

CRM on-demand solution Power User Guide



Release 500



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Icons in Body Text

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Additional icons are used in SAP Library documentation to help you identify different types of information at a glance. For more information, see *Help on Help → General Information Classes and Information Classes for Business Information Warehouse* on the first page of any version of *SAP Library*.

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, graphic titles, and table titles.
EXAMPLE TEXT	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 text	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.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE TEXT	Keys on the keyboard, for example, F2 or ENTER.

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Power User Guide

The power user provides support to both your overall company and the individual users that log on to *SAP CRM on-demand solution*. This can include:

- Entering all employees that will run *SAP CRM on-demand solution* as users
- Ensuring that the correct roles and authorizations are in place to manage and support your users effectively
- Developing an organizational model that best supports your company's business
- Changing the pages and fields within the "out-of-the-box" *SAP CRM on-demand solution* to meet your company's unique requirements
- Responding to any day-to-day user problems
- Running the process required for any internal data management changes

As a power user, you have access to areas that cannot be accessed by standard users. Once you log on, click *Administration* from your home page to access the power user areas. When you have completed your work, click *Leave Administration* to return to your home page.

The *Power User Guide* describes all pages and processes you need in your role as power user.

See also:

[Administration \[Page 9\]](#)

[Configuration/Organization \[Page 9\]](#)

[Authorizations \[Page 32\]](#)

[Users \[Page 39\]](#)

[Data Management \[Page 43\]](#)

[Policies \[Page 45\]](#)

Getting Started for Power Users

This section provides general information on concepts used within the administration area. Refer to the *Jump Start Guide* for the *SAP CRM on-demand solution* basics.

Selector Box

You choose which field, row, or business object you want to work with by clicking the selector box. For example, you choose *Company 2* from the following list by clicking the selector box next to the name *Company 2*:

	Name
<input type="checkbox"/>	Company 1
<input checked="" type="checkbox"/>	Company 2
<input type="checkbox"/>	Company 3

The selector box changes from to indicating you have selected it. Once selected, you can perform the desired action on this field, row, or business object.

Working with Fields

Field	Identified By	Description
Required	Red asterisk (*) after field name	Field must have a value to save the business object.
Dropdown box		Click icon and select value from dropdown box.
Select from popup		Click icon and choose field value from popup.
Select date		For date fields, click icon and select date from calendar popup.
Search for value		Launch secondary search to find value from within saved information.
Automatically filled		Filled in when viewing the page based on the content from the previous page, such as the contact name when switching to create an account
Standard entries		Enter the value.
Checkbox	<input type="checkbox"/> Not selected; off <input checked="" type="checkbox"/> Selected; on	Click checkbox to select or deselect field.

Field Types

Field Type	Description
<i>Caption</i>	A label added to the page to provide a description. You can add captions during simple page configuration changes. Captions do not have a data area.
<i>Input Field</i>	A data area where your users either enter, select, or view information.
<i>Dropdown Box</i>	A field where your users pick from a list of predefined values. During page configuration, these are treated as <i>Input Fields</i> .
<i>Checkbox</i>	A data area where your users click the field to indicate yes or no.
<i>Block</i>	A data area comprised of other fields, such as <i>Address</i> which contains fields for <i>Street</i> , <i>House Number</i> , <i>Postal Code</i> , <i>City</i> , <i>Country</i> , and <i>Region</i> .

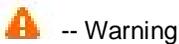
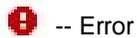
You cannot change the field types.

Messages

Messages can describe errors or warnings, or present processing information depending upon the action generating the message. You see messages at the top of the page you are working on, just above the data fields.

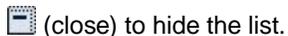
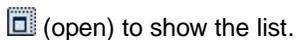
When you see an error message, the field or area containing the problem is highlighted to allow you to identify the cause and correct the error more easily .

These icons identify the type of message:



You must correct error messages in order to save the business object.

When there is more than one message, only the first message is displayed. Click:



Example

You see the following message:



To see all messages, you click :



Working with Users

Each employee in your company that will access and work with *SAP CRM on demand solution* must be created as a user. That process includes:

1. Attaching the user to a position within the organizational model
2. Assigning the user to a role
3. Assigning the user a permission profile providing the authorization to the functions and actions they need to perform

You do not have to enter users one at a time. You can use the import users function using a comma-separated values (CSV) file

You might have to group your current employee titles into the positions within *SAP CRM on demand solution*. In other words, there might not be a one-to-one relationship with your jobs and how they are referenced within *SAP CRM on demand solution*.

When you create a user from the organizational model, the organizational information is filled in automatically.

See also:

[Import Users \[Page 41\]](#)

[Create User \[Page 41\]](#)

[Roles \[Page 33\]](#)

[Permission Profiles \[Page 33\]](#)

Configuration

Configuration is the process where you make changes to fields and pages within *SAP CRM on-demand solution* to meet your company's specific needs.

1. On the *Administration* page, click *Configuration Area*.
You see the *Configuration: Select Application Area* page.
2. From the dropdown box, select the area that you want to change.
3. Select what you want to change in that area, such as *Accounts* or *Campaigns*.

Not all options are available for all areas.

- Click *Fields* to change field labels, whether a field can only be viewed and the contents of dropdown boxes.
- Click *Page Layout* to change how a page looks to your users.
- Click *Marketing Attributes* to change categories used for marketing segmentation (with accounts and contacts only).
- Click *Sales Assistant* to change the activities and recommended sales procedures (with opportunities only).

Things You Should Know About Configuration Changes

- You can only work on one business object type at a time. If you have more changes to make, you must return to the *Configuration: Select Application Area* page and select the next business object type.
- Save your changes in order to make the changes available to your users.

- You can choose to ignore your saved changes and revert to the default configuration at any time when making field or page changes.
- If you click *Cancel* or leave a page using the back button without first saving your changes, you lose your changes and have to restart your work.
- You lock a page when you are making configuration changes. If there are any other power users, they cannot make changes to the page until you save or cancel your work.

See also:

[Field Configuration Changes \[Page 10\]](#)

[Configuration Changes to a Page \[Page 12\]](#)

[Configure Marketing Attributes \[Page 30\]](#)

Field Configuration Changes

You see a table containing all of the fields available within the business object type you want to change, such as all of the fields that can appear when displaying or creating an *Appointment*. The table contains the following information on each field:

- *Field Name*, the technical name of the field which you can display or hide
- *Field Label*, the name of the field you see on the page
- *Type*, how your users use the field on the page
- *Not Displayed*, a checkbox that when checked, hides the field on the page
- *Action*, links to change the field; *Edit label* and, when required, *Edit dropdown box*

Things You Should Know About Field Configuration Changes

- Your users see any changes you make to a field on every page that uses the field, other than the search pages.



If you change a field label, you must also change the field label on the search page to keep the names consistent.

- As a reminder when you are making your changes, you see the name of the business object type at the top of the page.
- Entries appear in the field table in alphabetical order by field label.
- Click *Show Technical Names* or *Hide Technical Names* to display or not display the Field Name column with the field technical names.
- To revert to your original configuration, click *Set Back to General Default*.

See also:

[Edit Label \[Page 11\]](#)

[Edit Dropdown Box \[Page 11\]](#)

[Show/Hide Technical Names \[Page 30\]](#)

[Set Back to General Default \[Page 12\]](#)

[Field Types \[Page 8\]](#)

Edit Label

1. From the *Action* column, click *Edit label*.
You see the field in an area at the bottom of the page.
2. Type your changes over the current field label.
3. Click the *Not Displayed* checkbox to hide the field on a page.
When you see the checkmark in the checkbox, the field does not appear on the page.
4. When your changes are complete, click *Apply*.
The page refreshes and you see your changes on the field table.
5. Click *Save*.
The field information is updated and you return to the *Configuration: Select Application Area* page.

Edit Dropdown Box

Dropdown boxes limit entries to only those that appear in the list. When users see a dropdown box on a page, they can display the list and choose one of the entries from the list.

Add Entries

1. Click *New*.
You see the *Edit Dropdown Box Value* area at the bottom of the page.
2. In the *Field Label* field, enter the name of the entry.
3. Click *Add*.
The dropdown box information is updated and the new entry is added to the list.
4. Click *Save*.
You return to the configuration fields page.

Change Entries

1. Click *Edit*.
You see the entry in the *Edit Dropdown Box Value* area at the bottom of the page.
2. Type over the field label to make your changes.
3. Click *Apply*.
The page refreshes and you see your changes.
4. Click *Save*.
You return to the configuration fields page.

Delete Entries

1. Click *Delete*.
You see the message explaining the impact of deleting an entry.
2. To complete the edit process, click *Yes*.
3. Click *Save*.
The dropdown box information is updated and you return to the configuration fields page.

Things You Should Know About Dropdown Boxes

- Your users see any changes or additions you make to a dropdown box on every page where that dropdown box appears.
- As a reminder when you are making your changes, you see the name of the dropdown box at the top of the page.
- Entries appear in the dropdown box in alphabetical order by field label.
- Click *Display Key* or *Hide Key* to display or not display the *Key* column. The key is the technical identifier for the dropdown box entry and is added automatically when you add an entry to a dropdown box.

Set Back to General Default

Your changes to fields and dropdown boxes appear on every page where that field or dropdown box is used. Should there be a problem with your configuration changes, you can revert back to your original configuration settings using the *Set Back to General Default* button. When you click *Set Back to General Default*:

- All of your configuration changes are ignored.
- You see all pages in their original format, that is before you made any changes to the fields and pages.

You can also revert back to the original configuration settings on a role-by-role basis.

See also:

[Set Role Back to Default \[Page 29\]](#)

Page Configuration Changes

1. On the *Configuration: Select Application Area* page, select the area you want to change and click *Page Layout*.

You see the *Configuration: Screen layout entry* page with a list of the types of pages you can change for this specific business object type for each configuration role.

2. Select the type of page you want to change.

There are times when you cannot make configuration changes to a page, such as the *Search* page for *Sales Call*. The selector is grayed out on a page you cannot change.

3. Select the role for which the changes are to apply.

Your configuration changes to a page apply to the combination of the page type and the role. If you want the same change for more than one role, you must go through the change process for each role.

4. Click *Next*.

You see the preview display for this page.

5. Click *Configuration*.

You see the *Configuration: Simple Layout* page.

Things You Should Know About Configuration Changes for a Page

- Changes for a page can include:

- Simple configuration, where you can move fields between panels or add captions to a panel
- Detailed configuration, where you can realign fields on the page
- The level of page configuration you can perform is different for each type of page:
 - Edit pages: both simple and detailed configuration
 - Overview/print pages: simple configuration
 - Search pages: simple configuration plus search results configuration
- When on an edit page type, you start with the simple configuration. You move back and forth between the two page configuration types by clicking *Detailed Configuration* or *Simple Configuration*.
- Click *Preview* to check your progress as you are making configuration changes. This is also where you save your changes.
- Should there be a problem with your configuration changes, click *Set role back to default* to revert back to the default configuration settings for the role.

See also:

[Simple Page Configuration Changes \[Page 13\]](#)

[Detailed Page Configuration Changes \[Page 21\]](#)

[Simple Search Page Configuration \[Page 26\]](#)

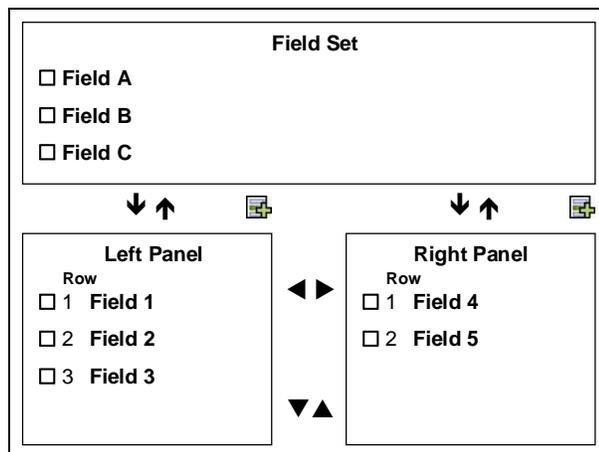
[Preview and Save Your Changes \[Page 29\]](#)

[Set Role Back to Default \[Page 29\]](#)

Simple Page Configuration Changes

Through simple configuration, you move fields on the page between panels, rows, and the field set.

When you are in simple configuration, you see your work area in this basic format:



The general procedure to make your simple configuration changes is:

1. Click the selector box to choose the field.
2. Optionally choose a location for the action.
3. Click an arrow button indicating the direction you want the field to move.

4. When your changes are complete, preview and save your changes.

See also:

[Field Set \[Page 29\]](#)

[Selector Box \[Page 7\]](#)

[Add a Field from the Field Set \[Page 14\]](#)

[Display/Hide the Field Set \[Page 15\]](#)

[Move a Field Between Panels \[Page 16\]](#)

[Remove a Field from a Page \[Page 17\]](#)

[Move a Field to a New Row \[Page 18\]](#)

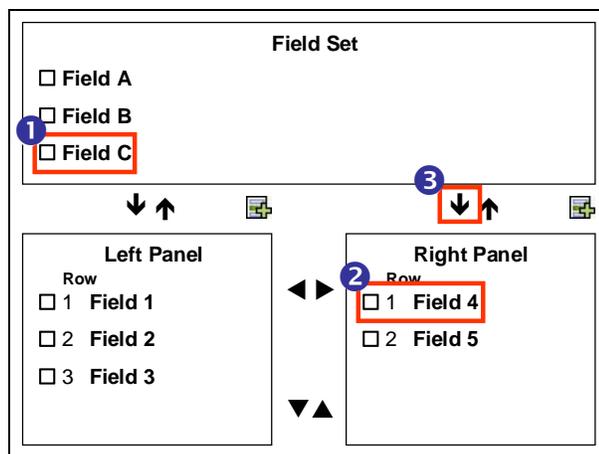
[Add a Row to a Panel \[Page 19\]](#)

[Add a Caption to a Panel \[Page 20\]](#)

[Field-Level Changes \[Page 20\]](#)

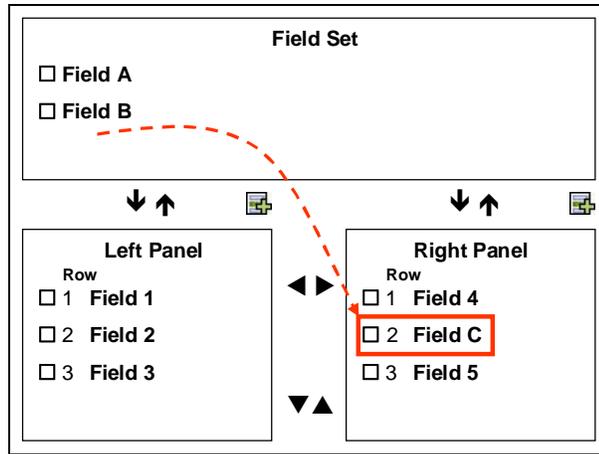
Example: Add a Field from the Field Set

To move Field C from the field set to row 2 in the right panel:



1. In the field set, click the selector box next to Field C.
2. In the right panel, click the selector box next to Field 4.
3. Above the right panel, click the down arrow.

Field C is moved. If you do not choose a row, the field is added as the last row of the panel where you can move it to the row you want it to occupy.



See also:

[Field Set \[Page 29\]](#)

[Selector Box \[Page 7\]](#)

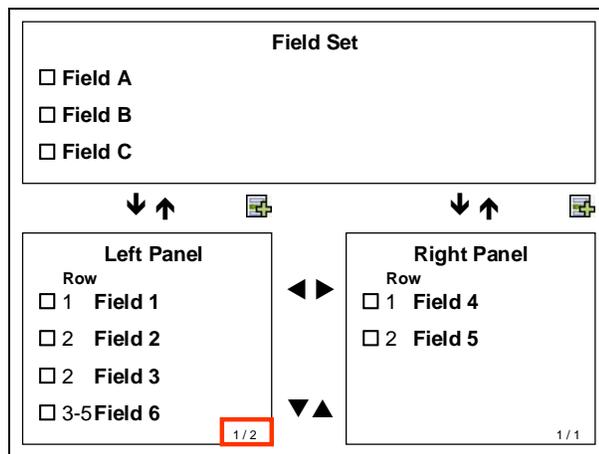
[Move a Field to a New Row \[Page 18\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

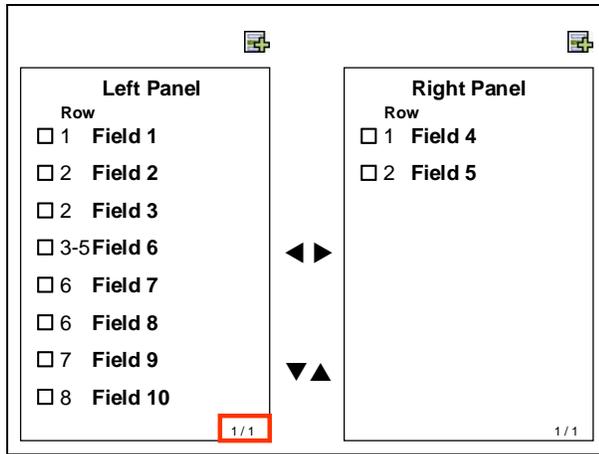
[Set Role Back to Default \[Page 29\]](#)

Example: Display/Hide the Field Set

You see the page for simple configuration with the field set displayed. There are two pages of fields within the left panel.



Click *Hide Field Set*. The simple configuration page redisplayes without the field set and there is now one page of fields on the left panel.

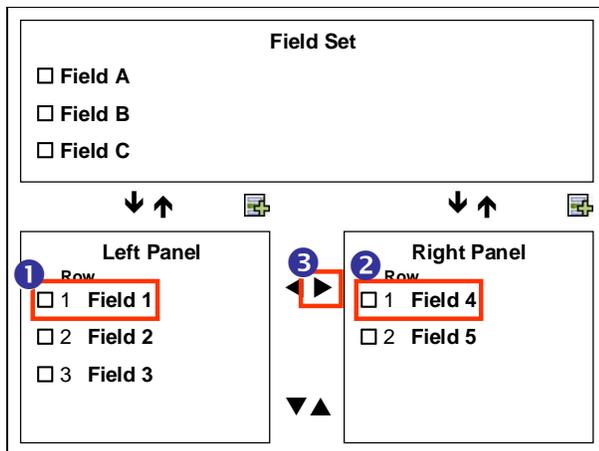


See also:

[Field Set \[Page 29\]](#)

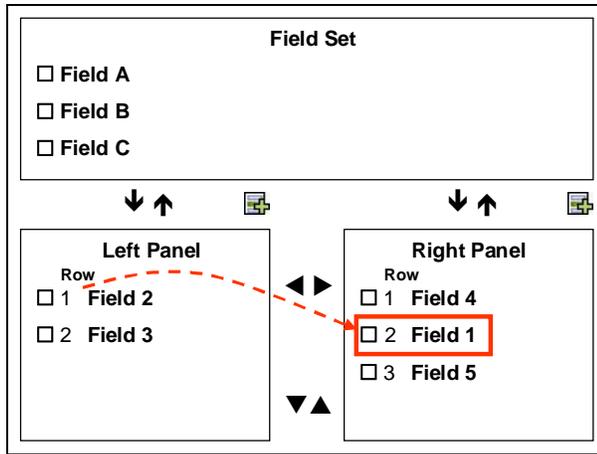
Example: Move a Field Between Panels

To move Field 1 from the left panel to row 2 in the right panel:



1. In the left panel, click the selector box next to Field 1.
2. In the right panel, click the selector box next to Field 4.
3. Between the panels, click the right arrow.

Field 1 is moved. If you do not choose a row, the field is added as the last row of the panel where you can move it to the row you want it to occupy.



See also:

[Selector Box \[Page 7\]](#)

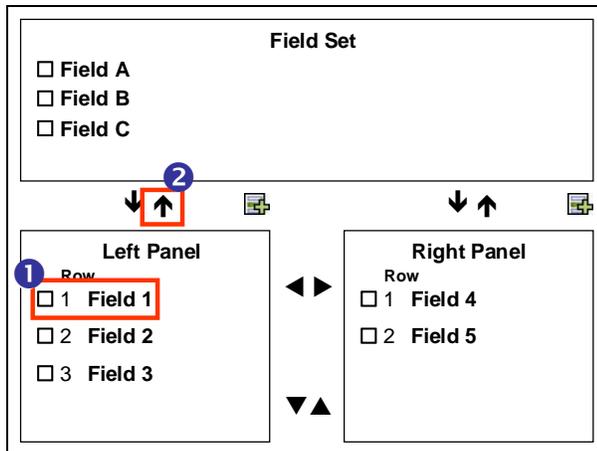
[Move a Field to a New Row \[Page 18\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

[Set Role Back to Default \[Page 29\]](#)

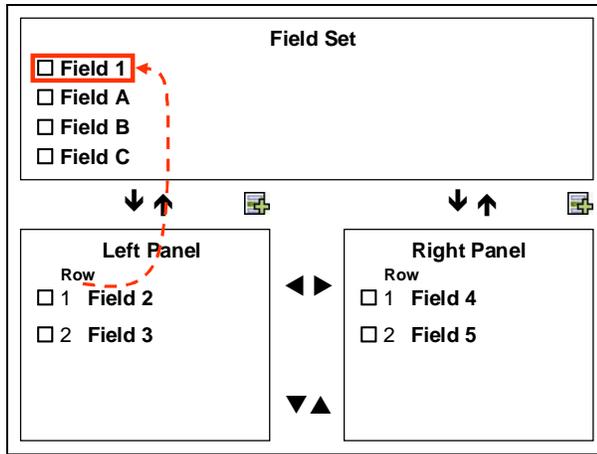
Example: Remove a Field from a Page

To remove Field 1 from the left panel:



1. On the left panel, click the selector box next to Field 1.
2. Above the left panel, click the up arrow.

Field 1 is removed and added to the field set. The remaining fields are moved up.



See also:

[Field Set \[Page 29\]](#)

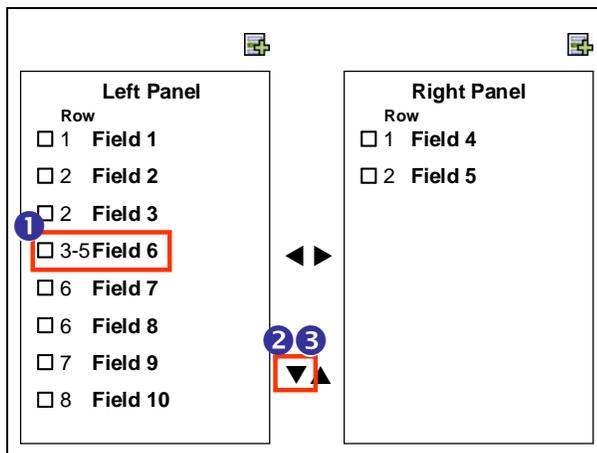
[Selector Box \[Page 7\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

[Set Role Back to Default \[Page 29\]](#)

Example: Move a Field to a New Row

To move Field 6 (a block field occupying a range of rows) down two rows:

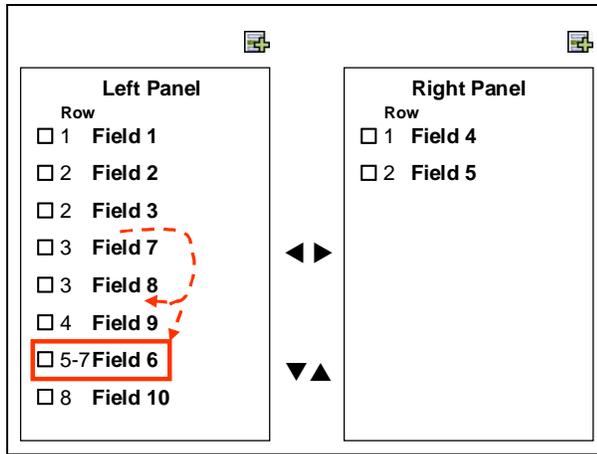


1. In the left panel, click the selector box next to Field 6.
2. Between the two panels, click the down arrow.

Field 6 is moved. The range of row numbers changes to the new numbers as you move the field.

3. Between the two panels, click the down arrow.

Field 6 is moved. The range of row numbers changes to the new numbers as you move the field.



You can end up with fields out of position when you move fields that appear on the same row. When in doubt, you should use detailed page configuration changes.

See also:

[Selector Box \[Page 7\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

[Set Role Back to Default \[Page 29\]](#)

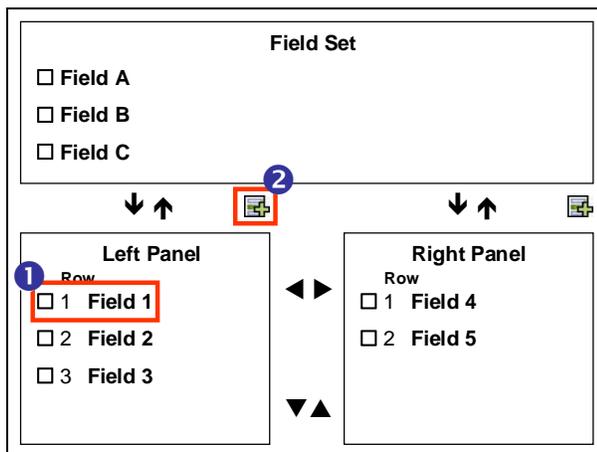
[Detailed Page Configuration Changes \[Page 21\]](#)

Example: Add a Row to a Panel

You can create blank lines within a panel by adding rows to the panel.

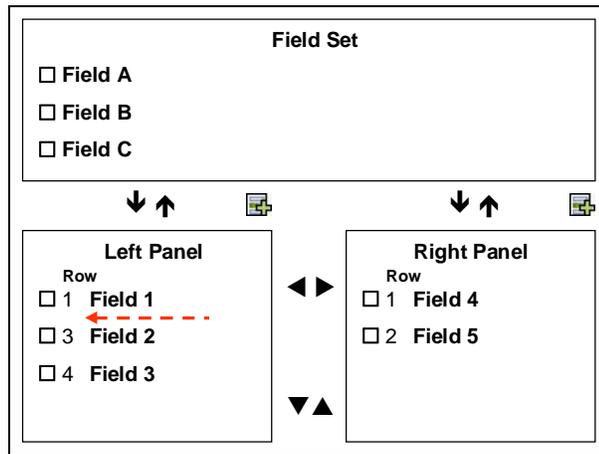
You cannot delete rows from a panel, only move fields to the new rows. Use detailed page configuration for major changes to multiple rows.

To add a row beneath row 1 on the left panel:



1. In the left panel, click the selector box next to Field 1.
2. Above the left panel, click , the add row button.
A row is added after row 1.

If you do not choose a row, the default is to add a row before the current row one. When there is more than one field on a row, the two fields are treated as a single row. When a field spans more than one row (such as a block field), the range of row numbers changes to the new numbers as you add rows.



See also:

[Selector Box \[Page 7\]](#)

[Add a Field from the Field Set \[Page 14\]](#)

[Move a Field to a New Row \[Page 18\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

[Detailed Page Configuration Changes \[Page 21\]](#)

[Set Role Back to Default \[Page 29\]](#)

Add a Caption to a Panel

Captions are text-only fields that can provide extra information to a panel. They also serve to group fields.

1. In the *Add Caption* area at the bottom of the page, select *Add to Left Column* or *Add to Right Column* from the dropdown box.
2. In the field next to the dropdown box, enter the caption text.
3. Click *Apply*.
You see the caption in the first row of the panel. If not in the required row, move the caption to a new row on the panel.
4. When your changes are complete, preview and save your changes.

See also:

[Preview and Save Your Changes \[Page 29\]](#)

[Move a Field to a New Row \[Page 18\]](#)

[Set Role Back to Default \[Page 29\]](#)

Make Field-Level Changes

1. In the *Action* column for the field you want to change, click the *Edit* link.

The page layout area is updated with your changes.

- When your changes are complete, preview and save your changes.

See also:

[Selector Box \[Page 7\]](#)

[Field Types \[Page 8\]](#)

[Change Field Definitions \[Page 22\]](#)

[Change Field Data Area Size Example \[Page 23\]](#)

[Display or Hide Field Label Example \[Page 23\]](#)

[Move Fields to New Rows Example \[Page 24\]](#)

[Change Block Field Size Example \[Page 25\]](#)

[Cancel Your Field Changes \[Page 26\]](#)

[Preview and Save Your Changes \[Page 29\]](#)

Change Field Definitions

The page layout definition contains the following information for each field on the page:

Column Title	Contains / Defines	Description
<i>Item</i>	Name of the field	Display only. Can only be changed during configuration when editing a field.
<i>Type</i>	Field type; can control some of the configuration actions you can perform	Display only
<i>Show Label</i>	Whether the item label is to be displayed on the page.	Click the checkbox to display the item name on the page.
<i>Row From</i>	The starting row for the field	Unless this is a block field, there is only an entry in the <i>Row From</i> column.
<i>Row To</i>	If required, the ending row for the field	The end of the range of rows for block fields
<i>Label Col. From</i>	The starting column for the label	When the field label is displayed, the <i>from</i> and <i>to</i> columns define the range of columns on the page where the label is displayed.
<i>Label Con. To</i>	The ending column for the label	
<i>Field Col. From</i>	The starting column for the field	The <i>from</i> and <i>to</i> columns define the range of columns on the page where the field is displayed. For captions, enter only a starting column.
<i>Field Col. To</i>	If required, the ending column for the field	
<i>Action</i>	Displays <i>Cancel Edit</i> link when changes have been made to the field.	Click <i>Cancel Edit</i> to return the field to its last saved values.

You change how and where the field is displayed on the page by changing its page layout definition.

See also:

[Field Types \[Page 8\]](#)

Example: Change Field Data Area Size

You can change the field size of the area where your users enter information into a field.



Changing the data area size on the page does not change the number of characters that a user can enter into a field. You cannot change the number of characters that a user can enter into a field.

To change the length of the input field *Description*:

	A	B	C	D	E	F	G	H	
1	Company								
2	Name	<input type="text"/>							
3	Industry	<input type="text"/>							
4	Description	<input type="text"/>							
5	Classification								

Field ranges from columns C to F

1. In the page layout definition area, click the selector box next to the field *Description*.
2. Click in the *Field Col To* cell.
3. Change the column from **F** to **H**.
4. Click the selector box next to the field *Description* or choose **ENTER**.

The input field is expanded by two columns.

	A	B	C	D	E	F	G	H
1	Company							
2	Name	<input type="text"/>						
3	Industry	<input type="text"/>						
4	Description	<input type="text"/>						
5	Classification							

Field ranges from columns C to H

Example: Display or Hide Field Label

There are times when you do not want to display the field label on the page. The *Show Label* cell in the definition table controls displaying or hiding the field label.



When a field label is hidden, you cannot make any entries in the *Label Col From* and *Label Col To* cells. These cells are also blanked out if you choose to not display a field label for a field that previously had values in these cells. This can also cause an error that can only be resolved by reentering values in the *Label Col From* and *Label Col To* cells.

To hide the label for the *Description* field and add the input field to the same row as the *Industry* field:

	A	B	C	D	E	F	G	H
1	Company							
2	Name	<input type="text"/>						
3	Industry	<input type="text"/>						
4	Description	<input type="text"/>						
5	Classification							

Hide field label 'Description'

1. In the page layout definition area, click the selector box next to the field *Description*.
2. Deselect the checkbox in the cell *Show Label*.
The *Label Col From* and *Label Col To* cells are blanked out as you are hiding the label.
3. Click in the cell *Row From* and change the row from 4 to 3.
4. Click in the cell *Field Col From* and change the column from C to E.
5. Click in the cell *Field Col To* and change the column from F to H.
6. Click the selector box next to the field *Description* or choose **ENTER**.

The label for the *Description* field is hidden and the input field is moved to the same row as the *Industry* field.

Note that row 4 is now blank as the field has been moved to a new row.

	A	B	C	D	E	F	G	H
1	Company							
2	Name	<input type="text"/>						
3	Industry	<input type="text"/>						
4								
5	Classification							

Input area moved to new row

Example: Move Fields to New Rows

You can move fields to new rows. For smaller fields, checkbox fields, for example, you can choose to move a field from its own separate row to the same row as another field.

To move the *Customer* field to row 6:

	A	B	C	D	E	F	G	H
5	Classification							
6	Prospect	<input type="checkbox"/>						
7	Customer	<input type="checkbox"/>						
8	Notes							
9								

Move the 'Customer' field to row 6

1. In the page layout definition area, click the selector box next to the field *Customer*.

2. Click in the *Row From* cell.
3. Change the row from row 7 to row 6.
4. Click in the *Label Col From* cell and change the column from **A** to **E**.
5. Click in the *Label Col To* cell and change the column from **B** to **F**.
6. Click in the *Field Col From* cell and change the column from **C** to **G**.
7. Click in the *Field Col To* cell and change the column from **D** to **H**.
8. Click the selector box next to the field *Customer* or choose **ENTER**.

The *Customer* field and checkbox are moved to row 6.

Note that after the *Customer* field is moved to line 6, line 7 is left blank.

	A	B	C	D	E	F	G	H
5	Classification							
6	Prospect		<input type="checkbox"/>	Customer		<input type="checkbox"/>		
7								
8	Notes							
9								

Label and checkbox moved to row 6

Example: Change Block Field Size

You can change the field size of a block field by changing the number of rows the field occupies.



Block fields can contain other fields, and by making this change, you might cause other fields to be inadvertently eliminated from the page.

To expand the *Notes* block from 2 rows to 3 rows:

	A	B	C	D	E	F	G	H
5	Classification							
6	Prospect		<input type="checkbox"/>	Customer		<input type="checkbox"/>		
7								
8	Notes							
9								

Increase the size of the 'Notes' block

1. In the page layout definition area, click the selector box next to the field *Notes*.
2. Click in the *Row From* cell.
3. Change the row from 8 to 7.
4. Click the selector box next to the *Notes* field or choose **ENTER**.

The *Notes* block is expanded to go from row 7 to row 9.

	A	B	C	D	E	F	G	H
5	Classification							
6	Prospect		<input type="checkbox"/>		Customer		<input type="checkbox"/>	
7	Notes							
8								
9								
'Notes' block expanded from row 7 to row 9								

Cancel Your Field Changes

You cannot preview or save page layouts with errors. Changing coordinates that either cause fields to overlap or to not fit within the specified row or column generates errors. Should you see any messages, click *Cancel Edit* within the *Action* column to revert to the previous and correct format.

Simple Search Page Configuration

Search is the first step in working with any business object within *SAP CRM on-demand solution*. On the *Search* page, users select search criteria, an operator, and when required, a search term.

Change Field Titles

The field title is the text that appears in the search criteria dropdown boxes.

1. For the search criterion you want to change, click the link in the *Field Title* column.
The title can be edited.
2. Enter the new text.

You can only change the field title for the search criterion where you clicked the link.

Either choose **ENTER** or preview your changes to redisplay the *Field Title* links.



If you changed a field label through field configuration, you must also change the field title on the search page to keep the names consistent.

Change Default Search Criteria

The default search criteria are the four search dropdown boxes users see when they first open the *Search* page for a business object. The search dropdown boxes appear on the search page in alphabetical order by default search criteria.

1. Deselect the *Default* checkbox for the search criterion you no longer want to use as default search criterion.
All *Default* checkboxes are opened for editing.
2. Locate the search criterion you want to use as the new default.
3. Select the *Default* checkbox for the search criterion.

When four search criteria are selected as defaults, the remaining *Default* checkboxes are grayed out.

Change Default Search Operators

Operators define the process the user wants to perform to find a specific set of business objects. Search operators include terms such as *is*, *is empty*, and *is not*. The default search operators are displayed in the dropdown boxes for the search criteria when a user first opens the *Search* page. Use the dropdown box to select the search operators.

Change the Order of the Search Criteria

The search criteria dropdown box includes all search criteria listed in the *Displayed Fields* table on the configuration page. Using the selector boxes and arrow buttons, you can :

- Change the order in which a search criterion is listed in the dropdown box
- Remove a search criterion from the dropdown box on a *Search* page by adding it to the *Field Set*

See also:

[Preview and Save Your Changes \[Page 29\]](#)

[Search \[External\]](#)

[Move a Field to a New Row \[Page 18\]](#)

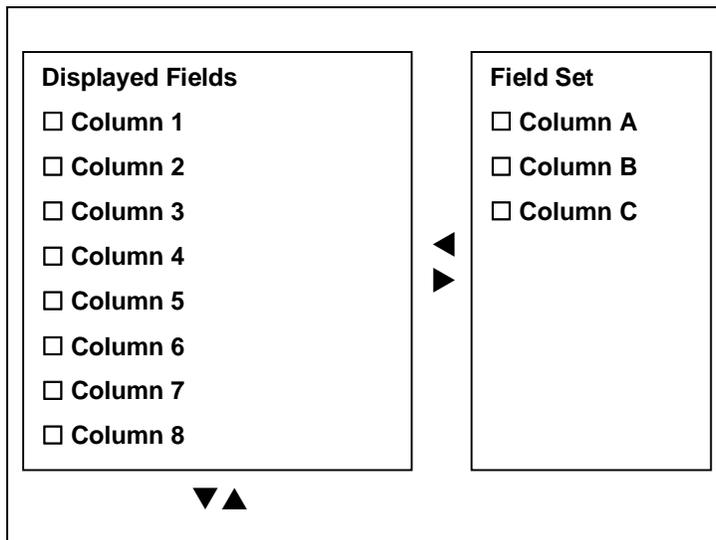
[Remove a Field from a Page \[Page 17\]](#)

[Field Set \[Page 29\]](#)

Configure the Search Result Table

Your users see their search results returned in a table format at the bottom of the search page. You access the configuration page for the result table through the *Configuration: Simple Layout* page.

When you are working with the search results table page, you see the work area in this basic format:



1. On the *Configuration: Simple Layout Search* page, click *Configure Result Table*.
You see the *Configuration: Table Setup* page.
2. Click the selector box next to the column you want to change.
You can access the column title, column width, and horizontal alignment fields.

3. Make your changes.
 - You make your column layout changes directly onto the table.
 - You choose a column and click the arrow buttons to make your table changes.
4. When complete, click *Save*.

You return to the *Configuration: Simple Layout* for the search page.

Column Width

- The column width value represents the percentage of space the column occupies within the search results table.
- Values must be whole numbers between 1 and 100.
- Columns with no values are defaulted to the remaining total column width.

No column widths specified – all widths default to 25%

A	B	C	D
---	---	---	---

A	B	C	D
---	---	---	---

Column width for Column C specified as 15%
Column widths for columns A, B, and D automatically default to 28%

- You see the result table based on the column widths; entering inaccurate width values can provide unexpected results.

See also:

[Field Set \[Page 29\]](#)

[Remove a Field from a Page \[Page 17\]](#)

General Information on Page Configuration

This section contains general information on page configuration.

Field Set

The field set contains additional fields you can add to a page. When the field set is empty, there are no additional fields possible for the page.

Users do not see fields that you can view within the field set during simple page configuration. You must move them to a page for users to see the field.

When you remove a field from a page, you are actually moving it from a panel that a user can see to the field set that they cannot see.

See also:

[Add a Field from the Field Set \[Page 14\]](#)

[Display/Hide the Field Set \[Page 15\]](#)

[Remove a Field from a Page \[Page 17\]](#)

Preview and Save Your Changes

You must preview your configuration changes before you can save them. Preview shows you how the page will look to your users. This helps reduce possible display problems when your users work on a page that you have changed. You can also use preview at any time when working on a page configuration in order to view your progress.

When you either complete your configuration changes to a page or get to a point where you want to review your work:

1. Click *Preview*.
You leave the configuration work page and view the page you are working on as your users would see it.
2. When you are viewing the preview page:
 - Click *Save* when you are satisfied with the changes you have made and want to publish the changes to your users.
 - Click *Back* to return to the configuration layout work page to continue working on the configuration changes.

Set Role Back to Default

You can make changes to the pages for any role listed on the *Configuration: Screen layout entry* page. Should there be a problem with your configuration changes, you can revert back to your original configuration settings using the *Set Role Back to Default* button. When you click *Set Role Back to Default*:

- All of your configuration changes for any pages for this role are ignored.
- You see all pages for this role in their original format, that is before you made any changes to any pages.
- You return to the field configuration page.

Unlike *Set Back to General Default*, *Set Role Back to Default* reverts to original configuration settings on a role-by-role basis. Select a different role to revert to the original configuration settings for that role.

The roles listed on the *Configuration: Screen layout entry* page are the configuration roles. The changes you make to the configuration role affect all roles based on the configuration role. You copy and edit roles, and view the configuration role on the *Roles* page.

See also:

[Set Back to General Default \[Page 12\]](#)

[Roles \[Page 33\]](#)

Show/Hide Technical Names

You can rename fields while making configuration changes. Your changes are only to the labels that your users see displayed on the pages. There are also technical names for all fields, such as the technical name *//BPCLASSIFICATION/INDSECTOR* for the field *Industry*.

Technical names normally remain hidden. You use the *Show Technical Names* button to display the hidden technical names if you require hosting support and the support team needs specific field information. Click *Hide Technical Names* to toggle back to the standard display.

Configure Marketing Attributes

Marketing attributes provide further information about your accounts and contacts. You can use marketing attributes to segment your accounts and contacts and to make your campaigns more personal and more effective. You can create up to 30 marketing attributes for your accounts and contacts. All attributes are created as CHAR fields with 30 characters and a value help.

To configure marketing attributes:

1. Select the account or contact that you want to change and click *Marketing Attributes*.
2. To create a new attribute, click *New Attribute*. To edit an existing attribute, click *Edit Attribute*. An editing area is displayed on the right hand side.
3. In the *Attribute* field, enter a name for the attribute and choose whether it is a multi-value attribute. Multi-value attributes mean that you can assign more than one value for this attribute to your accounts and contacts (for example, hobbies).
4. You can enter values for the attribute in the *Attribute Value* field. Enter an attribute value and click *Add*. Repeat this procedure for all attribute values. All attribute values are displayed in the selection list below. An ID is generated automatically for each attribute value, which you can display by choosing *Display ID*.



Attribute values are language-dependent, which means that you only ever see the attribute values created in your logon language.

See also:

[Marketing Attributes \[External\]](#)

Organizational Model

You use the organizational model to describe how you want to structure and staff each functional unit within your company for use within *SAP CRM on-demand solution*. The organizational model starts with a top level. You then define the supporting functional units within the company, such as departments, groups, project teams, or territories.

Things You Should Know About Working with the Organizational Model

- While you can only have one top level for the organization, the hierarchy can have four levels and you can have an unlimited number of functional units on the same level.
- You must create a functional unit within the organization before you can add positions to it and then create positions before you can add users to a position.
- You start a new branch for the organizational model when you create a functional unit at the same level as the previous level.
- The hierarchical structure of the organizational model defines who has access to data:
 - Managers attached to upper nodes have access to data for users below them on the same branch.
 - Employees only have access to their own data or to data from colleagues of their sales or support team.
- At the top of the *Organizational Model* page, you can expand or collapse all levels beneath the top level by choosing *Expand All* or *Collapse All*.
- The links in the *Action* column define what actions you can perform for the functional unit or position.

See also:

[Add Entries to the Organizational Model \[Page 31\]](#)

[Change Details within the Organizational Model \[Page 31\]](#)

[Delete an Organizational Unit or Position \[Page 32\]](#)

[Add a User to a Position \[Page 32\]](#)

[Data Access and Authorization \[Page 35\]](#)

Add Entries to the Organizational Model

1. Locate the functional unit to which you want to add an organizational unit or position.
2. Click the appropriate link within the *Actions* column for that unit.
You see the add unit or add position area at the bottom of the page.
3. Enter the details for the organizational unit or position.
4. When complete, click *Save*.
You see your entry within the organizational model.

Change Details within the Organizational Model

1. Click the selector box next to the organizational unit, position, or user you want to change.
You see the information in the *Details* area at the bottom of the page.

For users, you can also click the user name link to go directly to the user summary page.

2. Click *Change Details*.

The editing area is opened at the bottom of the page.

When you select a user, you see the user detail page.

3. Make your changes.
4. When complete, click *Save*.

The information is updated to reflect your changes.

See also:

[User Summary \[Page 42\]](#)

Delete an Organizational Unit or Position

1. Click the selector box next to the unit or position you want to delete.
You see the organizational unit or position in the *Details* area at the bottom of the page.

2. Click *Delete*.

You see the updated organizational model.



You cannot delete an organizational unit or position that has levels below it within the organizational model. Should you try, you see a warning message and the delete processing is not performed.

Add a User to a Position

When you have created a position beneath an organizational unit, you can add an employee to the position by clicking *Create User for Position* from the *Actions* column. You then see the *Create User* page with the position details automatically filled in.

See also:

[Create User \[Page 41\]](#)

Authorizations

Authorizations determine the actions your users can perform on the information within *SAP CRM on-demand solution*.

See also:

[Data Access and Authorization \[Page 35\]](#)

Roles

You use the *Roles* page to view default roles and create new ones based on the default ones. Default roles are Sales Manager, Sales Representative, and Campaign Manager. You cannot change these.

- To select a role, select a role name from the *Select the Role* dropdown box
The configuration role and role name change accordingly. A description of the role name appears in the *Role Description* field. A table of areas potentially relevant to the role also appears.
- To configure the role, you need to include areas you require in it. To include areas in your selected role, select the *Visible* checkbox next to the relevant area. To eliminate an area from your selected role, deselect the *Visible* checkbox.

To create a new role:

1. Select the role you want to copy.
2. Click *Copy*.
3. Enter a role name in the *Role Name* field.
4. Configure the role as described above.
5. Click *Save*. Note that some changes take effect only after you log on again.

Permission Profiles

You use the *Permission Profiles* page to grant permission to users to create, delete, or edit objects. There are four possible permission profiles:

- *Full*
The user has permission to create, delete or edit any or all business objects.
- *Display Only*
The user can view all business objects, but cannot create, delete or edit any or all of them.
- *No Deletion*
The user cannot delete any or all business objects, but may create or edit them (if granted permission).
- *Edit*
The user can edit any or all business objects, but cannot create or delete them (unless granted permission)

You can create any of the permission profiles above. To create a permission profile:

1. Choose *Permission Profiles*

You go to the *Permission Profiles* page.

2. On the *Permission Profiles* page, select a permission profile from the *Select Permission Profile* dropdown box.
3. Click *Create*, assign the relevant permissions by checking the appropriate checkboxes and enter the permission profile name in the *Permission Profile Name - Required Edit* field.
4. Click *Save* to save the permission profile, or *Cancel* to return to the *Permission Profiles* page.

You can edit *Edit* and *No Deletion* permission profiles, and any profiles you created. To edit a permission profile.

1. Choose *Permission Profiles*

You go to the *Permission Profiles* page.

2. On the *Permission Profiles* page, select a permission profile from the *Select Permission Profile* dropdown box.
3. Click *Edit*, assign the relevant permissions by checking the appropriate checkboxes and enter the permission profile name in the *Permission Profile Name - Required Edit* field.
4. Click *Save* to save the permission profile, or *Cancel* to return to the *Permission Profiles* page.

You can delete *Edit* and *No Deletion* permission profiles, and any permission profiles you created. To edit a permission profile.

1. Choose *Permission Profiles*

You go to the *Permission Profiles* page.

2. On the *Permission Profiles* page, select a permission profile from the *Select Permission Profile* dropdown box.
3. Click *Delete* and confirm the deletion popup that appears.

Extended Authorization

You use extended authorization to control the information that users can view, edit, or delete based on their relationship to the information.

To extend authorization for your company:

1. In the *Administration* page, under *Authorizations*, click *Extended Authorizations*.

You see the *Extended Authorization* page .

2. Select the checkbox next to *Use extended authorization for my company*.

The page expands to include some permission buttons, an area dropdown box, and a table displaying user relationship to information and permissions.

3. Decide whether to provide the information owner and manager of the owner with a 360° view of information from all areas and click the corresponding button. This means the owner and manager of the owner can also see business objects that they do not own.
4. To choose an area to view, select an area from the *Area* dropdown box.

The table below the dropdown box shows you the user relationship to the information in the chosen area, and whether these users are authorized to display, edit, or delete the information. Grayed-out boxes show authorizations that you cannot change. You can select blank ones to assign authorizations or deselect checked ones to remove authorizations.

5. When you are satisfied with your entries, choose *Save*.

See also:

[Permission Profiles \[Page 33\]](#)

[A User's Relationship to Information \[Page 38\]](#)

Data Access and Authorization

The information users can view, create, edit, and delete is based on four interconnected concepts:

- Roles
- Positions
- Permission Profile
- Extended Authorization

Roles

Roles dictate which application areas a user can access. When you create a role you choose what application areas, such as accounts, campaigns, and opportunities, are available for users having this role as the basis of the position to which they are assigned.

Positions

The organizational model defines what data a user has access to based on his or her position within the organization. There are two levels of positions, employees and managers.

- Employees can access business objects:
 - When they are the owner or “employee responsible”
 - When the business objects are assigned to them as part of the sales or support team
- Managers can access business objects:
 - When they are the owner or “employee responsible”
 - When the business object is owned by managers and employees on the same or lower level within the manager’s organizational unit

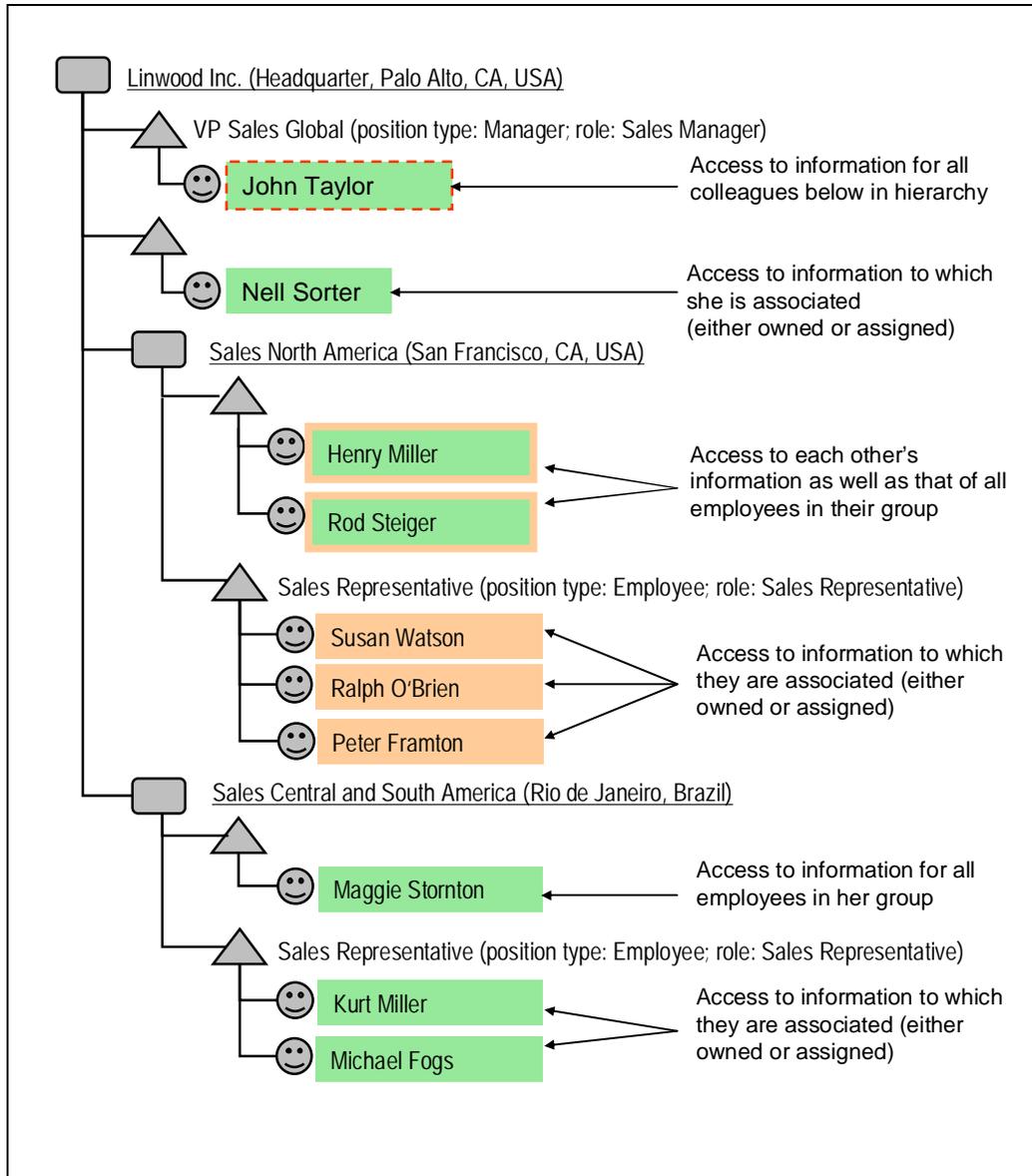
When you maintain the organizational model you create positions and assign a role to each position. Then when you create a user, you assign the user to a position and the user has the access definitions from the role and the position.

Example

As shown in the following organizational model example, managers Henry Miller and Rod Steiger within the Sales North America office:

- Have access to information owned by Susan Watson, Ralph O’Brien and Peter Framton.
- Have access to each other’s information as they are managers on the same level.
- Cannot access information belonging to anyone in the Sales Central and South American office.

John Taylor, VP Sales Global, has access to all information for all colleagues that report to him.



Permission Profiles

Permission profiles define whether users can create, edit, and delete business objects within an area. You assign a permission profile to an employee when you create him or her as a user. Permission profiles are typically based on the daily tasks a user would be performing, such as a sales assistant that can create and edit opportunities but cannot delete them.

Extended Authorization

Extended authorization defines whether users can display, edit, and delete business objects based on the user's relationship with the data. Relationships are determined by whether the user is the owner, team member, manager of the owner, manager of the team member, or an unrelated user. Extended authorization provides the additional information access that cannot be controlled exclusively through the permission profile.

Extended authorization can also provide a 360-degree view of data for owners and managers of owners where these users are able to view all detailed information that support a business object regardless of their other relationship to the information. For example, while all

employees can access account summary information, managers of owners can view the summary information and then also view all detailed information referenced within the summary.

Exceptions to Authorization

- Users in any position, both employees and managers, can access account and contact summary data unless overridden through extended authorization.
- All users can access any data that does not have an owner assigned to it.
- Activities and tasks marked as “private” can be accessed only by the owner or any users identified as participants within the activity or task.

See also:

[A User's Relationship to Information \[Page 38\]](#)

A User's Relationship to Information

This is the hierarchy that establishes what information a user can access and then what actions a user can perform on the information.

Relationship to information	Controlled by	Example	Page / Access
The areas a user can access	Role assigned to a position	<p>“Sales manager” role has access to all areas.</p> <p>“Sales assistant” role has no access to the areas campaigns, opportunities, and pipeline management.</p>	<p>Roles</p> <p>Maintain Organizational Model → Add Position</p>
The information a user can access within an area	Position type in organizational model	<p>User with the “employee” position type can access their opportunities and, possibly those of other employees in the same organizational unit.</p> <p>User with the “manager” position type can access opportunities for managers on the same level and those employees below the manager in the same organizational unit.</p>	<p>Position</p> <p>Maintain Organizational Model → Create User for Position</p>
The actions a user can perform on each type of business object	User's permission profile	<p>User with “limited-access” permission profile cannot delete or change opportunities.</p> <p>User with “full-access” permission profile can create, delete and change opportunities.</p>	<p>Permission Profile</p> <p>Maintain Organizational Model → Create User for Position</p>

Relationship to information	Controlled by	Example	Page / Access
The actions a user can perform on each type of business object	User's relationship to the information on an area-by-area basis; actions must still be approved within the user's permission profile	<p>User that is "owner" with extended authorization to display, edit and delete opportunities can only display opportunities as the "owner" has a "limited-access" permission profile that does not allow edit or delete.</p> <p>User that is "team member" with extended authorization not providing edit or delete for opportunities can only display opportunities for any user on his or her team, regardless of the "team member" having a "full-access" permission profile.</p>	Extended Authorization

Users

User are the employees within your company that access and work with *SAP CRM on-demand solution*.

Search and Edit Users

1. Choose *Search for*.
2. Choose *Users*.
3. Enter one or several search criteria in order to search for the desired user.
4. When you have entered the desired search criteria choose *Search*.

The users that match your search criteria are displayed in the result list at the bottom of the screen. The result list contains the most important fields for identifying the user and gaining an overview of several users at a glance.

5. Choose the name link of the user for which you were searching.
You see the user summary page for the user.
6. Choose *Change User Details*.
You see the *Edit User* page.
7. Make your edit to the user information.
8. When you have completed your changes, choose *Save*.
You see the user summary page with your changes.

Logon Monitor

You use the Logon Monitor page to view, search, and export logon histories of users of *SAP CRM on-demand solution* in a specific timeframe. You can view logon history information such as the IP address, which is the IP address of the location from which the user logged on, and the user status.  means the user is locked, and  means the user is unlocked.

- To search logon histories, specify the timeframe for your search and click *Search*
To specify a timeframe, choose  in *Last Logon from*  to  to trigger a dropdown calendar from which to select dates, or enter the dates you want directly in the input fields.
- To clear your search, choose *Clear*. This removes your search results from the result table, but does not delete the logon history.
- To export your search results to a Microsoft Excel sheet, choose *Export*.
- To unlock a user, click *Locked Users* under *Users* on the left of the page.

See also:

[Locked Users](#)

Locked Users

You use the *Locked Users* page to view locked users in *SAP CRM on-demand solution*, unlock them, reset their passwords, or export the data. For each user listed on the *Locked Users* page, you can:

- Unlock a user by clicking 
- Reset a password by clicking 

To export all locked user data to a Microsoft Excel sheet, click *Export*

Import Users

You use the *Import Users* page to import user files created earlier so that you can view or edit them. User files must be in a comma-separated values (CSV) file format, that is, each user entry must be in one paragraph, and the information given for each user must be in the following order, with commas separating the individual entries:

**Last Name, First Name, E-Mail Address, Position Description,
Permission Profile, Time Zone, Language, User Name, Initial
Password, Date Format**

All columns are required.

To import users:

1. Choose *Import Users*.
You see the *Import Users* page.
2. On the *Import Users* page, enter the location of the comma-separated values (CSV) file you want to upload in the input field, or choose *Browse...* to navigate to the file you want to upload.
3. Choose *Upload File*.
You see the *User Overview* page, where you can view or edit the CSV file.

Create User

You use the *Create User* page to enter user details.

This data is grouped into four areas:

- General Information
- Organizational Information
- Communication Information
- System Access

To create a user:

1. Choose *Create User*
You see the *Create User* page.
2. Enter the user details.
These include the *User ID*, which is used to transfer e-mails from Microsoft Outlook to *SAP CRM on-demand solution* and cannot be edited; *E-Mail Address*, which is used to log on and to receive notifications; and *Permissions*, where you specify the tasks the user can and cannot perform. In the *Command Pad*, enter *Copy User <User Name>* to copy an existing user and then edit these details for the user you want to create.
3. Click *Save* to save your entries..

See also:

[Maintain Organizational Model \[Page 31\]](#)

[Permission Profiles \[Page 33\]](#)

[Roles \[Page 33\]](#)

Options

You use the *Options* page to make notification settings to inform users about roles assigned to them, either at the time they are created or as a consequence of ownership realignment, and to configure e-mail settings to send the notifications.

Under *Notification Settings*:

- To send the user an automatic notification e-mail about the assigned role, select the *Send Automated Notification E-Mail* checkbox.
- To include the user's password in the notification e-mail, select the *Include Password in Notification E-Mail* checkbox
- To specify the user's e-mail address for a password reset, enter the user's e-mail address in the *E-Mail for Password Reset* input field.

Under *E-Mail Configuration*:

Select one of the following means of sending e-mails from the *Send e-mails through* dropdown box.

- *SMTP Server*
This is used to send messages from one server to another, or from mail client to mail server. You may need to contact your system administrator for details.
- *Local E-Mail Client*
This is preconfigured so you do not need to take any action.

See also:

[Realign Ownership \[Page 44\]](#)

User Summary

This display-only page contains a summary of the following user information maintained within *SAP CRM on-demand solution*:

- *User Details*, comprised of general, communication, organizational, and system access information
- *User History*, comprised of status information and logon history

You can see multiple managers listed in the organizational information for a user when the manager position in the same organizational unit has more than one user assigned to it.

As an audit trail, the *User Details* bar contains when the information you are viewing was last changed and who performed the changes.

To make any changes to the user details, click *Change User Details*. You cannot make any changes to the user history information.

See also:

[Create User \[Page 41\]](#)

[Print \[External\]](#)

Retrieve User Name

Users must enter their *User Name* in order to transfer e-mails from Microsoft Outlook to *SAP CRM on-demand solution*. You retrieve the *User Name* from the *System Access* area of the user summary page.

See also:

[Search and Maintain Users \[Page 40\]](#)

[User Summary \[Page 42\]](#)

Data Management

Data management defines the user that is responsible for information within *SAP CRM on-demand solution*.

Realign Ownership

You can change the ownership of a business object or business objects from the current user to another one. This might be necessary when an employee leaves your company or there is an organizational restructuring, for example. You can realign accounts, activities, campaigns, contacts, leads, and opportunities. Note that realigning multiple business objects transfers all business objects of the type you choose from one owner to another.

1. On the Administration page, under Data Management, click Owner Realignment.
The Realign Ownership page appears.
2. Choose the business object you want to realign ownership of by selecting it from the dropdown box to the right of the word Realign. We will use account realignment as an example.

To realign a single account:

1. Under *Realign a Single Account*, click the  icon next to *Account*.
The *Realign Ownership: Account – Search Help* page appears. This is where you define your search criteria.
2. When you have defined your search, click *Search*. To clear your search criteria, click *Clear*. If you click *Search*, you see the search results in the *Result List*.
3. To choose the single account you want to reassign, click the box to the left of the account. Then click *Choose*.
You have now selected the account you want to reassign, and you are returned to the *Realign Ownership Account* page.
4. To define the new owner, click the  icon next to *New Owner*.
The *Realign Ownership: Account – Search Help* page appears. This is where you define your search criteria.
5. Define your search criteria in the same way as you did for the account, or to clear your search criteria, click *Clear*. If you click *Search*, you see the search results in the *Result List*.
6. To choose the new owner, click the box to the left of the owner name. Then click *Choose*.
You have now selected the new owner, and you are returned to the *Realign Ownership Account* page.
7. Before you proceed to realign the account, decide whether you also want to realign all closed activities, leads, or opportunities for the account, and, if so, check the corresponding checkboxes on the *Realign Ownership Account* page. Similarly, decide whether you want to send a notification of the realignment to the new owner.
8. To define when realignment takes place, either accept the default setting of *Immediately*, or choose *In Future* from the *Start* dropdown box. Use the  icon to select a date or enter the date yourself, and enter the time you want realignment to take place. Note that the date cannot be today's date.
9. When you are satisfied with your entries, click *Realign*.

To realign multiple accounts:

1. To choose the current owner, click the  icon next to *Current Owner*.
The *Realign Ownership: Account – Search Help* page appears. This is where you define your search criteria.
2. When you have defined your search, click *Search*. To clear your search criteria, click *Clear*. If you click *Search*, you see the search results in the *Result List*.
3. To choose the current owner of the account you want to reassign, click the box to the left of the owner. Then click *Choose*.
You have now selected the current owner, and you are returned to the *Realign Ownership Account* page.
4. Proceed as described above for realigning the single account in steps 4 -9.

Policies

Policies are the specific technical definitions used to manage your company's users when they access and use *SAP CRM on-demand solution*.

View Policies

You use the *Policies* page to view the password and session policy specified for users of *SAP CRM on-demand solution*. However, you cannot change these policies.

For passwords, these policies are grouped into four areas:

- Password Expiration
- Password History
- Password Complexity
- Failed Logon Attempts

The session policy contains session settings. For details, see the tables below:

Password Expiration

Label Text	Description
Number of days password is valid	The number of days a password is valid before the user must use another one.
Number of days initial password is valid	The number of days an initial password is valid before the user must specify a user-defined one.
Number of days a password (set by the user) can remain unused	The number of days an inactive user's password is valid before the user must specify another one.

Password History

Label Text	Description
Number of past passwords that cannot be used as new passwords	The number of past passwords that must have expired before the user can use the same password again.
Minimum number of new characters in new password	The minimum number of different characters in a new password. A value of 1 means the password could be the same letter or number repeated to fulfill the minimum number of characters.

Password Complexity

Label Text	Description
Minimum number of characters	The minimum length of a password. A value of 6 means the password must be at least 6 characters long.
Maximum number of characters	The maximum length of a password. A value of 40 means the password must be no longer than 40 characters.

Label Text	Description
Character set	A value of backwards compatible means the character set is compatible with either ASCII or ISO-8859-1 characters.
Minimum number of digits	The minimum number of digits the password must contain. A value of 0 means the password need not contain any numbers.
Minimum number of letters (A-Z)	The minimum number of letters the password must contain. A value of 0 means the password need not contain any letters.
Minimum number of special characters	The minimum number of special characters, such as !, &, or \$, the password must contain. A value of 0 means the password need not contain any special characters.

Failed Logon Attempts

Label Text	Description
Maximum number of failed logon attempts	The maximum number of failed logon attempts allowed before the user is locked.
Enable auto unlock users	This enables the Power User to unlock locked users automatically.

Session Settings

Label Text	Description
Session time-out length (in minutes)	The length of time in minutes before an inactive session closes automatically.