Reassign All in DWC in the Manager View.
F4 was not available in the Reassign All function from the DWC, this has now been made available to enable the user to select the forwarding reason from the list of options rather than needing to enter the reason directly.



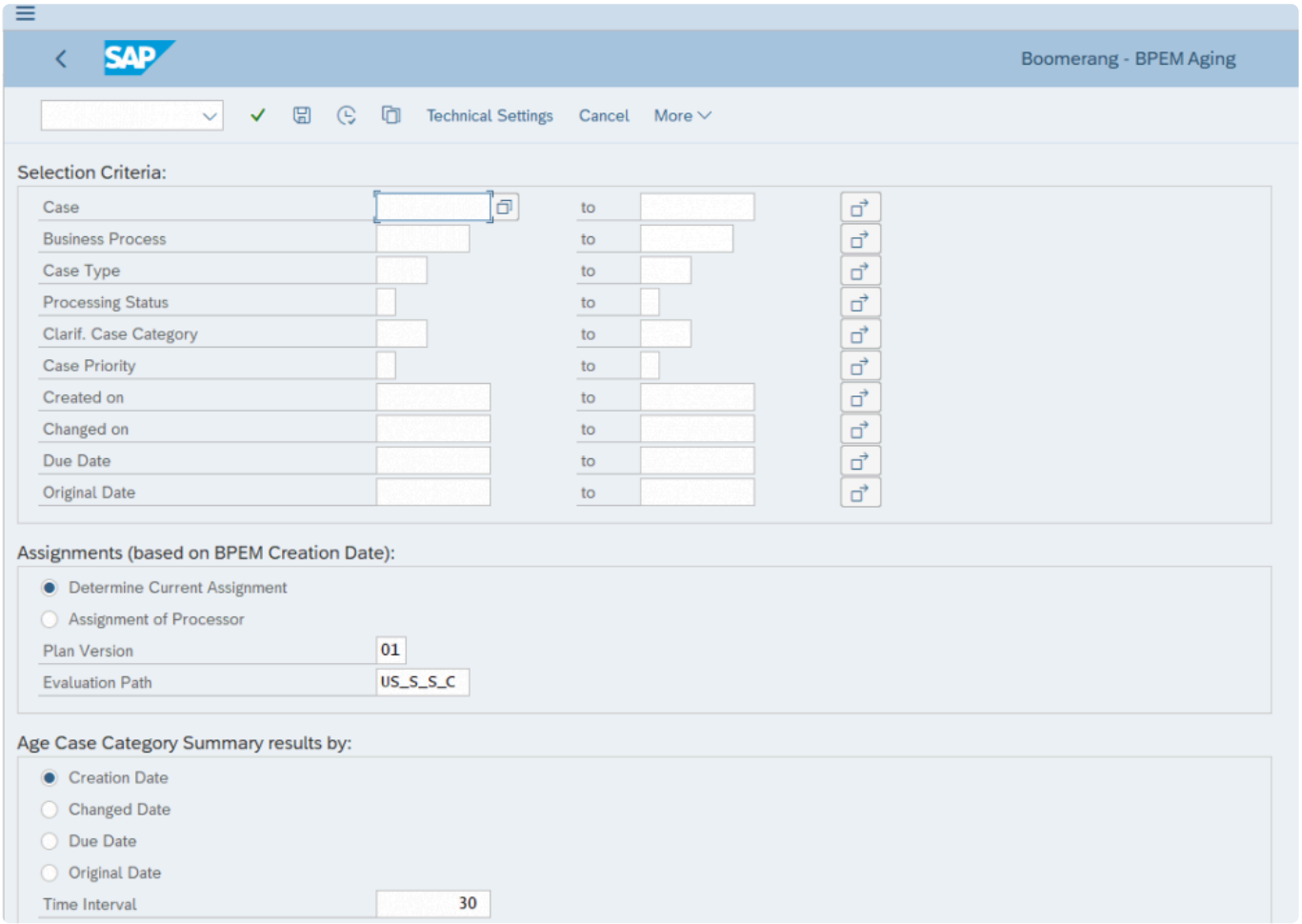
Update to Master Data for Device Location

Ability to build Master Data Hierarchy using the Device Location.
In previous versions when using Identify Account with the Device Location as the parent object – the connection object list was built from the Device Location and the parent was switched to the Connection Object. This is how SAP builds the Master Data in the Data Environment. This has been changed to enable the Device Location to become the parent and build the Master Data using only the data relating to that specific Device Location.

Boomerang Aging Assignments

The Aging assignments has been rebuilt to determine the assignments from the work queues rather than getting the position of the processor ID.
Two options for assignments view when running the Boomerang Aging Report.

- Determine Current Assignment
- Assignment of Processor.



In the previous version there was no difference between these views.
Now the Determine Current Assignment option will fetch the actual assignment of the case either:
From the work queue or if the case has a processor the processor ID will be displayed.
Assignment of Processor – will display the cases with a processor ID and determine which positions the users are assigned too.
This is showing the cases belonging to the users within a team in the org structure rather than where the cases routed too.

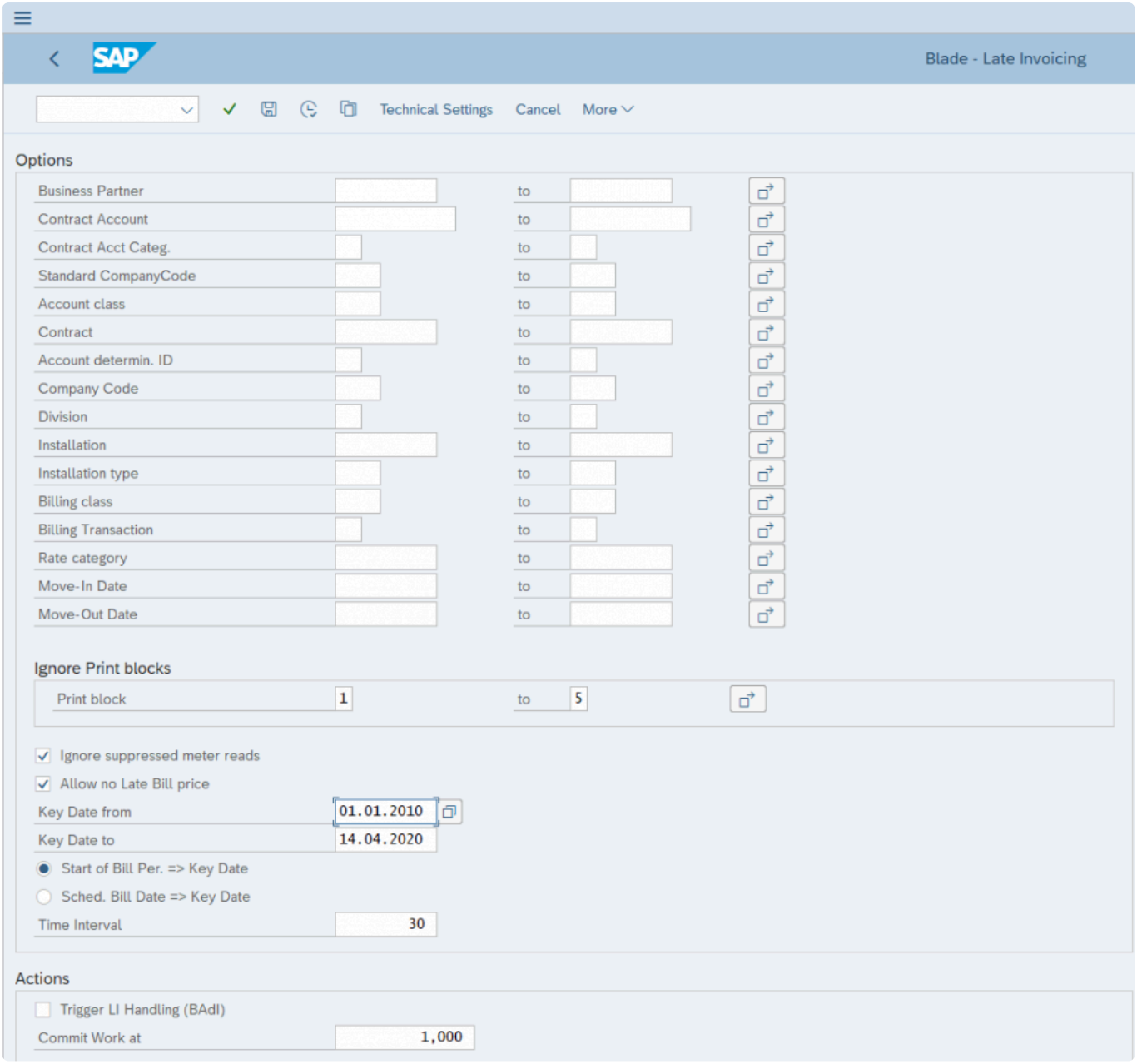
Enhancement created to enable new Master Data objects to be added

This is a technical update to enable the ability to add new Master Data using a new enhancement spot in the build Master Data step.
This means the Business Add-In (BAdI) can be implemented and the logic rebuilt according to customer requirements. Example here was to add Provider Contract into the Master Data Hierarchy.
See the development cookbook for more details on using this BAdI.

Blade – Add key date from to selection screen parameter for Late Invoicing Report

Added new parameter into Late Invoicing Report to add a Key Date From. This will enable the from and to date to be determined for the Late Invoiced period to reduce performance issues and change the selection of the criteria when the report is executed. Previously all dates were considered in the report. This meant the report picked up archived billing periods in error and also would check accounts back to move in dates if no invoice found.

Now the key date from can be input to reduce the period back in which Blade will evaluate Late Invoiced period.


Blade - Late Invoicing
Technical Settings
Cancel
More
Options
Business Partner
Contract Account
Contract Acct Categ.
Standard CompanyCode
Account class
Contract
Account determin. ID
Company Code
Division
Installation
Installation type
Billing class
Billing Transaction
Rate category
Move-In Date
Move-Out Date
to
Ignore Print blocks
Print block
1
5
Ignore suppressed meter reads
Allow no Late Bill price
Key Date from
01.01.2010
Key Date to
14.04.2020
Start of Bill Per. => Key Date
Sched. Bill Date => Key Date
Time Interval
30
Actions
Trigger LI Handling (BAdI)
Commit Work at
1,000

4. Implementation Instructions

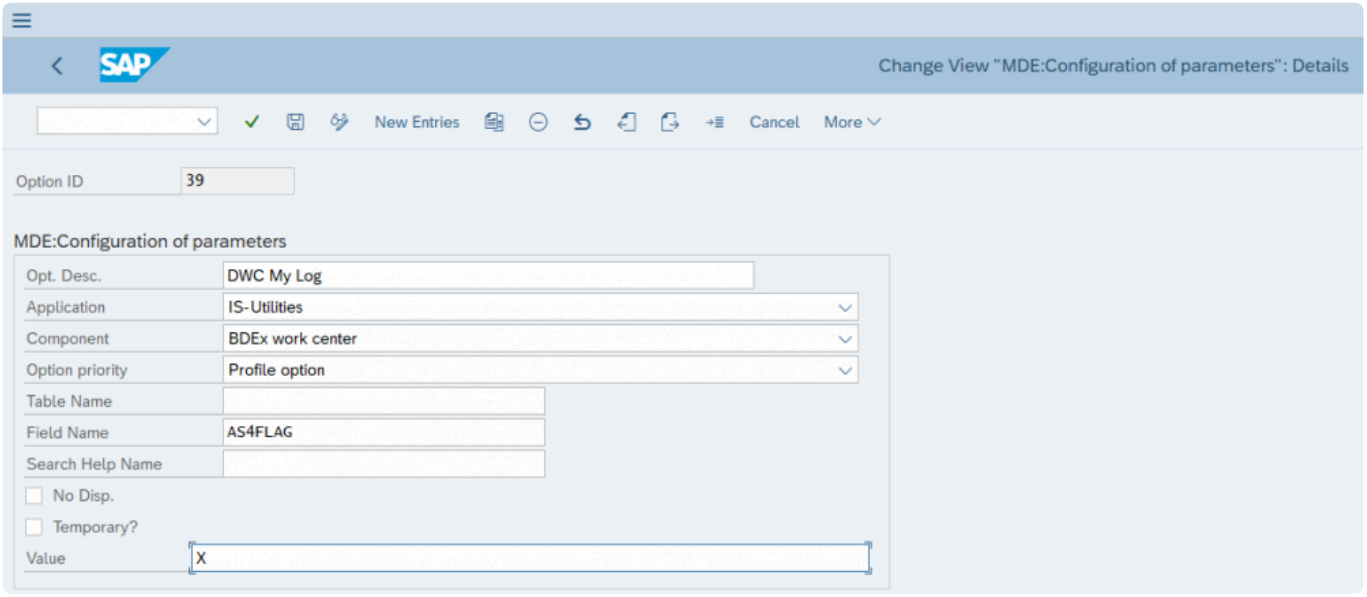
A transport will be provided with the changes – this must be imported to your local development system. Once imported it is recommended to complete regression changes.

4.1. Configuration Requirements

See the next topics to understand what requirements and configurations are needed to set up all the new functions.
The configuration requirements are listed for each topic to for the features.

4.1.1. My Log – Activation

My Log is activated in the options table /BTI/MDE_C_OPT

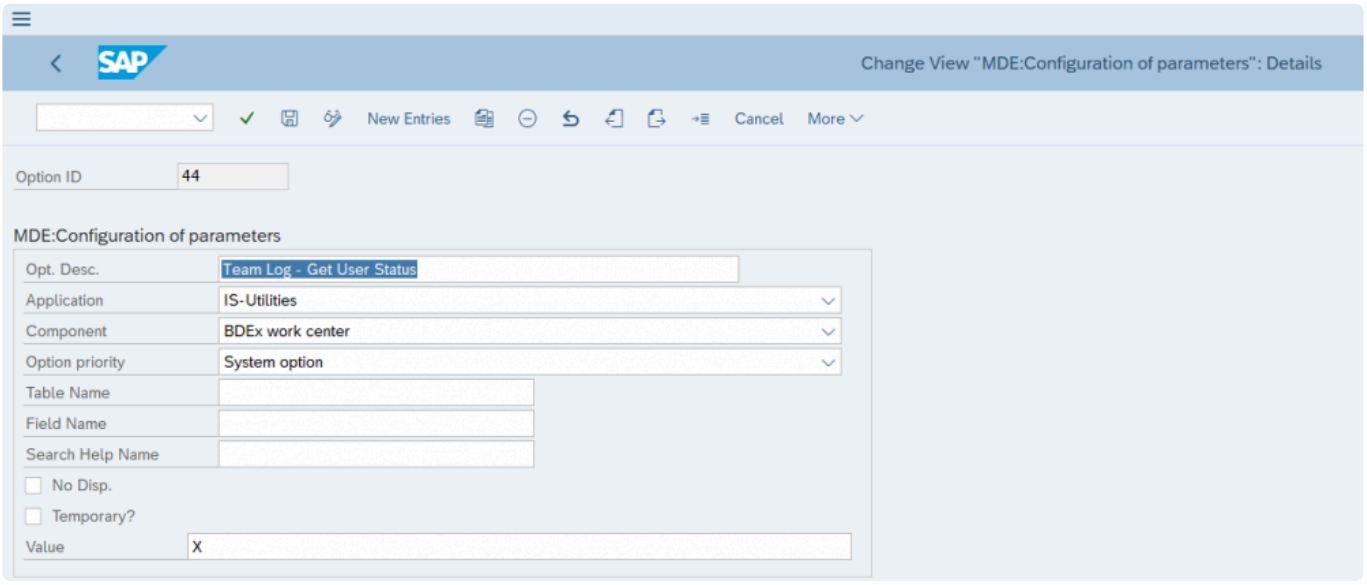


If the option priority is set to Profile. The activation of the My Log can be set for each Profile. This can be updated in the Profile Manager using transaction code /BTI/MDE_PROF_MGR.

Users assigned to Profiles without My Log will not see the My Log listed in the menu layout in the Dynamic Work Center.

4.1.2. User Status – Activation

User status is activated using the options table /BTI/MDE_C_OPT (can be turned on or off as required).
To activate update:
Option 44 – Team Log – Get User Status



If this option is set to Profile then it can be updated using the Profile Manager transaction /BTI/MDE_PROF_MGR

4.1.3. Manual Work Configuration

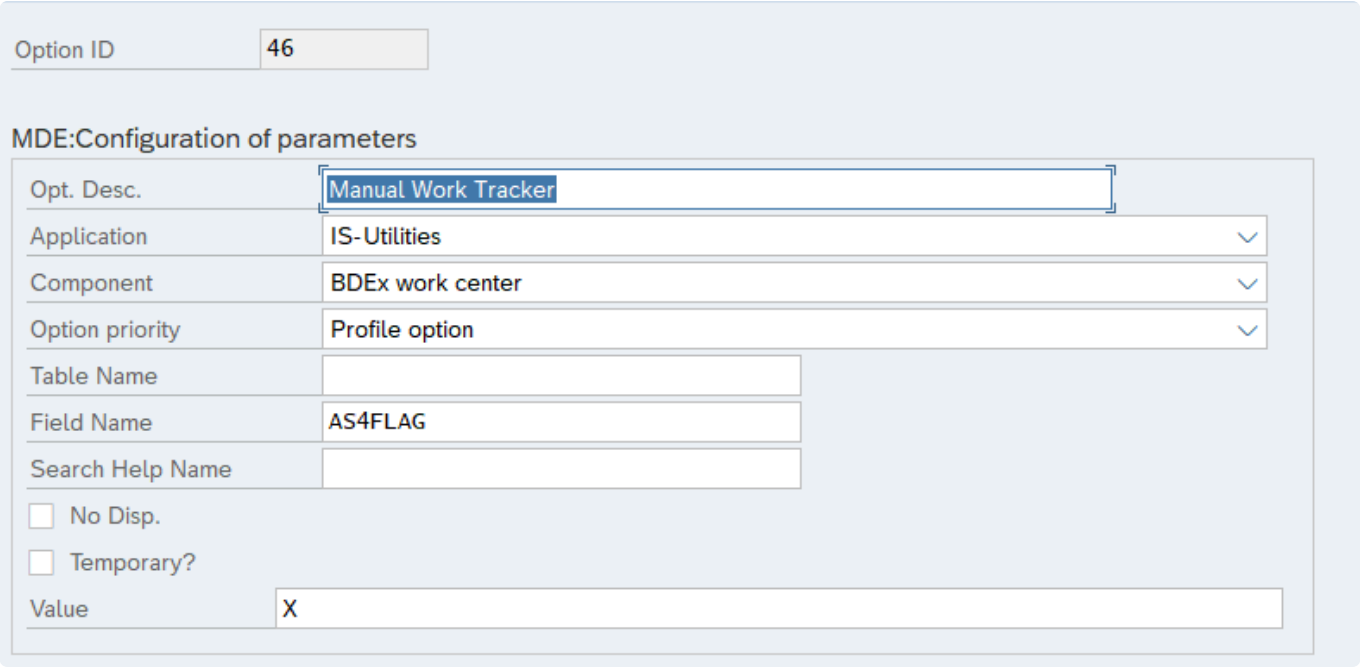
Configuration tables required to be updated are:

- /BTI/MDE_C_OPT – Options table
- /BTI/MDE_C_MANWR – Manual Work Reasons
- /BTI/MDE_C_MANW – Manual Work Tracker
- /BTI/MDE_C_WRCLS – Work Request Classes
- /BTI/MDE_C_WRRES – Work Request Resolution Times

Manual work items need to be activated in the options table /BTI/MDE_C_OPT to enable the button to be displayed in the Dynamic Work Center to add these tasks.

Option ID 46 – Manual Work Tracker

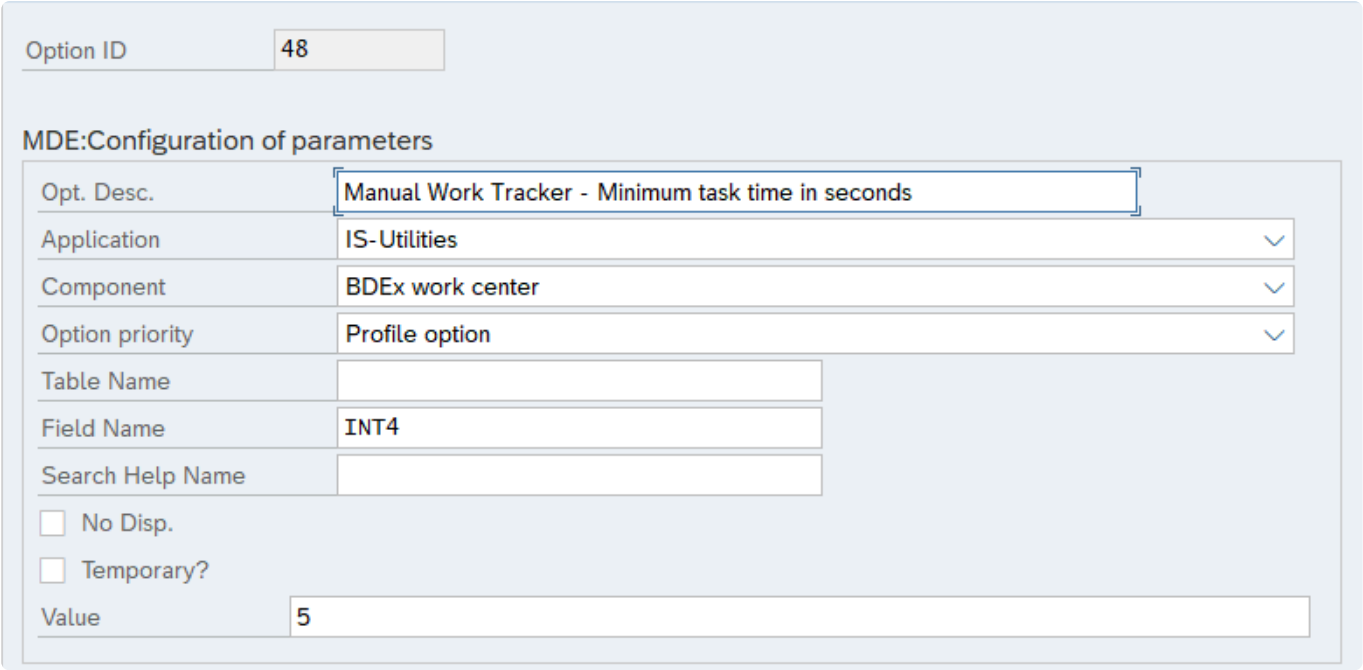
This turns on the option to see the Manual Work Tracker button in the Dynamic Work Center and activates it.



Option ID 48 – Manual Work Tracker – Minimum task time in seconds

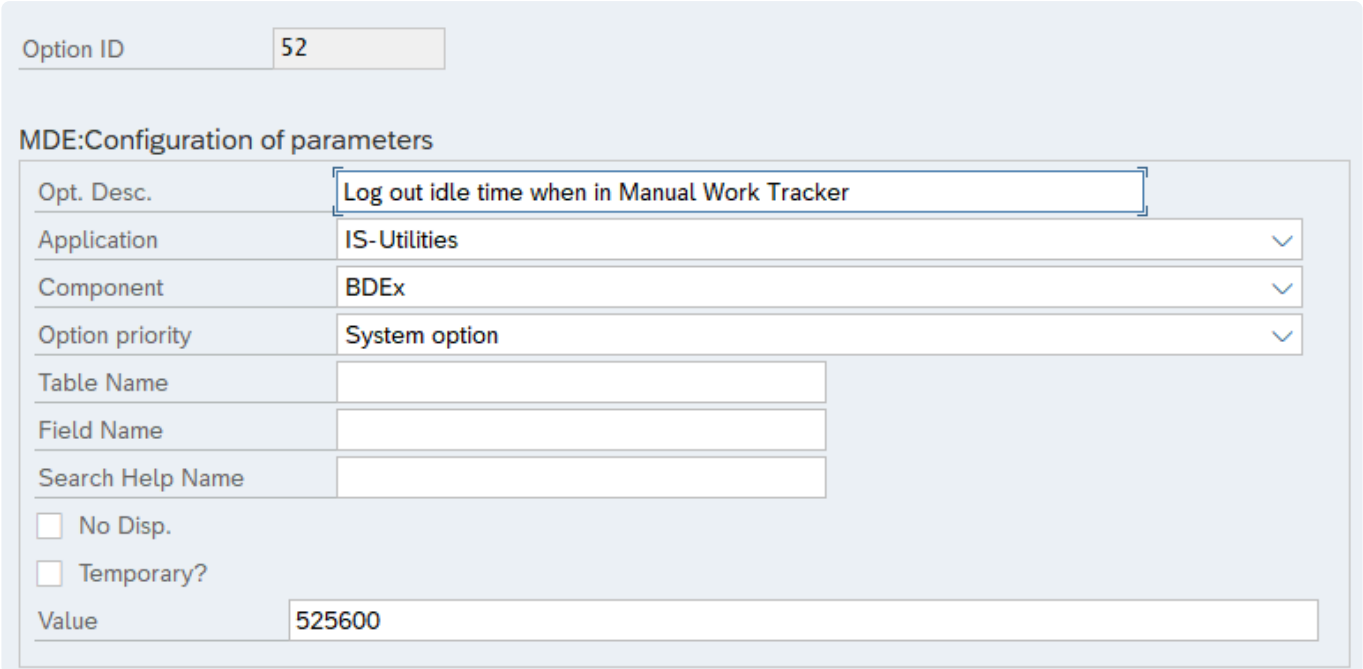
This option enables you to set a default task time preventing a user from adding too many cases in a short period. For example if the value here is 5 and I add 12 cases I can not submit my time until at least

1 minute has passed. This option is to prevent over inflation of stats or incorrect volume of work being submitted.



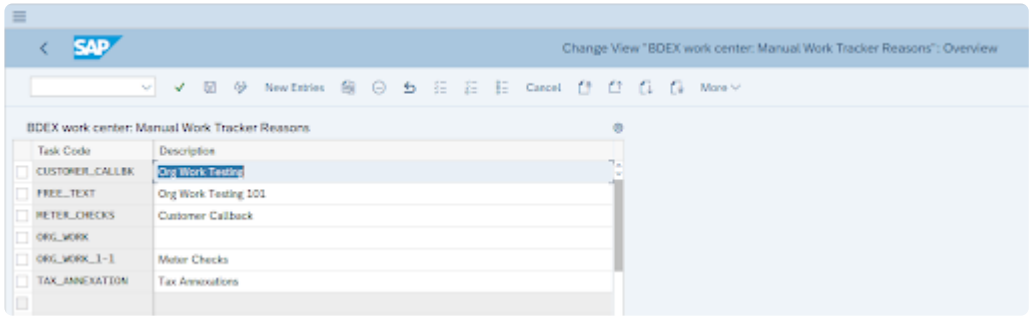
Option 52 – Log out idle time when in Manual Work Tracker

For those customers using Log out idle you must set a log out idle time when the user is in the Manual Work Tracker. This will prevent the user being logged out of BDEx as idle if they are in another system or have not triggered an action in time for the idle job to log them out of BDEx.



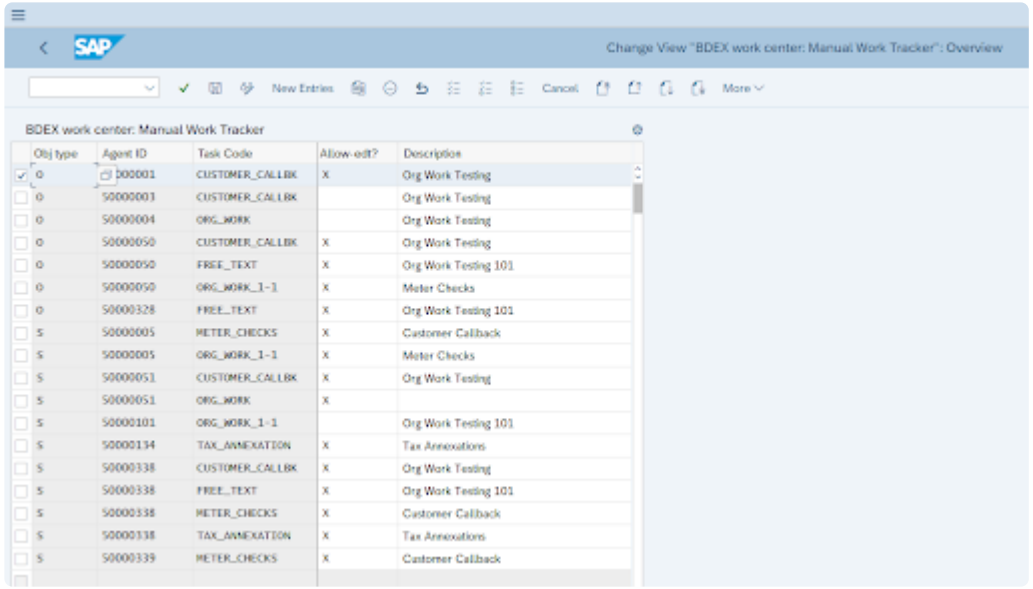
Manual Work Task Reasons

The manual work tasks are configured in table /BTI/MDE_C_MANWR. In this table you can add the task code and description which is used to determine the reason for the manual work task.



Manual Work Tasks Assignments

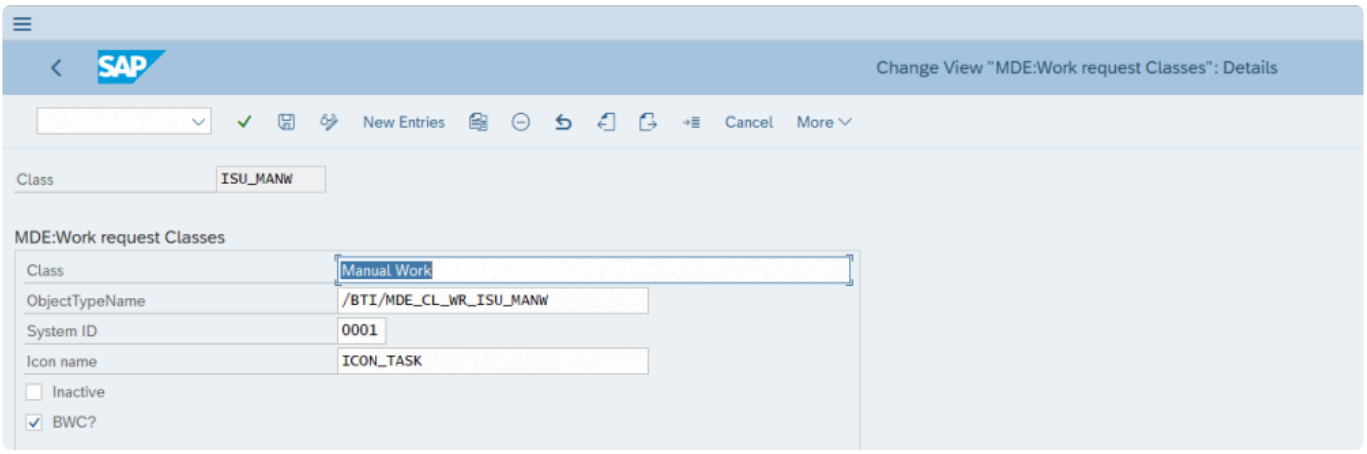
Once the tasks have been set up the organization units/positions or users can be assigned to the tasks to determine who can add a certain task. This is defined in table /BTI/MDE_C_MANW



In this table you can add the object type and ID and assign the task code to this. Acceptable Object Types are O – Organizational Unit, S – Position and US – User.
The Allow – Edit if = X means the user can update the description and add their note to the task. The task code remains unchanged so that the codes can be used for reporting.

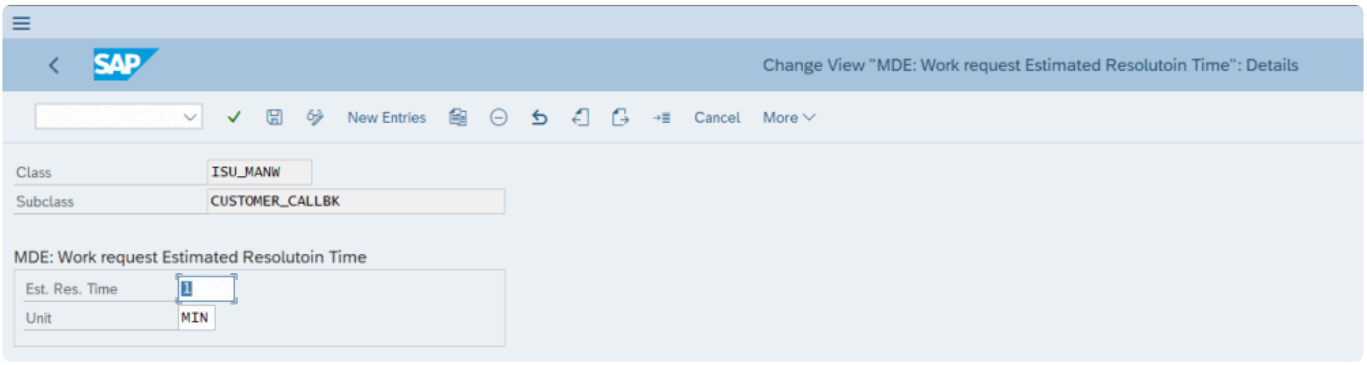
Manual Work – Work Request in DWC

In addition in order to save resolution times for these tasks the task needs to be added as a Work Request to use in the Productivity Report an entry must exist in table /BTI/MDE_C_WRCLS as follows:



Manual Work Resolution Times

Once the new class is added you can add the work request ISU_MANW and task into the work request resolution table /BTI/MDE_C_WRRES to save the resolution times for each task.



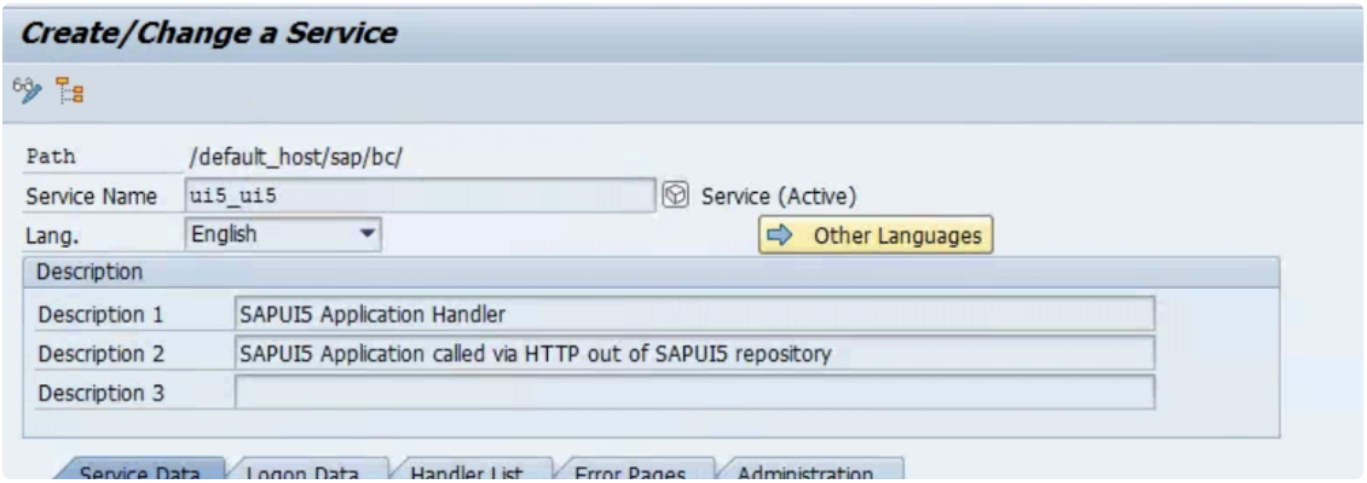
4.1.4. User Admin & BPEM Dashboard – Set up

The User Administration tool once installed to your system must be activated in the SAP UI5 services available.
This is a task for your Basis team and a reference document is attached with the steps required.

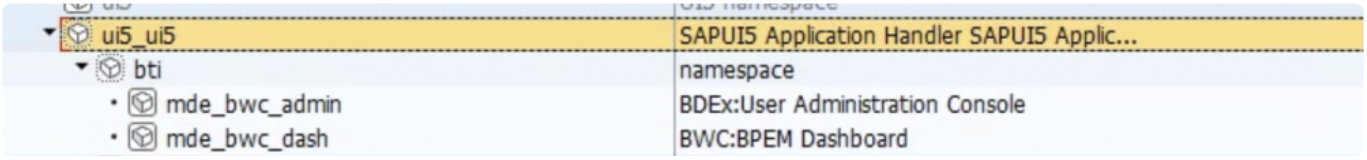
The activation of web screens must be completed in each environment and should be added to your cutover tasks.

4.1.4.1. Activation Web Screens

Navigate to the following node transaction SICF

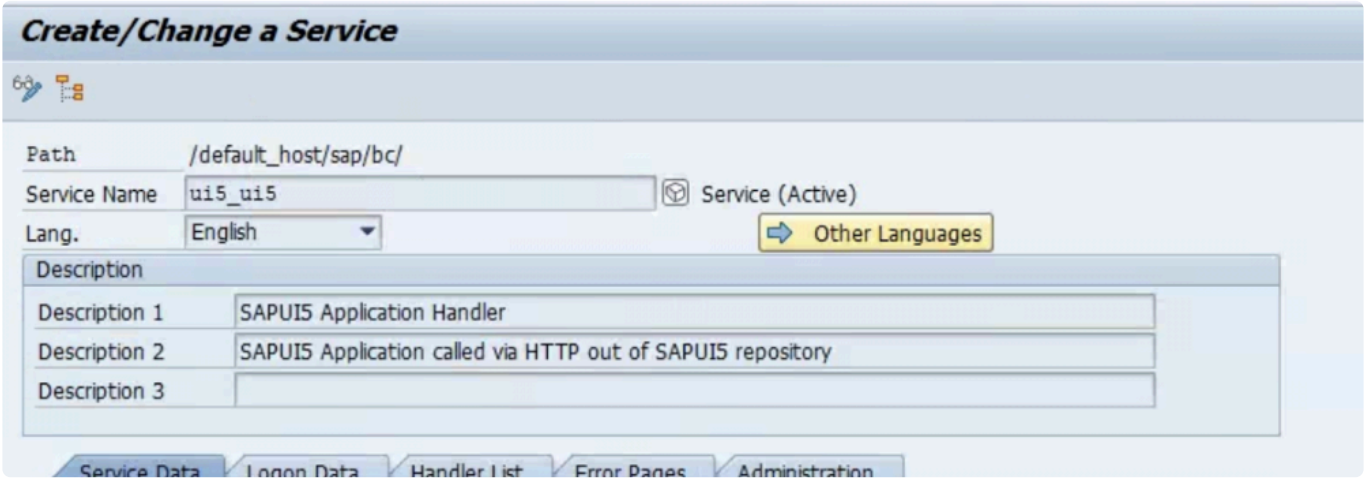


Activate all relevant SICF services under bti (user admin and bwc_dash)



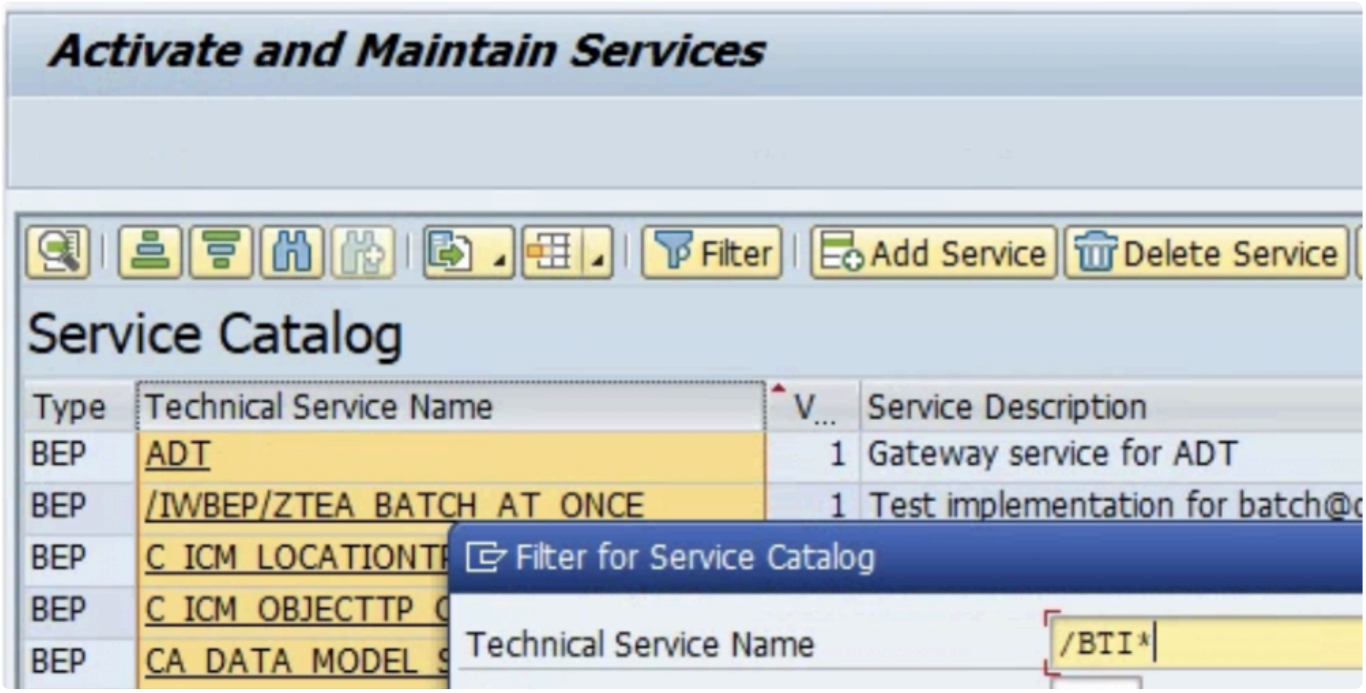
4.1.4.2. Activate Gateway Services

Navigate to the following node in SPRO:

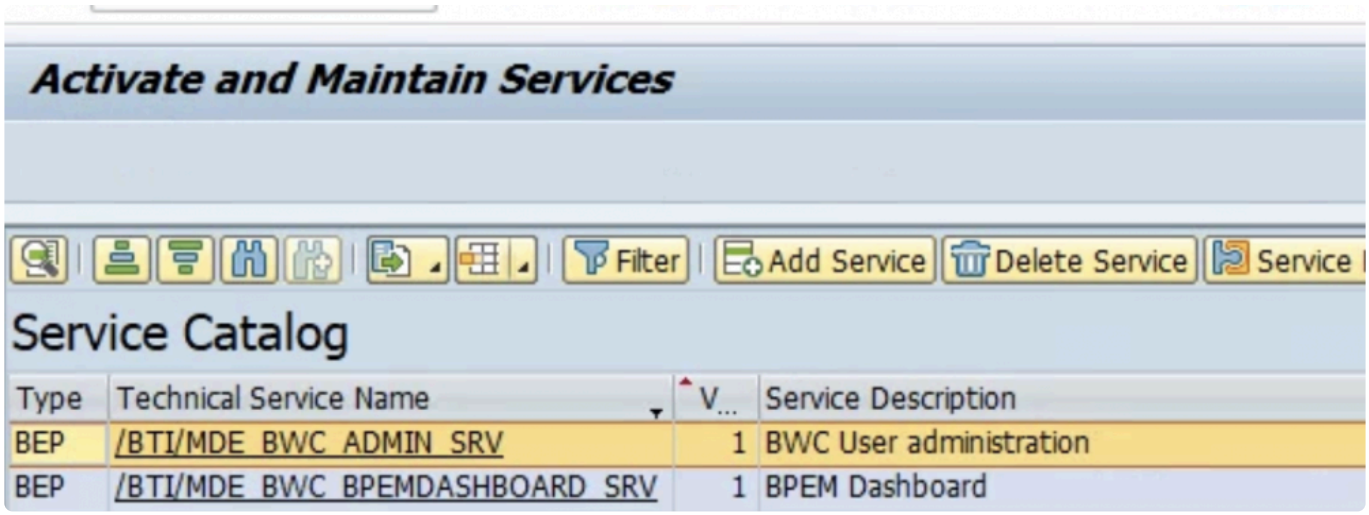


> Navigation path: SAP NetWeaver->SAP Gateway->Administration->General Settings Activate and Maintain Services

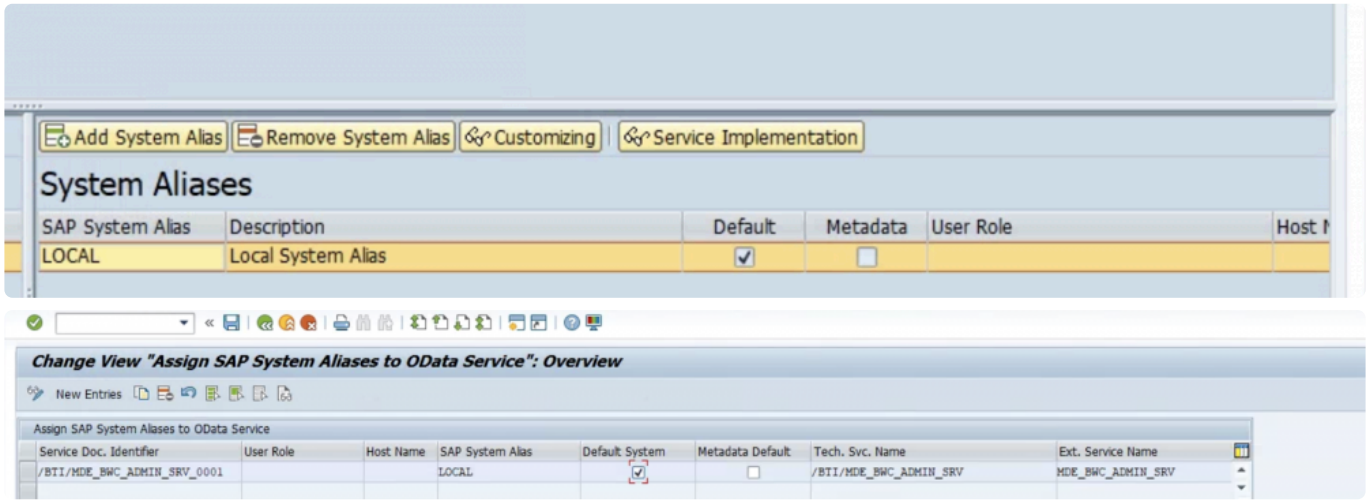
Filter for /BTI/* services:



Activate relevant services



If this is the configuration system add system alias. (LOCAL by default) .



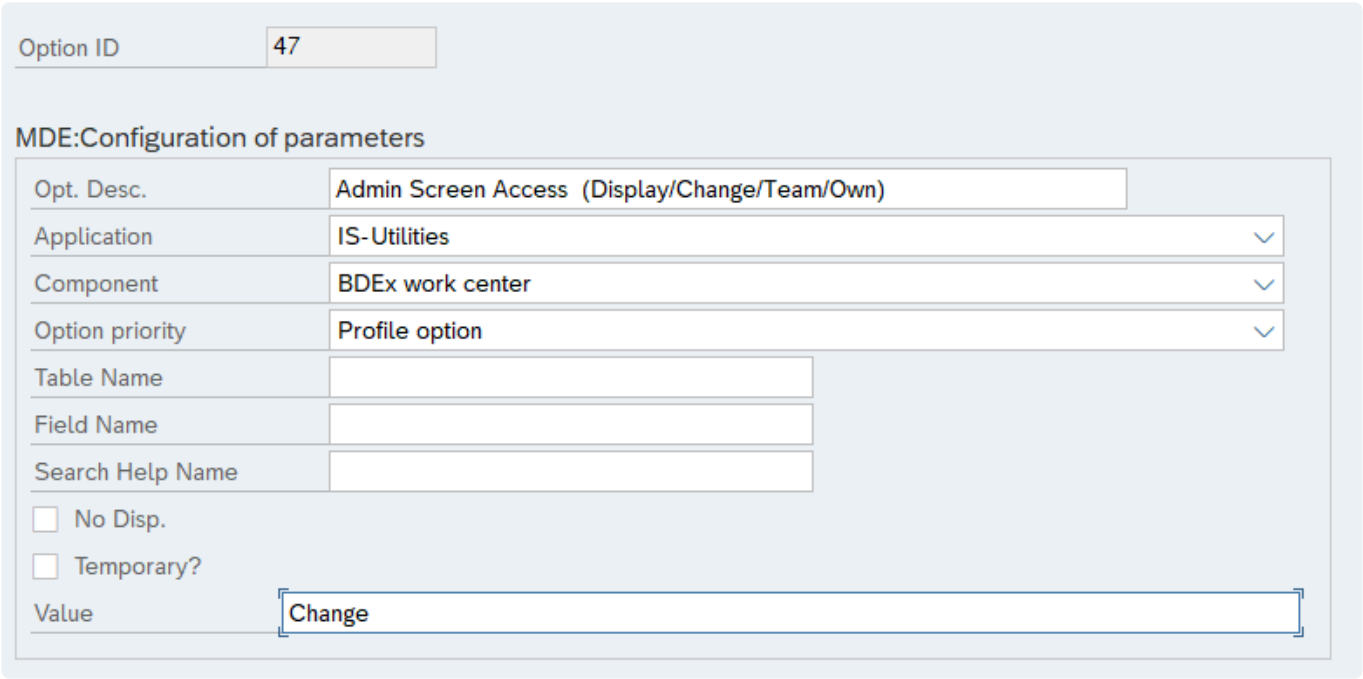
Set up Local System Alias (Transport as configuration)

4.1.4.3. Activate Options

Once the UI5 service is activated by your Basis team the Admin screen can be activated in BDEx using the options table /BTI/MDE_C_OPT.

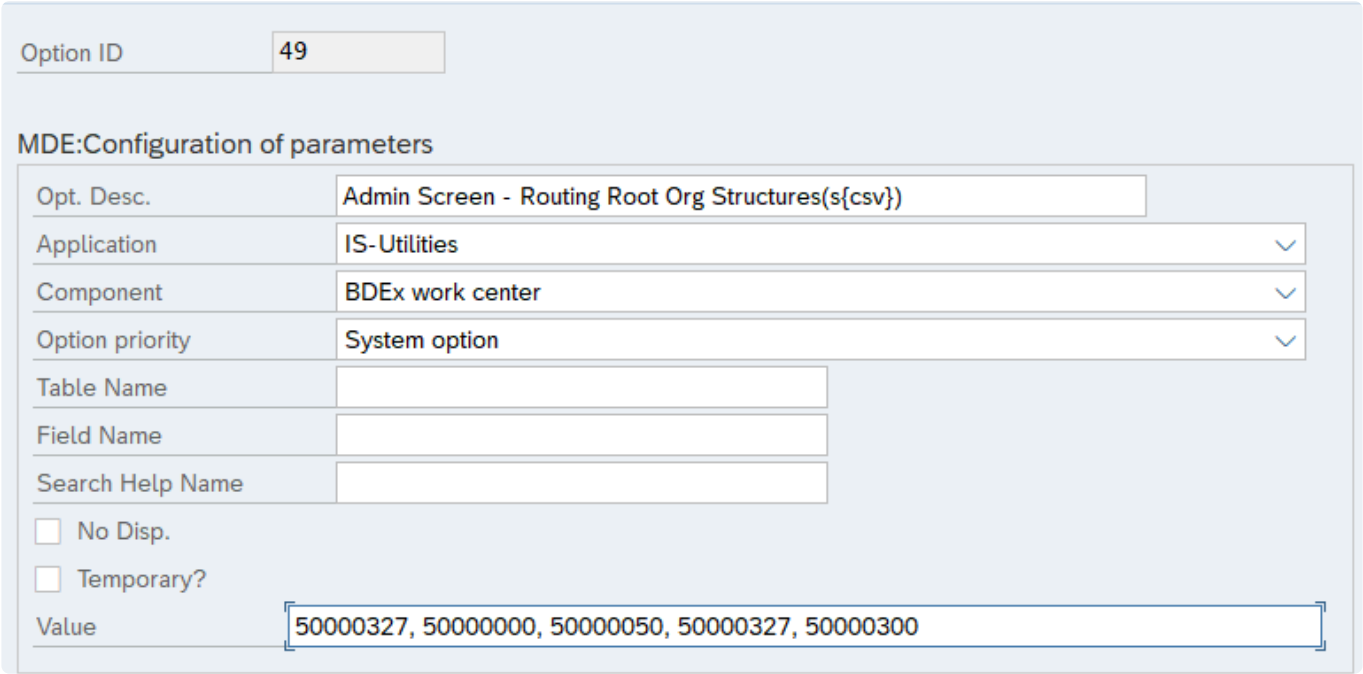
Option 47 – Admin Screen Access

Controls the type of access.
Enter value ‘Display’ for display only access to all users settings.
Enter value ‘Change’ to allow changing the various settings and parameters presented for all users.
Enter value ‘Own’ for display access to own settings only.
Leave value blank for no access to the screen.



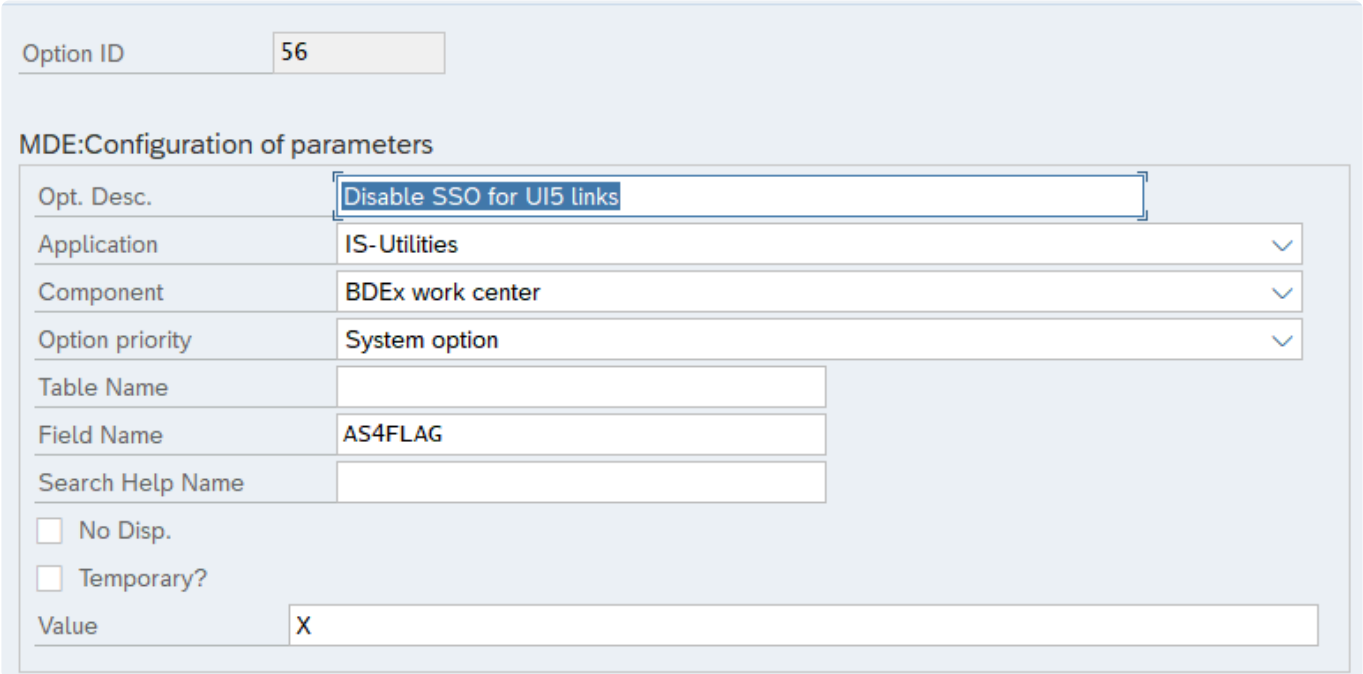
Option 49 – Routing Root Org Structures(s{csv{)

Specify the org structure (root node number example: 50000000) used for routing. Multiple root nodes can be entered separated by comma.

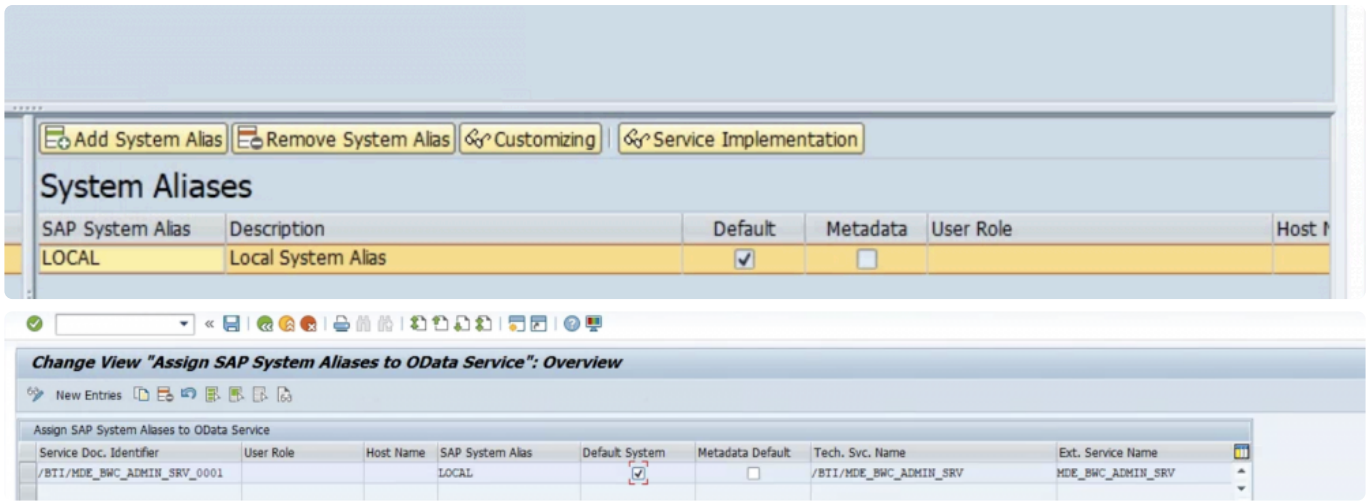


Option 56 – Disable SSO for UI5 links

When turned on Single Sign On is deactivated for the UI5 Web screens. Therefore the user will be prompted with a password page to access the User Admin or other UI5 views.



If this option is not selected BDEx will attempt to automatically sign the user on to the web application using SAP GUI credentials. This requires SAP service myssocntl to be active and is supported by internet explorer and edge browsers only.



Option 56 enables users to override automatic sign on and use the standard logon procedure set by their company.
The url opens in the default browser, and is not restricted to internet explorer or edge.

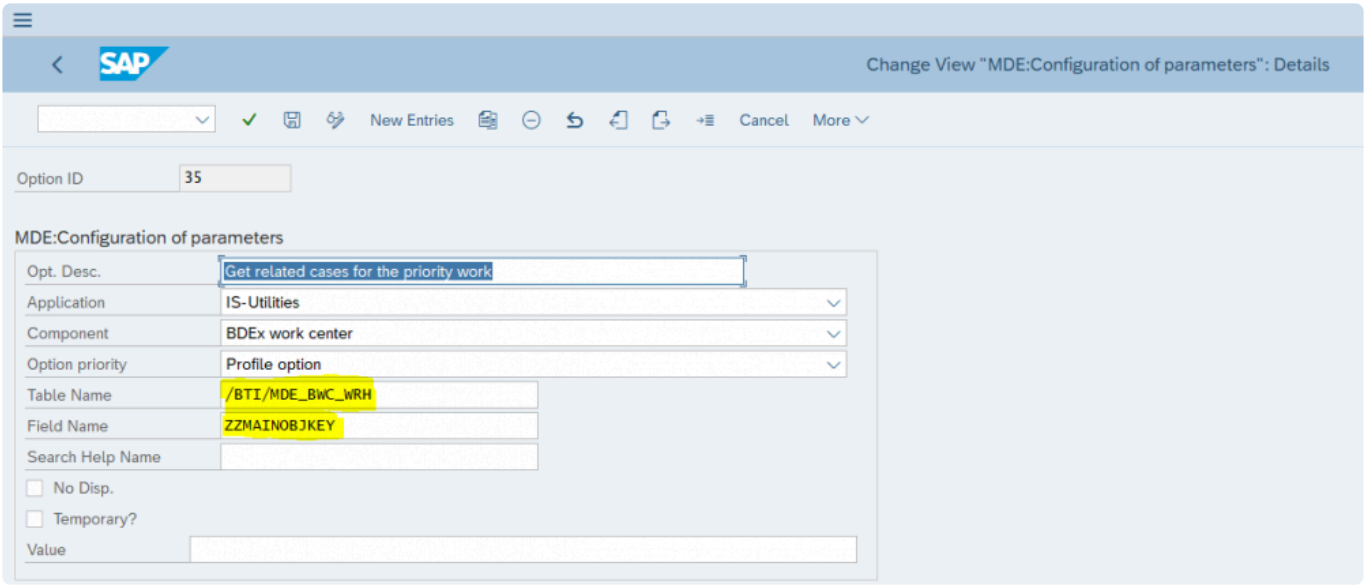
4.1.5. Related Work and Locked Cases

Configurations are required to update the following tables:

Options are set to activate this function using table /BTI/MDE_C_OPT.
For options with Option Priority as Profile can be updated in the Profile Manager using transaction code /BTI/MDE_PROF_MGR.

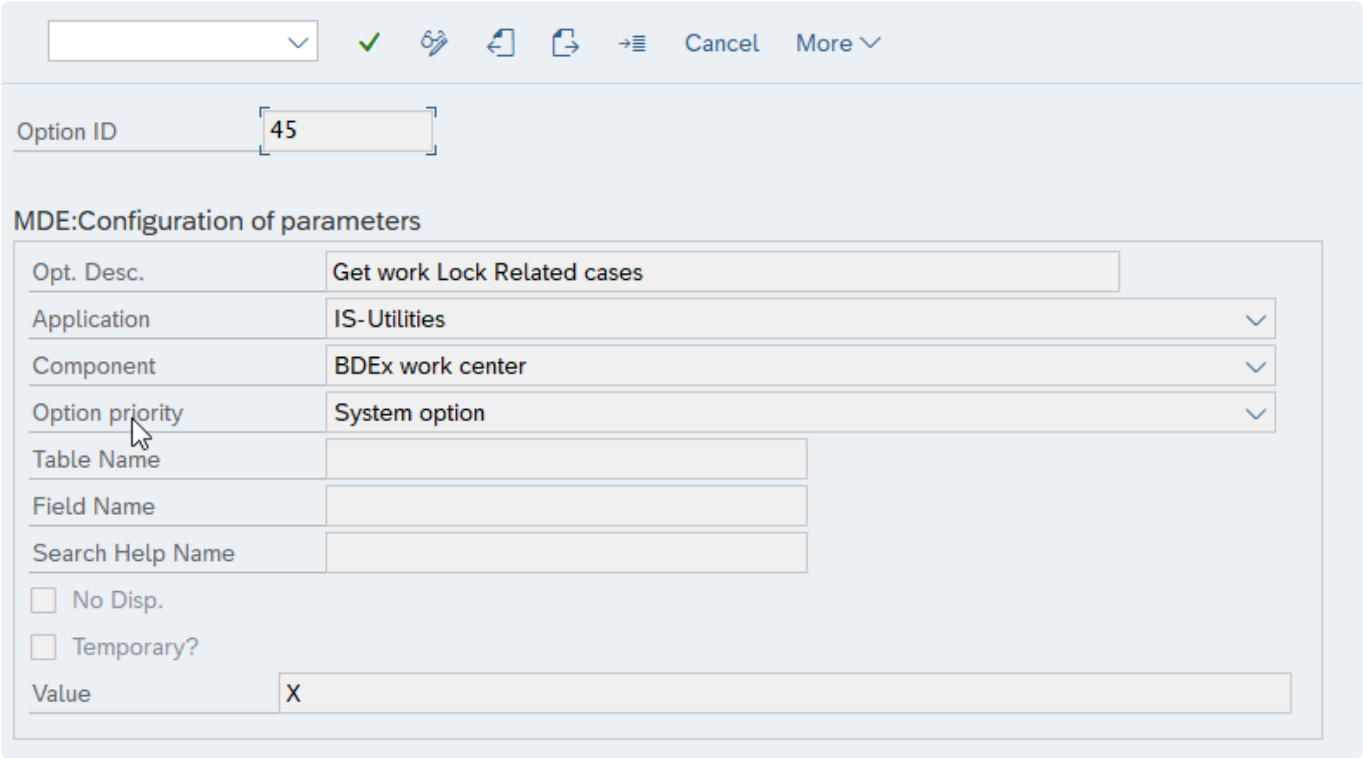
Option 35 – Get Related Cases for the priority work

Field name is a mandatory field – this field must be a valid field within table /BTI/MDE_BWC_WRH to enable related cases to be identified. A valid field is any master data object or the master data object key defined in Dynamic Work Center. Please consider if you use an object that is not shared by all cases – related work cannot be identified for those cases.



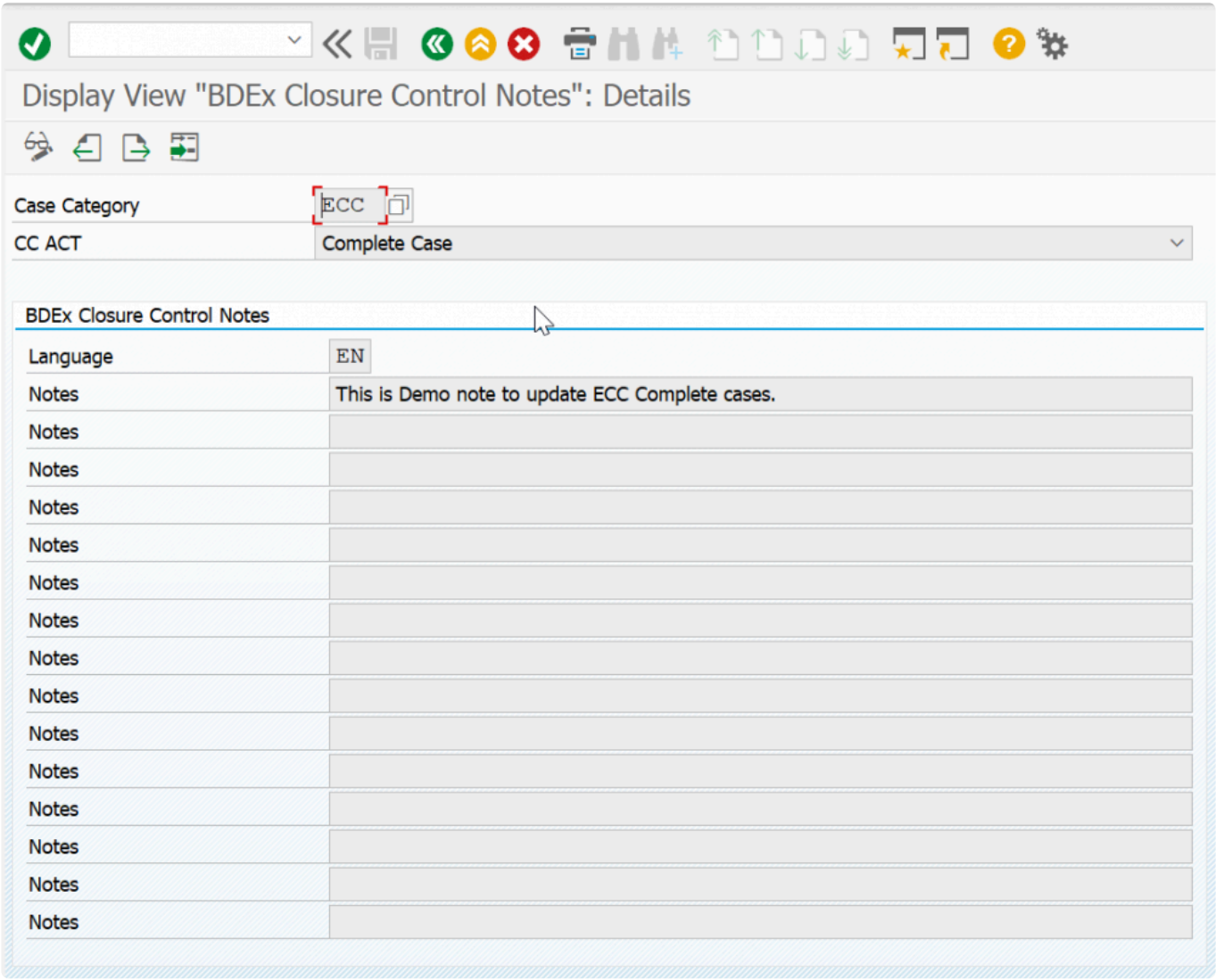
Option 45 – Get Work Lock Related Cases

Set the value to X to activate this feature.
In order to Lock related work to work, related get work and lock get work both options will have to be enabled

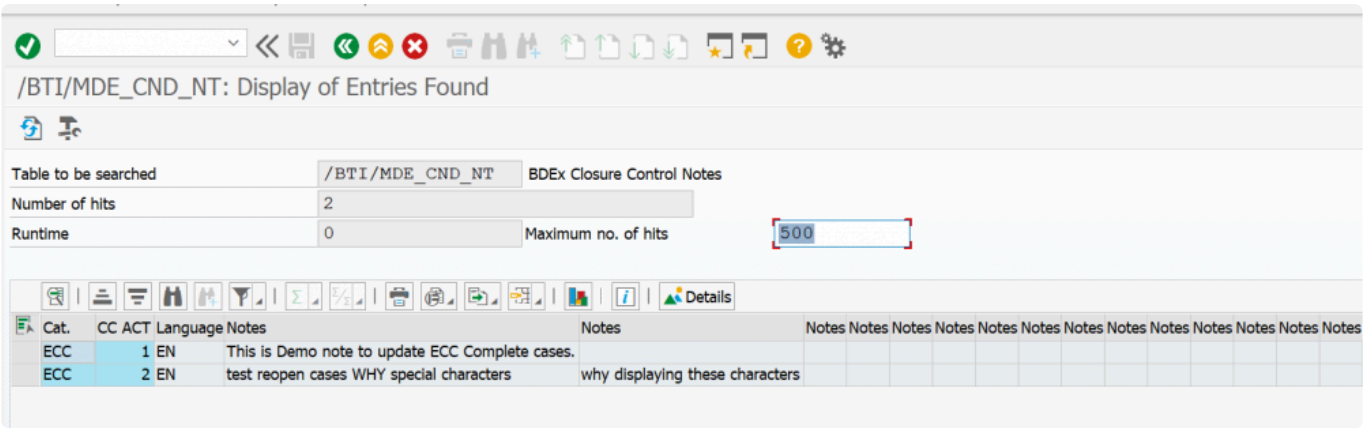

Cancel
More
Option ID
45
MDE:Configuration of parameters
Opt. Desc.
Get work Lock Related cases
Application
IS-Utilities
Component
BDEx work center
Option priority
System option
Table Name
Field Name
Search Help Name
No Disp.
Temporary?
Value
X

4.1.6. Closure Control – Notes Configuration

Configure Closure Control Notes can be added into the following table:
/BTI/MDE_CND_NT



Example Table entries

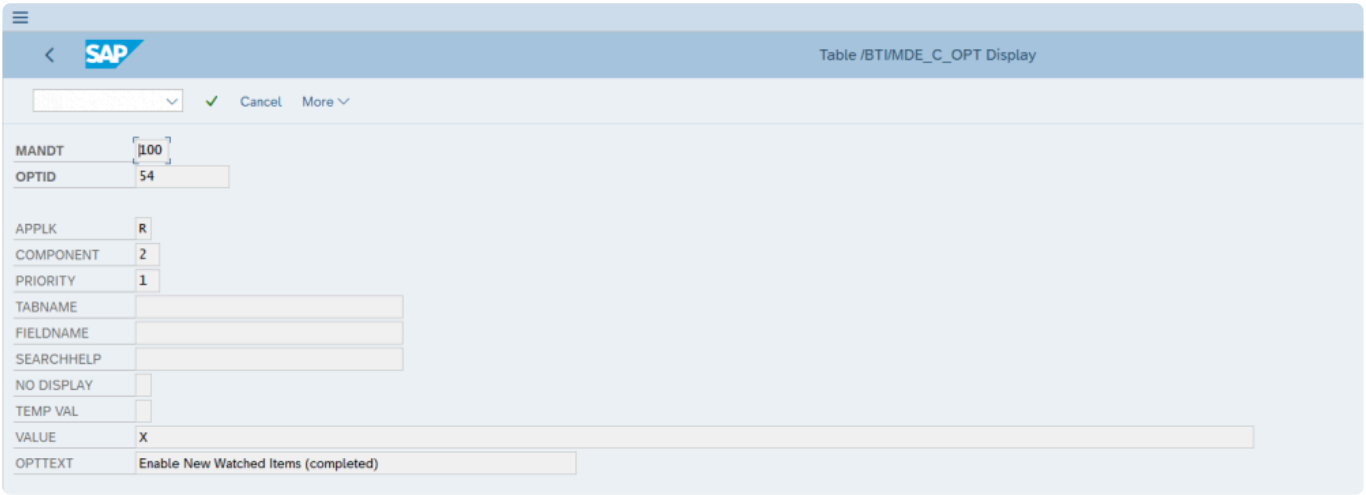


It is recommended to add the notes via the Configure Notes button in the Closure Control Editor.

4.1.7. Enable New Watched Items (completed) – Activation

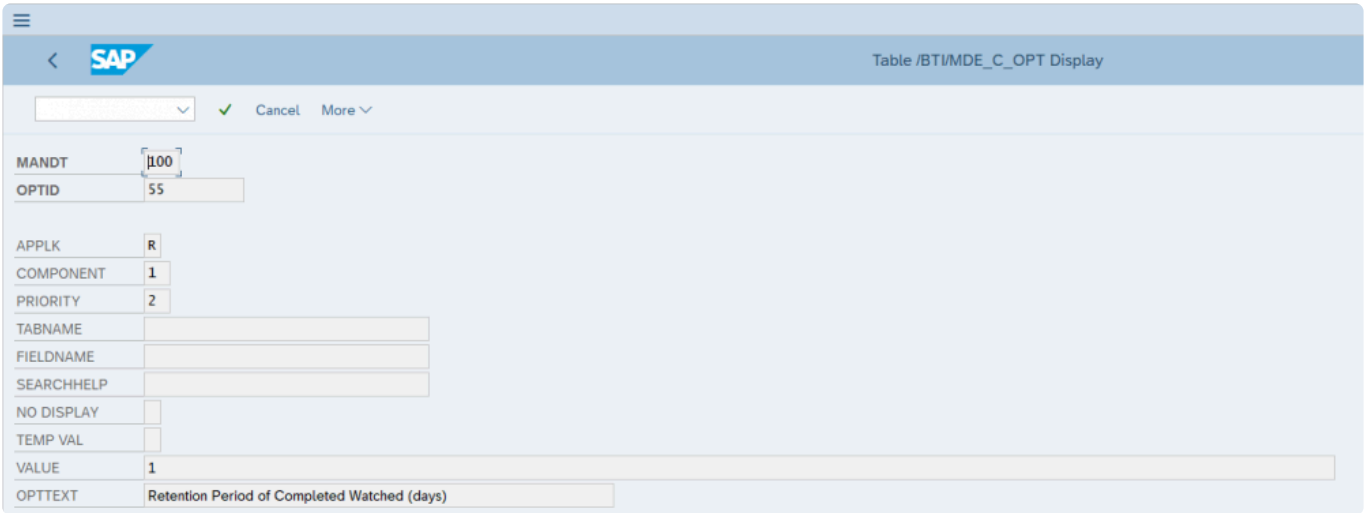
If you wish to retain Completed Watched Items this is activated in the options table /BTI/MDE_C_OPT

Option 54 – Activate the New watched items folders



Added an X to this option will suppress the notifications via email and will add the new folders into the Watched Item menu in the Dynamic Work Center.

Option 55 – Setting the Retention Period



Only numbers should be added to the value for this option.
This determines the retention period in days for how long the completed items should be displayed in the

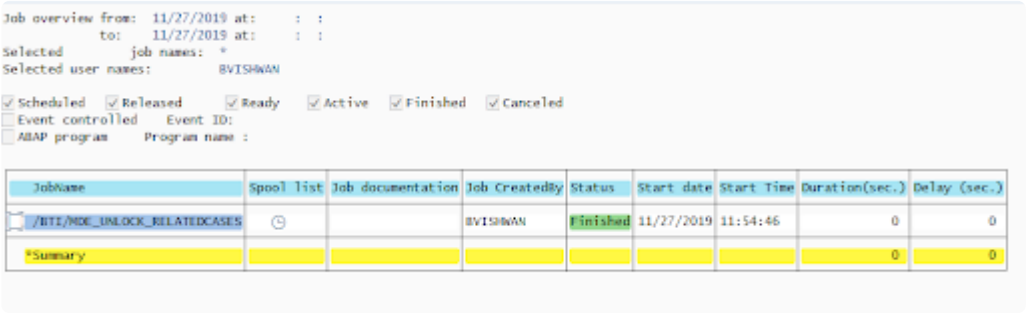
Completed Watched folders.
Once the retention period has passed from the completion date of the item the item will be removed from the Completed Watched folders.

If the option priorities are set to Profile. The activation of the Completed Watched Folder can be set for each Profile.
This can be updated in the Profile Manager using transaction code /BTI/MDE_PROF_MGR.

> Users assigned to Profiles without this activated will not see the Completed Watched Items or the Team's Watched Items folders in the menu layout in the Dynamic Work Center.

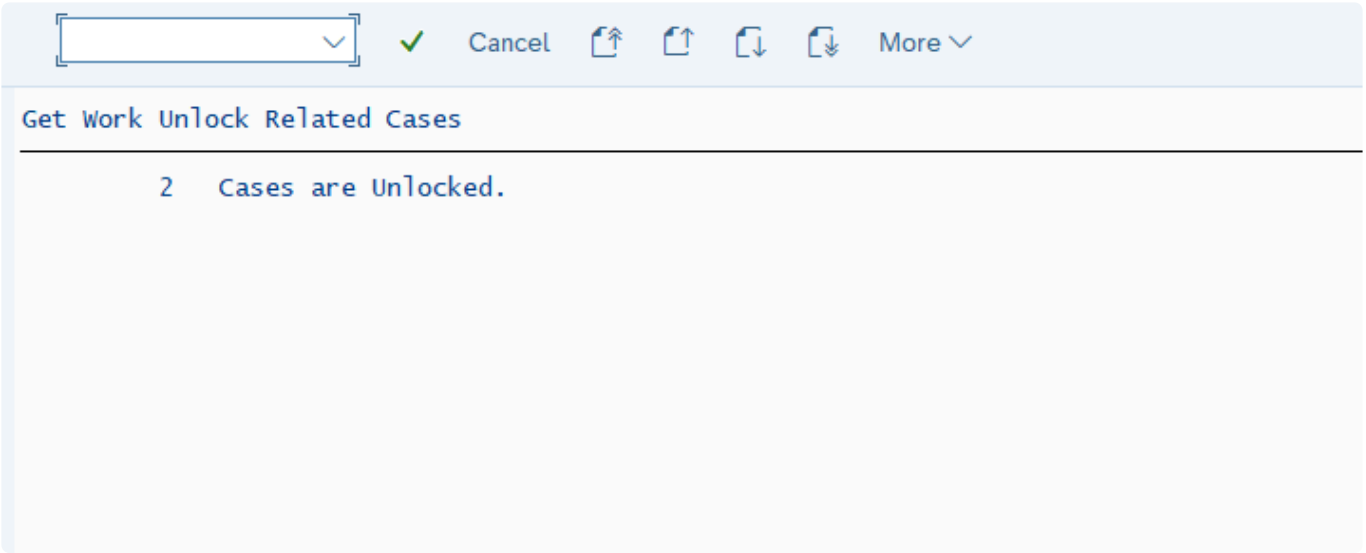
4.2. Batch Job Requirements

Schedule a background job for /BTI/MDE_UNLOCK_RELATEDCASES for every 30 minutes (or as frequent as desired) to find cases which are locked and unlock them (whereby the primary case has been completed or reassigned to a new user).

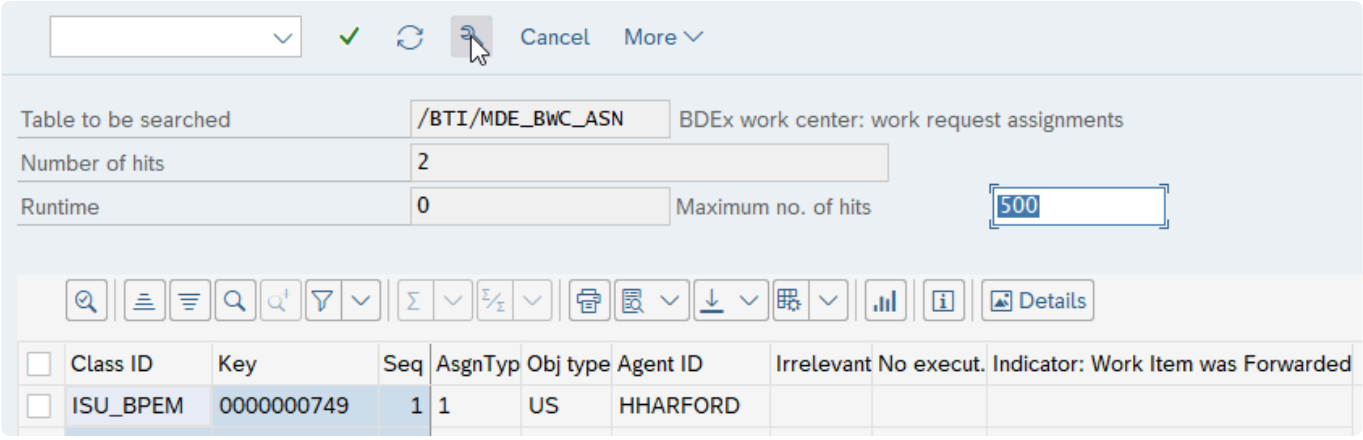


The job will find the locked cases and the associated primary case.
The primary case will be checked to see if it has been completed or if the processor of the case has changed.
If the primary case is completed or the processor has changed the case will be unlocked (by removing the irrelevant flag).

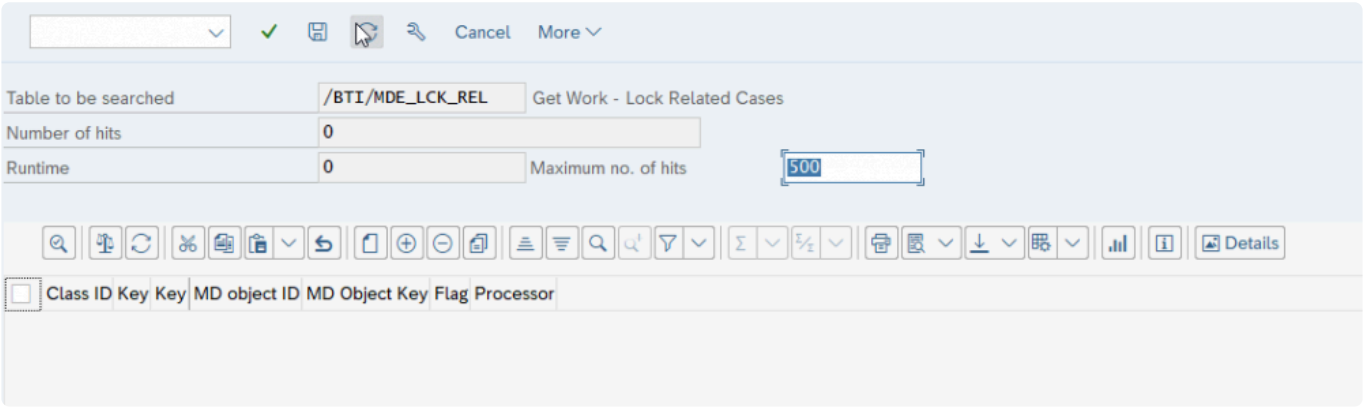
Output – Lock Cases Job



Cases are unlocked from /BTI/MDE_BWC_ANS table



Entries would be deleted from /BTI/MDE_LCK_REL table.



5. Glossary of Terms

Glossary of Terms

Term	Description
ABAP	Advanced Business Application program – ABAP is the programming language in SAP. All enhancement, interfaces, forms will be written in this programming language. ABAP programs are SQL statements to pull data from tables, update tables and processing logic to perform a specific task.
Application Log	Application Log is a place where all Success, Warning or Error messages are written after the execution of SAP programs.
Application Table	Application tables are maintained directly in production usually by business people.
BDEx	SAP add-on offering some extended functionalities and used to manage exceptions for back and front office personnel.
BPEM	Business Process Exception Management – is a case creation tool for capturing specific errors, warning or success messages. BPEM cases will be assigned to a specific user group and will warrant action based on the messages.
Case Type	A clarification case type categorizes a clarification case and is for information and administration purposes only. It can be used to group clarification cases in work lists. A clarification case type does not have any further functionality. All manual cases created from the Interaction call center could, for example, share a common case type for quick identification. Or the case type can be used to identify which group is responsible to resolve the case.
CCH	Customer Centric Hub – This is the 360 degree view of the customer in BDEx.
Custom Table	Custom Tables are specific tables built for storing specific data. These custom tables are required when data can’t be maintained in SAP provided table structures.
DWC	Dynamic Work Center – BDEx tool for work management and allocation.
Organizational Structure	Used to represent the organizational chart in SAP and also used to determine the work queues for work allocation.
Root Node	This is the parent level organisational unit to which the other org units belong to.
Security Authorization	Security Authorizations are associated with every user. Every user in the system is assigned specific roles. These roles are configured to perform only certain transactions in the system.
Transaction Code (TCODE)	Transaction Codes are triggers to invoke a program, screen or configuration. These are like shortcut codes and can be saved to the user menu’s favourites in the Easy Access Screen.
SAPUI5 Service	(SAP user interface for HTML 5) is a collection of libraries that developers can use to build desktop and mobile applications that run in a browser. With SAP’s SAPUI5 JavaScript toolkit, developers can build SAP web applications using HTML5 web development standards.