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Focused Build for SAP Solution Manager

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THE BEST RUN SAP

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1 Focused Build for SAP Solution Manager

Focused Build is an add-on for SAP Solution Manager.

Focused Build consists of a preconfigured end-to-end implementation process and standalone extensions for SAP Solution Manager. You can also use the standalone extensions separately to enhance the standard capabilities of SAP Solution Manager.

For more information, see https://support.sap.com/solution-manager/focused/focused-build.html.

Related Information

End-to-End Implementation Process [page 17]
Focused Build Standalone Extensions [page 128]

1.1 Implementation Considerations for Focused Build 2.0 SP 12

Focused Build 2.0 SP 12 is an add-on to SAP Solution Manager 7.2 SPS 17.

Prerequisites

- You have installed and configured SAP Solution Manager 7.2 SPS 17.
- You have installed the SAP Solution Manager Focused Build add-on as described in SAP Note 3315763.
- You have configured Focused Build as described in Customizing and in the Focused Build for SAP Solution Manager Configuration Guide.

> **i Note**
>
> You can download the software from the SAP Software Download Center at https://support.sap.com/SWDC. Search for component ST-OST 200.

Features

Focused Build integrates the following functions:

- Project Management
  Project Management helps you to plan the project timing and resources. You use can use project templates for different project types to structure and schedule your projects.
- Solution Documentation and Requirements Management
  You can design business models collaboratively between business and IT. The resulting requirements are documented in Solution Documentation of SAP Solution Manager. This process supports a standardized work packages process without media breaks.
- Issue and Risk Management integrated in Project Management (cProjects)
- Change Request Management
  You can handle all activities related to software changes and transports to any follow-on systems. The Focused Build process uses normal changes, general changes, and defect corrections.
- Release Management
  You can plan, manage, and coordinate your release activities.
- Solution Readiness Dashboard
  You get an automated project progress reporting based on live-system data. The dashboard offers aggregated information on the current project.
- Document Management
  You can create, change, and store documents per drag and drop, using new user interfaces for work packages and work items.
- Test Management
  With Focused Build extensions to the test suite of SAP Solution Manager, you can check that all changes have been made correctly and do not negatively impact other business processes before you transfer them to your productive system.

More Information

For information about standard SAP Solution Manager 7.2 features, see SAP Help Portal at http://help.sap.com/solutionmanager72.

For information about the configuration of Focused Build, see the Focused Build for SAP Solution Manager Configuration Guide.

1.2 What's New in Focused Build 2.0 SP 12

Process Management

Function	Type of Change	Description
Structure History Report and *Document History Report*	New	Use these two reports to detect changes to the process structure or to documents assigned to the structure. The reports shows when new processes/documents are added or changed for a better overview of the changes.
Design Branch Consistency report	New	Use this report to detect structures and process steps that are not assigned to a requirement or a work package. You can identify structure differences between the design and development branch and create work packages to integrate them into the development process.
Documentation Release Check report	New	Use this report to mass check that the process documentation connected to work items has no issues. This check can be performed for a release, project, wave, or sprint. For work items with incorrect documentation, you can create email notifications to inform the person responsible.
Color code for the scope in the *Business Process Readiness* dashboard	New	Requirements or work packages that are not directly assigned to structures from the selected scope are displayed in black letters. Those that are part of structures from the scope are displayed in blue letters. However, the link to requirements, work packages or work items is always supported independently of the color.

Release Management

Function	Type of Change	Description
Variant management in the *Release Batch Import - Trigger* app	New	You can create, change or delete a variant in the app (similar to the report in SAP GUI). You can change the variant name at any time.
Export and search in the *Release Batch Import - Log* app	New	You can search in job logs. You can export log entries to an Excel spreadsheet.

Function	Type of Change	Description
Release batch import: log in `SLG1`	Changed	Ignored downgrades are shown in the log in transaction `SLG1` even if they were ignored on cycle or change document level.
Release batch import: log	Changed	The log now shows information about instances that run in parallel. The release batch import function does not allow parallel instances, to prevent deadlocks. The log was improved by adding additional information about already running batch import instances.
Release Dashboard app	Changed	Grouping on the following cards is now available: • *FB Requests for Change*: RB requests for change are grouped by status. • *FB Changes*: FB changes are grouped by types of change.

Project Management

Function	Type of Change	Description
New *Solution Readiness Dashboard*	New	A new version of the *Solution Readiness Dashboard* is available using standard SAP Fiori elements. It replaces the existing *Solution Readiness Dashboard*. You can analyze project data like statuses of work packages, work items, defect corrections, project tasks, defects, test plans, and issues from different perspectives. It offers the following functions: • Adaptable overview page • Interactive detail pages for detailed customized analysis • Chart visualization for users to spot relevant data faster • Customizing and sharing detail pages as a variant with other users The following cards are available: • *Overall Status* • *Requirements* • *Work Packages* • *Work Items* • *Project Tasks* • *Work Item Distribution* • *Work Package Distribution* • *KPI Status* • *Progress* • *Risks* • *Defect Status* • *Issues* • *Test Status* • *Defect Corrections for Work Packages* In-app help is available for the *Solution Readiness Dashboard*. To display the in-app help, choose the ⓘ (question mark) icon.
Edit element relationships in *Project Management - Focused Build Projects*	New	You can now edit element relationships in *Project Management - Focused Build Projects* directly in the *Details* panel. The new *Relationships* area shows existing relationships in a table that contains the related element, the relationship type, and the successor/predecessor status. Here, you can also *Create* or *Delete* relationships. The *Create* button opens a dialog where you can specify the relationship type, the successor/predecessor, and select the related element.

Requirements, Work Packages, Work Items

Function	Type of Change	Description
Include customer fields in import report	Changed	Customer fields are now included in report `/SALM/REQUIREMENT_IMPORT`. You can do the following: • Include data consistency checks • Edit customer fields in Excel and upload from the same solution • Move edited requirements including customer field values from one system or solution to a different system or solution
Business Add-In (BAdI) `/SALM/CUSTOMER_EXT_FLD_BADI`	New	BAdI `/SALM/CUSTOMER_EXT_FLD_BADI` is now available. You can use it to implement the following: • To control which customer fields are editable in which status • Validation and conversion of customer fields while importing the requirements using report `/SALM/REQUIREMENT_IMPORT` • Conversion of customer field values while importing the requirements using report `/SALM/REQUIREMENT_IMPORT` You can use the BAdI to define a specific status behavior for each customer field. It improves correctness of uploaded data, for example, checking domains in e-mail addresses. It can convert uploaded data, for example, customer data specific to Focused Build number ranges.
Work package classification	Changed	If you change the work package classification, after scope items have been created, a popup prompts you to reclassify the work items.
Search help for business partners	Changed	When you create transport requests, you can use the harmonized business partner search.
Cancel scope extension	Changed	If the work package is in status *Scope extension*, you must delete additionally created scope items manually before the action *Cancel Scope Extension* is available.

Function	Type of Change	Description
Status change after reassignment of work item	New	If you reassign a work item to another work package, the system checks the status of the source work package. **Example** The source work package is in status *In Development* and has two work items assigned. The first one is in status *Successfully Tested* and the second one in status *In Development*. If you reassign the second work item to another work package, the status of the source work package is changed to *To Be Tested* (corresponding to the remaining work item that is in status *Successfully Tested*).

Mass Change Operations

Function	Type of Change	Description
Filter fields: date range selection	New	For requirements and defects, date range selection is available.
Multiple selection		You can select multiple values in the following fields: • For all transaction types (requirements, work packages, work items, risks, defect corrections, requests for change, changes): *Priority* field • For work packages: *Classification* field
New look for the *Mass Change* popup in defect corrections	New	The *Mass Change* popup for defect corrections has a new look in accordance with the new SAP Fiori design guidelines. With the new *Mass Change* popup, you can do the following: • Depending on your filter, you can only see the fields that you can edit. • You can only edit selected defect corrections whose status is not final. • You can only use the *Project Name* and *Project Phase* fields to reassign an open defect correction to another project or phase (wave) with the same system landscape. • The filter for date type selection has been removed from the *Mass Change* popup. For more information, see Mass Change Operations.
Task list check for reassignment of work packages	New	If you assign a work package to a different release and if it has a work item or a defect correction with a transport assigned, the *Mass Change Operations* app checks that the target release also has a task list assigned if the source release has a task list assigned.

Function	Type of Change	Description
Date maintenance	Changed	For work packages and work items, you can now fill empty dates.

SAP Analytics Cloud API

Function	Type of Change	Description
Extract project information	New	The SAP Analytics Cloud API can now extract planned project information from the *Requirements* app.
Extract custom fields	New	The requirement entity of the SAP Analytics Cloud API now includes the `RequirementFullSet` and `RequirementDeltaSet` entities, which enable the extraction of custom fields from the *Requirements* app.

Test Suite Extensions

Test Steps Designer

Function	Type of Change	Description
Define mandatory fields	New	In the *Define Test Steps Header Field Settings* Customizing activity, you can determine which fields are mandatory or are hidden for test cases. For more information, see Editing Test Steps Test Cases.

Test Suite Dashboard

Function	Type of Change	Description
New detail pages for *Test Status Progress* and *Defect Status Progress*	New	For the *Test Suite Dashboard*, there are new detail pages available that you can access from the *Test Status Progress* and *Defect Status Progress* cards. In-app help is available for these detail pages.

Function	Type of Change	Description
Customize the legend	New	In the *Define Defect Status Aggregation Group* Customizing activity, you can now customize the color, text, and order of the legend for the *Defect Status* details page.
Details page opens in new tab	New	Detail information about *Defect* and *Work Package* now opens in a new tab.
New filter fields	New	You can now filter for detailed test information using the new filter fields.

My Test Executions

Function	Type of Change	Description
Change status quickly	New	You can now change the status of test cases quickly with one click to a custom status using the *Set to <customized target status>* button. For more information, see My Test Executions.
Extend tester personalization	New	In the *App Settings*, you can personalize your test case settings with the following options: • Hide object list by default • Open test cases of type *Test Steps* on the *Test Steps* tab. When you open the test case, this then navigates you to *Test Steps*. • When a test case has an error, you can choose to automatically open the *Defect* dialog.
Extend `/SALM/TM_TWL_DEFECT_DIALOG` BAdI	New	The `/SALM/TM_TWL_DEFECT_DIALOG` BAdI for the defect correction dialog can be extended to configure default values that the *Processor* field and the *Support Team* field use.

Test Plan Management

Function	Type of Change	Description
Generate reports for single test packages	New	You can now generate test reports for single test packages.

Test Steps Parameters

Function	Type of Change	Description
Assign parameters to test cases	New	You can now specify the parameters for certain test cases.

Standalone Extensions

Template Protection

Function	Type of Change	Description
Live locking scope for global systems	New	On the *Scenario Overview* tab, you can now define a virtual system and assign several global systems that contribute to the live locking scope of this virtual system. This significantly reduces the number of template rules that are generated via live locking if you have multiple global templates in parallel that, to a significant degree, consist of cross-project developments.
Enhanced local lock handling	New	You can now choose to ignore a selected template rule in a specific local development system. You can now also select the event for which the message type is valid. You can choose between all events, when saving, or when releasing.

Cross-Landscape Distribution

Function	Type of Change	Description
Cross Landscape Distribution Log	New	Use the new *Cross Landscape Distribution Log* function to directly access the application log of the relevant document to check the distribution progress and review logs for warnings and errors.
Error and logging message improvements	New	The log now also shows which objects of a transport were distributed. You can see which relevant distribution group triggered the distribution for each object.
Upload/Download Excel	New	Use the *Download to Excel* and *Upload from Excel* options to make changes to the entries and update the distribution group.

Cutover

Function	Type of Change	Description
Synchronize Deployment activity	Changed	Post-cutover activities ignore transports from preceding phase cycles. Transport of copies will only be created for the transports that belong to the current cycle, but not for transports of completed cycles. For more information, see SAP Note 3308349 .

My Checklist Steps

Function	Type of Change	Description
Additional filter criteria	New	You can now filter checklist steps by ID, process type, or status of their parent document. You can enable these filters in the *Adapt Filters* settings.

Test Suite Extensions

Function	Type of Change	Description
Test Suite Dashboard: New detail pages for *Test Status Progress* and *Defect Status Progress*	New	For the *Test Suite Dashboard*, there are new detail pages available that you can access from the *Test Status Progress* and *Defect Status Progress* cards. In-app help is available for these detail pages.

1.3 In-App Help for Focused Build Applications

For the following Focused Build for SAP Solution Manager applications, you can display the in-app help (context-sensitive help). To display the in-app help, choose the ⓘ icon.

- Change Request Management Dashboard
- Documentation Reporting Dashboard
- My Checklist Steps
- My Requests
- My Test Executions
- Project Management
- Release Batch Import - Log
- Release Batch Import - Scheduled Jobs

- Release Batch Import - Trigger
- Release Dashboard
- Requirements Management
- Service Catalog
- Simplification Item Management
- Solution Readiness Dashboard
- Test Suite Dashboard
- Test Suite Dashboard (Standalone Extension for Focused Build)
- Test Steps Designer
- Test Steps Parameter

For the setup of the in-app help, see Setup of In-App Help - SAP Help Portal.

2 End-to-End Implementation Process

Focused Build enhances standard SAP Solution Manager features and processes by adding specific functions.

Innovating business processes with minimal risk to live operations is a challenge for companies seeking to maintain and increase their competitive edge. The Focused Build approach supports customers in identifying and selecting the right building blocks from the SAP platform and deploying them in an optimal way. For this purpose, Focused Build enhances standard SAP Solution Manager features and processes by adding specific functions.

Focused Build projects use a standardized methodology and an integrated tool chain, which enable companies to build different and innovative software solutions on top of existing industry best practices provided by SAP – to lower the time to market and to realize tangible value. Following this new approach, customers assess business processes in collaboration with their business experts, start with best practices for commodity processes, and document requirements for differentiation and innovation. Efficient simulations of the user experience show the business tangible results of the solutions at an early stage.

Using the methodology and integrated tool chain of Focused Build has many advantages, including the following:

- Information flows from one phase to the next without media breaks: There is no information loss between project phases, with clear-cut milestones for handovers from one role to the next. All sign-offs are documented to improve compliance. Once created, content is reused throughout the software lifecycle, preventing integration gaps.
- One common language: Standardized, structured, and systematic procedure throughout the project that includes resource planning and controlling as well as workflow support. A centralized metadata repository is provided for solutions, including documentation, test cases, and configuration information.
- Automated project status information: Clear visibility of resources, scope changes, issues, and risks, as well as transparent and automated reporting.
- Transport automation grants the continuous integration and delivery of the software changes into the systems.

> **i Note**
>
> Focused Build is a preconfigured add-on. Although Customizing is available, we recommend that you use the solution as it is delivered.

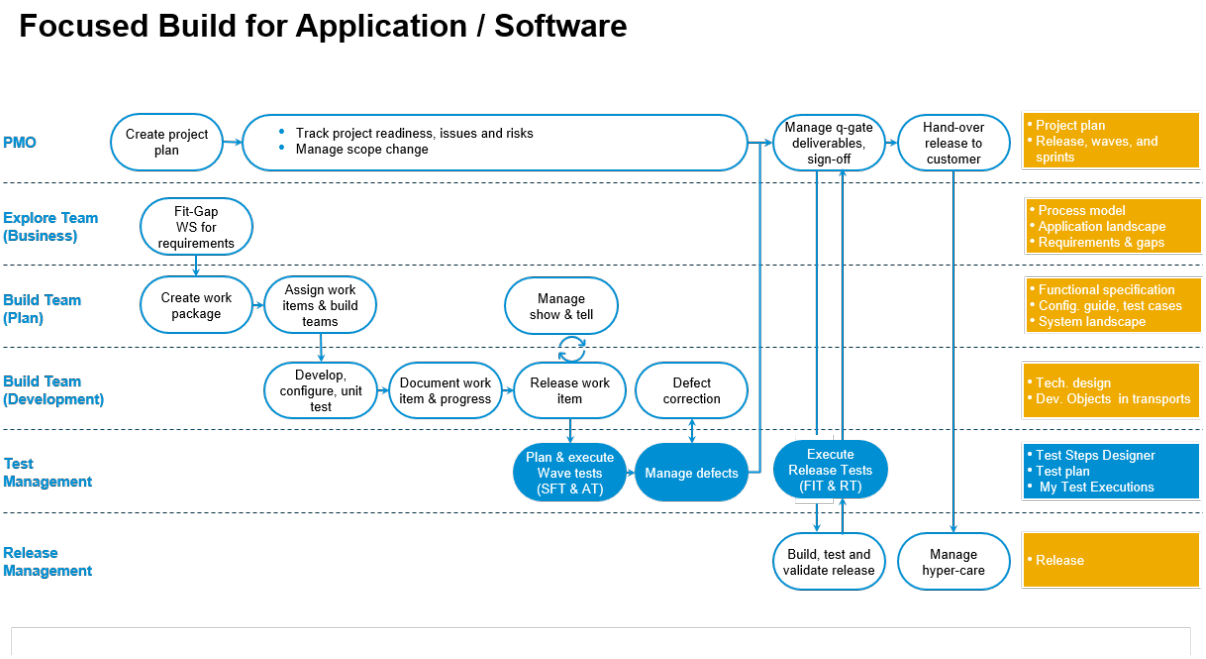
For more information, see https://support.sap.com/solution-manager/focused/focused-build.html.

2.1 Process Overview

By using the end-to-end implementation process (requirement-to-deploy), you can create requirements in Solution Documentation of SAP Solution Manager and create follow-up work packages.

For the actual execution of the work package, you break down the work packages into work items. The release can go live based on a single change, a group of changes, or a planned release following a release cycle controlled by release phases.

The Focused Build process consists of several workflows, some of which run in parallel. The overall process runs as shown in the following graphic:

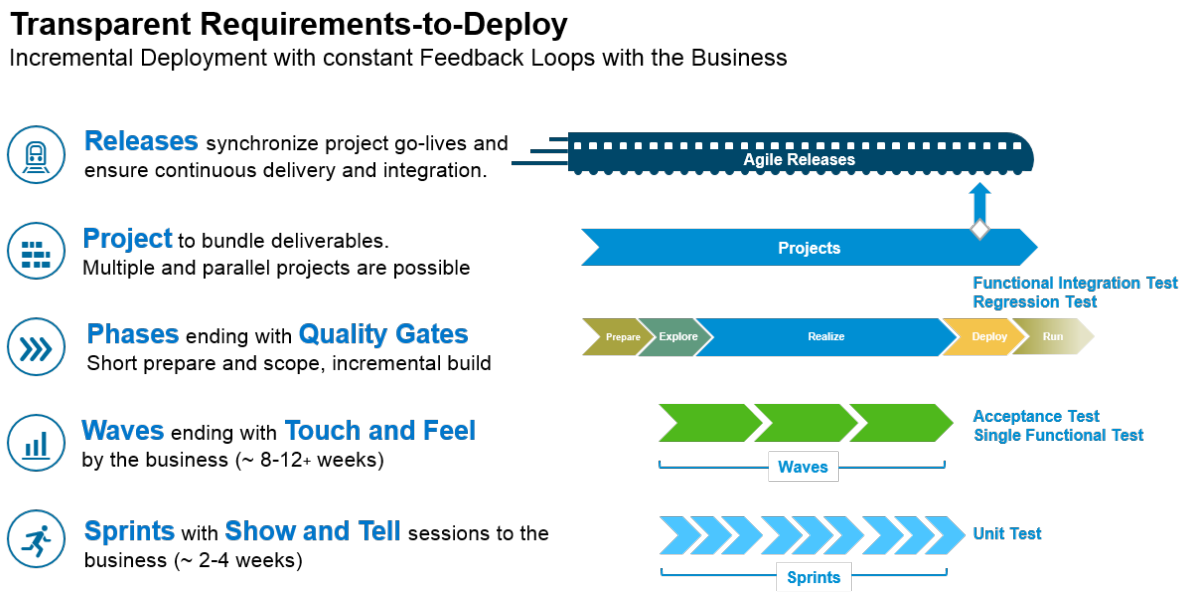


For more information about the requirement-to-release process using Focused Build, see the workflows of the following user groups:

- Project Management Office (PMO) [page 20]
- Explore Team (Business) [page 21]
- Build Team (Architects) [page 21]
- Build Team (Development) [page 22]
- Test Management [page 23]
- Release Management [page 23]

2.1.1 Structure Elements of Focused Build Projects

The following graphic shows the structure elements of Focused Build projects.



Project Phases

A project usually comprises the following phases:

- **Discover & Prepare**
  Modeling of the business processes, definition of requirements, and planning of projects and releases
- **Explore**
  Creation of work packages for requirements, scope definition, and breaking down work packages into work items
- **Realize**
  Developing and testing of the software changes
- **Deploy**
  Finalizing of the release and handover to the customer
- **Run**
  Go-live of the new release and hypercare during the introduction phase

Releases, Waves, and Sprints

A project has one or more **releases**.

A release is developed in several **waves**. A wave comprises a well-defined functional scope of work packages that is formally signed off by key users, such as business process experts. A wave starts with a scope definition

and a functional specification. Each wave ends with a quality gate. After a wave, developers present the changes and new features to the requesters and key users.

The lowest level is the **sprint**. A sprint is a defined period of time during which the development teams have to provide deliverables for review. The backlog of a sprint is based on the prioritized work items.

Requirements, Work Packages, and Work Items

Requirements are defined during the prepare phase of a project and describe the scope of the project. Solution architects create work packages for the requirements.

Work packages are used to plan the technical implementation of a requirement. Work packages are assigned to waves. Development architects divide the work packages into work items.

Work items are implementation tasks of work packages. Work items are realized during sprints.

Related Information

Glossary [page 168]

2.1.2 Project Management Office (PMO)

Project managers perform the following tasks:

- Define the project type and plan the project
  In SAP Solution Manager, project managers use integrated project management functions to create project plans based on project templates. These templates are delivered as part of the Focused Build add-on. They can assign issues and risks to the project, and they can display a list of all work packages for which the scope has been finalized.
- Initiate sprints
  After project managers have prepared the project, for example, by planning the effort based on the estimates by the solution architect, they trigger the first sprint of the project.
- Manage project issues and risks
  The project manager tracks all issues that come up during the project, and manages the risks and the overall progress.
- Manage project documentation
  All IT documents related to the project can be handled using SAP Solution Manager functionality.
- Manage quality gates and sign off
  The project manager is responsible for milestone and quality gate deadlines, and signs off the tasks that pass the gates.
- Close sprints
  Each sprint ends with a review meeting, during which the finished developments are signed off, and unfinished tasks are assigned to the scope of the next sprint.

> **i Note**
>
> You can store PMO documents in SAP Jam or in SAP Work Zone. You can restrict the access to protect customer-sensitive project data. For more information on PMO documents, see PMO Documentation [page 25]

Related Information

Managing Projects [page 48]
Solution Readiness Dashboard [page 68]

2.1.3 Explore Team (Business)

The explore team is made up of business process experts, consultants, solution architects, and method and tool experts.

The explore team creates the business process model and identifies requirements based on best practice content, such as SAP Activate.

During explore workshops, you model your business processes in Solution Documentation and identify requirements in a fit / gap analysis. Substantial functional gaps are handed over to SAP development. The remaining requirements constitute the scope of your Focused Build projects.

Solution Documentation provides a business process model diagrams based on the Business Process Model and Notation (BPMN) for all business processes in your business process model. You can publish your process model diagrams for feedback.

When you have created the business process model, you attach your requirements directly to the related processes and process steps in Solution Documentation.

Related Information

Modeling Business Processes in Solution Documentation [page 41]
Defining Requirements [page 75]

2.1.4 Build Team (Architects)

Solution architects and development architects plan and coordinate the development.

- Create functional specification

Solution architects validate the requirements, approve or reject them, and document the requirements, the business cases, and the required new and changed functions in detail. They then create work packages from the requirements and write functional specifications for work packages.

- Assign functional specification to work packages and process structure
  In SAP Solution Manager, solution architects assign the functional specifications to the corresponding work packages. The IT scope is validated and changed if necessary by the solution architect and development architect. The work package is assigned to a wave, which determines the schedule of the work package deliverable. The development architect divides the work package into work items and assigns developers to them.
- Manage gaps
  Solution architects validate perceived gaps in the system and retrieve implementation recommendations.
- Define sprint scope
  Solution architects assign the approved work items to sprints.

During the development and test process, the solution architect constantly monitors the status of the work packages.

Related Information

Creating Work Packages for Requirements [page 81]
Managing Work Packages [page 83]
Defining the Scope of Work Packages by Creating Work Items [page 86]
Documenting Work Packages and Work Items [page 26]

2.1.5 Build Team (Development)

Focused Build supports the collaboration across distributed development teams.

- Code, customize, and configure work items
  Developers call up the work items assigned to them for the relevant development sprint, and start to implement the work items in the development system.
- Create documents and test cases
  Developers document each work item that they implement and create test cases for the new and changed functions.
- Execute tests
  Developers test these new and changed functions in the test system.
- Record effort
  Developers record the time that they have spent on the work items, based on the effort planned by the solution architect.
- Hand over to release
  Any changes that are tested with OK are handed over to Release Management.

Related Information

Managing Work Items [page 88]
Documenting Work Packages and Work Items [page 26]

2.1.6 Test Management

Test managers identify which tests are required and coordinate the test activities.

- Identify the test scope and create test plan
  Based on the work items implemented during the project, test managers create a test plan and test cases.
- Schedule sprint tests
  The test managers schedule developer tests for each sprint. In case of large functional changes, multiple sprints might be required to complete a change, and the test takes place after the last sprint.
- Manage integration, user acceptance, and regression test
  Test activities can take place as part of each individual sprint, in parallel to sprints, or after all sprints have finished. With an increasing number of sprints, more functional integration tests can be performed because new features become available that are required for end-to-end testing.
- Perform release tests
  The test confirmed status in the work package is the prerequisite for the changeover to release
- Sign off if the test is successful
  The test is successful if all test cases have been confirmed with OK.

Related Information

Focused Build Test Suite Extensions [page 92]

2.1.7 Release Management

Release managers build, test, and validate releases.

Release managers compile the new developments and configurations that are to go live as part of the release. New features can go live after each sprint, or the release can consist of a number of functions developed over multiple sprints and with a dedicated go-live event.

A release type defines the size and duration of a release. In general, a distinction is made between major and minor releases.

Related Information

Release Dashboard [page 46]

Release Management - Release Planning [page 41]

2.2 Document Management

Focused Build offers two basic documentation categories: PMO documentation and IT documentation.

> **i Note**
>
> If your PMO team or development teams don't have access to SAP Solution Manager, you can use SAP Jam, SAP Work Zone or third party tools to store and share your documentation.

The IT documentation is stored and maintained in the Solution Documentation of SAP Solution Manager.

Maintaining Documents in the Solution Documentation

In Focused Build projects, you do not only document you business processes in the Solution Documentation, but can also record, accumulate and continuously expand your data in the Solution Documentation during an entire project. In Focused Build, the standard functionality of the Solution Documentation is enhanced by additional functions for documenting work packages and work items that are integrated in Focused Build applications such as *My Work Packages* and *My Work Items*. Using these applications together with Solution Documentation, you can do the following:

- Maintain documents related to work packages and work items
- Access and upload documents easily
- Work with your own templates or predefined templates that are based on attributes you have defined. In Customizing, you can determine which document types are permitted at which structure level.
- Create new versions of documents
- Search your processes and find related documents
- Mark documents in the Solution Documentation as relevant for work packages or work items

Related Information

PMO Documentation [page 25]
IT Documentation [page 25]

2.2.1 PMO Documentation

You can store your PMO documentation in SAP Jam or in SAP Work Zone, which enables you to exchange project documentation internally among project members.

The storage structure should be defined by the PMO as it is customer-specific. You can restrict the access to protect customer-sensitive project data, for example, detailed resource scheduling reporting.

For your PMO documentation, you can use PMO templates.

2.2.2 IT Documentation

You can store and maintain your IT documentation in Solution Documentation of SAP Solution Manager.

IT documentation includes the following:

- Documentation, for example, process designs, specifications, test cases, configuration or business test requirements
- Technical objects, for example, transactions, TBOMs, custom codes, background jobs, system configurations, interfaces
- System and software components (SAP and non-SAP), for example, SAP Enterprise Resource Planning, legacy systems.

For all basic documents, you can use predefined templates in SAP Solution Manager.

> **i Note**
>
> After going live, all IT documents to be handed over to the customer are stored in Solution Documentation.

During a project, you create and assign various types of documents in Solution Documentation:

- Prepare and Scope phase
  Create business process models in Solution Documentation.
- Build phase
  - Business Process Model
    - Create functional specifications
    - Create single functional tests (test cases)
    - Assign documents to work packages
    - Create functional integration tests
  - Application Landscape
    - Create technical design or configuration guides.

      > **i Note**
      >
      > Use consistent terminology. The terminology used in these guides should also correspond with the terminology used in related documents (for example, design, or solution proposal) and the terms and definitions in SAP's terminology database, SAPTerm.

    - Assign documents to work items

- E2E process
  - Create E2E integration or user acceptance tests

> **i Note**
>
> To ensure worldwide communication, we recommend that you use English as your documentation language.

Automated Email Notifications for Status Changes of Documents

You can configure automated email notification for specified document types:

If a document is switched to a status defined in Customizing, the document owner or the person responsible for the document are notified by an automatically generated email. In the email, they can use a link to navigate directly to the document in the *My Documents* application.

Related Information

Documenting Work Packages and Work Items [page 26]

2.2.3 Documenting Work Packages and Work Items

You use the *My Work Packages* and *My Work Items* applications to maintain documents related to work packages and work items and assign them to business processes (process diagrams) or other Solution Documentation structure elements.

On the *Documentation* tab page of these applications, you can create, change, and store documents for your work packages or work items in the Solution Documentation structure elements that you assign to the work package or work item. For work packages, the structure element is usually a process or a process step.

The *Documentation* tab page has the following subtab pages:

- *Solution Documentation* - for assigning Solution Documentation structures and maintaining documents
- *KPI Status* - for viewing the current ratings of the document KPIs (if configured)

> **i Note**
>
> The *Documentation* tab page is also available in the following Focused Build apps:
>
> - *My Defect Corrections*
> - *My Requests for Change*
> - *My Change Documents*
>
> You can use the *Documentation* tab to access and change documentation. The *Current Status* subtab for viewing document KPI ratings is not available in these apps.

Prerequisites

- You have configured the documentation function in Customizing for SAP Solution Manager under *Focused Build* > *Documentation* > *Assign Document Types to Tab Pages*.
- You have maintained table `/SALM/SDOC_PRJ` in transaction `SE30`.
- You have started the *My Work Packages* or the *My Work Items* application and you have selected the work package or work item for which you want to create, change, or assign documents.

Activities

Documentation > *Documents*

On the *Documents* subtab page, you can do the following:

- **Assign Solution Documentation structure elements**
  To assign a process, process step, or library element to the work package or work item, choose the *Assign Structures* icon and assign the relevant structure elements in Solution Documentation. For more information, see Assigning Solution Documentation Structure Elements [page 29].
- **Unassign Solution Documentation structure elements**
  You can unassign a process, process step, or library element from the work package or work item in the Solution Documentation. For more information, see Unassigning Solution Documentation Structure Elements [page 30].
- **Move structures in work items**
  You can move structures including assigned documents between work items. For more information, see Move Structures Between Work Items [page 31].
- **Display and change the status of a test step**
  You can display and change the status of a test step from a work package, work item, or defect correction. You can also change the test case categorization. For more information, see Change Test Step Status and Categorization [page 34].
- **Display the documents for the work package or work item**
  In the *Structures* section, select a Solution Documentation structure element assigned to the work package or work item to display the documents stored in this structure element in the *Assignments* table.
- **Create or upload documents and store them in an assigned Solution Documentation structure element**
  If you have assigned a Solution Documentation structure element (process, process step, or interface) to the work package or work item, you can store a new document for the work package or work item. You have the following options:
  - To create a new document, choose (*Create New Document*). Specify the document title, select the document type, and choose *Create*.
    The new document, which is based on the selected document type template, is created and stored in the assigned process structure element.
  - To upload a new document, drag and drop a document file from a local storage to the *Assignments* table. Specify the document type and choose *Create*. The language of the uploaded document is automatically recognized.
  - You can also upload new versions of documents.

- On the *Attachments* tab page, you can attach files, such as image files or document files from a local storage, by using drag and drop. The files on the *Attachments* tab page are stored only locally in the work package or work item, not in Solution Documentation.

> **i Note**
>
> This also applies to the creation of test steps. You can create test steps directly from work packages or work items without having to execute the corresponding transaction in Solution Documentation.

- **Link documents to a work package or work item**

  To use a document that is already stored in another structure element, choose (*Search Documents*). Search and select the document in Solution Documentation and choose *Link Documents*.
- **Assign documents that are already available in Solution Documentation to the work package or work item or cancel the assignment of the documents**
  In the *Assignments* table, you can assign the documents stored in Solution Documentation to the work package or work item or you can cancel an assignment by using the button in the *Assign* column.
- **Edit documents**
  For more information on how to edit documents, see Editing Documents for Work Packages and Work Items [page 32].
- **Change the document status**

  To change the document status, select one or more documents and choose (*Change Document Status*). The document status reflects the processing status of the document, for example, *In Progress*, *Review*, or *Released*. You can prevent further processing of the document by setting the status to *Released*.
- **Maintain and change a document owner or document responsible**
  By default, the person who has created or uploaded a document is the document owner.
  To change the document owner or to specify or change a document responsible for a document, display the columns *Owner ID* and *Responsible ID* in the *Assignments* table. Then select the document and choose the icon for changing the document owner or responsible (*Change Document Owner / Responsible*).
- **Delete documents**
  Once you have deleted a document, it cannot be restored. A dialog warns you therefore if a document is also assigned to another work package or work item. In this case, you have the option to cancel the assignment of the document to the current work package instead of completely deleting the document.

> **i Note**
>
> The traffic light icons in the *Conflict* column of the *Structure* section or the *Assignments* table indicate potential conflicts for assigned Solution documentation structure elements or documents.
>
> By clicking an icon in the *Conflict* column, you can navigate to the Solution Documentation to resolve conflicts for the assigned Solution Documentation structure elements or documents.

Documentation > *Current Status*

On the *Current Status* page, you can check the document KPIs. For more information, see KPI Ratings for Documents in My Work Packages and My Work Items [page 33].

2.2.3.1 Assigning Solution Documentation Structure Elements

On the *Documentation* tab, you specify the Solution Documentation structures that are relevant for the work package, work item, or other Focused Build transaction types. You can assign process steps and other library elements from the Solution Documentation. When you assign structures to a work package, the structures are inherited by the work items contained in that work package. You can also manually assign structures to a work item (not inherited).

Once you have assigned a Solution Documentation structure, you can view, access, and edit the documents stored at this structure directly from the *Documentation* tab. You can also use the *Documentation* tab to create and store new documents at the assigned structures.

1. On the *Documentation* tab on the *Documents* subtab, choose (Assign Structures) to open the *Assign Structures* pop-up window.
2. In the *Assign Structures* pop-up window, search for the Solution Documentation structure elements that you want to assign. To simplify the search, you can expand the hierarchy view or use filters in the list view.

   > **i Note**
   >
   > Observe the following when assigning Solution Documentation structure elements to work packages, work items, or other Focused Build transaction types:
   >
   > - If a Solution Documentation scope has been used to create a requirement, you can select only process/library structures belonging to this scope.
   > - If a requirement addresses several structures from different scopes, these scopes are inherited to the successors (work package and work items).
   > - If a Solution Documentation scope is assigned to a project (in a project header), the selection of a project in a work package can be simplified by using this scope. In this case, the input help for project selection presents only projects with the corresponding Solution Documentation scope assigned and fades out projects with other scope assignments.

3. Select the checkbox next to the assignable elements.
   The Solution Documentation elements that you have selected are displayed below. You can see which Solution Documentation structures have been assigned from which Solution Documentation scope.
4. Save your selection.

To assign a document to a previously assigned structure:

1. Go to the *Documentation* tab, then to the *Documents* subtab.
2. In the *Documents* list, in the *Assign/Unassign* column, choose (Unassign).
   The document is assigned (the icon changes to *).*

You can reassign a work item to a work package in status *Scoping* if the following conditions apply:

- no Solution Documentation elements are assigned to the target work package
- no scope items exist for the target work package

2.2.3.2 Unassigning Solution Documentation Structure Elements

On the *Documentation* tab, you can unassign process steps and other library elements from the Solution Documentation.

Unassign Elements from Work Package (Design Branch)

The following procedure applies to work packages up to status *Scope finalized*. Later, you can change the Solution Documentation scope only in status *Scope extension*. In this status, you can unassign only structures that have been added in this status.

Structures that have been already handed over to a work item cannot be unassigned from the work package anymore. For more information, see **Unassign Element from Work Item** and Move Structures Between Work Items [page 31].

To unassign a Solution Documentation structure and all related documents from a work package in the design branch, do the following:

1. On the *Documentation* tab, on the *Documents* subtab, find the Solution Documentation structure element that you want to unassign.
2. For the structure element that you want to unassign, select the checkbox for *Step for un-assignment* in the list.
3. Choose (Unassign selected structures).
4. The item is removed from the list.

Unassign Element from Work Item

In work items, you cannot unassign structures that were inherited from the work package and created through the particular work item in the design branch. You can unassign only structures that were manually assigned to this work item.

To unassign a Solution Documentation structure and all related documents from a work item, do the following:

1. Go to the *My Work Items* application and choose a work item.
2. Go to *Documentation* > *Documents* and choose (Unassign selected structures).
3. Choose (Assign Structures).
4. In the *Assign Structures* window, select the element for which you want to create an unassignment element.
   - Expand the element.
   - Select a step or process.
   - Choose *Apply*.

   A step for unassignment is assigned to the work item.
5. Select the assigned structure.

6. Choose (Unassign selected structure).

Structures that were manually assigned to a work item (not inherited by a work package) can be removed again. To remove an assigned structure, select it from the list. Choose (Unassign selected structures). The structure is removed from the list.

2.2.3.3 Where Used List in My Work Packages

The *Where Used list* in the *My Work Packages* app allows you to run a search within Solution Documentation content to find out where it is used. This may help to figure out where a particular transaction, process step, configuration unit, etc. is used in a business process.

Use this feature for conversion projects. The detection of transaction assignments to business process content allows deeper integration into the conversion project use case.

2.2.3.4 Move Structures Between Work Items

Move structures between work items. You can move a work item's structure elements including assignments from a source work item to a target work item directly in the source work item. You do not have to access the standard Solution Documentation procedures anymore.

Moving structures is available only between work items. You can access a work item directly from the *My Work Items* application.

Prerequisites

- You have started the *My Work Items* application.
- You have selected a work item.
- The work item contains an assigned structure (for example, a process step).

Procedure

Move a Structure

1. On the *Documentation* tab page, on the *Documents* subtab page, choose a Solution Documentation structure element or process diagram to display the documents stored in the structure element in the *Documents* table.
2. Select the element that you want to move.
3. To open the structure package including assigned documents, choose (Open the structure move popup).

4. In the *Move Structure* window, from the *Target change document* dropdown list, select a target work item.
5. Select the checkbox for the element and drag the element from *Source change document* to the designated *+ Drag and Drop* area. You can also use the navigation arrows > and < to move between source and target.
6. Choose *Next* > *Apply* > *Close*.

Result

The elements are moved to the target work item. The moved structures and assignments are added to the work package of the target work item. The moved content is removed from the scope of the source work item and corresponding work package.

Review and Move Remaining Assignments

When the Solution Documentation was edited directly in the Solution Documentation in context of the work item, the elements are not visible in the general application. Changed structures are not listed in the structure section of the work item, and created or changed documents are not automatically assigned to the work item.

To review and move remaining assignments, do the following:

1. On the *Documentation* tab page, on the *Documents* subtab page, choose *Click here to review and move remaining assignments* link.
2. In the *Move Structure* window:
   - Select a target work item
   - Select the checkbox for the element and drag it to the designated *+ Drag and Drop* area
   - Choose *Next* > *Apply* > *Close*.
3. Navigate to the target work item by selecting it from the *My Work Items* list on the left-side panel.
4. Go to the *Documentation* tab page, then to the *Documents* subtab page.
   In the *Documents* list, check if the moved documents are listed.

2.2.3.5 Editing Documents for Work Packages and Work Items

You can use the *Documents* tab page of the *My Work Packages* or the *My Work Items* application to edit and store documents.

Prerequisites

- You have started the *My Work Packages* or the *My Work Items* application.
- You have selected the work package or the work item.

Procedure

1. On the *Documentation* tab page, on the *Documents* sub-tab page, choose a Solution Documentation structure element to display the documents stored for the structure element in the *Assignments* table.
2. Double-click on a document to download the document file to your computer.
3. Change and temporarily store the document on your computer.
4. Drag and drop the changed document from the local storage to the *Assignments* table.
5. Decide if the changed document is stored as a new version and replaces the existing version or as an additional document:
   - To save the document as a new version and replace an existing version, choose *New Version*.
   - To create an additional document out of the upload, choose *New File*.

2.2.3.6 KPI Ratings for Documents in My Work Packages and My Work Items

Document KPIs determine the following:

- Which types of documents are required for a work package or work item
- Which status the documents/test steps must have in which status of a work package or work item

If document KPIs are configured in the Customizing (IMG), you can check the KPI ratings for the documents of a work package or work item in *My Work Packages* or *My Work Items* on the *Documentation* tab page on the *Current Status* sub-tab page. The *Current Status* sub-tab page has the following sections:

- *KPI Overall*
  This section shows the overall ratings for the document types that are required for the work package or work item.
  If this overall KPI rating is positive for a required document type depends on the principle that has been configured in the Customizing:
  - **Best case principle:** The KPI rating is positive if the rating of at least one document for the required document type is positive. For example, the rating is positive if a test case is required for a work package and there is at least one test case in the correct status available in one of the assigned Solution Documentation structure elements.
  - **Worst case principle**: The KPI rating is positive if the ratings of all documents of a required document type are positive. For example, the rating is positive if a test case is required for a work package and there are test cases with the correct status available in all of the assigned Solution Documentation structure elements.
- *KPI Relevant Structure*
  If several Solution Documentation structure elements are assigned to the work package or work item, you can check the document KPI ratings for each Solution Documentation structure element in a separate *KPI Relevant Structure* section.

If several documents types are available for a document KPI, the column *Document Type* displays the entry *Several Document Types*. You can move your mouse over the entry *Several Document Types* to display the KPI rating for each of the document types in a popover window.

2.2.3.7 Automatic Creation of Required Documents for Work Packages

If you work with document KPIs and have defined which document types are required for a work package, you can activate the automatic creation of required documents.

If this feature is activated, files for the required document types are automatically created and assigned to the relevant Solution Documentation structure elements when you create a work package or when you assign a Solution Documentation structure to a work package. The file names and document titles of the automatically created documents follow the pattern that you have defined for the document types in the Customizing. An automatically created document initially has the status *Draft*.

2.2.3.8 Change Test Step Status and Categorization

Display and change the status of a test step from within a work package or work item.

You can view the status of a test step in the *My Work Packages* application and in the *My Work Items* application. Navigate to the *Documentation* tab page and choose the *Documents* subtab page. The test step status is displayed in the *Documents* list in the *Status* column.

The following statuses are available: *In Progress*, *Copy Editing*, *Review*, or *Released*.

Prerequisites

- You have started the *My Work Items* application or the *My Work Packages* application.
- You are assigned to a work item or a work package.
- You have assigned an object of type *Test Steps <Orig.>* to the work package or work item.

Procedure

> **i** Note
>
> You can change the test step status only for assigned test steps.

1. In the *Documents* list, select the test step for which you want to change the status.
2. Choose (*Change document status*).
   Possible status values are loaded.
3. In the *Change document status* popup, in the *Status* column, choose an item that has an editable status.
   Documents that cannot be edited are grayed out.
4. From the dropdown list, select the status that you want to set for the document.
5. Choose *Change*.
   The status of the document is updated. The *Status change operation* bar turns green and displays *Status change successfully*.

6. When you are finished changing statuses, choose *Close*.
   The changed status value is not visible in the table view for the test step.

Change Test Case Categorization

You can change the test case categorization in the *My Work Packages* application and in the *My Work Items* application. Navigate to the *Documentation* tab page and choose the *Documents* subtab page. In the *Assignments* table, the categorization is not displayed. You have to select test steps and change / add the categorization to see entries that are already assigned.

To change the test case categorization, do the following:

1. In the *Assignments* list, select the checkbox for the document or Test Steps.
2. Choose (Change Test Case Categorization).
3. In the *Change the test case categorization* popup, from the *Category* dropdown list, select one or more categories.
4. Choose *Change*.
5. When you are finished changing categorizations, choose *Close*.

2.2.3.9 Related Documents in Focused Build

There is a method and numbering of displayed related documents for an allowed structure type.

Independent of the branch, the attribute panel in the related document area shows the following items:

- Incidents (standard)
- Request for change (standard)
- Change documents (standard)
- Request for Change (Focused Build)
- Change Documents (Focused Build)
- Requirements (Focused Build)
- Work Packages (Focused Build)
- Work Items (Focused Build)

Method and Counting

Request for Change and *Change Documents* in Focused Build are entries counting the number of Focused Build-specific requests for change and related change documents. These two entries are available in all branches and count the number of Focused Build-specific request for change and change documents for the relevant structure.

As soon as the number of counted requests for change or change documents is more than zero, the link to the *Mass Change* transaction becomes active.

Requirements

This entry is shown in all branches. Due to the Focused Build methodology, you can create a requirement for a relevant selected structure only in the **design branch**.

The displayed number of requirements depends on the selected branch:

- **Design branch**: As the design branch is the main working area for requirements, all requirements assigned to a structure are counted and displayed in the *Requirements Management* app. In this app, you can create new or process already existing requirements. You can also create new or assign already existing work packages.
- **Development branch**: All requirements with at least one work package in status *In Development* or higher.
- **Production branch**: Sum of all available requirements for a selected structure.

Work Packages

This entry is shown in all branches. However, the number differs depending on the selected branch:

- **Design branch**: All work packages in a status before *In Development*, that is, without assignments in the development branch in status *Scope Extension*
- **Development branch**: All work packages in status *In Development* or later, that is, with assignments in the development branch
- **Production branch**: Sum of all available work packages

Work Items

This entry is shown in the development and production branch:

- **Design branch**: No work items
- **Development branch**: All work items
- **Production branch**: Sum of all available work items

2.2.4 Solution Documentation - My Documents

You can use the *Solution Documentation - My Documents* application to manage the documents for which you are the owner or which you last changed.

When starting the *Solution Documentation - My Documents* application for the first time, you have to select the solution for which you want to maintain documents. *My Documents* has to tab pages: *Owned by Me* and *Processed by Me*.

Owned by Me

The *Owned by Me* tab shows all documents that you have created or for which you have been assigned as the owner.

> **i Note**
>
> You can assign a document owner for a document on the *Documentation* tab of *My Work Packages* or *My Work Items*.

Choose a document to view all active versions of the document in all branches. You can do the following:

- Download selected document versions
- Upload new document versions on branches without change control
- Change the status of document versions on branches without change control
- Navigate to the Solution Documentation

Processed by Me

The *Processed by Me* tab shows the documents that have been last changed by you on a selected branch.

Select a branch to view all document versions last changed by you . You can do the following:

- Download selected document versions
- Upload new document versions on branches without change control
- Change the status of document versions on branches without change control
- Navigate to the Solution Documentation

2.2.5 Displaying Deleted Documentation Objects in a Work Package or Work Item

You can display deleted structures and documents (including test steps) for the following already finished objects:

- Requirements (just documentation structure assignments)
- Work packages
- Work items
- Requests for change
- Change documents
- Defect corrections

As a prerequisite, the objects must have a final status, and the process structure and/or process documents must have been deleted.

The assigned structure that has been deleted in the meantime is marked with *Structure deleted* in the relevant object in the structure assignment area of the column branch.

> **i Note**
>
> As soon as you delete the assigned structure, it is no longer possible to navigate to the solution documentation.

Documents and test steps that have been assigned directly to the deleted structure are displayed and marked with *Assignment deleted*.

However, the link to the document is still active. Once you choose the link, the system opens the document version that was valid for the work package or work item when it was released to the productive branch (the historical version of the document is displayed with a time stamp not older than the completion time of the work package or work item).

This document/test step display behaviour applies to all work packages and work items with final status.

2.2.6 Documentation Reporting Dashboard

You use the *Documentation Reporting Dashboard* to report on the readiness from the business process perspective.

This application is available on the following launchpad groups:

- Solution Architect
- Business Analyst
- Project Manager

On the *Documentation Reporting Dashboard* landing page, select a solution, a branch, and a scope. The selection initiates the calculation of the following cards:

- The number of requirements, work packages, and work items in the *Business Process Readiness* reporting card
- All created, changed or deleted structures in the *Design Branch Consistency* card (for the selected design branch)

Business Process Readiness

The *Business Process Readiness* card displays the number of requirements / work packages and work items being currently implemented in the current wave (development branch) or numbers for future waves (design branch). You can readjust your settings here. The results can be filtered based on selected business processes from a preselected scope. If you select a set of business processes, the result list is adjusted to just the requirements, work packages, and work items that refer to the selected process structures.

The *Business Process Readiness* page is divided into the following areas:

- Selection area: filter for *Solution*, *Branch*, *Scope*, *Process*, and *Structure Attribute / Values*
  You can define which structure attribute / value of business process content is relevant for the report result. Example: You want to see all requirements and work packages assigned to business processes where a certain user is assigned as responsible. You can combine the filter with another standard (country or site) and customer structure attributes.
- Change the pie chart logical operator:
  - *OR*: The selection of the pie chart value doesn't have effect on the other pie charts. You can select different status values to match other pie charts. This is the default setting.
  - *AND*: The first selection for one pie chart leads to changes to displayed status values of the remaining two pie charts showing just dependent status values.

> **Example**
>
> For the development branch, you select the status *In Development* from the work package chart. The pie chart for requirements shows only the status value *In Realization* while the work item chart shows the status values *Created*, *In Development*, etc.

- Graphical area: shows the interactive pie charts for *Requirements*, *Work Packages*, and *Work Items*.
- Overview area: The *Overview* shows all filtered requirements with the corresponding work packages and work items (if they exist already). The result table displays additional information such as:
  - Current standard KPI status
  - Document title that is used for the KPI calculation (as well as document type and document type description)
  - Project/wave/sprint information for appropriate objects

> **Note**
>
> The selection of valid values for structure attributes is restricted by the selected scope. Only attribute values used in the scope are proposed for filtering.

> **Note**
>
> The dashboard displays requirements, work packages and work items that have Solution Documentation assignments in the selected branch, scope, process, and attribute filter in blue. Additional requirements, work packages and work items that do not fulfill these filter conditions are displayed in grey. This includes predecessors or successors of those in blue and those that meet the status filter that you have selected first in the pie chart.

Additional Functions

- Download the list as an Exel file .
- Change *View Settings* :
  - Add or remove columns.
  - Sort by individual columns.
  - Group the items within a column.

> **Note**
>
> Requirements, work packages, and work items are not considered in this dashboard after their corresponding structure has been fully deleted.

Structure and Document History

Use these two reports to detect changes to the process structure or to documents assigned to the structure. The reports shows when new processes/documents are added or changed for a better overview of the changes.

The *Structure History Report* page is divided into the following areas:

- Selection area: filter for *Solution*, *Branch*, *Scope*, and *Changed By*
- Structure History overview: shows the table with filtered results

The *Document History Report* page is divided into the following areas:

- Selection area: filter for *Solution*, *Branch*, *Scope*, *Document Group* and *Changed Since*
- Document History overview: shows the table with filtered results

Additional Functions

- Download the list as an Exel file .
- Change *View Settings* :
  - Add or remove columns.
  - Sort by individual columns.
  - Group the items within a column.

> **i** Note
>
> The branch selection for these reports only considers the structure available in the selected branch, not the exclusive changes in it. The results area is always shown for the whole solution.

Design Branch Consistency

Use this report to detect structures and process steps that are not assigned to a requirement or a work package. You can identify structure differences between the design and development branch and create work packages to integrate them into the development process.

This page is divided into the following areas:

- Selection area: filter for *Solution*, *Branch*, *Scope*, and *Process*
- Graphical area: shows the pie chart for *Change Status*
- Overview area: shows the table with filtered results

Documentation Release Check

Use this report to mass check that the process documentation connected to work items has no issues. This check can be performed for a release, project, wave, or sprint. For work items with incorrect documentation, you can create email notifications to inform the person responsible.

This page is divided into the following areas:

- Selection area: filter for *Release*, *Work Item Status*, *Project*, *Wave*, *Sprint*, and *Development Team*
- Work Item overview: shows the table with filtered results

2.3 Modeling Business Processes in Solution Documentation

You use the Solution Documentation to model your business processes.

The Solution Documentation of SAP Solution Manager integrates SAP Project and Portfolio Management as well as Change Request Management of SAP Solution Manager. You use the Solution Documentation to document your core business processes and the system landscape. In Focused Build projects, the Solution Documentation links your business process models and application landscape to requirements, work packages, and documentation.

During a discovery workshop, you do the following:

- Create process definitions
  A process is a set of logically related activities and executes functions in systems to achieve a business goal. You create new processes in the column browser of the Solution Documentation.
- Create process diagrams
  The graphical process editor of the Solution Documentation provides process diagrams based on the Business Process Model and Notation (BPMN) for all business processes in your business process model. For more information about BPMN, see http://www.bpmn.org .
  For each process definition, you can create multiple process diagrams representing different perspectives on the process. For example, you can organize diagrams by participant role or by system. You can publish your process models for feedback.

  > **i Note**
  >
  > There is a comprehensive description available for the graphical process editor at https://help.sap.com/solutionmanager in the application help of SAP Solution Manager ▶ *Process Management* ▶ *Solution Documentation* ▶ *Modeling* ▶ *Process and Collaboration Diagrams* ▶.

- Document the application landscape
  The application landscape is a description of the most important applications that are part of the implementation scope.
- Create Solution Documentation libraries (optional)
  You can create libraries for re-use content, such as process steps.

2.4 Managing Releases

2.4.1 Release Management - Release Planning

In Focused Build, release managers can use the *Release Management - Release Planning* tile on the SAP Solution Manager launchpad to prepare the releases for a release component and switch the release phases.

By choosing the *Release Management - Release Planning* tile on the SAP Solution Manager launchpad, you access release planning functions of Focused Build in the WebClient UI.

Planning Releases

To plan a release, you do the following:

1. Create and define major and minor releases for a release component.
2. Define the scheduling for the major release.
3. Create a release cycle for the major release.
4. Switch the release cycle to the prepare phase.
5. Create and activate a task list for the release cycle.

For more information, see the Focused Build Configuration Guide at https://help.sap.com > *Focused Build for SAP Solution Manager*.

Switching Release Phases

You can use *Release Management - Release Planning* to switch the release phases:

1. In the application, open the release.
2. Choose *Action* and select the relevant option.

A Focused Build release cycle has the following phases:

- Created
- Prepare
- Build
- Test
- Deployment preparation
- Deployment
- Hypercare
- Operation
- Completed

After the testing phase, you switch the release to the deployment phase before you can import the changes (the work items that have been created and tested during the project) into the production branch.

Handling of Open Defect Corrections

When you try to set a release to the *Deploy* phase, there's an automatic check whether all defect corrections with priority 1 or 2 (high priority) that were created for the Functional Integration Test or Regression Test have the status *Handed over to Release*. Otherwise, the release cannot be switched to *Deploy* and cannot go live.

When you set a release to the *Hypercare* phase, open defect corrections with priority 3 or 4 (medium/low priority) and all other open change documents (together with the related work packages) are automatically reassigned to the next release or wave.

> **i Note**
>
> The *Early Reassignment* option available in Customizing enables you to automatically reassign open change documents to the successor release or wave already when the release is switched to the *Test* phase. This is valid only for change documents that have not reached status *Handed over to Release*.
>
> For the *Early Reassignment* option, navigate to Customizing for *SAP Solution Manager* > *Focused Build* > *Release Management Configurations* > *Define Release Management Settings*.
>
> 1. Choose the *Define Release Profile Mapping* activity.
> 2. Choose a landscape.
> 3. Choose *Details*.
> 4. Select *Early Reassignment*.

> **i Note**
>
> The *Cross Project Reassignment* option available in Customizing enables you to automatically reassign open change documents to the successor wave/release of a project different than the current one. Only change documents that have not reached status *Handed over to Release* can be reassigned to a successor release. With this option activated, an additional popup will appear where you can choose the target project and wave.
>
> For the *Cross Project Reassignment* option, navigate to Customizing for *SAP Solution Manager* > *Focused Build* > *Release Management Configurations* > *Define Release Management Settings*.
>
> 1. Choose the *Define Release Profile Mapping* activity.
> 2. Choose a landscape.
> 3. Choose *Details*.
> 4. Select *Cross Project Reassignment*.

2.4.2 Release Batch Import - Scheduled Jobs

The *Release Batch Import – Scheduled Jobs* app helps you to monitor scheduled batch jobs of your release batch import variants.

The app provides an overview of all recurring import jobs. Selecting jobs from the scheduled job list allows you to:

- Change the job name
- Change the *Minutes until Auto Restart*
- Delete jobs

You can export the current job list as a spreadsheet. To do this, choose *Export to Spreadsheet*.

> **i Note**
>
> The system displays only scheduled jobs for import variants that have the *Enable Automatic Rescheduling* option selected in the scheduling options. To enable this setting, do one of the following actions:
>
> - Open transaction `SE38` and execute program `/SALM/BATCH_IMPORT_TRIGGER`.

- Open the *Release Batch Import - Trigger* app.

2.4.3 Release Batch Import - Trigger

The *Release Batch Import – Trigger* app helps you to schedule an import, based on the Customizing settings.

> → Tip
>
> The in-app help provides help for the *Release Batch Import - Trigger* app. You can display the in-app help by choosing the ⓘ icon.

This app provides the same functions as the report `/SALM/BATCH_IMPORT_TRIGGER`.

Selection

General Options

- *Use Release Selection*
  You can specify the releases for the selection of change documents and the corresponding transport requests.
- *Use Task List Selection*
  Specifies the task list for the selection of change documents and the corresponding transport requests.
- *Import into Production Systems*
  If you select this checkbox, you confirm that the current run is to import into the productive system.
- *Import Variant*
  Specify the scheduling variant to be evaluated in the run. Imports are triggered as required.
- *Allow Transports of Task Lists Without Change Assigned*
  Transports without change document assignment are also determined (for example, transports created directly via the task list).
- *Test Mode (No Import)*
  The current run shows the transports that are determined with the current settings and screen parameters. No import happens if this checkbox is selected.
- *Process Only Test Transports*
  Only test transports (transport of copies) are to be imported for the transport selection.

E-Mail Notification

- *Enable E-Mail Notification*
  Determines if an e-mail is to be sent in case of import errors.

Scheduling Options

- *Enable Automatic Rescheduling*
  Reschedule jobs automatically.
- *Name of Job*
  In case of a re-schedule, the release batch import job is run again with the job name that has been entered. You can monitor this through the Job Scheduler (transaction `SM37`).

> **Note**
>
> The time for completing the whole run of the release batch import is calculated. This prevents overtakes.

Check Options

- *Enable Downgrade Protection*
  Activates the downgrade protection for the transports that are in the import selection from the Release Batch Import job.
- *Transport-Related Check Framework*
  Uses the transport-related check framework for the downgrade protection check.
- *Legacy DGP Check*
  Uses the legacy downgrade protection check.
- *Skip Downgrade Transports*
  When a downgrade is detected, the release batch import job stops running and the user is requested to correct this. You can import all the other transports that are not involved in the detected downgrade.

  > **Note**
  >
  > This does not work if a productive system is detected as the target system.

- *Enable Relation Checks*
  Enables checks for predecessor documents that are in the import selection from the release batch import job.
- *Check Change Doc. Predecessors*
  Checks that the predecessors of change documents that are included in the import selection are also in the import selection of the Release Batch Import job and ready to import. This option looks for the predecessor of the single change document in one work package.
- *Check for Complete WP Import*
  Checks that the predecessors of all change document in a work package are also in the import selection of the release batch import job.
- *Check Work Package Predecessors*
  Checks that the work package has predecessors and that these are also in the import selection.

> **Note**
>
> You can save a page variant to access your settings in the filter or the content area.

2.4.4 Release Batch Import – Log

The *Release Batch Import – Log* app helps you to monitor run batch import jobs. The log data that is provided here is restricted to a 10-day period that you can select.

The table view on the landing page shows an overview of the run batch import jobs (`SLG1`) of your chosen 10-day period. For each batch import log, information is provided about:

- *Date*

- *Time*
- *User*
- *Number* (of messages)

Each log entry in the table view is color-coded:

- Green = ok
- Yellow = warning
- Red = error

By choosing a log of a specific date in the table view, you can access more detailed information.

You can export log entries to an Excel spreadsheet.

> **i Note**
>
> You can *Re-Run* or *Delete* the automatic status setting job that was triggered by the batch import job. Use transaction `SE38` and execute program `/SALM/BATCH_IMPORT_STAT_BUFFER`.

2.4.5 Release Dashboard

As a release manager, you monitor the progress of a release or continual cycle with the *Release Dashboard*.

To use the *Release Dashboard*, you must have defined the KPIs and other settings in the Customizing (IMG) for *SAP Solution Manager* > *Focused Build* > *Dashboard Configurations* > *Release Dashboard Customizing*.

On the entry screen of the *Release Dashboard*, you select a change control landscape and a release or continual cycle to get an overview of the current status of this release or continual cycle on various cards.

In some cards, you can open a detailed view. You can use the breadcrumb navigation to switch between the detail view and the dashboard.

> **→ Tip**
>
> The in-app help provides help for the *Release Dashboard* app. You can display the in-app help by choosing the ⓘ icon.

The *Release Dashboard* displays the following information for the selected release or continual cycle:

Cards on the Release Dashboard

Card	Content
System Landscape	The number of systems related to the release or continual cycle Choose this card to get an overview of the number of work packages, work items, defect corrections, or transports related to the systems. You can also make settings to display additional columns. Choose a number in the table to display details of the work packages, work items, defect corrections, or transports in a separate view. Only work packages, work items, and defect corrections are shown that contain transport requests.

Card	Content
Transports	The number of transport requests related to the release or continual cycle In the *Transports* view, you can display an overview table of the transport requests related to the release or continual cycle. Optionally, you can specify additional selection criteria, such as the development teams or specific systems. To check and edit a transport request in Transport Organizer (transaction `SE09`), choose the transport ID in the search results table.
Work Packages	The number of work packages related to the release or continual cycle In the *Work Packages* view, you can display an overview table of the work packages related to the release or continual cycle. Optionally, you can specify additional selection criteria, such as the development teams or specific systems. You can do the following: • To check the rating details of work package, choose the overall rating of a work package. This opens the *Status Details* view, which displays the ratings for the testing, the document, transport rating details, and other status details for the work package. • To navigate to a work package in the *My Work Packages* application, choose the work package ID in the table.
Work Items	The number of work items assigned to the work packages for the release or continual cycle In the *Work Item* view, you can display the details of the work items assigned to the work packages related to the release or continual cycle. Optionally, you can specify additional selection criteria, such as the development team or specific systems. In the table, you can choose work item IDs to open the work items in the *My Work Items* app or you can select several work items and change them in the *Mass Change Operations* app.
Defect Corrections	The number of defect corrections related to all releases or continual cycles of the release component In the *Defect Corrections* view, select at least one release or continual cycle to display an overview table of the defect corrections related to the releases or continual cycles. Optionally, you can specify additional selection criteria, such as the development teams or specific systems. To view or edit the details of a defect correction in the *My Defects* application, choose the Object ID of the defect correction in the search results table.
FB Requests for Change	The number of requests for change Choose this card to get an overview of all FB requests for change.

Card	Content
FB Changes	The number of changes Choose this card to get an overview of all FB changes.
Teams	The number of development teams, test teams, and support teams working on the releases or continual cycles Choose this card to check the number of work packages, work items, defect corrections, transports, test packages or test plans, or all documents per team in a table. You can also make settings to display additional columns. Choose a number in the table to display details of the work packages, work items, defect corrections, transports, test packages or test plans, or documents in a separate view.
Transports Without Assignment	The number of the transport requests that are not assigned to work items In the *Transports Without Assignments* view, you can display an overview table of the transport requests without assignment to a work item in the selected release or continual cycle.

> → Tip
>
> In views in which you define selection criteria, you can save the selected criteria as a variant that you can use again later.

In views in which you can select several criteria, you can choose *Selection Summary* to expand a diagram displaying the numbers of work packages, work items, transports, and other data for the selected release or continual cycle.

2.5 Managing Projects

Project managers can use the *Project Management - Focused Build Projects* application and the project management functions of SAP Portfolio and Project Management (SAP PPM) integrated in SAP Solution Manager to plan and maintain projects.

Project Management - Focused Build Projects

The *Project Management - Focused Build Projects* application is designed for planning and scheduling Focused Build projects. You can perform all essential project management activities with this application. For some advanced activities, for example maintaining relationships between project elements, you navigate directly to the standard Project Management UI in SAP Solution Manager.

For more information about this application, see Project Management - Focused Build Projects [page 51].

→ Tip

The in-app help provides help for the *Project Management - Focused Build Projects* app. You can display the in-app help by choosing the ⓘ icon.

Project Management in SAP Solution Manager

SAP Solution Manager is integrated with the project management functions of SAP Portfolio and Project Management (SAP PPM). You can access the standard Project Management UI by choosing *My Projects* on the SAP Solution Manager launchpad. In Focused Build, the standard Project Management UI is extended by additional functions, such as the integration of risk management and test management and the linking with related work packages.

The projects are structured in phases, project tasks and subtasks, and milestones. In the Focused Build project templates, the waves and sprints are task types and the quality gates are a milestone type. When you open a project in the Project Management UI, you can see the project structure in the *Structure - Detail* view. There you can edit the structure of a project by adding, deleting, or moving the project elements and you can select and edit individual project elements.

If you have opened a project in the standard Project Management UI, you can choose *Open in UI5 App* to view the same project in the *Project Management - Focused Build Projects* app.

Activities

For Focused Build projects, you perform the following activities:

- **Create projects**
  To create a project, you have three options:
  - By template
  - By user input
  - By using the *Easy Project Setup*

  For more information, see Creating Focused Build Projects [page 53]
- **Assign build projects to main project**
- **Edit project structures**
  You adapt the preconfigured project structure to the actual project scope by adding or deleting waves, sprints, or milestones. For more information, see Adjusting the Project Structure for Waves and Sprints [page 58]
- **Assign releases to the projects**
  You assign a release component and a release to a project and you specify the releases in which the waves are implemented. For more information, see Assigning Projects and Waves to Releases [page 56].
- **Schedule project tasks and milestones**
  You can schedule individual project dates manually.
- **Release your projects**

When you release a project, the work packages assigned to the project can be processed. Only when the project is released, is the project data visible in the Solution Readiness Dashboard and other dashboard applications of Focused Build.

- **Manage risks and issues**
  For more information, see Managing Risks and Issues [page 65].

You can also do the following in the standard Project Management UI:

- **Create and maintain relationships between project elements**
  You can map the dependencies between the project elements by configuring predecessor and successor relationships for each project task or milestone on the *Relationships* tab page of the *Detail* view of the standard Project Management UI. For example, you can configure that a specific quality gate has to be finished before a new project phase starts.
- **Include work packages in the project structure**
  You can display the work packages assigned to the project and you can add the work packages as project tasks to the project structure. For more information, see Adding Work Packages to the Project Structure [page 67].

Related Information

Solution Readiness Dashboard [page 68]

2.5.1 Project Templates and Project Types

To create a new project, you select a project type and template.

A project template generates the basic project structure with project phases, project tasks, quality gates (Q-gates) and other milestones. A project template contains the typical workflow of a project. You can adapt the project structure as needed.

There are templates for the following Focused Build project types:

- Focused Build single project
  You use Focused Build single projects if you want to manage all tasks in one project.
- Focused Build main project
  You use Focused Build main and build projects for larger projects that are implemented by several teams. The main project defines the timeline and overall schedule for the project.
- Focused Build build project
  Build projects can run in parallel and can be implemented by different teams, for example, you can set up build projects for different systems.
- Focused Build maintenance project
  A Focused Build maintenance project is a project that is used for correcting errors. It has only a single wave with a single sprint.

> **i Note**
>
> The Focused Build maintenance project type is obsolete. It is recommended to use the Fix Pace process instead. For more information, see Fix Pace [page 111].

2.5.2 Project Management - Focused Build Projects

You can use the *Project Management - Focused Build Projects* application for planning and scheduling Focused Build projects.

You can start *Project Management - Focused Build Projects* from the SAP Solution Manager launchpad. The application has a landing page and a project view.

Landing Page

On the landing page, the projects are displayed in the project list. To find specific projects, you can specify selection criteria in the filter bar and choose *Go*.

> → Tip
>
> You can also mark projects as favorites and then use the *Favorite* filter to display only the projects that you have marked as favorites.

On the landing page, you can do the following:

- Create projects.
- Assign build projects to main projects.
- Add build projects to existing synchronized main projects.

  > i Note
  >
  > With report `/SALM/FB_PROJECT_SYNC`, you can do the following:
  >
  > - Enable synchronization between existing Main and Build Projects for new Waves
  >
  > - Disable synchronization between projects
  >
  > - Perform housekeeping for synchronization data
  >
  > For more information, see the detailed documentation in the report view under ⓘ.

- Open the project view for a project.

Creating and Using Variants

Filters for the project status values *Created*, *Locked*, and *Released* are predefined in the delivered *Standard* variant.

You can save the filter settings of a search as a variant:

1. Set the filters and run a search.
2. Choose the variant switch.
3. Choose *Save As*.
4. Enter a name for the variant.

To use a variant, choose the variant switch and select the variant.

Project View

You edit and schedule a project in the project view. To open the project view for a project, on the landing page in the project list, choose the project ID or project name.

The project view contains the following features:

- Tree view and table view
  The **tree view** of the project structure contains the project elements, that is, the waves, sprints, and milestones of the project. The **table** next to the tree view contains fields for the start dates, the end dates, and sort numbers of the project elements that are used to schedule the project. Other fields contain information about the releases and the work packages and work items assigned to the project elements.
- Gantt chart
  The Gantt chart visualizes the scheduling of the project elements on a timeline. In the Gantt chart of a main project, you can expand (or collapse) the structure for the underlying build projects and edit the related dates and project details.
- *Details* pane
  The *Details* pane contains basic information about the project or the project element.
  To open the *Details* pane for the project or for a project element, such as a wave or a sprint, in the tree view, select the header row or select the row of the respective project element and then choose the *Details* button.
  In the *Details* pane, you can do the following:
  - Assign a release to the project and the waves.
  - Set the severity.
  - Maintain details, such as the name and a description.
  - Assign or change the person responsible for the project by first choosing the responsible role and then the responsible resource. To unassign a responsible resource, click on the ⊗ icon (clean) left in the field.
- Link to the **Solution Documentation**
  You can open a window to view the solution, the branch, and the change cycle of the release component assigned to the project. From there, you can directly navigate to the solution, branch, and change cycle in the Solution Documentation.
  If you have already assigned the project to a release and thereby to a solution and a branch, you can assign public scopes defined in the Solution Documentation to the project.
- *Work Packages* and *Work Items*
  You can navigate to the related work packages or work items in the *Mass Change Operations* app.
- *Risks*
  You create risk documents for the project.
- Link to the project in the Project Management UI of SAP Solution Manager
  Choose the project ID to navigate to the standard Project Management UI of SAP Solution Manager if you want to use advanced functions.
- Open the *Solution Readiness Dashboard*
  You can open to the *Solution Readiness Dashboard* to check the status of the project.

2.5.3 Creating Focused Build Projects

Context

You can create projects on the landing page of the *Project Management - Focused Build Projects* application. To create a project, you have three options:

- **By template**
  You select a Focused Build project template that is suitable for the project type. A project template contains a basic project structure of phases, waves, sprints, and milestones. For more information about Focused Build project templates, see Project Templates and Project Types [page 50]
- **By user input**
  You can create projects on the fly by providing the most important input data, such as project type, start date, number of waves / sprints, and project language. Moreover, the detailed schedule can be maintained manually.
- **By using the Easy Project Setup**
  With this wizard, you can create a synchronized schedule that has the same duration and timing for all waves, sprints, and related Q-gates or milestones, choose *Easy Project Setup*. For more information, see Easy Project Setup [page 54].

If you want to create a project with an individual schedule - either by using a template or by providing your own input, follow the steps described below.

Procedure

1. On the landing page of *Project Management - Focused Build Projects*, in the tool bar, choose *Create Project*.
2. Choose *Create Project By Template* or *Create Project by User Input*.
3. Enter the project details.

   > **i** Note
   >
   > For more information about Focused Build project templates, see Project Templates and Project Types [page 50].

4. Choose *Create*.

Results

On the landing page, you can use the filters in the filter bar to find the newly created project. By choosing the project ID or project name you can open the project view.

Next Steps

- Assign a release to the project.
  For more information, see Assigning Projects and Waves to Releases [page 56].
- Release the project.
  To release the project, change the status of the project in the *Details* pane.
  Only when the project is released, it is visible in the *Solution Readiness Dashboard* and you can assign work packages to the project. You can also lock, complete, or cancel the project.
- Assign the work packages to the waves of the project. To assign work packages, you use the *Work Package Management* application. For more information, see Defining Work Package Details [page 85].
- Adapt the project structure by adding waves or sprints to an existing project or by deleting them. For more information, see Adjusting the Project Structure for Waves and Sprints [page 58].

2.5.3.1 Easy Project Setup

Easy Project Setup is a guided procedure to set up Focused Build projects.

Context

You use the *Easy Project Setup* procedure to synchronously schedule multiple main projects, build projects, or single projects.

Easy Project Setup provides the following:

- Agile project approach: Timing of sprints, waves, and phases
- Timing of Q-Gates and milestones
- Creation of projects and release assignment
- Wave / release number assignment
- Project naming and creation for main/build projects
- Option to create main/build projects as synchronized projects

> **i Note**
>
> With report `/SALM/FB_PROJECT_SYNC`, you can do the following:
>
> - Enable synchronization between existing Main and Build Projects for new Waves
>
> - Disable synchronization between projects
>
> - Perform housekeeping for synchronization data
>
> For more information, see the detailed documentation in the report view under ⓘ.

If you want to create an individual schedule, you can use the manual approach. On the landing page of the *Project Management* app, choose *Create Project*. For more information, see Creating Focused Build Projects [page 53].

Prerequisites

- You have defined a change control landscape.
- You have defined releases and assigned them to a change control landscape.

Procedure

The procedure consists of several steps. In the *Easy Project Setup* wizard, you can see the current step and navigate between steps using the navigation bar at the top of the window. You can adjust the displayed default values to your needs.

1. On the landing page of the *Project Management* app, choose *Easy Project Setup*.
   The *Easy Project Setup* wizard opens.
2. On the *Agile Project Approach* tab page, you define sprints, waves, and phase durations.
3. On the *Q-Gates and Milestones Approach* tab page, you define the following:
   - Timing of Q-gates related to phase or wave end dates
   - Timing of milestones related to wave and sprint timeframes
4. On the *Creation of Projects and Release Assignment* tab page, you define the following:
   - Project start date
   - Project type: Choose to create a *Main Project* with multiple build projects or one *Single Project*.
   - Number of parallel build projects
   - Choose the *Synchronized date / status update via Main Project* option if you want to enable synchronizing of status, dates, and sorting number of projects, phases, and tasks between the main project and its related build projects.

     > **i Note**
     >
     > This update process works only in one direction – from main project to build projects – and only takes place after saving the main project. Synched projects are marked with 品 in the project list on the landing page and in the detail view.

   - Release
5. On the *Wave / Release Number Assignment* tab page, you can assign dedicated releases per wave. Check if *Project Waves / End Date* is consistent with the *Release Go-Live Date*. You can adjust either the wave schedule in the wizard or the release schedule in *Release Planning*.
6. On the *Project Naming and Creation for Main/Build Projects* tab page, you define the following:
   - Project IDs and project names of your projects
   - Main language and additional language for your projects (optional)
7. To start the project creation and scheduling, choose *Create Projects*.

2.5.4 Assigning Build Projects to Main Projects

Context

You assign build projects to main projects on the landing page of the *Project Management - Focused Build Projects* application.

Procedure

1. On the landing page of *Project Management - Focused Build Projects*, in the filter bar, specify search criteria to find your main project.
2. In the result list, select the main project.
3. In the tool bar, choose *Assign Build*.

   A window with the available build projects opens.
4. Select the build projects that you want to assign to the main project and choose *Assign*.

> **i Note**
>
> This procedure also works the other way around: You can also select a build project and assign a main project to it.

2.5.5 Assigning Projects and Waves to Releases

Assign the project as a whole to a change control landscape. You can then assign the waves of the project to specific release numbers.

Context

> **i Note**
>
> You must assign a project to a change control landscape and the waves to a release number before you can set the project status to *Released*. Once a project is in status *Released*, it is ready for you to assign work packages to it, but in consequence, you cannot change the assignment of the change control landscape anymore. The assignment of a wave/release can also be changed later depending on the status of the release number.

When you assign a release to your project, you determine the following:

- You link the project to a change control landscape, which means the systems and applications of a solution that should get the same release schedule planned via various release numbers/cycles.

- The change control landscape automatically links the project to a solution and branch.

When you have assigned the project to a change control landscape, you can assign the waves of the project to specific release numbers.

Procedure

1. To open the project view, choose the project name on the landing page of *Project Management - Focused Build Projects*.
2. To switch to edit mode, choose the edit icon in the toolbar.
3. To open the dialog for assignment of change control landscape and release numbers, choose the *Solution/Release Assignment* button.
4. In the dropdown list of the filed change control landscape, select the relevant entry.
5. In the *Wave* list you can now assign the right release number to each wave.

   The dialog ensures that higher waves can't be assigned to lower release numbers to ensure a consistent sequence.
6. To save your settings, close the *Solution/Release Assignment* dialog and choose the save icon in the toolbar.

   Check the *Save* column next to the project name in the tree view: A warning icon is displayed in the Save column if the settings have not yet been saved.

Results

By selecting a change control landscape for your project, you have also permanently linked the project to a solution, a branch. The assignment of the release number to a wave can be changed.

2.5.6 Scheduling Projects

Context

Using the *Project Management - Focused Build Projects* app, you schedule the project as a whole and the individual project tasks.

When creating a project in *Project Management - Focused Build Projects*, you specify a start and an end date for the project. You can change these dates in the project view. Here you also specify dates for the start and end date for project phases, waves and sprints, and milestone dates. In the project view, the dates that you have scheduled manully are displayed in black. Dates that have been calculated by the app are displayed in gray. Only the manually scheduled dates are used in Focused Build, for example, for KPI ratings.

> **i Note**
>
> You must adjust all dates manually. The dates for project tasks that are superior or subordinate in the project structure are not automatically adjusted if the data of superior or subordinate project tasks changes. For example, if you postpone a wave, the dates for the sprints or milestones of the wave are not automatically adjusted.

> **i Note**
>
> If you want to benefit from automatic update synchronization between main project and build projects, you should use the *The Easy Project Setup* wizard. For more information, see Easy Project Setup [page 54].

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. In the project view, activate the edit mode by choosing the edit icon in the tool bar.
3. To display the table next to the tree view, hide the Gantt chart.
4. In the table next to the tree view, use the fields in the *Start Date* and *End Date* columns to change projects dates:
   - To change the start or end date of the project, select the top node of the tree view (the project name) and change the dates in the *Start Date* or *End Date* column.
   - To change the dates for a project phase, a wave or a sprint, select the wave or sprint in the tree view and change the dates in the *Start Date* or *End Date* column.
   - To change a milestone date, select the milestone in the tree view and change the date in the *End Date* column.
5. Save your changes.

   Check the *Save* column next to the project name in the tree view: If the settings have not yet been saved, a warning icon is displayed in the *Save* column.

2.5.7 Adjusting the Project Structure for Waves and Sprints

The project template defines the project structure with phases, waves, and sprints. You can adjust this structure by adding or deleting waves and sprints. You can adjust the project structure as follows:

- Creating waves and sprints from scratch to be added to an existing project. For more information, see Creating Waves and Sprints to be Added to the Project Structure [page 59].
- Copying existing waves and sprints to the project structure. For more information, see Copying Waves and Sprints to the Project Structure [page 60].
- Deleting waves and sprints. For more information, see Deleting Waves and Sprints from the Project Structure [page 61].

> **i Note**
>
> For the *Realize* phase, it is important to keep the default structure and only add new waves, sprints, or add common tasks at any existing structure level. Manually modifying the structure could impact the general Focused Build integration scenario Requirements-to-Deploy. For reference, the default structure with project element types:
>
> - Level 1: Project
> - Level 2: Phase Type - Sprint Planning
> - Level 3: Task Type - Quality Gate (Phase Q-Gate)
> - Level 3: Task Type - Wave
> - Level 4: Task Type - Scope Definition
> - Level 4: Task Type - Quality Gate (Wave Q-Gate)
> - Level 5: Task Type - Summary Task for Work Packages
> - Level 5: Task Type - Milestone (for Wave)
> - Level 5: Task Type - Sprint Execution
> - Level 6: Task Type - Summary Task for Work Items
> - Level 6: Task Type - Milestone (for Sprint)

2.5.7.1 Creating Waves and Sprints to be Added to the Project Structure

Context

The project template defines the project structure with phases, waves, and sprints. You can adjust this structure by deleting or adding waves and sprints. Here, you learn how to create waves or sprints from scratch to be added to your project structure.

> **i Note**
>
> For synchronized projects, you can add a new wave or sprint only in the main project. From there, the change is automatically synchronized to the build projects.

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. In the project view, activate the edit mode by choosing the edit icon in the tool bar.
3. Select a wave or sprint in the tree view.
4. In the tool bar, choose the (+) icon to create a new wave or sprint.
5. In the dialog box, enter the parameters that are required.

6. Choose *Create*.

Related Information

Copying Waves and Sprints to the Project Structure [page 60]
Deleting Waves and Sprints from the Project Structure [page 61]

2.5.7.2 Copying Waves and Sprints to the Project Structure

Context

The project template defines the project structure with phases, waves, and sprints. You can adjust this structure by adding or deleting waves and sprints. Here, you learn how to copy existing waves or sprints to your project structure.

> **i Note**
>
> For synchronized projects, adding a new wave or sprint is possible only in the main project. From there, the change is automatically synchronized to the build projects.

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. In the project view, activate the edit mode by choosing the edit icon in the tool bar.
3. Select a wave or sprint in the tree view.
4. In the tool bar, choose the ( ) icon to copy a wave or sprint.
5. In the dialog box, enter the parameters that are required.
6. Choose *Create*.

Related Information

Creating Waves and Sprints to be Added to the Project Structure [page 59]
Deleting Waves and Sprints from the Project Structure [page 61]

2.5.7.3 Deleting Waves and Sprints from the Project Structure

Context

The project template defines the project structure with phases, waves, and sprints. You can adjust this structure by adding or deleting waves and sprints. Here, you learn how to delete waves or sprints from your project structure.

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. Select the wave or sprint in the tree view.
3. In the tool bar, choose the (🗑) icon to delete waves or sprints.
4. Choose *Confirm* to delete the selected wave or sprint.
5. Check the *Save* column next to the project name in the tree view: A warning icon is displayed in the *Save* column if the settings have not yet been saved.

Related Information

Creating Waves and Sprints to be Added to the Project Structure [page 59]
Copying Waves and Sprints to the Project Structure [page 60]

2.5.8 Simplified Task Management for Additional Task Types

Learn more about creating, editing, and deleting generic tasks in the project structure.

In *Project Management - Focused Build Projects*, you can use an additional task type that is called *Common Task for Focused Build projects*. This generic task type enables you to define your own custom tasks for your projects. You can perform the following actions:

- Making Additional Task Types Visible [page 62]
- Creating Additional Task Types [page 63]
- Editing Additional Task Types [page 64]
- Deleting Additional Task Types [page 64]

> **i Note**
>
> The optional *Confirm Project Tasks* SAP Fiori application, which is not part of Focused Build but can be installed additionally, is a useful tool when you work with additional task types. For more information, see Confirm Project Tasks.

> **i Note**
>
> For the *Realize* phase, it is important to keep the default structure and only add new waves, sprints, or add common tasks at any existing structure level. Manually modifying the structure could impact the general Focused Build integration scenario Requirements-to-Deploy. For reference, the default structure with project element types:
>
> - Level 1: Project
> - Level 2: Phase Type - Sprint Planning
> - Level 3: Task Type - Quality Gate (Phase Q-Gate)
> - Level 3: Task Type - Wave
> - Level 4: Task Type - Scope Definition
> - Level 4: Task Type - Quality Gate (Wave Q-Gate)
> - Level 5: Task Type - Summary Task for Work Packages
> - Level 5: Task Type - Milestone (for Wave)
> - Level 5: Task Type - Sprint Execution
> - Level 6: Task Type - Summary Task for Work Items
> - Level 6: Task Type - Milestone (for Sprint)

2.5.8.1 Making Additional Task Types Visible

Learn how to make additional task types visible in the *Focused Build - Project Management* application.

Context

If you want to use generic tasks in the project structure, you must make sure that they are visible in the *Focused Build - Project Management* application. Perform the following steps to make the generic tasks visible.

Procedure

1. To make the additional task type visible in the Focused Build *Project Management* application, navigate to Customizing for *SAP Solution Manager* > *Focused Build* > *Project Management Configuration* > *Focused Build Projects – Task Type Visibility*.

   The *Change View "Focused Build Projects - Task Type Visibility"* opens.

2. Choose *New Entries*.
3. To add an additional task of type, for example, *Common Tasks for Focused Build Project* to the *Task Type Visibility* table view, enter `/SALM/TASK` in the *Task Type* column.
4. Save your changes.

2.5.8.2 Creating Additional Task Types

Learn how to create generic tasks in the project structure.

Prerequisites

In Customizing, you have made the additional task types visible. For more information, see Making Additional Task Types Visible [page 62]

Context

Follow this procedure if you want to create generic tasks of type *Common Task for Focused Build project* in the *Project Management - Focused Build Project* application.

Procedure

1. On the landing page of *Project Management - Focused Build Projects*, choose the project.

   The project view opens.
2. To add a task to your project, select an existing project element, for example a phase, and switch to edit mode (✎).
3. Choose the ⊕ icon.
4. Choose *Create Task* to create a new task on the same hierarchy level or *Create Subtask* to create a new task one level below the selected project element.
5. Select a task type, for example, *Common Tasks for Focus Build Project*.
6. Enter the information required and choose *Create*.

Related Information

Editing Additional Task Types [page 64]
Deleting Additional Task Types [page 64]

2.5.8.3 Editing Additional Task Types

Learn how to edit generic task types in the project structure.

Context

Follow this procedure if you want to edit generic tasks of type *Common Task for Focused Build project* in the *Project Management - Focused Build Project* application.

Procedure

1. Choose the project on the landing page of *Project Management - Focused Build Projects*.

   The project view opens.
2. Select the task that you want to edit and switch to edit mode (✎).
3. Open the *Details* pane (🏷).
4. Make your changes and *Save*.

Related Information

Creating Additional Task Types [page 63]
Deleting Additional Task Types [page 64]

2.5.8.4 Deleting Additional Task Types

Learn how to delete generic task types from the project structure.

Context

Follow this procedure if you want to delete generic tasks of type *Common Task for Focused Build project* in the *Project Management - Focused Build Project* application.

Procedure

1. Choose the project on the landing page of *Project Management - Focused Build Projects*.

   The project view opens.
2. Select the task that you want to delete and switch to edit mode (✎).
3. To delete the task, choose the 🗑 icon.

   You have deleted the task.

Related Information

Creating Additional Task Types [page 63]
Editing Additional Task Types [page 64]

2.5.9 Multi-Language Maintenance of Projects

Projects are by default displayed in the language that you have selected when logging on to the system.

To display the project in a different language version, in the project view in the *Language* field, select the language.

By editing the details of the project or project elements in the *Details* pane, you can maintain and translate the names and descriptions for the project elements in the currently displayed language version.

2.5.10 Managing Risks and Issues

Risk management helps you to stay aware of possible risks and to react appropriately to changes. After the initial risk assessment, you monitor your risks and measures to effectively implement risk management.

You can use the following applications for risk management in Focused Build:

- *Project Management - Focused Build* app
  You can create and maintain risks (risk documents) for a project in the *Project Management - Focused Build* app.
- Standard Project Management UI
  You can also use the the *Risk* tab page of the standard Project Management UI to create and maintain risks.
- *My Risks*
  You can use the *My Risks* application to maintain the details of risks and to assign a risk owner and a risk responsible (risk processor).
- *Solution Readiness Dashboard*
  You can monitor the risks of a project with the *Risks* tile of the *Solution Readiness Dashboard*. The *Overview* tab of the *Risks* tile shows the risk levels of the risks of the project.

You use **issue management** to document issues that come up during the project and need to be resolved. You can create and maintain issues for a project in the standard Project Management UI. You ca check the issues of a problem in the *Solution Readiness Dashboard* on the *Issues* tile.

You can use the following applications for issue management in Focused Build:

- Project Management
  You create and maintain issues for a project in the standard Project Management UI.
- *Solution Readiness Dashboard*
  You can monitor the issues of a project with the *Issues* tile of the *Solution Readiness Dashboard*.

2.5.10.1 Creating Risk Documents for a Project

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. In the header of the project view, choose *Risks*.

   The *Risks* window opens.
3. In the *Risks* window, choose the + icon (Create Risk).

   The *Create Risk* popup window opens.
4. In the *Create Risk* window, enter a name for the risk and other risk details, such as a description, priority, and a risk owner.

   You can select an estimated impact level and a probability level (low, medium, or high). The values that you select for the impact and the probability are used to calculate the risk level.
5. Choose *Create* and then save your settings.

2.5.10.2 Changing Risk Details in My Risks

Context

You use the *My Risks* application to update and change the details of risks assigned to you as risk owner or risk processor. For example, you can define the probability and impact for a risk and assign it to a risk processor.

Procedure

1. Start the *My Risks* application from the SAP Solution Manager launchpad.
2. In the *Risks* list, choose the risk.
3. To change risk details, choose the edit icon in the tool bar.

4. Change risk details.

   On the *Details* tab, you can, specify, among other things, the probaility and impact of the risk, which are used to calculate the risk level or you can assign a risk processor.

   On the *Dates* tab, you can specify the date on which a solution to the risk is required. On the *Texts* tab and the *Attachments* tab, you can can write comments or attach files to further describe the risk.
5. Save your changes.

2.5.10.3 Documenting Issues for a Project

Procedure

1. To open the project view of the project, choose the project on the start page of *Project Management - Focused Build Projects*.
2. To navigate to the standard Project Managment UI, choose the project ID above the tree view.

   The standard Project Management UI opens with the *Detail* view of the project. In the project structure, the header, that is the project name, is preselected.
3. Go to the *Issues* tab page.
4. Choose *Create*
5. Enter a priority, a short text, and a due date. Enter a description for the issue. You can add files to document the issue.
6. Confirm and save your settings.

2.5.11 Adding Work Packages to the Project Structure

Using the standard Project management UI, you can display the work packages assigned to the project and add them as project tasks to the project structure.

Prerequisites

You have assigned work packages to the project in the *Work Packages Management* application.

Context

If you add the work packages of a project to the project structure, you can schedule them as project tasks.

Procedure

1. To open the project view of the project, choose the project on the landing page of *Project Management - Focused Build Projects*.
2. To navigate to the standard Project Management UI, choose the project ID above the tree view.

   The standard Project Management UI opens with the *Detail* view of the project. In the project structure, the header, that is the project name, is preselected.
3. Go to the *Work Package* tab page.

   The *Work Package* tab page shows the work packages that are assigned to the project.
4. To add the work packages to the project structure, choose *Create Tasks*.
5. Save your settings.

2.5.12 Solution Readiness Dashboard

You use the *Solution Readiness Dashboard* app to monitor the progress, issues, and milestones of projects.

Across all phases of a project, status reporting is available based on extracted data from the Focused Build applications to give you an overview of the current status of the project.

> → Tip
>
> You can display the in-app help (context-sensitive help). To display the in-app help, choose the ⓘ (question mark) icon.

Prerequisites

- You have defined KPIs in the Customizing for *SAP Solution Manager* under *Focused Build Projects* > *Dashboard Configurations*.
- You have scheduled the job `/SALM/SRD_FILL_CACHE_ALP` in SAP Solution Manager Configuration under *Focused Build* > *Standard Jobs* > *Schedule Jobs*.

Overview Page with Cards

On the *Solution Readiness Dashboard*, select a main/single project, and optionally one or more build projects and a wave, to display aggregated information about the selected project on the cards specified in the view.

> → Tip
>
> You can configure and save views to save your filter settings and the cards visible on the dashboard for main projects and build projects. When you open the *Solution Readiness Dashboard*, you can select the view that you want to use.

You can trigger a refresh to update all data for the selected projects shown on the *Solution Readiness Dashboard*. This is necessary when the real-time data has been changed.

Choose the cards to open a detailed view.

The following cards are available on the *Solution Readiness Dashboard*:

Card	Content
Overall Status	This data is read from the projects selected on the dashboard. Choose the project name to navigate to the project in the *Project Management - Focused Build Projects* app.
Requirements	See the requirements that are assigned to work packages that are assigned to the selected projects. The assignment of requirements to work packages is done in the *Requirements Management* app. The requirements are grouped by status groups. For example, by default, the *In Realization* status group shows the requirement statuses *Realized* and *Completed*. You can choose the card to view the complete list of requirements.
Work Packages	See the number of work packages by status groups. For example, by default, the *Scoping* status group shows the work package statuses *Scoping*, *Scope Extension*, and *Scope Finalized*. Status groups and the grouping of the statuses can be customized. In addition, see the percentage of scope changes. You can choose the card to check the details and to show statuses of work packages as a series in status groups.
Work Items	See the number of work items shown by status groups. For example, by default, the *In Development* status group shows the work item statuses *In Development*, *To Be Tested*, and *Being Corrected*. Status groups and the grouping of the statuses can be customized. You can choose the card to check the details.
Project Tasks	See the project tasks grouped by their task status. In addition, this card shows the days available until the next quality gate. This information considers Q-Gate tasks from the projects with a fixed end date and a status *Released*. You can choose the card to check the details.
Work Package Distribution	See the number of work packages grouped by project, by category or by wave. The number of work packages is shown on a stacked bar chart serialized by status groups. You can choose the card to check the details.
Work Item Distribution	See the number of work items grouped by project, category, wave or sprint. The number of work items is shown on a stacked bar chart serialized by status groups. You can choose the card to check the details.

Card	Content
Progress	See the development over time for work packages or work items in status *Successfully Tested*. You can choose the card to check the details.
Risks	See the number open risks. The risks are arranged on a risk matrix via impact and probability. The risk level is defined as: impact * probability. Therefore, the risk level rises from bottom left to top right of the risk matrix. You can choose the card to check the details.

Card	Content
KPI Status	**KPI** *Functional Specification Availability* Percentage of functional specifications according to status and due date (from milestone). The KPI considers whether a functional specification with the correct document type and expected status has been assigned to a work package. • *Completed* Milestone-independent, includes all work packages for which the document of type functional specification (or other document types that have been configured in KPI framework as type functional specification) is in status *Released*. These work packages do not have to be edited from a functional specification perspective. • *To be done* Work packages that didn't reach the milestone *Functional Specification Released*, but do not have functional specification assigned or the functional specification is on a status lower than released. You can edit and release the functional specification right from the work packages if the work package status allows it or later through a corresponding work item. The document status will be retrofitted into the work package. • *Milestone missing* Work packages for which the milestone *Functional Specification Released* is not maintained. • *Overdue* Work packages that reached the milestone date but have no functional specification assigned or the functional specification is on a status lower than expected. These work packages can then be corrected through corresponding work items. The document status will be retrofitted from work item into the work package. **KPI** *Test Case Availability* Percentage of test cases depending on work package status and due date. The KPI considers whether a test case with the correct document type and expected status has been assigned to a work package. • *Completed* Technical design document with status *Released* has been assigned to work item. The work item status is *In Development* or higher. • *To be done* Work items that didn't reach the milestone *Technical Design Released* and have no technical design document assigned or the technical design document is on a status lower than *Released*. • *Milestone missing* Work items for which the milestone *Technical Design Released* not maintained. • *Overdue* Work items that exceeded the milestone *Technical Design Released* and have no technical design document assigned or the technical design document is in a status lower than *Released*. **KPI** *Technical Design Availability*

Card	Content
	Percentage of technical design depending on status and due date. The KPI checks if a technical design document with the correct document type and expected status has been assigned to a work item. • *Completed* A technical design document with status *Released* has been assigned to work item. The work item status is *In Development* or higher. • *To be done* Work items that didn't reach the milestone *Technical Design Released* and have no technical design document assigned or the technical design document is in a status lower than *Released*. • *Milestone missing* Work items for which the milestone *Technical Design Released* not maintained. • *Overdue* Work items that exceeded the milestone *Technical Design Released* and have no technical design document assigned or the technical design document is in a status lower than *Released*. **KPI** *Development progress* Percentage of work items depending on status and due date. The KPI checks whether work item with status *Successfully Tested* exceeds the planned date for its completion. • *Completed* Work items that have the status *Successfully Tested*, and the milestone *Build Finished* has not been reached yet. • *To be done* Work items that don't have the status *Successfully Tested*, and the milestone *Build Finished* has not been reached yet. • *Milestone missing* Work items for which the milestone *Build Finished* is not maintained. • *Overdue* Work items that don't have the status *Successfully Tested* and the milestone *Build Finished* has already been passed. **KPI** *Unit Test* Percentage of work items according to status and due date. The KPI checks whether a work item with status *Successfully Tested* exceeds the planned date for its completion. • *Completed* Work items that have the status *Successfully Tested*, and the milestone *Unit Test Completed* has not been reached yet. • *To be done* Work items that don't have the status *Successfully Tested*, but the milestone *Unit Test Completed* has not been reached yet. • *Milestone missing*

Card	Content
	Work items for which the milestone *Unit Test Completed* is not maintained. • *Overdue* Work items that don't have the status *Successfully Tested*, and the milestone *Unit Test Completed* has already been passed. You can choose the card to check the details.
Issues	See the number of open issues grouped by their priority. You can choose the card to check the details.
Test Status	See the test status percentages grouped by the test plan classification. You can choose the card to check the details.
Defect Status	See the number of open defects grouped by their priority or by their priority and status. You can choose the card to check the details.
Defect Corrections for Work Packages	See the number of defect corrections that have been created for single functional tests in the selected projects and that are also assigned to a work package. Status groups: • *Completed* Defect corrections that have one of the following statuses: *Confirmed* or *Handed Over to Release* • *To Be Done* Defect corrections that have one of the following statuses: *Created*, *Being Corrected*, *Information Required*, *To be Retested w/o Transport*, *Transport to Retesting*, or *In Delivery* • *Withdrawn* Defect corrections in status *Withdrawn* • *Overdue* If the milestone *Single Functional Test Finished* has been maintained for one of the selected projects, defect corrections are displayed as *Overdue* if they are not set to status *Confirmed* when the milestone is reached. You can choose the card to check the details.

> **i Note**
>
> In the application log (transaction `SLG1`), choose object `/SALM/SRD` to see detailed information for error analysis.
>
> To compare the overview records and detail page records and to detect inconsistencies, you can use the report `/SALM/SRD_OVP_ALP_COMPARE`.

2.6 Managing Requirements

Business analysts and project managers can use the *Requirements Management* and the *My Requirements* apps to plan their project backlog and maintain requirements. In business language, a requirement describes IT-related developments or configurations that need to be done to implement a new SAP or non-SAP solution.

Requirements Management

The *Requirements Management* app is designed to create requirements and work packages. It includes a filter section where you can search for requirements in a specific context. You can save these filter settings in customer-specific or public views. You can add filters for **Work Package Title** and **Work Package ID** by choosing **Adapt Filters**.

If you need additional requirement attributes, you can customize these in customer-specific fields.

In the *Realize* phase of the project, it may be necessary to rearrange requirements and their related work packages. Therefore, you can assign work packages to requirements and unassign work packages from requirements.

> → Tip
>
> In-app help is available for the *Requirements Management* app. You can display the in-app help by choosing the ⓘ icon.

My Requirements

After you create the requirements, you can maintain them in the *My Requirements* app. This app has a similar UI to the ones in the *My Work Packages* and the *My Work Items* apps, which are the follow-up documents.

My Requirement Approvals

You can access requirements that you need to approve.

Activities

For requirements, you can perform the following activities:

- Create requirements
  To create requirements, you have the following options:

    - Out of Solution Documentation structure, scope, or process diagram
    - In the *Requirements Management* app
    - Mass import by using XLS files
- Maintain requirements
  To maintain requirements, you have the following options:
    - *Requirements Management* app
    - *My Requirements* app
    - XLS download and upload
    - *Mass Change Operations* app
- Create work packages
- Assign and unassign work packages
- Approve requirements
  To approve requirements, you have the following options:
    - In the *My Requirement Approvals* app
    - Through the action in the *Requirements Management* pop-up
    - Through the action in the *My Requirements* app
    - Through the action in the *Mass Change Operations* app
    - Through the extended requirements approval workflow
- Display custom field values, process element information, and fields of the extended approval workflow
  Use report `/SALM/REQUIREMENT_REPORT`. For example, you can display all requirements planned for a specific release or a list of all approvers that have not approved their requirements so far.

2.6.1 Defining Requirements

The discovery team formulates requirements to describe new functions or features that are to be implemented.

Prerequisites

- You have modeled and analyzed your business processes.
- You have documented the application landscape.
- In a fit / gap analysis of your business processes, you have identified the need to implement new functions or features or to change existing functions or features.

Context

In Focused Build, you can create requirements from within the Solution Documentation by adding them to business processes or process steps. For this purpose, you use the *Requirements Management* application, a user interface for documenting and assigning requirements.

If you have not yet modeled your business processes and only start with a list of requirements, you can create the requirements directly in *Requirements Management*. Later, you can use this app to assign the requirements to the structure elements of the Solution Documentation.

Architect Mode

In the *architect* mode, architects can enter the project and wave that is relevant for a requirement. You can activate the architect mode in the Customizing (IMG).

Creating Requirements from Within the Solution Documentation

Prerequisites

- You have already modeled your business processes in the Solution Documentation.

Procedure

1. In the Solution Documentation, in the Design Branch, select the business process or process step related to your requirement.
2. In the attributes pane, at *Related Documents*, choose *Requirements*.

   The *Requirements Management* application opens in a separate browser window.
3. In *Requirements Management*, choose *Requirement*. In the menu, choose *Create New Requirement*.
4. Specify the header data, such as title, priority, and requirement owner, and requirements team, and add a description for the requirement.

   You can also specify the following:
   - Specify the category of the requirement and the classification of the work packages for the requirement.
   - Select a solution. By default, the selection is blank (no solution assigned). You can later search for requirements that have no solution assigned and change the assignment.
   - Specify the requirement as local.
   - Enter value points or effort points. Value and effort points can be used for the release planning. For example, if the estimated value is high and the estimated effort is low, you can give the requirement a higher priority.
   - Maintain customizable text or numeric fields and flags. The fields can be:
     - provided with self-defined value helps
     - filtered, sorted, and saved in user-specific views
5. Save your settings. You have the following saving options:
   - Choose (Save) to keep the *Create new requirement* window open and send the requirement for approval (set the requirement's status to *To be Approved*).

- Choose (Save and New) to close the *Create new requirement* window and create another requirement.

2.6.1.1 Uploading Requirements

You can upload requirements by using the `/SALM/Requirement_Import` report in transaction `SE38`.

Prerequisites

You have prepared an XLS file in one of the following ways:

- If the process structure and requirements have already been defined in another SAP Solution Manager system:
  You can upload requirements with Solution Documentation structure information (for example, process, process step, library) to the design branch of the on-premise SAP Solution Manager system with automated assignment to the process structure.
  To download requirements from *Solution Documentation*, proceed as follows:
  1. Create a scope for the process structures to be transferred:
  2. When selecting the structure, select the *Include Originals* checkbox to transfer the library elements as well.
  3. When saving the scope, decide if it should be visible to all Solution Documentation users (public) or only to you (private).
  4. Export the process structure (from *Solution Documentation*):
     In the *Solution Administration* application, choose the *Imports* tab.
  5. Choose the *Global Functions* icon and then *Export*.
  6. In the popup, to establish the linkage to the library elements, select the *Map deployment to origin* checkbox.
  7. Export the file to a share or your frontend.
  8. Import the Solution Documentation process structure (JSON file) from the frontend or share to the target SAP Solution Manager system.
  9. Export requirements from the *Requirements Management* application in your source SAP Solution Manager system to your frontend as an XLS file.
- If the process structure and requirements have not been defined in another SAP Solution Manager system:
  You can download an XLS file (without Solution Documentation structure information) and populate it with requirements from an external data source.
  To prepare an XLS file:
  1. To get the upload XLS structure, export the requirements list from your SAP Solution Manager system. There must be at least one example entry.
  2. Populate the XLS file with data from a source XLS file or document.

Context

Procedure

1. Run the report in test mode.
2. Correct the requirements with warnings, for example, for:
   - Duplicates (for example, if several work packages are assigned)
   - No work package assigned
   - Mandatory fields not filled, for example, *Solution*
   - Solution Documentation element not available in target system
3. Choose how to handle the **Requirement Owner** field (check, overwrite, keep existing value).
4. Select *Source Language* and *Target Language*.
5. Run the report in regular mode (*Test Mode* checkbox deselected).

Results

All requirements are uploaded, linked to process elements, and set to status *Draft* in the target system.

Next Steps

Maintain process structure/diagrams: Open each requirement. On the *Documentation* tab, assign process structure elements.

2.6.2 Assigning Requirements to Business Processes

Context

A requirement should be assigned to a solution and a process structure element, that is a process or a process step in the Solution Documentation. If you have created a requirement from within the Solution Documentation by selecting a business process or process steps, the requirement is automatically assigned to the process structure elements.

You can also create requirements directly in the *Requirements Management* app without assigning them immediately to a solution and a process structure element.

If you have created scopes in the Solution Documentation, you can assign the requirement first to a scope and then to Solution Documentation elements from this scope.

To create or change an assignment of a requirement in the *Requirements Management* app, do the following:

Procedure

1. Start the *Requirements Management* app on the SAP Solution Manager launchpad.
2. Use the filters to search for the requirement.

   > **i Note**
   >
   > A requirement can be classified as *WRICEF*. Select *WRICEF* in the *Requirement Classification* field next to this field to filter your requirements. You can select one or several of the following*WRICEF Sub-Classification* parameters:
   >
   > - *Workflow* (W)
   > - *Report* (R)
   > - *Interface* (I)
   > - *Conversion* (C)
   > - *Enhancement* (E)
   > - *Form* (F)
   >
   > If several sub-classifications parameters are selected and the result list is sorted, the entries are listed in the same order as in WRICEF:
   >
   > - W, R, I
   > - W, R
   > - W
   > - R, I

3. In the search results table, select the requirement.
4. Choose *Requirement*. In the menu, choose *Assign Process Structure*.
5. Assign the requirement to a solution, a branch, and a process structure element (process or process step).
6. Confirm your settings.

2.6.3 My Requirements

You can use the *My Requirements* application to further specify and process requirements assigned to you or your team.

In *My Requirements*, you can find the requirements assigned to you or your team. You can further specify the requirements by adding texts, attaching files, or assigning Solution Documentation elements. To process a requirement, you change the status of the requirement, for example, you can it send for approval or approve or reject it.

Specifying Requirements

In *My Requirements*, you can select a requirement from the list and then specify and document it further by using the following tabs:

- *Details*
  - Assign a business process expert and requirement owner.
  - Categorize the requirement.
  - Specify priority and a value or effort estimation. Value and effort points can be used for the release planning. For example, if the estimated value is high and the estimated effort is low, you can give the requirement a higher priority.
  - Maintain customizable text or numeric fields and flags in the *Custom Fields* section in the *Details* tab. The fields can be:
    - provided with self-defined value helps
    - filtered, sorted, and saved in user-specific views
- *Text*
  Add texts, such as an extended requirement or solution description or comments.
- *Attachments*
  Attach files, such as image files or document files, by using drag and drop or the upload function.
  Files that are attached to a requirement are automatically copied to the work packages that are assigned to the requirement.
- *Documentation*
  Assign Solution Documentation structure elements, such as business process steps, to the requirement. You can also use this tab to create an assignment to documents, for example test cases, that are stored in the Solution Documentation.

The *Relations* tab shows the work packages created for the requirement.

Processing Requirements

To change the status of a requirement, choose *Action* in the tool bar and then the relevant status.

A new requirement has the status *Draft*. After you have specified the requirement, change the status to *To Be Approved*. The approver, that is, the solution architect or the project manager, can then decide to approve, reject, postpone, or request a revision of the request. You can also postpone an already approved requirement.

If a requirement is set to *Approved*, it is planned in for the next release and you can create work packages for the requirement or assign work packages. To do this, use the *Requirements Management* app.

Advanced Approval Process

Prerequisites

- The requirements approval workflow must be enabled in Customizing (transaction SPRO).
- A business partner must be authorized to approve requirements before he can be assigned to an approval step as a *Requirement Approver*.

> **Note**
>
> If the *My Requirements* app appears empty, go to the filter menu ( ) and change the criterion *Approver* to *Yes* and the criterion *Assigned to* to *All*.

In the *Approval* tab, define mandatory and optional approval steps. Mandatory approval steps are maintained via a central Customizing and optional steps can be added via the app ( ). You can maintain complex approvals with several steps, sequences, e-mail notifications, etc., based on the CRM standard approval customizing workflow.

> **Note**
>
> You need to assign an authorized business partner for each step before the process can be executed.

A requirement can be in status *Draft*, *To Be Approved*, *Rejected*, *Canceled*, *Postponed*, or *Approved*.

If there are several approvement steps, the status is changed as follows:

- When all steps are set to the same status, the status of the requirement is matched accordingly.
- If there is a mixture of *Approved* and *Postponed*, the status is changed to *Postponed*.
- If there is a mixture of statuses and at least one is *Rejected*, the status is changed to *Rejected*.

2.6.4 Creating Work Packages for Requirements

Solution architects create work packages to manage and document the implementation of requirements.

Prerequisites

- The requirements have been validated and documented. Substantial functional gaps have been handed over to SAP development so that the remaining requirements constitute the scope of your Focused Build project.
- The requirements have the status *Approved*.

Context

When the requirements have been specified and approved, you create work packages for the requirements. The work packages are used to manage and document the implementation of the requirements. To create the work packages, use the *Requirements Management* app.

Procedure

1. Start the *Requirements Management* app on the SAP Solution Manager launchpad.
2. In the *Requirements Management* app, search for unassigned requirements that have the status *Approved* or higher. Use additional filters to find relevant requirements.
3. In the results table, select a requirement.
4. In the tool bar, choose *Work Package*. Then choose *Create New Work Package*. You can also create a work package by opening the requirement and choose *Create New Work Package* ( ) from the toolbar. The requirement needs to be in status *Approved* or *In Realization*.
5. Enter the header data for the work package. Select the work package type (regular work package, maintenance work package, or scope change), enter a title, select a work package owner and a work package classification.
6. Choose *Create* to create the work package.

   The work package has the status *Created* and can be processed in the *My Work Packages* application.

   You can also navigate directly to the newly created work package using the link shown in the popup window.

   Information from the requirement, such as the assigned process steps in the Solution Documentation and files that are attached to the requirement are automatically copied to the work package.

   If the release is an actual release, the release manager is automatically copied to the work package.

2.6.5 Creating Work Packages Without Requirements

Context

Usually, you create work packages for a specific requirement in the *Requirements Management* app. You can, however, also create work packages without related requirements in the *Requirements Management* app.

Procedure

1. Start the *Requirements Management* app on the SAP Solution Manager launchpad.
2. In the tool bar, choose *Work Package*. In the menu, choose *Create New Work Package*.
3. Enter the header data for the work package. Select the work package type (regular work package, maintenance work package, or scope change), enter a title, and select a work package owner.
4. Choose *Create* to create the work package.

   The work package has the status *Created* and can be processed in the *My Work Packages* application.

   If the release is an actual release, the release manager is automatically copied to the work package.

2.6.6 Assigning Work Packages to Requirements

Context

You can assign an already existing work package to a requirement. If a work package is assigned to a requirement, files that are attached to the requirement are automatically copied to the work package.

Procedure

1. Start the *Requirements Management* app on the SAP Solution Manager launchpad.
2. Use the filters to search for the requirement.
3. In the search results table, select the requirement.
4. In the tool bar, choose *Work Package*. In the menu, choose *Assign Existing Work Package*.
5. Search for the work package. When filtering for a project, activate or deactivate the *Consider documentation Scope* option.
6. Choose *Assign*.

2.7 Managing Work Packages

As a solution architect or a project manager, you use the *My Work Packages* application to specify and manage work packages.

A work package is a container for information about the implementation of a requirement. You check, document, and maintain this information in *My Work Packages*. A work package combines the following information:

- Status of the overall implementation of the work package
- Information about the work items derived from the work package
- People involved in development and testing
- Project and wave during which the work package is implemented
- Milestone dates for the implementation of the work package
- IT documentation, such as the functional specification or test cases
- Planned and documented efforts
- Status of related test packages and test plans

Tasks

To manage a work package, you do the following:

- Define the work package details
  For more information, see Defining Work Package Details [page 85].
- Assign the work package to a project and a wave
- Analyze the implementation scope of the work package and break it down to implementation tasks by defining work items
  For more information, see Defining the Scope of Work Packages by Creating Work Items [page 86].
- Attach files
  On the *Attachments* tab page, you can attach files, such as image files or document files from a local storage by using drag and drop. The files on the *Attachments* tab page are stored only locally in the work package, not in the Solution Documentation.
- Create, store, or link to IT documents for the work package in the Solution Documentation on the *Documentation* tab

  > **i Note**
  >
  > For more information about how to create, edit, and store documents for work packages in the Solution Documentation, see Documenting Work Packages and Work Items [page 26].
- Specify dependencies between the work package and related work packages or defect corrections
  To do so, go to the *Relations* tab page and choose *Add Dependency*. Select a work package and assign one of the following relationship types:
  - *Predecessor* for work packages that need to precede the current work package
  - *Parallel work package* for work packages that are developed simultaneously with the current work package
  - *Follow-Up* for work packages that succeed the current work package
- Change the work package status
  For more information, see Changing the Work Package Status [page 87].
- Schedule milestone dates for the work package
  For more information, see Scheduling Milestone Dates for Work Packages [page 87].
- Document the time that you have spent for the implementation and documentation of the work package
  On the *Efforts* tab page, you can specify planned and actual efforts.
- Read and create comments and notifications for the work package
  On the *Text* tab page, you can check system notifications, such as status changes, that the system creates automatically when the work package is processed. You can add your own comments or other texts to log the work package process.
- Check test packages and test plans related to the work package
  On the *Test Management* tab page, you can open test packages and test plans that are related to the work package and check their status. You can assign or unassign test packages and test plans to the work package.
- Use checklists
  If checklists have been defined, you can select a checklist on the *Checklist* tab.

Related Information

Defining Work Package Details [page 85]
Defining the Scope of Work Packages by Creating Work Items [page 86]
Changing the Work Package Status [page 87]
Documenting Work Packages and Work Items [page 26]
My Checklist Steps [page 150]

2.7.1 Defining Work Package Details

You use the *My Work Packages* application to specify and maintain work package details.

Procedure

1. Start *My Work Packages* on the SAP Solution Manager launchpad.
2. In the *My Work Packages* list, select a work package.

   By default, the *My Work Packages* list displays only the work packages that are assigned to you. You can use the filters to search for specific work packages or to find work packages that are assigned to your team or are unassigned.
3. To specify work package details, go to the *Details* tab page and choose *Edit*:

   - *Description*
     Enter a descriptive work package title.
   - *Priority*
     Select the priority level of the work package.
   - *Value Points* and *Effort Points*
     Optionally, you can specify value points and effort points.
   - *Classification*
     Select the work package classification, such as WRICEF, fit, gap, or non-functional.
   - *Category*
     Select the category, such as applications, IT infrastructure, or end-user workspace, or a more specific sub-category.
   - *Project*
     To assign the work package to a project, select a project.
   - *Wave*
     Select the wave in which the work package is implemented. Only if the work package is assigned to a wave, you can start defining the work package scope by creating work items for the work package.
   - Assign the Focused Build roles, such as the SAP business process expert, the work package owner, the developer team, or the tester to the people responsible.
   - Update the completion rate

2.7.2 Defining the Scope of Work Packages by Creating Work Items

Development architects define the scope of the work packages by creating work items and assign the work items to developers.

Prerequisites

- The work package is assigned to a project and a wave.
- The work package has the status *Scope Analysis*.

Context

When the work package has been set to *Scope Analysis*, you analyze the requested feature in terms of planned efforts, budget, and resources, and you define the work package scope by dividing the work package into development tasks that you assign as work items to developers or development teams.

When the work package has been set to the *To Be Tested* status, you can also create defect correction for the work package in My Work Packages. Unlike defect corrections that are created from defects in the My Defects app, these defect corrections are not associated to a test plan execution.

Procedure

1. Start *My Work Packages* on the SAP Solution Manager launchpad.
2. In the *My Work Packages* list, select the work package.
3. Go to the *Scope* tab page.
4. To create a new work item, choose *Add*.
5. Specify the work item type:
   - Normal change (NC)
     The work item uses a transport request for changes in the software code.
   - General change (GC)
     The work item that doesn't use a transport request. For example a new workflow, a change in 3rd party software or administration changes
   - Defect correction
     When the work package has been set to *To Be Tested*, you can also create a defect correction to correct an known error.
6. At *Title*, enter a descriptive work item title.
7. At *Sprint*, select the sprint in which the work item has to be developed.
8. At *Productive System*, select the system or component that will be changed by the work item.

9. At *Classification*, select the work item class.

   Which work item class can be selected depends on the classification of the related work package.

   The work item class *Non-Functional* is meant for changes in non-SAP software. Non-functional work items do not require a technical design document.
10. Under *Partners*, add the required partner functions, such as the development team, developers, and testers, and assign them to the people and teams responsible.
11. Under *Solution Documentation*, assign a Solution Documentation structure element to the work item.
12. Save your settings.

    The work item has been created and can be processed by the assigned developers and testers in the *My Work Items* application.

2.7.3 Scheduling Milestone Dates for Work Packages

You can specify milestone dates, for example, deadlines for the functional specification, the implementation, or the testing of the work packages.

In *My Work Packages*, you specify dates of important milestones on the *Dates* tab page.

> **i** Note
>
> Milestone dates can be set in the *Project Management - Focused Build Projects* app or in *My Work Packages*:
>
> The milestone dates on the *Dates* tab are initially and automatically filled with the dates maintained by the project manager in the *Project Management- Focused Build Projects* app. These milestone dates can be changed by the architects in the *My Work Packages* app (default setting).

2.7.4 Changing the Work Package Status

You change the status of a work package to enable further processing of the work package or to extend or reject the work package.

You change the work package status in the *My Work Packages* application. To move a work package to a new status, choose *Action* in the footer toolbar. Then choose the next action or next work package status. For example, if you choose the *Define Scope* action, you change the work package from the status *Created* to the status *Scope Analysis*.

To reject a work package, you change the work package status to *Rejected*.

To reverse the scope extension of a work package, delete the scope items and choose *Reverse Scope Extension*.

You can change the statuses of several work packages at the same time in the *Mass Change Operations* application. For more information, see Mass Change Operations [page 91].

2.8 Managing Work Items

Developers and testers use the *My Work Items* application to document and process work items.

Using *My Work Items*, you call up information about the work items assigned to you and document the implementation of the work items. You can also create transport requests for work items for normal changes.

Tasks

You start *My Work Items* on the SAP Solution Manager launchpad. In the *My Work Items* list, you see the work items that are assigned to you as a developer. You can use filters to search for specific work items.

The tab pages of *My Work Items* provide the functions for maintaining work item data and transport requests:

- *Details*
  Read or specify the work item details.
  The *Details* tab page displays basic information about the work item. To complete or change this information, choose *Edit*. You can, for example, set the priority, story, or value points. You can also document the completion rate.
- *Dates*
  Check milestone dates for the work item, such as deadlines for the design or the implementation.
  The dates are initially and automatically filled with the dates maintained in the *Project Management - Focused Build Projects* app.
- *Texts*
  The *Text* tab page displays system notifications, such as status changes, that the system creates automatically when the work item is processed.
  You can also add comments or texts, such as descriptions or test instructions for the work item. To do so, select a template for the relevant text type and add your text.
- *Attachments*
  You can attach files, such as image files or document files, from a local storage by using drag and drop or the upload function. The files on the *Attachments* tab page are stored only locally in the work item, not in the Solution Documentation.
- *Documentation*
  Create, store, or link to documents for the work item in the Solution Documentation
  You can use the *Documentation* tab page to store new documents in Solution Documentation or link to existing documents in Solution Documentation. For more information, see Documenting Work Packages and Work Items [page 26].
- *Transport*
  Manage transport requests.
  The *Transport* tab page displays information about the transport landscape, that is the relevant systems and their transport relationship, and your transport requests.
  You can log on to the systems or you can create, assign, and decouple (unassign) transport requests. For more information, see Creating Transport Requests for Work Items [page 89].
  In the *Requests* table, the *Transport Requests* and *Transport of Copies* columns enable you to access more detailed information by choosing an element in one of these columns.
- *Transport-Related Checks*

You can see the ATC (ABAP Test Cockpit) checks from the transport-related check framework related to the work item.

- *Tasks*
  You can specify and log tasks that need to be done for the work item.
- *Efforts*
  You can document the time that you have spent on development or testing activities for the work item.
- *Checklist*
  If checklists have been defined, you can select a checklist on the *Checklist* tab.

Changing the Work Item Status

To change the work item status, choose *Action* in the tool bar. In the menu, choose the next work item action or status.

To withdraw a work item, choose *Action* in the tool bar. In the menu, choose *Withdraw*.

> **i Note**
>
> You cannot withdraw work items if Solution Documentation elements are assigned to them. If there is at least one changed element, the system blocks the withdrawal. You have to discard changed elements or move them to another work item to complete the withdrawal.

You can change the status of several work items at once in the *Mass Change Operations* application. For more information, see Mass Change Operations [page 91]

Related Information

My Checklist Steps [page 150]

2.8.1 Creating Transport Requests for Work Items

You can create transport requests for work items for normal changes directly in the *My Work Items* application.

Prerequisites

- You have started the *My Work Items* app from the SAP Solution Manager launchpad.
- You have selected a work item.
- The work item has the status *In Development* or higher.

Procedure

1. Go to the *Transport* tab page.
2. At *Requests*, choose +.
3. In the *Create Transport* pop-up window, select the request type and enter a description.

   You are preselected as the request owner. You can change the request owner and you can create transport tasks for other developers.

Results

The requests for the work item are displayed under *Requests*. To access more detailed information, choose a request *ID*. When you select a request, the transport tasks of the request are displayed under *Transports*.

> **i Note**
>
> To display detailed information about a transport of copy that is related to a request shown in the *Requests* table on the *Transport* tab page (for example, for a non-imported copy of transports), choose the corresponding element in the *Transport of Copies* column on the *Transport* tab page. The next view provides you with information on the following elements:
>
> - *ID*
> - *Status Text*
> - *Source System*
> - *Source Client*
> - *Release Date*
> - *Release Time*
> - *Transport Target*
> - *Newest Request*

Next Steps

If you want to create a transport of copies for a transport request, select the request and choose *Create TOC*.

If you want to create an additional transport task for a request, select the request. At *Tasks*, choose + and select a task owner.

2.9 Mass Change Operations

In this app, you can view and change several attributes of work packages, work items, defect corrections, or other types of transactions used in a Focused Build release or a project at the same time.

Context

As a solution architect, a project manager, or a release manager, you can use the *Mass Change Operations* application to edit attributes such as the status of several work packages, work items, defect corrections, or other types of transactions at once. You can also display all the work packages, work items, defect corrections, and other transactions that are related to a release or project and use additional filters to find transactions with specific attributes.

> **i Note**
>
> Focused Build architects can view and change all types of items in the *Mass Change Operations* app. Users with other roles can also access the app to view and analyze items. These business partner roles only have a limited authority to change items in the app. For example, test managers can only change test documents. They can view all the other items but not change them. Developers can access the app only in display mode and they cannot make any changes in the app.

To change several transactions of a type, a project, or a release at the same time, proceed as described in the procedure below.

Procedure

1. Specify the type of transaction that you want to display or change, for example, requirements, work packages, work items, or defect corrections.
2. In the filter bar, use the attribute filters to specify search criteria. For example, to search for work packages, you can specify the project, release, status, or priority of the work packages that you want to change. To start the search, choose *Go*.

   The search results are displayed in a table.
3. In the result list table, select the items that you want to change.

> **i Note**
>
> - Choose *Select View* ( ) to save or manage your view settings.
> - Depending on your filters, you can only see the fields of defect corrections that you can edit, and you can only edit selected defect corrections whose status is not final.

4. Choose *Mass Change*.
5. In the *Mass Change* popup, select what you want to change for the selected items and then select the *Change Selected* button.

Depending on the type of transaction that you have selected, you can change the following attributes:

- Status

  > **i Note**
  >
  > To perform a mass change of the status, select items that have the same status. For example, you can change several work packages with the status *In Development* to the status *To be Tested*.

- Priority
  You can select multiple values.
- Category
- Description
- Project Lead
- Planned Project
- Project
- Wave
- Branch
- Solution
- Project Name (for defect corrections)

  > **i Note**
  >
  > On the WebClient UI, you can select the date type. To enable this, maintain *Implementation Date* and *Decision Date* fields on the WebClient UI in expert mode.

A popup that informs you about the items that have been changed appears.

6. Select *Save Changes*.

   The changed items are highlighted.

2.10 Focused Build Test Suite Extensions

In Focused Build for SAP Solution Manager, the test suite is extended by additional applications and functions.

For test plan management, you can use the following Focused Build applications:

- To create test steps test cases (test cases of type *Test Steps*), use the *Test Steps Designer* application.
- To create test plans for projects or to assign test plans to projects, use the *Test Plan Management - Assignment Analysis and Test Plan Generation* and the *Test Plan Management - Project Assignment* applications.
- To define parameters used as placeholders in test cases or test steps and the respective variable values for test plans, test packages, or testers, use the *Test Steps Parameters* application.
- To monitor the status of the testing, use *Test Suite Dashboard*.

As a tester, use the *My Test Executions* application to document the execution of test cases. With *My Test Executions*, testers can also create defects, which then can be documented and corrected with the *My Defects* and the *My Defect Corrections* applications.

2.10.1 Test Steps Designer

Use the *Test Steps Designer* to create and edit test steps test cases (test cases of type *Test Steps*) and to describe test activities. In test steps test cases, the test steps (test activities) are assigned to process steps in Solution Documentation.

You can start the *Test Steps Designer* app from within a solution in Solution Documentation or from the SAP Solution Manager launchpad.

Features

With the *Test Steps Designer* app, you can do the following:

Create and Edit Individual Test Cases

- Create test steps test cases (test cases of type *Test Steps*) based on process steps in Solution Documentation.

  > → Recommendation
  >
  > SAP recommends that you create test steps from within a solution in Solution Documentation because this method automatically provides the solution context, which is a prerequisite for the selection of executables.

- Create test steps test cases (test cases of type *Test Steps*) directly in the *Test Steps Designer* app and assign them later to executables in Solution Documentation.
- Edit test steps test cases (test cases of type *Test Steps*).
- Find all test plans, test packages, and sequences that contain the selected test case.
- Copy test cases ( ).
  When you copy a test case, you can assign the new test case a name, select a destination folder, and select a status schema and a branch. You can also activate the *Copy Solution Assignment* function to link the test case directly into the same position in Solution Documentation.

Manage Multiple Test Cases

- Use parameters as placeholders for test plan-specific values in text fields in the header section of a test case or in a test step.
- Create template test cases that make it easier to create, maintain, and update test step test cases with similar content.
- Upload test cases from Excel files.
- Mass update the header details of multiple test cases.

Use Groups and Folders

Groups and folders help you find your test cases in the *Test Steps Designer* app.

There are several **groups** including the following:

- *My Test Cases*
  Test cases owned or changed by you.

- *Favorite Test Cases*
  Test cases bookmarked as favorites.
- *Recently Changed Test Cases*

When creating or editing a test case in the *Test Steps Designer* app, you can select a folder in which the test case can later be found.

Related Information

Linking Test Cases to Solution Documentation Processes [page 94]
Editing Test Cases of Type Test Step [page 95]
Test Steps Parameters [page 100]
Template Test Cases [page 96]

2.10.1.1 Linking Test Cases to Solution Documentation Processes

If you want to add executables to a test step, the test step must be assigned to the Solution Documentation process step.

> → Recommendation
>
> While you can create a test case directly in the *Test Steps Designer* app and assign it later, SAP recommends creating it from within a solution. This method automatically provides the solution context for the test steps.

To create test step test cases from within a solution in Solution Documentation, do the following:

1. In Solution Documentation, navigate to the business process, subprocess, or process for which you want to create a test case.
2. To create a new test case, select the Solution Documentation elements for which you want to create the test case and, in the context menu, choose *New* > *Test Cases* > *Test Steps (Create)*.
   The *Test Steps Designer* app opens and you can edit the test case. For each process step, a test step on the *Test Steps* tab exists. The executables of the process steps are automatically assigned to the test steps.
3. In the *Test Steps Designer* app, edit and complete the test case.

You can also assign an existing test case to process steps in Solution Documentation. To do so, in the context menu, choose *New* > *Test Cases* > *Test Steps (Assign)* and select the test case that you want to assign.

2.10.1.2 Editing Test Cases of Type Test Step

In the *Test Steps Designer* application, each test case has the following tabs that you can use to change or further specify the test case:

- *Header*
  Edit general properties and settings such as the version, version title, testing mode, status, priority, owner, strict step sequence, duration, description, prerequisites, or exit criteria. Wherever you can enter a long text, you can use the parameters you defined in the *Test Steps Parameters* app.
  You can customize which fields are mandatory and which fields must be hidden.
  You can edit multiple test cases at once with the mass update function.

  > → Recommendation
  >
  > SAP recommends that you only add test cases of type Test Step with the status *Released* to test plans.

- *Test Steps*
  Each step is defined with a description, instruction, and expected result. Wherever you can enter a long text, you can use the parameters you defined in the *Test Steps Parameters* app. If the test case is assigned to Solution Documentation, you can add an executable. You can also do the following:
  - Create substeps.
  - Include a checkbox that the testers must select as evidence for certain steps (for example, by attaching a screenshot).
  - Set additional test result attributes.
    You can specify for which test step a result attribute is relevant. For example, whether the result attribute is mandatory and for which step it is mandatory. You can set result attributes to *Inactive* if they are not used anymore. You can also define result attributes as *Public* to make them visible in *Test Sequences*. Public result attributes are also shown as *Previous Results from Test Sequence* in the *My Test Executions* app.
  - Upload an attachment for the step.
    You can upload document files and attach them to the step by using the drag and drop function or by adding links.
- *Attachments*
  You can upload document files or add links on this tab page.
- *Notes*
  You can add notes.
- *Relationships* (only relevant if you are using template test cases)
  In a template test case, you see the test cases derived from the template.
  In a test case derived from a template, you see the related template.
- *Where-Used*
  You can see the version of a test case that is used in a test plan. The tab content shows you where the test case is used by listing the test plans with information about the version of the test case that is currently being used.
- *Change Log*
  You see the changes that were made for the test case.

Adding New Solution Documentation Content to Test Steps

If the Solution Documentation content has been changed, you can display the changed Solution Documentation content to update the test case. For example, if new process steps have been added, you can create new test steps accordingly.

To display the Solution Documentation content, on the *Test Steps* tab, choose *Add from SolDoc* and select the new Solution Documentation content that you want to use in the test case.

Related Information

Test Steps Parameters [page 100]

2.10.1.3 Uploading Test Cases from Files

You can upload test cases that you have prepared as an Excel or a CSV (UTF-8 encoding only) file to the *Test Steps Designer* app. The *Test Steps Designer* app converts them to a test step test case (a test case of type *Test Step*), which, for example, can be executed with the *My Test Executions* app.

To upload a test case, on the start page of the *Test Steps Designer* app, choose (*Upload New Test Case from File*) and follow the steps in the wizard.

> → Tip
>
> You can download a sample Excel file and use it as a template for your test cases as follows:
>
> 1. Choose (*Upload New Test Case from File*).
> 2. In the *Upload Test Cases* wizard, choose *Download Sample File*.

With the download/upload function, you can also create new versions of existing test cases that have been created with the upload function. If you update the test case in the CSV or Excel file and then upload this file with the same test case title as the existing test case, the *Test Step Designer* app creates a new version of the test case.

2.10.1.4 Template Test Cases

Template test cases make it easier to create, maintain, and update test cases with similar content.

The *Relationship* tab of a template test case displays the test cases that have been created based on the template. On the *Relationship* tab of a test case derived from a template test case, you can choose the corresponding template test case and choose *Pull Updates* to import changes made in the template into the derived test case.

Creating Template Test Cases

You create template test cases as follows:

1. In the *Test Steps Designer* application, choose + (*Create New Test Case*).
2. In *Test Case Properties*, switch the toggle at *Template Test Case* to *Yes*.
3. Select a solution and a branch.

> **i** Note
>
> The solution and the branch are copied into all the test cases that are created based on this template test case.

4. Choose *Create*.
5. Define the properties and test steps of the template test case.
6. Release the template test case.

Template test cases are not used for testing. When you change or update a template test case, the updates can be imported into all the test cases that have been created based on the template test case.

Creating Test Cases Based on Template Test Cases

For the actual testing, you create new test cases based on the template test case.

To create a new test case based on a template test case, do the following:

1. Open the template test case in the *Test Steps Designer* application.
2. In the tool bar, choose *Create New Test Case from Template*.
3. Choose whether you want the updates in the template to be automatically pushed into the new test case.
4. Choose *Create*.

2.10.2 Test Plan Management Extensions

In Focused Build, two applications extend the test plan management of SAP Solution Manager: *Test Plan Management - Assignment Analysis and Test Plan Generation* and *Test Plan Management - Project Assignment*.

In Focused Build, the test suite is integrated with the project management. You create test plans for projects or you can assign test plans to projects.

> **i** Note
>
> Creating a test plan for a project or assigning a test plan to a project automatically creates a project task and a test request.

In Focused Build projects, you create test plans with *Test Plan Management - Assignment Analysis and Test Plan Generation*. With this application, you can check the test plan coverage of the work packages of a project and create a test plan based on the test cases assigned to the work packages.

You can also create test plans in the standard test plan management of SAP Solution Manager and then use the *Test Plan Management - Project Assignment* application to assign the test plans to projects and waves. Using *Test Plan Management - Project Assignment*, you can adjust the start and end dates and other test plan attributes to match the project data.

Related Information

Test Plan Management - Assignment Analysis and Test Plan Generation [page 98]
Test Plan Management – Project Assignment [page 99]

2.10.2.1 Test Plan Management - Assignment Analysis and Test Plan Generation

To create and maintain test plans for the work packages of a Focused Build project, you use the *Test Management - Assignment Analysis and Test Plan Generation* application.

In the application, you select a project and a wave and, if configured, a view. *Test Management - Assignment Analysis and Test Plan Generation* comprises the following tab pages:

- *Work Packages without Test Coverage*
- *Assignment Analysis and Test Plan Generation*

Work Packages without Test Plan Coverage

You use the *Work Packages without Test Coverage* tab to find out which work packages of the wave are not yet covered by a test plan. You use this information to create test plans on the *Assignment Analysis and Test Plan Generation* tab.

Work Packages without Test Coverage displays the work packages that are not included in a test plan in an overview table. The table provides information about the work packages, such as the work package status or the test cases assigned to the work pages. You can print or download the overview table.

Assignment Analysis and Test Plan Generation

The *Assignment Analysis and Test Plan Generation* tab displays a tree structure with the Solution Documentation folders for the scenarios, processes and process steps, and the Solution Documentation libraries of the solution. You can expand the folders to check the work packages. The *Work Packages without Assignment* folder lists the work packages that are not assigned to a Solution Documentation structure element.

On the *Assignment Analysis and Test Plan Generation* tab, you can do the following:

- Find work packages that do not have a test case assigned
  You can choose *Highlight Work Packages / Test Cases* and select *Work Packages without Test Case* to highlight the work packages without test cases.
- Assign test cases to work packages
  You can assign test cases stored in Solution Documentation to work packages without test cases. To do so, select the work packages and choose *Assign Test Case*. Select the test case and choose *Assign*.
- Create new test plans
  To create a test plan, select the work packages for which you want to create a test plan and choose *Save as a New Test Plan*. Enter test plan attributes such as a description, a start and an end date, a test classification, and a release schema and release status.

  > **i** Note
  >
  > Make sure that the work packages have test cases assigned.
  >
  > To create a test plan for all work packages of a wave, you can choose *Select all Work Packages with Test Cases*.

- Navigate to *Test Plan Management* to check and edit test plans
  The test plan ID of the last test plan that you have created for the wave is displayed on the *Assignment Analysis and Test Plan Generation* tab page. You can choose the test plan ID to check and edit the test plan in *Test Plan Management*.

  > **i** Note
  >
  > If you have created more than one test plan, you can choose *Load Test Plan* and select a test plan to display the test plan ID of the test plan on the *Assignment Analysis and Test Plan Generation* tab page.

2.10.2.2 Test Plan Management – Project Assignment

If you create test plans in the standard test plan management and want to assign these test plans to projects and waves, you use the *Test Plan Management – Project Assignment* application.

To assign a test plan to a project and a wave, do the following:

1. Start the application by choosing *Test Plan Management – Project Assignment* on the SAP Solution Manager launchpad.
2. To search for the test plan, select the solution, branch, and (if configured) the view.
3. Select the test plan.
4. Assign test plan to a project and a wave.

When you save the test plan assignment to the project, a test request and a project task are created automatically.

You can do the following:

- Choose the test request for the test plan to edit the test request in the WebClient UI.
- *Open Assigned Project*
  Navigate directly to the assigned project in the project management WebClient UI.

- *Unassign Project*
  Cancel the assignment to a project.
- *Adjust Test Plan Dates to Wave*
  Adjust the test plan start date and end date to the dates scheduled for the wave.
- *Maintain Test Plan Attributes*
  Change attributes of the test plan, such as the test plan classification category.

2.10.3 Test Steps Parameters

When you design test steps test cases (test cases of type *Test Steps*), enter parameters as placeholders to put test data values directly at the right place for the right tester during test execution. Use this application to manage the parameters and check missing assignments.

Basic Terms and Concepts

Parameters make it easy to reuse one common test case with slightly different information. You don't need to create a separate test data sheet with specific instructions for different test packages or testers. Instead, you use the parameters as placeholders in test steps test cases (test cases of type *Test Steps*) and assign specific values to it.

For every test plan that uses a parameter, at least one **value** must be assigned. You can define several values for the same parameter and distinguish them based on test packages, test cases, and testers. During test execution, the most specific value is shown. For example, if you assigned different values for testers, test cases, and test packages, the testers see the value individually assigned to them, regardless of the general test package value.

For test cases with the testing mode *Shared Results*, the value assignment of the test plan or test package level is considered only. Value assignments on tester level are ignored. This ensures that testers work with the same parameter values as they share instructions and results in this kind of test case.

For a better overview, every parameter must be in a **group**. When you design test steps test cases (test cases of type *Test Steps*) with parameters, groups help you find and add them.

Prerequisites

- For value assignments, at least one test plan containing one or more test steps test cases (test cases of type *Test Steps*) with parameters exists.
- To see the change log of value assignments in a test plan, you have been assigned the authorization object `FB_TS_CLOG`.

Features

The *Test Steps Parameters* application gives an overview of the test steps parameters that have been created in SAP Solution Manager and helps you to find missing value assignments and empty values.

If a test step test case (test cases of type *Test Steps*) with parameters is used in a test plan and has no value assigned, the tester only sees the parameter name in brackets instead of a specific value during test execution. The tester can refer to the parameter name to inform the test manager about a missing test data value.

Parameter Overview

- You can see the existing parameters in their groups and whether test plans without assigned values exist.
- You can add new groups and parameters and directly access value assignment.
- You can delete empty groups.
- You can search for parameter names or parts of names.

Parameter Details

- For each parameter, you see a list of the test cases that use it and the test plans that contain those test cases. You can also search for specific test cases and test plans.
- You can directly access the test steps test cases (test cases of type *Test Steps*) that contain the selected parameter.
  After selecting a parameter under *Test Plan Assignment*, you can filter the test plan list to find the test plans that are missing a value.
- When you select a test case, you go directly to the *Test Steps Designer* application and you can use the parameters in long-text fields within the header and test steps.
- You can delete parameters that are not used in any test cases.

Value Assignment

- After selecting a test plan, you can use a switch to filter for the parameters that are empty for this particular test plan.
- You can also mass upload value assignments and download the values assigned to a test plan.

Related Information

Test Steps Designer [page 93]

2.10.4 Test Suite Dashboard (Focused Build)

As a test manager, you use the *Test Suite Dashboard* app to monitor the test status of projects and solutions. It offers a unique way to analyze data step by step from different perspectives, to investigate a root cause through drilldown, and to act on transactional content.

The *Test Suite Dashboard* app offers the following functions:

- Adaptable *Overview* page
- Interactive details pages for detailed customized reports on test execution and defect status
- Customize and share details pages as a page variant with other users
- Chart visualization to spot relevant data more quickly
- Export data to a spreadsheet file

> → Tip
>
> The in-app help provides help for the *Test Suite Dashboard* app. You can display the in-app help by choosing the ⓘ icon.

Procedure

To check the status testing for a project in the *Test Suite Dashboard* app, follow these steps:

1. Start the application by choosing *Test Suite Dashboard - Focused Build* on the SAP Solution Manager launchpad.

   > i Note
   >
   > If you do not use project management for Focused Build projects, select *Test Suite Dashboard - Test Suite*.

2. In *Filter Bar*, select at least the project. You can limit the search by selecting additional attributes.
3. Choose *Go*.

   > i Note
   >
   > In the *My Views* dropdown, you can configure, save, and share views.
   >
   > Choose *Save As* to save a view. It contains the whole page content.
   >
   > To load a view, select the view from the list. To change or delete a view, choose *Manage*.

Cards

In the dashboard, you have access to the following cards:

1. *Work Package Test Case Assignment*
   This card shows the number of work packages by their status in relation to the assigned test cases. You can switch the view of the card between *Absolute* or *Percentage*.
2. *Test Status Progress*
   This card shows the progress of all aggregated test execution status values based on the filters and the selected time frame
3. *Test Status*

This card shows the number of test cases by the aggregated test execution status grouped by test plans. Additionally, it shows the number of test cases that are not passed yet.

4. *Critical Test Executions*
   This card shows a list of test cases in test execution status red sorted by priority and open defects.
5. *Test Steps Progress Monitor*
   This card shows all test steps test cases in relation to the filter settings sorted by status and open steps.
6. *Defect Status*
   This card shows the number of test cases by the aggregated test execution status grouped by test plans. You can switch the view of the card between *Priority* or *Priority and Status*. Additionally, it shows the number of open defects.
7. *Critical Defects*
   This card shows a list of defects with priority *High* or *Very High* sorted by priority and status.
8. *Defect Status Progress*
   This card shows the progress of all aggregated defect status values based on the filters and the selected time frame.

You use the `/SALM/TRACEABILITY_MATRIX` report to get detailed reporting on requirements, work packages, work items, and test cases assigned to work packages and their relations. Additionally, you can also get detailed reporting on test management data such as test plans, test packages, test cases, test case execution data, and defects and defect corrections created.

Details Pages

From the overview page, you can navigate to the following details pages by selecting the relevant card:

- *Work Package Test Case Assignment*
- *Test Status*
- *Critical Test Executions*
- *Defect Status*
- *Critical Defects*
- *Test Status Progress*
- *Defect Status Progress*

The details pages provide further information for analysis, view building, chart visualisation, sharing/export mechanisms, filtering, and interactive chart and table data visualization. A details page has a filter bar as well as a chart and table view.

2.10.5 My Test Executions

As a tester, you can use the *My Test Executions* app to document your test cases and report defects for the test cases.

You open the *My Test Executions* app from the SAP Solution Manager launchpad.

The app opens with the *My Packages* page. Under *Test Packages*, you find the test packages assigned to you, categorized by status:

- *Ready to Test*: all test packages with test cases that are ready to be tested
- *Released*: all test packages that are not locked
- *Protected*: all test packages that are locked
- *Assigned*: all test packages assigned to the current user

> **i Note**
>
> To display and access the test packages of another tester, you can choose (On Behalf), search and select the tester, and log on on behalf of this tester.

My Packages

In the *Test Packages* list, you can do the following:

- Filter and sort the test packages, for example, by status, test plan, test package name, or empty test package priority.
- Select a test package to open the test package in the test package view.

Test Package View

In the test package view, you can do the following:

- View general information about the test package and read attached documents.
- Get an overview of the status of the test cases in the selected test package.
- Select a test case to manage and document it in the test case view.

Test Case View

In the test case view, you can find information about the test case and read attached test case descriptions.

For test cases that are ready to test, you can do the following:

- Document the test case execution.
- Record TBOMs for the test document and test steps.
- Enter a comment in the *Comment* field on the *Header* tab page.

  > **i Note**
  >
  > The *Comment* field has to be activated in the Customizing for SAP Solution Manager (transaction **SPRO**) at *SAP Solution Manager* > *Focused Build* > *Test Suite Extensions* > *Central Settings for Test Suite* > .

- If this is enabled in the standard test suite, testers can also digitally sign test results and test notes.
- Report a new defect for the test case.
  Choose *Create Defect*. Select the defect type *Defect*, the system, and a priority and enter a defect title and a description. You can select categories to further specify the defect. If there is an evidence document attached to the test case, you can choose to take it over as a defect attachment.
  You can later find and further specify the defect in the *My Defects* app. Defects are used to notify developers of errors that have been identified during testing. If necessary, a defect correction for the defect can be created in *My Defects* and later be processed in *My Defect Corrections*.

> **i Note**
>
> Setting an error for a test case or a test step automatically calls up the *Create Defect* dialog, if in the Customizing for SAP Solution Manager (transaction **SPRO**) at *SAP Solution Manager* > *Focused Build* > *Test Suite Extensions* > *Central Settings for Test Suite* > the *Open Defect Dialog on Error* function is active.
>
> If the other *Allow Personalization* function is set to active, the *Create Defect* dialog only starts if the settings in transaction `SU01` are either set to *Yes* or *Default*.
>
> The *Create Defect* dialog shows the defect type (taken from the personalization) and takes over information on the system, the client (if the executable is assigned to a test case), and the actual and expected results.

- Report an incident.
  Choose *Create Defect*. Select the defect type *Incident*, the system, and a priority and enter an incident title and a description. You can select categories to further specify the incidents.
  Incidents are processed using IT service management.
- Assign an already existing defect to the test case.
  Choose *Assign Defect*. Search for known defects related to the function tested in the test case, select the defect and assign it to the test case.
- Change the status of the test case.
  You can change the status of the test cases from the default *Set to "OK"* status to the statuses that you have customized.
- *Results* tab page:
  - Upload files, for example, screenshots, to document the test results.
  - View the results that other testers had for the same test case.
- *Attachments* tab page:
  Upload test result documents such as screenshots for the test case.

Test Steps

The *My Test Executions* app displays test steps for test cases that have been created with the *Test Step Designer* app. Public result attributes are shown as *Previous Results from Test Sequence*.

A single test steps test case can be executed multiple times. Each time a test case is executed, a new runtime object is created and the previous objects are saved for reference and documentation purposes.

Related Information

Managing Defects and Defect Corrections [page 105]

2.11 Managing Defects and Defect Corrections

The *My Defects* and *My Defect Corrections* applications, together with *My Test Executions*, enable the processing and correction of defects found during the execution of test plans.

By passing information about the project and wave from the test plan to a defect and then from the defect to the corresponding defect correction, these applications support the collaboration between testers and developers as follows:

- If a test case fails, the tester can report a defect in *My Test Executions*. This creates a defect containing information about the project and the wave from the test plan in *My Defects*.
- The defect can then be further specified, analyzed, and processed in *My Defects*.
  If it turns out that the implementation of a change is necessary for the defect, a defect correction can be requested in *My Defects*. This creates a defect correction in *My Defect Corrections* that automatically contains information about the release. You can assign defect corrections to developers.
- The defect correction is processed and documented by the assigned developers in the *My Defect Corrections* application.
  If a developer changes the status of a defect correction, for example, by providing a solution for the defect, this is reported to the tester by a status change of the corresponding defect in *My Defects*.

> **i Note**
>
> For the two workflows described below (defect correction for SFT/AT and defect correction for FIT/RT), the following prerequisite applies:
>
> An active import feedback must be configured. For more information, see the Configuration Guide at https://help.sap.com/docs/Focused_Build_Focused_Insights?task=use_task, chapter *6.2.7 Configuring Active Import Feedback*.

Defect Correction for SFT/AT Workflow

When the developer finishes the correction assigned to a defect correction that was created for a single functional test (SFT) or an acceptance test (AT), they trigger the *Set to Retest with Transport* action. This releases the original transport request and the defect correction is set to the new *In Delivery* status (shown on the top right of the defect correction area).

Normally, the import to the QAS system is scheduled and performed periodically by the *Release Batch Import* program `/SALM/BATCH_IMPORT_TRIGGER` with the import variant `/SALM/QAS`. When the import is successful, the *Release Batch Import* program automatically sets the target status to *Transport to Testing*.

Defect Correction for FIT/RT Workflow

If you require a defect correction for a functional integration test (FIT) and a regression test (RT), run the *Release Batch Import* program `/SALM/BATCH_IMPORT_TRIGGER` with the following variants in the order that is shown:

1. Import variant `/SALM/INTEGRATION_TEST_QAS` for the import to the QAS system.
2. Import variant `/SALM_INTEGRATION_TEST_PRE` for the import to the pre-production system.

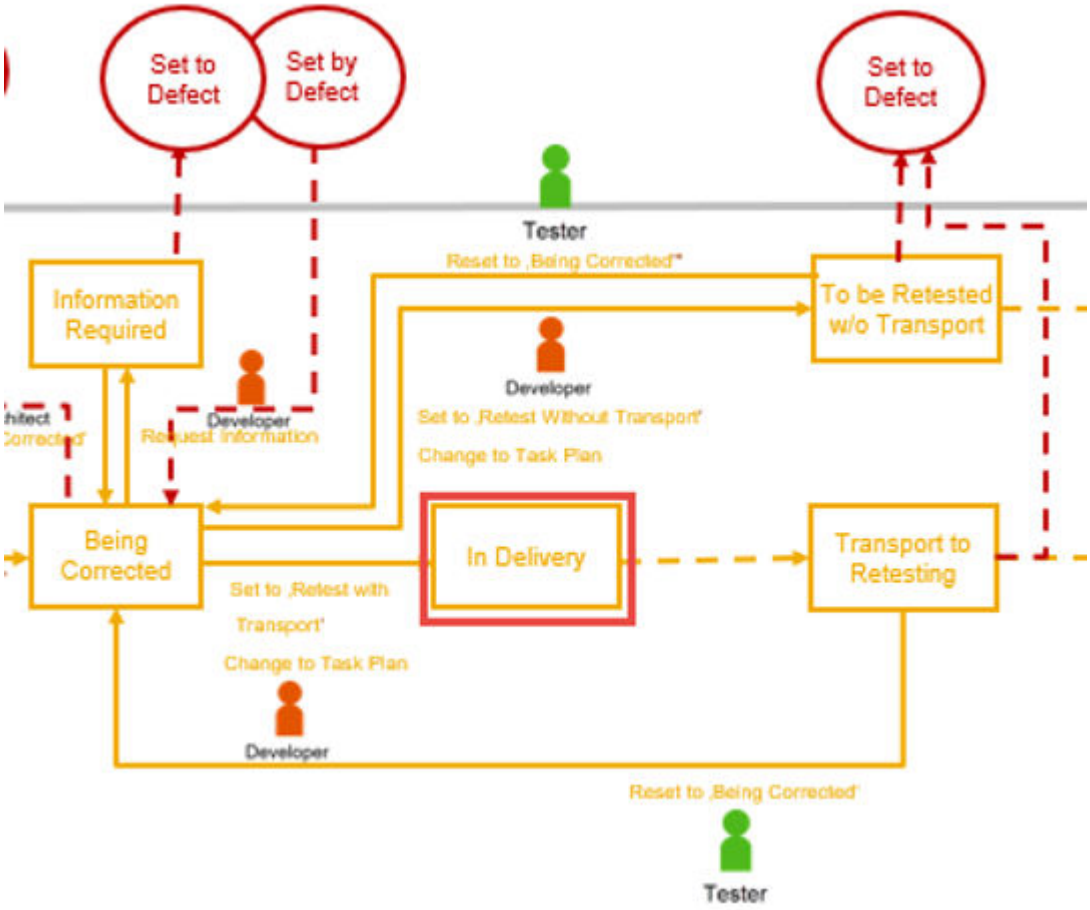
Select the *Check for Complete WP Import* option for the program `/SALM/BATCH_IMPORT_TRIGGER` with the import variant `/SALM_INTEGRATION_TEST_PRE`.

The target status *Transport to Retesting* is only set if the import to the pre-production system was successful.

If you run the release batch import program in dialog mode, you must leave the program completely after the protocol for the import run is displayed. Otherwise, the CRM documents are locked.

> **Note**
>
> You can also request defect corrections for work packages with the status *To Be Tested* in the *My Work Packages* app. These defect corrections do not have a corresponding defect. You can use this function for single functional test and acceptance test without integration in the Test Suite.

Flow Diagram: Focused Build Defect Correction Workflow



Focused Build Defect Correction Workflow

Automatic E-Mail Notifications

The system sends automatic e-mail notifications for Focused Build defects. This feature is not active by default. If you want to receive automatic notifications, complete the following steps:

- In the action profile for `S1DM` (Focused Build Defects), set the automatic PPF actions `S1DM_SEND_MAIL_REPORTER` and `S1DM_SEND_MAIL_PROCESSOR` to *active*. Each automatic defect e-mail notification type is an automatic PPF-Action.
- Create customer-own mail forms for each automatic e-mail type and assign them to the corresponding automatic PPF action via the expression `MAIL_FORM_TEMPLATE` within the method call.

- Add a sender e-mail to each automatic PPF action via the expression `DEFAULT_SENDER_EMAIL`. The sender must be authorized for sending e-mails.
- Perform all further configuration steps in the Configuration Guide at https://help.sap.com/docs/Focused_Build_Focused_Insights?task=use_task, chapter *7.2.9 My Defects: Configuring automatic Actions for Email Notification*.

When the status of a defect changes, an automatic e-mail notification is sent out to the corresponding Focused Build recipient user.

For the automatic PPF action `S1DM_SEND_MAIL_PROCESSOR_CHG`, perform the same configuration steps as described above.

When a new message processor is entered in the defect (without a user status change), an automatic e-mail notification is sent out to the corresponding Focused Build recipient user.

Related Information

My Defects [page 108]
My Defect Corrections [page 110]
My Test Executions [page 103]
Release Batch Import - Trigger [page 44]

2.11.1 My Defects

The *My Defects* app shows all defects that have been reported by you for a test case in the *My Test Executions* app or for which you have been assigned as a processor and all defects assigned to your team. You can use the *My Defects* app to further specify, categorize, and process defects. You also use this application to request defect corrections.

You can open the *My Defects* application from the SAP Solution Manager launchpad.

Analyzing and Documenting Defects

Choose the defect in the list under *Defects*. On the tab pages, you can do the following:

- *Details*
  Shows the active defect correction. You can:
  - Further specify or categorize the defect
  - Assign the defect to a message processor or support team
- *Texts*
  Read and add texts that document the defect
  You can use rich text format to enrich the text with formatting and images or screenshots if you have activated this function in the Customizing for SAP Solution Manager (transaction SPRO). For more

information, see the Configuration Guide at https://help.sap.com/docs/Focused_Build_Focused_Insights?task=use_task.

- *Attachments*
  Attach files, such as image files or document files
- *My Defect Corrections*
  If you have requested a defect correction: Navigate to the defect correction that has been created for the defect
- *Relations* and *Related Test Case*
  The *Relations* tile shows the entire docflow (active and inactive defect corrections)
  Check related transactions or the related test case
- *Actual Effort*
  Document the tasks and the time that you spent on the defect

Changing the Status of Defects

To process the defect, change the status of the defect by choosing *Action* in the tool bar and selecting the appropriate CRM action to set the wanted follow-on status. For example, you can set a newly created defect to *In Process* to start working on it or you can withdraw the defect. Once the defect is set to *In Process*, you can do the following:

- Forward the defect to another team if you or your team is not responsible
- Propose a solution for the defect
- Request a defect correction
  To request a defect correction for the defect, choose *Action* and select *Create Defect Correction*. This creates the corresponding defect correction in the *My Defect Corrections* application.
  You can only create a defect correction in the action menu of the *My Defects* app if no defect correction has been created yet, or if no active defect correction exists. A defect correction with user status *Withdrawn* is classified as inactive. This ensures that only one active defect correction related to a defect can exist at any point in time.
- Request additional information from the testers

Finally, you can close the defect by setting its status to *Confirmed*. Prerequisite for this is one the following cases:

- The solution has been accepted by the tester.
- The retest of the correction assigned to the defect correction has been successful.

When you confirm a defect, the defect and the corresponding defect correction are both confirmed if the assigned transport request has been imported into the target system successfully.

A defect which is set to the status *In Process* can be withdrawn. A defect can also be withdrawn in statuses *New* and *Tester Action*. Prerequisite: You can only withdraw the defect if you are also assigned to the partner function *Reporter*.

If you are not authorized to withdraw the defect, you receive the following error messages:

- Status was reset by system.
- Withdrawal of defect is not allowed. Current user is not the reporter.

> **Note**
>
> If you are assigned to the defect as *Message Processor* and execute the action *Withdraw*, you have to either empty the *Message Processor* field or replace yourself as *Message Processor* with another business partner to receive the error messages described.
>
> Otherwise, the status will also be reset by the system. You will then receive an error message from SAP CRM standard.

2.11.2 My Defect Corrections

The *My Defect Corrections* application shows all defect corrections assigned to you or your team. You can use this application to check and document information about the defect corrections, create transport requests for the defect corrections, and change the status of the defect corrections.

On the tab pages, you can do the following:

- *Details*
  - Find information about the release
  - Describe or categorize the defect correction
  - Assign the defect correction to the responsible roles

    > **Note**
    >
    > Only defect corrections that were created as part of single functional tests or acceptance tests are connected to a work package. In these cases, the *Handover to Release* action can only be set in the associated work package. A confirmed defect correction is set to *Handed Over to Release* automatically.
    >
    > Defect corrections that were created for functional integration and regression tests are not connected to work packages. In this case, you need the *Handover to Release* action to further process the document.
- *Texts*
  Read and add texts that document the defect correction
- *Attachments*
  Attach files, such as image files or document files
- *Documentation*
  Assign, unassign and move Solution Documentation structures, and change the status of a test step
- *Transport*
  Create transport requests for the defect correction
  Under the *Transport* tab, use the *Assign Transport Request* button and the *Decouple Transport Request* button to assign and decouple ABAP- or Cloud TMS-related transport requests to and from defect corrections with the status *Being Corrected*.
- *Relations*
  Check related transactions such as defects, work packages, or releases
- *Efforts*
  Document the tasks and the time that you spent on the defect correction

To process the defect correction, you change the status of the defect correction by choosing *Action* in the tool bar and selecting a follow-on status. For example, you can accept a newly created defect correction and start working on it or you can withdraw the defect correction. Using the status control, you can also request additional information about the defect or request a retest for the solution that you have provided.

> **!** Restriction
>
> The following actions are only available if the predecessor document of the defect correction is a work package and **no** defect:
>
> - Confirm Defect Correction
> - Confirm Defect Correction with Transport
> - Reset to 'Being Corrected'
>
> If the predecessor document is a defect, the tester must set the status in the defect.

During an import run, if you get an import error with the return code 08 (RC08 import error), you can automatically reset the user status of the defect correction. For example, when the *Release Batch Import – Trigger* import run detects an RC08 import error for a specific defect correction, the consistency check `S1_IMPORT_INTO_X_OK` resets the defect correction automatically to the user status *Being Corrected*. Imported transports are set to *Imported with Error*.

2.12 Fix Pace

Fix Pace is a fix process for Focused Build releases in the *Hypercare* phase and *Operation* phase.

Fix Pace uses the following change transaction types:

- Focused Build request for change
- Focused Build standard change
- Focused Build urgent change

These change transactions apply to the same system landscape as the Focused Build release. Fix Pace is used for corrections in a release in the *Hypercare* or *Operate* phases. When the follow-on release is switched to *Hypercare*, Fix Pace is completed and all changes have to be completed.

Fix Pace is supported by *My Requests for Change*, *My Requests for Change Approvals*, and *My Change Documents* applications. You can also change requests for change and change documents in the *Mass Change Operations* app.

Roles

- Change manager
  Business partner function that is responsible for validating and approving requests for change.
- Tester
  Business partner function that performs the unit test of change documents in the quality assurance system.
- Release manager
  Business partner function that is responsible for importing the changes into the production system.

Processes

- Requests for change
  A request for change can be created for an incident message or directly in the WebClient UI or in the *My Requests for Change* app.
  The change manager validates the request for change and defines its scope by specifying which type of change document (standard change or urgent change) is required and the system in which the change has to be implemented. Several change documents of the same type can be assigned to a request for change. The request for change then must pass an approval process before any change can be made. After the change manager has approved the request for change, the change documents are created and linked to the request for change.
- Standard changes
  Standard changes are used for low-risk changes that are uncritical and frequently used. Standard changes affect only Customizing objects that are defined as uncritical (allowlisted) on the *Allowlist Objects* tab of the *Change Request Management Administration Cockpit*.
  Since standard changes have no technical impact, they can be processed without an approval procedure.
- Urgent changes
  Urgent changes are used to quickly fix errors in existing functionality.
  When urgent changes have been be made in the development system, they need to be successfully tested before the release manager can set them to *Handover to Production* to import them to the production system.

Approval Procedures

The delivered default approval procedure consists of only one approval step in which the change manager has to approve the request for change. You can also set up your own approval procedures and use them in the *My Requests for Change* app.

In *My Requests for Change* and *My Change Documents*, you can also implement the Electronic Signature extension to use a FDA-compliant digital signature for signing off requests for change or urgent changes.

Related Information

My Requests for Change [page 112]
My Change Documents [page 113]
Electronic Signature [page 140]

2.12.1 My Requests for Change

The *My Requests for Change* can be used to create and process requests for change as part of the Fix Pace process in Focused Build:

- Requesters use the app to create requests for change.
- Change managers use the app to validate and approve or reject requests for change.

The *My Requests for Change* app has the following tab pages:

- *Details*
  View and change details of the request for change.
  To change details of the request for change, choose the ✎ (edit) icon.
  You can assign the request for change to a category and a release and assign the business partner functions to the relevant people.
- *Dates*
  View and set dates for the request for change
- *Texts*
  View and add texts, such as comments about the change.
- *Attachments*
  Attach documents to the change in the *My Requests for Change* app by uploading them or using the drag and drop function.
  Attachments are stored only locally for the change in the *My Requests for Change* app, not in the Solution Documentation.
- *Documentation*
  On the *Documentation* tab page, you can assign Solution Documentation structures and thereby the documents that are already stored at these Solution Documentation structures.
- *Scope*
  On the *Scope* tab, you define the required change documents:
  Select the type of change (standard change or urgent change) and specify the productive system in which the change should be implemented.
- *Approval*
  On the *Approval* tab, you define the required approval steps or approval procedure.
- *Relations*
  Related change documents or incident messages

Processing and Approving Requests for Changes

To switch the request for change to another status, use the *Action* button in the footer and select the next status in the menu.

The status of a request for change is automatically set to *Implemented* when all change documents in the scope are in status *Productive*. After all change documents in scope were implemented, the request for change can be completed by setting the *Confirmed* status. This also completes all related change documents.

2.12.2 My Change Documents

The *My Change Documents* app can be used to process standard changes and urgent changes as part of the Fix Pace process in Focused Build. This app is used by developers and, if involved in the testing of urgent changes, by testers.

The *My Change Documents* app has the following tab pages:

- *Details*
  View and change details of the change.
  To change details of the change, choose the ✎ (edit) icon.
  You can assign the change to a category and a release and assign the business partner functions to the relevant people.

- *Dates*
  Display dates.
- *Texts*
  View and add texts, such as comments about the change.
- *Attachments*
  Attach documents to the change in the *My Change Documents* app by uploading them or using the drag and drop function.
  Attachments are stored only locally for the change in the *My Change Documents* app, not in the Solution Documentation.
- *Documentation*
  Assign structure elements of the Solution Documentation and then manage and change the documents that are already stored in the assigned Solution Documentation structures or upload or create new documents to store them at the assigned structures.
  Change documents inherit the assignment to Solution Documentation structures from their related requests for change but you can also assign additional structure elements.
- *Transports*
  Create transport requests, transports of copies, or tasks for transport requests for the change.
- *Relations*
  View the related request for change, or other related transactions.
  You can also create new dependencies to other transactions.

Changing the Status of Change Documents

To switch the change to another status, use the *Action* button in the footer and select the next status in the menu.

2.12.3 My Requests for Change Approvals

You use the *My Requests for Change Approvals* app to display all requests for change (RfCs) for the business partner that is assigned to the user who is currently logged on.

The *My Requests for Change Approvals* app has the following tab pages:

- *Details*
  View and change details of the request for change approval.
  To change details of the request for change approval, choose the ✎ (edit) icon.
  You can assign the request for change appoval to a category and a release and assign the business partner functions to the relevant people.
- *Dates*
  View and set dates for the request for change approval.
- *Texts*
  View and add texts such as comments about the request for change approval.
- *Attachments*
  Attach documents to the change in the *My Requests for Change Approval* app by uploading them or by using the drag and drop function.
  Attachments are stored only locally for the change in the *My Requests for Change Approval* app, not in Solution Documentation.

- *Documentation*
  On the *Documentation* tab page, you can assign Solution Documentation structures and thereby the documents that are already stored at these Solution Documentation structures.
- *Scope*
  On the *Scope* tab, you define the required change documents as follows:
  Select the type of change (standard change or urgent change) and specify the productive system in which the change should be implemented.
- *Approval*
  On the *Approval* tab, you define the required approval steps or approval procedure.
- *Relations*
  This tab shows related change documents or incident messages.

Displaying Requests for Change Approval

To display your requests for change approval, log into the system and open the application.

2.13 Enhance Pace

Enhance Pace is a process that allows you to do maintenance activities on the maintenance branch, and to bundle normal changes that are not bug fixes or standard changes.

If you have a dual track landscape in place, you can use Focused Build for your maintenance track.

Enhance Pace uses the following change transaction types:

- Focused Build request for change
- Focused Build standard change
- Focused Build urgent change
- Focused Build normal change

Enhance Pace is supported by *My Requests for Change*, *My Requests for Change Approvals*, and *My Change Documents* applications. You can also change requests for change and change documents in the *Mass Change Operations* app.

Roles

- Requester
  Business partner function that is responsible for the creation and confirmation of requests for change.
- Change manager
  Business partner function that is responsible for validating and approving requests for change.
- Tester
  Business partner function that performs the unit test of change documents in the quality assurance system.
- Release manager
  Business partner function that is responsible for importing the changes into the production system.

Processes

- Requests for change

A request for change can be created in the *My Request for Change* app.
The change manager validates the request for change and defines its scope by specifying which type of change document (standard change, normal change or urgent change) is required and the system in which the change has to be implemented. Several change documents of the same type can be assigned to a request for change. The request for change then must pass an approval process before any change can be made. After the change manager has approved the request for change, the change documents are created and linked to the request for change.

- Standard changes
  Standard changes are used for low-risk changes that are uncritical and frequently used. Standard changes affect only Customizing objects that are defined as uncritical (allowlisted) on the *Allowlist Objects* tab of the *Change Request Management Administration Cockpit*.
  Since standard changes have no technical impact, they can be processed without an approval procedure.
- Urgent changes
  Urgent changes are used to quickly fix errors in existing functionality.
  When urgent changes have been be made in the development system, they need to be successfully tested before the release manager can set them to *Handover to Production* to import them to the production system.
- Normal changes
  Normal changes are regular changes, for example, a new function or a new feature in existing functionality. A normal change is usually deployed together with other normal changes in a bigger package.

Approval Procedures

The delivered default approval procedure consist of only one approval step in which the change manager has to approve the request for change. You can also set up your own approval procedures and use them in the *My Requests for Change* app.

In *My Requests for Change* and *My Change Documents*, you can also implement the Electronic Signature extension to use a FDA-compliant digital signature for signing off requests for change or urgent changes.

2.13.1 My Requests for Change

You can use the *My Requests for Change* app to create and process requests for change as part of the Enhance Pace process in Focused Build:

- Requesters use the app to create requests for change.
- Change managers use the app to validate and approve or reject requests for change.

The *My Requests for Change* app has the following tab pages:

- *Details*
  View and change details of the request for change.
  To change details of the request for change, choose the ✎ (edit) icon.
  You can assign the request for change to a category and a release and assign the business partner functions to the relevant people.
- *Dates*
  View and set dates for the request for change
- *Texts*
  View and add texts, such as comments about the change.

- *Attachments*
  Attach documents to the change in the *My Requests for Change* app by uploading them or using the drag and drop function.
  Attachments are stored only locally for the change in the *My Requests for Change* app, not in the Solution Documentation.
- *Documentation*
  On the *Documentation* tab page, you can assign Solution Documentation structures and thereby the documents that are already stored at these Solution Documentation structures.
- *Scope*
  Define the required change documents:
  Select the type of change (standard change, normal change or urgent change) and specify the productive system in which the change should be implemented.
- *Approval*
  Define the required approval steps or approval procedure.
- *Relations*
  See related change documents or incident messages.

Processing and Approving Requests for Changes

To switch the request for change to another status, use the *Action* button in the footer and select the next status in the menu.

The status of a request for change is automatically set to *Implemented* when all change documents in the scope are in status *Productive*. After all change documents in scope were implemented, the request for change can be completed by setting the *Confirmed* status. This also completes all related change documents.

2.13.2 My Change Documents

You can use the *My Change Documents* app to process standard changes, normal changes, and urgent changes as part of the Enhance Pace process in Focused Build.

This app is used by developers and, if involved in the testing of urgent changes, by testers.

The *My Change Documents* app has the following tab pages:

- *Details*
  View and change details of the change.
  To change details of the change, choose the (edit) icon.
  You can assign the change to a category and a continual cycle and assign the business partner functions to the relevant people.
- *Dates*
  Display dates.
- *Texts*
  View and add texts, such as comments about the change.
- *Attachments*
  Attach documents to the change in the *My Change Documents* app by uploading them or using the drag and drop function.
  Attachments are stored only locally for the change in the *My Change Documents* app, not in the Solution Documentation.

- *Documentation*
  Assign structure elements of the Solution Documentation and then manage and change the documents that are already stored in the assigned Solution Documentation structures or upload or create new documents to store them at the assigned structures.
  Change documents inherit the assignment to Solution Documentation structures from their related requests for change but you can also assign additional structure elements.
- *Transports*
  Create transport requests, transports of copies, or tasks for transport requests for the change.
- *Relations*
  View the related request for change, or other related transactions.
  You can also create new dependencies to other transactions.

Changing the Status of Change Documents

To switch the change to another status, use the *Action* button in the footer and select the next status in the menu.

2.13.3 My Requests for Change Approvals

You use the *My Requests for Change Approvals* app to display all requests for change (RfCs) for the business partner that is assigned to the user who is currently logged on.

The *My Requests for Change Approvals* app has the following tab pages:

- *Details*
  View and change details of the request for change approval.
  To change details of the request for change approval, choose the ✎ (edit) icon.
  You can assign the request for change appoval to a category and a release and assign the business partner functions to the relevant people.
- *Dates*
  View and set dates for the request for change approval.
- *Texts*
  View and add texts such as comments about the request for change approval.
- *Attachments*
  Attach documents to the change in the *My Requests for Change Approval* app by uploading them or by using the drag and drop function.
  Attachments are stored only locally for the change in the *My Requests for Change Approval* app, not in Solution Documentation.
- *Documentation*
  You can assign Solution Documentation structures and thereby the documents that are already stored at these Solution Documentation structures.
- *Scope*
  On the *Scope* tab, you define the required change documents as follows:
  Select the type of change (standard change, urgent change or normal change) and specify the productive system in which the change should be implemented.
- *Approval*
  You define the required approval steps or approval procedure.

- *Relations*
  This tab shows related change documents or incident messages.

3 Conversion to SAP S/4HANA

SAP supports you in the conversion of an existing SAP ERP system to SAP S/4HANA system.

System Preparation

In the SAP ERP landscape, you must implement the following notes in the latest version:

- SAP Readiness Check 2.0 & Next Generation SAP Business Scenario Recommendations or SAP Innovation and Optimization Pathfinder
  2758146
- For more information, see https://rc.cfapps.eu10.hana.ondemand.com/comsaprcweb/index.html.

If you want to analyze additional data in the SAP Readiness Check, the following notes are relevant:

Description	Note
Custom Code	Custom Code Analyzer 2185390
SAP S/4HANA Sizing	ABAP on HANA sizing report 1872170
Simplification Item Check	Simplification Item Check 2399707
Business Process Analytics	Business Process Improvement Content for "SAP Readiness Check 2.0" and "Next Generation SAP Business Scenario Recommendations" and "SAP Innovation and Optimization Pathfinder" 2745851
IDoc Data	INR: Interface Discovery for IDoc 2769657
Data Volume Management	FAQ for collecting DVM data during S/4HANA Readiness Check 2721530
Business Partner/Customer -Vendor	Enabling BP/CVI Analysis with Readiness Check 2.0 2811183

Description	Note
Innovation Potential	Enabling BP/CVI Analysis with Readiness Check 2.0 2811183

3.1 Simplification Item Management for System Conversion

In the *Simplification Item Management* application, you upload the results from the SAP Readiness Check. During the upload, simplification items that contain one or more activities are created. You can then inspect and process the activities for conversion.

Context

The SAP Readiness Check provides information about which components are used in the SAP ERP system and is compared to a simplification item database for SAP S/4HANA provided by SAP. This comparison between the source system and the target system is used to find out which steps or changes are necessary for a successful conversion to SAP S/4HANA.

Simplification items are created and each simplification item is broken down into one or more activities including additional information. You access these simplification items and activities from the *Simplification Item Management* application to plan and schedule your conversion in detail.

Prerequisites

- You have executed the SAP Readiness Check. For more information, see *Change Management* > *SAP Readiness Check* > *SAP Readiness Check 2.0* and 2758146.
- You have run the analysis of your SAP ERP system and a zip file was created. You can download the zip file and verify the data before the upload. You find the relevant information in the *Activities* and *RelevantSimplificationItems* files.
- For the upload, you must provide the zip file in English.
- You have the role `SAP_OST_FB_SC_ARCHITECT`.

Starting the Application

To open the application, from the launchpad, in the *Focused Build - Conversion Project area*, choose the *Simplification Item Management* tile.

The overview page displays analyses from SAP Readiness Check that you or other users have uploaded to the application. You can search for an analysis by entering the name or part of the name into the search bar, or you can access an analysis by selecting it from the list.

When you open the application for the first time and no analysis is available, you need to upload an analysis. For more information, see Upload Analysis [page 122].

3.1.1 Upload Analysis

You upload the zip file that you downloaded from the SAP Readiness Check. The file is analyzed during the upload and simplification item activities are created.

Procedure

1. In the *Focused Build - Conversion Project* area, choose the *Simplification Item Management* tile.
2. In the *Overview* screen, upload a new readiness check by choosing ↑ *Upload*.
3. Enter a description and choose a file / browse to a file.
4. Choose *OK*.

Results

Before the simplification items and activities are created, the following checks are executed during the upload:

- Maximum number of activities uploaded
- URL that you provided in *SAP Note* section
- Values that you provided in the Excel files
- Duplicates: You can upload a readiness check only once.
  If one of the checks fails, an error message informs you that the upload failed. As a tool lead, you check and analyze the application log for further details (object: `/SALM/SIM`).

Related Information

Conversion Activities [page 123]

3.1.2 Conversion Activities

You access the uploaded simplification items and activities to plan and schedule your conversion in detail.

Managing Your Simplification Items and Activities

Once the data has been processed, you can start browsing through the results. The dashboard helps you to get a quick overview of the status of the activities and track the progress in the current conversion project.

1. Search for an analysis by entering a name or part of a name into the search bar or choose from the list.
2. To access the simplification items of an analysis, choose *Open Simplification Items* ( ). This opens the *Analysis from SAP Readiness Check* page.

   > **i Note**
   >
   > To get a quick overview of the progress made in processing simplification items and activities, access the *Progress Dashboard* by choosing *Open Dashboard* ( ). Moreover, the *Progress Dashboard* provides you with multiple filter options that help you to monitor more easily the progress of key activities related to your conversion project.

3. In the *Filters* section, use the filter criteria to identify activities that are related to the technical infrastructure.
   - By default, you can search for *Simplification Item* or filter by *LOB*, *Business Area*, *Activity Type*, or *Activity Status*.
   - For more filter options, choose *Filters* > *More Filters* and select your preferred filter options.
4. The dashboard consists of several pages. To navigate between pages, hover over the left or right side of the dashboard and choose a navigation arrow:
   - < (left)
   - > (right).

Useful Filters

You can select multiple filters at the same time, for example, phase and condition. When you save your preferred filter settings as a view, you can filter a new analysis faster.

Filter	Description
Effort Ranking	In the latest version of SAP Readiness Check 2.0, you can rank the activities by effort to get a better impression of the expected effort for the upcoming conversion project. The project lead and the solution architects together check for which activities the effort must be assessed. Select *Effort Ranking* > *Assessment Required (default)*.
Condition	You must process all activities that match *Condition* > *Mandatory*. You can postpone or reject only activities that match *Optional* or *Conditional*.
Phase	Plan and schedule the required work based on the phase of the activities. For example, start with *Phase* > *Before or during conversion project*, then change the filter to *During conversion project* and so on.
Activity Status	To find activities that were created after the upload and that you can process, choose *Activity Status* > *Created*.

Activities

Display Activities

The *Activities* table below the dashboard shows which filters were used and the activities matching these filter criteria. You can change the displayed columns by choosing *Settings*. You can also sort the activities by choosing *Sort*.

Process Activities

Select or more activities that you want to process from the *Activities* table. You can select all activities by selecting the checkbox next to *Simplification Item*.

Activity	
Set Status: Postpone or reject	Use the dropdown menus to filter by *LoB* or *Business Area* to identify activities for which you are responsible. • You can postpone or reject only **optional** or **conditional** activities. • You cannot postpone or reject **mandatory** activities. From the *Set Status* dropdown menu, select *Postponed* or *Rejected*. **i Note** Note that the status *Rejected* is a final status that cannot be changed or reactivated.
Select Follow-Up Type	Create a work package or a requirement. You can also assign an existing build or single project to the activity. For more information, see Follow-Up Activities [page 125].

Related Information

Follow-Up Activities [page 125]

3.1.3 Follow-Up Activities

As a solution architect, you can select one or more activities and create requirements or work packages as follow-up activities. You can also assign an existing build or single project to the activity (for example, for complex activities such as the implementation of SAP SuccessFactors).

Prerequisites

- You successfully uploaded the results from SAP Readiness Check to the Simplification Item Management application.
- You checked the results from the upload and decided for which activities you want to create a follow-up activity.
- Note that you can only assign an existing project. If no appropriate project is available, create a new project before you start creating follow-up activities.

Assign and Reassign Activities

With the *Assignment* button, you can assign and reassign activities.

- Select *Assign Item* to assign an activity without a follow-up document to an already existing work package or requirement.
- Select *Reassign Item* to make changes to an existing assignment.

The *Relations* and *Text* tabs of the work package show details about the assignment.

Create a Follow-Up Activity

You can merge several activities of the same type into one follow-up document using the *Create* function.

Note that the user who created a follow-up activity is automatically assigned as the owner.

To create a follow-up activity, do the following:

1. From the *Activities* list, select one or more activities.
2. Choose (Create).
3. In the *Select Follow-Up Type* window, select a follow-up action. If one activity is selected, you can choose the following:
   - *Create one Requirement per Activity (1:1)*
   - *Create one Work Package per Activity (1:1)*
   - *Assign one Project per Activity (1:1)*

   If multiple activities are selected, you can choose the following:
   - *Create one Requirement per Activity (1:1)*
   - *Create one Requirement for all selected Activities. (n:1)*
     The system proposes a title for the follow-up document which can be changed after selecting *Save*.
   - *Create one Work Package per Activity (1:1)*
   - *Create one Work Package for all selected Activities. (n:1)*
   - *Assign one Project per Activity (1:1)*
4. Choose *OK*.
   The related screen is displayed.

Create Requirements

> **i Note**
>
> If you selected several activities from the same simplification item, enter different titles for the requirements. We recommend maintaining unique titles, as they help you identify the requirement more easily. When you use a title more than once, a message reminds you to change the titles.

1. In the *Follow-Up Requirement creation* screen, change the title of the requirement (if necessary).
2. To create a requirement, choose *Save*.
   The requirement information is available in the *Activities* table.

Create Work Packages

> **i** Note
>
> If you selected several activities from the same simplification item, enter different titles for the work packages. We recommend maintaining unique titles, as unique titles help you to identify the work packages more easily. When you use a title more than once, a message reminds you to change the titles.

1. In the *Follow-Up Work Package creation* screen, change the title of the work package if necessary.
2. From the dropdown menu, select a *Work Package Classification*: *Gap*, *WRICEF*, *Fit*, or *Non-Functional*.
3. Choose *Save*.
   The work package information is available in the *Activities* table.

Assign Projects

You can assign a project to each activity.

1. In the *Project Assignment* screen, select an activity.
2. From the dropdown menu, select a project.
   Only build projects and single projects that have the status *Created* or *Released* are available.
3. To assign the project, choose *Save*.
   The project information is available in the *Activities* table.

For each follow-up activity that you create, a follow-up ID is automatically generated. The follow-up ID is displayed as a link in the *Activities* table, in the *Follow-Up ID* column. Simply choose a link to access the work package, requirement, or project in the appropriate application.

Follow-Up Type	Application
Work package	*My Work Packages*
Requirements	*My Requirements*
Projects	*Project Management*

Once a follow-up activity has the activity status status *Follow-Up Created* in the *Simplification Item Management* application, you cannot change its status within this application any more. To change the status, go to the *My Work Packages*, *My Requirements*, or *Project Management* application (depending on the follow-up type) and select the item.

4 Focused Build Standalone Extensions

You can use the Focused Build standalone extensions together with the Focused Build end-to-end implementation process, but they don't require a full implementation of Focused Build. You can also use them separately to enhance the standard capabilities of SAP Solution Manager.

For any of the Focused Build standalone extensions, you need to have installed the Focused build for SAP Solution Manager add-on (ST-OST 200 component).

4.1 ScoreCard

The ScoreCard provides an overview on current process types in the context of Change Request Management. It is also possible to look into the respective list view and into the details of each individual business transaction. For this purpose, the ScoreCard provides at least one top-level aggregation attribute (usually the process type) and several second-level aggregation attributes (for example, priority or status).

The entry allows navigation to the detailed result list that presents all entries of a dedicated group. From there, the user can navigate directly to a single business transaction.

Prerequisites

You use the business role `/SALM/SM_PRO` or a copied business role.

Procedure

1. Open the WebClient UI of Change Request Management or IT Service Management.
   The ScoreCard is available in both processes.
2. In the ScoreCard assignment block, go to the group you are interested in.
   A percentage is displayed for each element in a group. This percentage is calculated with respect to all elements of this group.
3. Choose a description of a group element.
   You will be forwarded to a search result list matching the criteria of the selected element.

4.2 Template Protection

Use template protection to protect workbench and customizing objects of a global template.

Prerequisites

- Template protection only considers transport requests that are managed by Change Request Management or the Focused Build end-to-end implementation process.
- After the template protection Business Addd-Ins (BAdIs) have been implemented or activated, the default configuration of template protection is active.
  Customizing usually deactivates the default configuration.
- Template protection is built on top of the standard Change Request Management transport-related check framework.
  You must activate the transport-related check framework to use template protection.

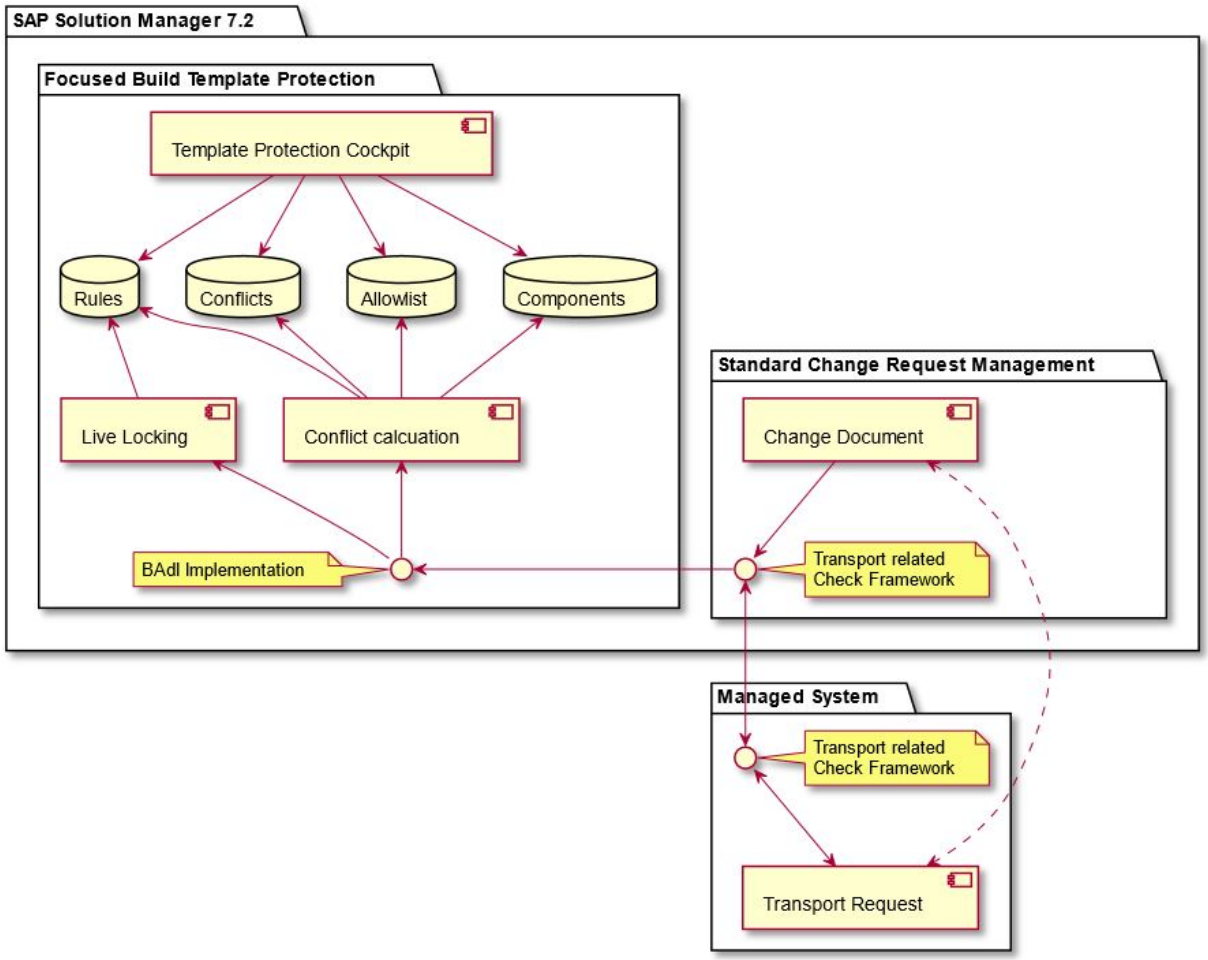
You can use template protection together with repack (Focused Build standalone extension). There will be no issues when protected objects are repacked.

Related Information

Repack [page 141]

4.2.1 Architecture

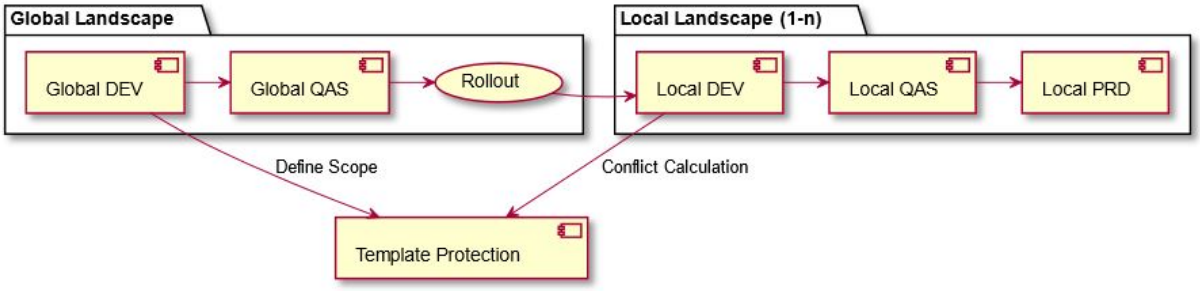
Focused Build template protection is an add-on for the standard Change Request Management transport-related check framework. It is implemented as a Business Add-In (BAdI) for custom checks.



4.2.2 Scenarios

Global Template System

Within the global template system scenario (global/local), a global development system automatically defines a scope of objects to be protected on the local development systems. This is especially used in rollout/localization scenarios.

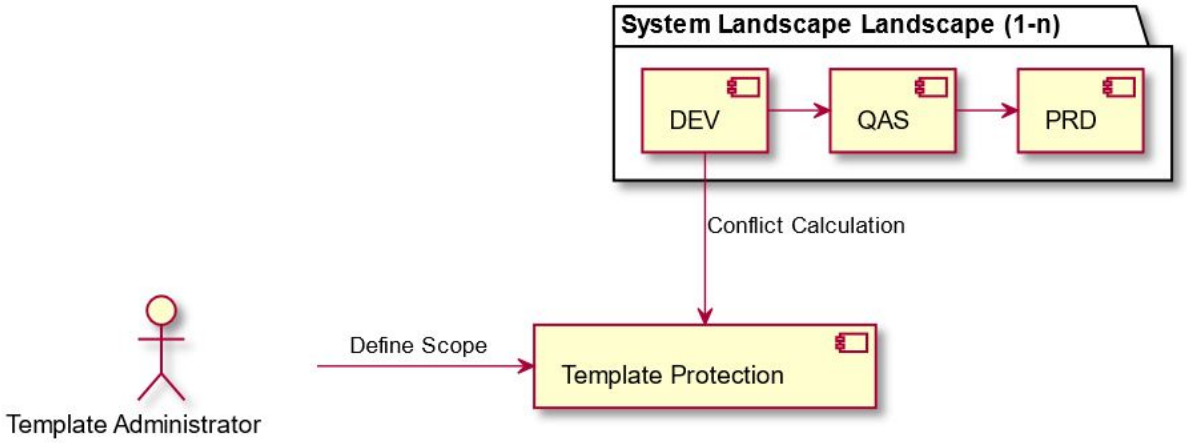


In this scenario:

- Rules are created via live locking based on the global development system.
- One or several local landscapes (for example countries/regions) are protected.
- The process of locking and protecting objects can be fully automated.

Manual Rule Definition

Within the manual rule definition scenario, there is no need to have a dedicated global development system as rules are created manually via direct input or transport-request-based scoping.



In this scenario:

- Rules are created via manual scoping (direct input, file upload or transport request based).
- No live locking is active, as there is no global system (it is only available as a “virtual” system within the scenario definition).
- One or several landscapes may be protected.

4.2.3 Functions

4.2.3.1 Template Protection Cockpit

The template protection cockpit enables centralized maintenance of the following items:

- Template protection scenario configuration
- Template components
- Template rules
- Conflicts

Additionally, you can navigate to the technical administration of template protection.

You can implement a detailed authorization concept for segregation of concerns using the authorization object FB_TPPC.

4.2.3.1.1 Scenario Overview

In the scenario overview, you can maintain global and local systems as well as allowlists.

Global System

Global systems include one to several template rules, which shall be checked and protected on the connected local systems.

If a global system exists, template rules can be created based on live locking.

A global system can also be a virtual, non-existent system. You can define a virtual system and assign several global systems that contribute to the live locking scope of this virtual system to reduce the number of template rules that are generated via live locking. For more information, see Live Locking [page 138].

Local System

A local system is always assigned to a global system and is checked according to the rules defined within the global system.

A local system may be part of multiple global systems, but a global system may also contain multiple local systems (m:n relationship between local and global systems).

If live locking should apply to local systems as well (because there is an additional localized landscape), a local system can also act as a global system in parallel.

Allowlist

You can add an allowlist to the global system. All entries created for the allowlist overrule the template rules, so that you can define that specific objects/template rules may never be protected, even though they were added as part of live locking or manual rule maintenance.

4.2.3.1.2 Template Components

A template component clusters template rules across global systems. This means that you can, for example, define a template component `FICO` and assign template rules of different global systems to that component.

4.2.3.1.3 Template Rules

A template rule contains an object or, if wildcards are used, a set of objects to be protected.

A template rule is always connected to one global system or to its corresponding allowlist.

Within the Template Protection cockpit, you can create, read, update and delete template rules.

Create Template Rules

You can manually create template rules using the *Add Template Rule* button, which opens the wizard.

Select Global System

It is mandatory to select the global system, for which new rules should be created

Select Template Component

Optionally, you can select a template component.

Select Scope

Template rules can be created for the global system itself, so that the objects are protected or for the corresponding allowlist to overrule all other template rules.

Select Source

Template rules can either be created from transport requests, through manual input, through manual scoping of unknown objects, or by uploading a CSV file created in Microsoft Excel.

You can also manually scope objects that are not known to the SAP Solution Manager data model. The function module `/SALM/TPP_GET_LOCK_KEYS` automatically gathers the technical information on the managed development system that is required to manually scope an unknown workbench or customizing object. The package `/SALM/TEMPLATE_PROTECTION_MS` must be installed on the managed development system.

Transport-Request-Based Scoping

The transport-request-based scoping shows all transport requests managed by Change Request Management for the global system. This means it works for existing global systems only.

After you have selected a transport request and confirmed the scoping, a template rule is created for every object of the transport request. They are bundled via the *Source Type TR* and the *Transport Request Number* as source.

Manual Selection

You can manually create template rules via direct input. The system differentiates between workbench and customizing objects, but both types can be scoped in a row.

Copy and paste, for example based on the same structure as in Microsoft Excel, works when you select the header of the table and press `Ctrl` + `V`. Due to restrictions within the SAP UI5 library, this is only supported for up to 100 entries.

During the manual scoping, selecting the reference helps to correctly determine the corresponding lock keys.

- No reference: The system calculates the lock entries only based on the input.
  - For workbench objects, you cannot scope LIMU objects (such as function modules) as they depend on a parent object.
  - For customizing objects, it is important to maintain the key length of the database table.
- This system: The current system (SAP Solution Manager) is used for the lock key generation.
  The object to be scoped has to exist in SAP Solution Manager, otherwise scoping will fail.
- Any other system: The selected system is used for the lock key generation.
  When you select the system, this triggers a check whether the remote infrastructure is available and if RFC destinations to that system are working.

File-Based Scoping

You can mass create template rules via a file upload. Just like for the manual scoping, you first need to select a reference for the created template rules:

- No reference: The system calculates the lock entries only based on the input.
  - For workbench objects, you cannot scope LIMU objects (such as function modules) as they depend on a parent object.
  - For customizing objects, it is important to maintain the key length of the database table.
- This system: The current system (SAP Solution Manager) is used for the lock key generation.
  The object to be scoped has to exist in SAP Solution Manager, otherwise scoping will fail.
- Any other system: The selected system is used for the lock key generation.
  When you select the system, this triggers a check whether the remote infrastructure is available and if RFC destinations to that system are working.

In the file upload, you can only upload CSV files. During the upload, the file is checked for its integrity. If the file can't be read successfully, the number of identified rules is shown. Otherwise, an error message appears that points out the issue (for example a missing column or the wrong file format).

When you have finished scoping, the template rule generation runs in the background as a lot of rules take some time to be processed. A message displays the job name for you to monitor.

Update Template Rules

You can change the template rules within the template protection cockpit using the buttons in the footer of the cockpit:

- *Edit Template Rule* (single maintenance)
  You can change object-specific details of a template rule via the single maintenance. To do so, select an entry and open the edit mode. Beside the object-specific details, you can also change the local lock handling.
  The local lock handling gives the possibility to define how a rule should react on a specific local system. You can define a rule on local system A as a warning, even though the global configuration would see it as an error. You can also choose to ignore a selected template rule in a specific local system
  You can also specify the event for which the selected message type is valid. You can choose between all events, when saving, or when releasing.
- *Selected Template Rules* (mass change)
  If you select multiple template rules, the *Selected Template Rules* mass change allows you to apply certain changes to all selected rules:
  - Activate/Deactivate Rule
  - Ignore/Unignore Rule
  - Delete Rule
- *Filtered Template Rules* (mass change)
  Via the *Filtered Template Rules* mass change, you an apply certain changes to all rules that are available based on the current filter. With that, not every single rule has to be selected, but the changes are applied to all relevant template rules:
  - Activate/Deactivate Rule
  - Ignore/Unignore Rule
  - Delete Rule
  - Maintain Local Lock Handling

4.2.3.1.4 Conflicts

Within the *Conflicts* tab, you can maintain template protection conflicts. A conflict describes a change to a protected object on a local system.

Conflicts are only possible in the conflict calculation mode warning, as an error during conflict calculation would not allow to save the change to a transport request.

You can update conflicts using the following settings:

- *Select Conflicts*: Updates only selected conflicts
- *Filtered Conflicts*: Updates all conflicts available for the current filter

You can set various statuses for a conflict:

- *Approved*: The change is approved – release of the transport request is allowed
- *Rejected*: The change is rejected – the object must be removed from the transport request to allow the release

- *Manually Resolved*: The change is rejected, but it is not required to remove the object from the transport request. With this status, the user confirms that the change has been undone.

4.2.3.1.5 Administration

The *Administration* tab provides a direct link to the view cluster for the central customizing of template protection.

4.2.3.2 Conflict Calculation

Trigger

The conflict calculation is triggered in the following situations:

- When a transport request managed by Change Request Management has been changed
- When Change Request Management triggers the release of a transport request

Procedure

Changed objects or objects that are part of the transport request are checked against the template rules for all global systems to which the development system of the transport request is assigned as a local system.

Depending on the global template protection configuration, the global-system-specific configuration and finally also the local lock handling, an identified conflict is visible as a warning or as an error within the popup of the transport-related check framework.

In case of an error, the change is not saved to the transport request or the release of the transport request is canceled.

In case of a warning, you may confirm the conflicts. Those conflicts are persisted to the Template Protection tables (*Conflicts* tab in the template protection cockpit) and reevaluated during the release of a transport request.

> → Recommendation
>
> We highly recommend that you consider conflicts during the release of a transport request as an error, as this is the last point in time when the conflicts are checked. Having the release check set up as a warning and simply confirming unprocessed conflicts results in a lot of unprocessed conflicts.

Customizing

Prevent Display of Existing Conflicts

If a conflict has been found again, this conflict is shown in the transport-related check framework popup again. You can prevent this with the following customizing option so that already-known conflicts are not shown anymore. This applies only for the change of transport requests, as unprocessed conflicts must be shown and confirmed during the release of a transport request.

View cluster `/SALM/TPP_VCUST` -> *Customizing*

Parameter	`DCNF_INACT`
Value	X

Threshold for Large Transport Requests

If a transport request contains many objects, an analysis of the transport request before the conflict calculation can increase the system performance. With the transport request analysis, the number of objects to be checked can be reduced. One use case is a table containing a lot of table keys. If there is no template rule for the table at all, there is no need to check every single key. With the following customizing activity, you can set the threshold for large transport requests. If the transport request contains more objects as set in the customizing, the transport analysis is performed before the actual conflict calculation.

View cluster `/SALM/TPP_VCUST` -> *Customizing*

Parameter	`PERFTH_OBJ`
Value	Number, default is 1000

Conflict Handling Per Global System

You can define how conflicts with objects protected by a global system should react. This configuration applies to all corresponding template rules but can be overruled by local-system-specific lock handling and template-rule-specific local lock handling.

View cluster `/SALM/TPP_VCUST` -> *Conflict Handling*

System	Global system in the format of `<system id>:<client>`. Wildcards (such as *:*) are supported.
Event	`ONRELEASE`: when releasing the transport request
	`ONSAVE`: when changing the transport request
Handling	Warning. Conflicts can be confirmed or ignored.
	Error. Activity will be canceled.

Conflict Handling Per Local System

You can define how template rules should react on a local system connected to a global system.

View `/SALM/TPP_SG_LCU`

Global System GUID	Calculated when global system has been selected
Global System	Relevant global system (no wildcards allowed)

Local System GUID	Calculated when local system has been selected
Local System	Relevant local system
Parameter	`CONFLICT_ONRELEASE`: Check when releasing transport requests. `CONFLICT_ONSAVE`: Check when changing transport requests.
VALUE:	E: Error. Activity will be canceled. W: Warning. Conflicts can be confirmed or ignored.

Template-Rule-Specific Local Lock Handling

Within the template protection cockpit, you can define how a specific template rule should react for a selected local system.

Use Cached Template Protection for Performance Optimization

When checking large transport requests in conjunction with a lot of template rules, performance can be very slow. With this customizing activity, it is possible to activate a cache for template rules to speed up conflict calculation. The cache is built up right before the conflict calculation and deleted afterwards again so you do not have to take care of keeping the cache up to date. If the transport request contains more objects than defined in the customizing, this functionality is active. Please find the right setting for your system, as it highly depends on the number of template rules. When 200,000 rules are protected in the template protection, we recommend setting a value of 500 in customizing.

View cluster `/SALM/TPP_VCUST` -> *Customizing*

Parameter	`PERFTH_CH`
Value	Number

4.2.3.3 Live Locking

Trigger

If a development system of a transport request is maintained as a global system or as live locking scope for a global system within template protection, the live locking is performed as part of the conflict calculation.

Procedure

Every changed object or object part of the transport request is converted in a template rule.

Depending on the customizing option, the template rule is created in status *inactive* when the transport request has been changed and is activated during the release of the transport request. This procedure ensures that temporary changes do not lead to conflicts but only final released changes.

A global system can also be a virtual, non-existent system. In that case, it is just a container for manual rule definitions. You can define a virtual system and assign several global systems that contribute to the live locking scope of this virtual system. This significantly reduces the number of template rules that are generated via live locking if you have multiple global templates in parallel that, to a significant degree, consist of cross-project developments.

In this case, live locking only generates template rules for the virtual system, but these rules are also valid for the systems that have been assigned to the virtual system.

Customizing

Deactivate Live Locking Globally

You can globally deactivate the live locking function for all global systems.

View cluster `/SALM/TPP_VCUST` -> *Customizing*

Parameter	`LIVE_INACT`
Value	X

Activate Live Locking During Creation

By default, template rules created as part of live locking are created in status *inactive* during the change of the transport request and are activated as part of the release of a transport request. With the following customizing option, the template rules are always created in status *active*:

View cluster `/SALM/TPP_VCUST` -> *Customizing*

Parameter	`LL_ASACT`
Value	X

4.2.4 Housekeeping

You can use report `/SALM/_TPP_REORG` to delete or reorganize duplicates of template rules.

So far, conflicts cannot be deleted. If you want to delete a template rule duplicate for which there are existing conflicts, the recommended procedure is to link the conflicts to another template rule that will be continued to be used. Alternatively, you can delete the template rule while the conflict remains in the system with no link to a template rule.

For more information, see the report documentation.

4.3 Change Request Management Dashboard

The *Change Request Management Dashboard* shows information about the current status of a selected change control landscape. You can use the *Change Request Management Dashboard* to monitor release cycles or other change cycles, view details, and easily identify potential problems.

On the home page of the *Change Request Management Dashboard*, you select a change control landscape to get an overview of the current status of this change control landscape on various tiles. You can choose a tile to open a detailed view. You can use the breadcrumb navigation to switch between the detail view and the dashboard.

> → Tip
>
> The in-app help provides help for the *Change Request Management Dashboard* app. You can display the in-app help by choosing the ⓘ icon.

The *Change Request Management Dashboard* displays the following cards:

- *System Landscape*
  Systems
- *Requests for Change / IT Requirements*
  Requests for change and IT requirements
- *Changes*
  Change documents assigned to requests for change or IT requirements
- *Changes Without Assignments*
  Change documents not assigned to a request for change or an IT requirement
- *Defect Corrections*
- *Transport Requests*
- *Transport Requests Without Assignment*
  Transport requests not assigned to a change transaction

To use the *Change Request Management Dashboard*, you need to have defined the KPIs and other settings in the Customizing (IMG).

4.4 Electronic Signature

The electronic signature function is primarily intended for FDA-regulated environments where the normal change process in Change Request Management requires specific approval a FDA-compliant electronic (digital) signature.

Prerequisites

You have the business role `/SALM/SM_PRO` or a copied business role.

Context

When you process change transactions, there are two situations where a digital signature may be required:

- During an approval step that uses the approval procedure
- During any status switch within a request for change or change document

Signing Documents

The signature dialog box appears automatically when a digital signature is required.

1. Enter a text in the *Comment* field.
2. Fill in your user name and password.
3. - To save your signature and your comment in the transaction log, choose *Sign&Save*.
   - To discard all inputs within the signature dialog box, choose *Cancel*.

Analyzing Signatures

To analyze if, when and by whom tickets have been signed, call transaction SE38 and execute `/SALM/CM_DS_READ_SIGNATURES`.

You see the ID, type, description, status, date, time, and user.

4.5 Repack

The Repack function addresses complex system landscapes where you may work with dual development tracks delivering into one or more production systems.

Use

A typical use case is having one development track for the maintenance of the production systems and another one for implementation and enhancement projects. As part of the preparation of a go-live of an implementation or enhancement project, you must document this as a change to your production systems. Therefore, this project must be passed as a change through the maintenance track, which adds the additional benefit of performing a "dress rehearsal" in this track.

There are two different repack scenarios available:

- **Repack by Transport**
  You can select transport requests freely from the source system.

Use the *Repack by Transport* function to transport already imported external transports through your maintenance landscape. You can filter the transports by import date, which is read from the import history. You can also combine the content of single open transports in the current system into one aggregated transport.

- **Repack by Change Cycle**
  You can select transport requests assigned to a specific change cycle.
  Use the *Repack by Change Cycle* function during a cut-over process after the import into your maintenance landscape.

Prerequisites

- You use the business role `/SALM/SM_PRO` or a copied business role.
- The target change document has the status *In Development* and is assigned to a change cycle of the maintenance landscape.
- For repack by transport:
  - The target change document has at least one workbench transport request and one customizing transport request as the target transport requests for all objects.
  - There are transports in the development system of your current maintenance landscape that were imported (import history) or currently open.
- For repack by change cycle:
  - The target change document has at least one transport request as the target transport request for all objects.
  - You have at least one change cycle that imports into the development system of your current maintenance landscape.

Procedure

1. In your current target change document, go to the *Transport Management* assignment block.
2. Under *More*, choose *Repack*.
3. In the wizard, select the repack scenario (*Repack by Transport* or *Repack by Change Cycle*) and choose *Next*.
4. Find the transport requests that are to be repacked. For the two scenarios, the available selection criteria are different.

   Selection Criteria for Transports to Repack

Repack by Transport	*Repack by Change Cycle*
Repack System Select the relevant source system (if there is more than one source system available). The source system is the system where the repack takes place.	

Repack by Transport	*Repack by Change Cycle*
• *Start Date* Select a start date to display transports requests that were imported into the source system during a particular period of time. • *End Date* Select an end date to display transports requests that were imported into the source system during a particular period of time. • *Show Open Transports* Select this option to display open transport requests in the result list. (Start date and end date have no effect here). • *Show ToC* Select this option to display transports of copies in the result list.	• *Change Cycle* Select the change cycle to display all assigned transport requests that were imported into the source system.

All matching transports are displayed in the result list. The column *Repacked* identifies transports that have been repacked before.

5. Mark the transports that you want to repack and choose *Next*.
6. Specify the target transport requests:
   - *Workbench Request*
     Select a target workbench request (if there is more than one available in the current change document).
   - *Customizing Request*
     Select a target customizing request (if there is more than one available in the current change document).
7. You can select the following predefined repacking options:
   - *Change Originality*
     Change originality of workbench objects to the source system.
   - *Add Directory Locks*
     If transport locks exist for objects that are to be repacked in the source system, this function removes these locks in order to add the locks for the repack target transport request.
   - *Add Cross-System Object Lock*
     Add cross-system object lock for the target repack transport request
   - *Repack Transport of Copies into Customizing Request:*
     Repack transports of copies into the target customizing transport. (By default, they are repacked into target workbench transport.)
8. Choose *Start Repack*.
   The results of the repack are displayed in a list. An icon indicates the status for each repacked transport.
9. To close the repack wizard, choose *Leave*.
   You return to the *Transport Management* assignment block.

> **i Note**
>
> To check the summary of the repack, go to the *Text* assignment block.

In the application log (transaction `SLG1`), choose `/SALM/CM_REPACK` to see detailed information about the repack, for example, the status and any messages.

4.6 Cross-Landscape Distribution

The Cross-Landscape Distribution function (XLD function) is used to distribute transports from one landscape to another landscape.

Use

This function can be helpful in several scenarios:

- Cross-Landscape Functional Developments
  If you develop a custom development package in one landscape and want to distribute the same functionality to other landscapes, for example, functions for the user maintenance or basis reports that should be available in all landscapes.
- Global Functional Development
  If you have different landscapes that depend on each other, but you do not have a direct transport connection as they differ in some major parts, but you still want to distribute changes from one global development landscape to other local landscape.

> ⚠ Caution
>
> The Cross-Landscape Distribution function does not check whether the distributed objects are changed in the target system or not. It always imports the version from the source development system into the target development system.

Customizing Cross-Landscape Distribution

For cross-landscape distribution, the user has a choice between streamlining all versions of an object or modifying individual versions. In the system-specific settings, the user can select the following options:

- **Strict Mode**
  In the strict mode, you can provide a list of development packages and customizing tables for checks that are executed during distribution and change workflows to validate which objects are allowed.
- **Non-Strict Mode**
  In the non-strict mode, cross-landscape distribution allows you to distribute any change to any landscape that is configured in SAP Solution Manager. This mode provides flexibility to distribute changes across different landscapes.
- **Target Lock**
  For distribution from one system to another, the user can enable target lock to lock the distributed object. If a user attempts to change the protected object, the system shows an error message. This gives the

user the choice to receive an object as it was delivered from the source or as a customizable model of the original.

- **Overwrite Original**
  Ensures that the distributed object overwrites original versions of the same object in the target system.
- **Overwrite Objects in Unconfirmed Repairs**
  Overwrites the object if it has been modified in the target system.

Execution Modes

There are two different execution modes for cross-landscape distribution:

- **Wizard-based execution mode**
  You can use a wizard to specify a target change document or a target transport request for the transports. In this mode, you can distribute transports to only one target at a time.
- **Automated Cross-Landscape Distribution**
  In the automated mode, you do not specify a target because the targets for cross-landscape distribution are configured in customizing.
  The automated cross-landscape distribution only works in the **strict mode**.
  The automated cross-landscape distribution distributes the transports to several targets at the same time.

Wizard-Based Execution Mode

In the wizard, you can choose to distribute the contents into a change document, or into a transport request. Depending on your customizing settings, only one of these two options may be available.

To simplify the repetition of a successful distribution, you can also reload the previous settings.

Distribution into a Change Document

Prerequisites

- The source change document has transport requests assigned that contain objects. By default, these transports must be released, but in customizing, you can allow the distribution of open transports.
- A target change document in the defined status exists (the transaction types and status that are allowed are defined in customizing).
- The target change document must have an open transport request assigned.
- You use the business role `/SALM/SM_PRO`.

Context

You use cross-landscape distribution to copy the content of the transport requests that belong to a change document into a different landscape. The target is a different change document.

Procedure

1. In the source change document, in the *Transport Management* assignment block, open the *Cross Landscape Distribution* wizard by choosing *Cross Landscape Distribution*. You may need to choose *More* to see this option.

2. On the first page of the wizard, choose *Next* to define a new distribution.
3. Select the target *Change Document* of your distribution.
4. Choose the target change cycle.

> **i Note**
>
> You can restrict the availability of change cycles in customizing. By default, all change cycles are listed.

5. Select the target change document.
   If you cannot find your target change document in this list, it might have the wrong status.
6. Verify the target cycle and the change document selected in the previous steps and start the distribution.

Distribution into a Transport Request

Instead of copying the content of the transport requests assigned to the source change document into a change document in a target change cycle, you can also copy the objects directly into a transport request in the target landscape. In this case, the target of the cross-landscape distribution is an open transport request in the selected target system.

Prerequisites

- The source change document has transport requests that contain objects assigned. By default, these transports must be released, but distribution of open transports can be allowed in customizing.
- A target transport request exists and is not released.
- You use the business role `/SALM/SM_PRO`.

Procedure

1. In the *Transport Management* assignment block of the source change document, open *Cross Landscape Distribution* and define a new distribution.
2. Instead of selecting *Change Document* as target of your distribution, select *Transport Request*.
3. Select a target system and client.

> **i Note**
>
> You can restrict the availability of target systems in customizing. By default, all target systems that have been marked as development system in any of the logical component groups are displayed.

4. Select the target transport request in the selected system and start the distribution.

Repeated Distribution

Prerequisites

- You have already executed a distribution successfully.
- You use the business role `/SALM/SM_PRO`.

Context

To simplify the repetition of a successful distribution, you can reload the previous settings.

Procedure

1. In the source change document, in the *Transport Management* assignment block, open the *Cross Landscape Distribution* wizard by choosing *Cross Landscape Distribution*. You may need to choose *More* to see this option.

The first page of the wizard shows an overview of the previous distributions that were executed for this change document.

2. Select one of the previous distributions and choose *Confirm and Start Distribution*.
   All settings from the selected distribution are reloaded.
3. Verify the target change cycle and change document or the target system and transport request and start the distribution.

Automated Cross-Landscape Distribution

If you use the Automated Cross-Landscape Distribution function, the target transport requests are created automatically and assigned to the current change document. Automated cross-landscape distribution only works in the strict mode.

To execute the automated cross-landscape distribution for the transports of a change document, in the *Transport Management* assignment block of the change document, choose *Automated Cross Landscape Distribution*. You may need to choose the *More* button to see this option.

Automated cross-landscape distribution distributes the transports to several targets at the same time.

4.7 Status-Dependent Check Framework

The status-dependent check framework provides two main functions:

- Checking for mandatory inputs
- Locking fields against subsequent changes

Checking for Mandatory Inputs

Prerequisites

You have opened the current transaction (for example, a change document) in the WebClient UI and have activated the edit mode.

Context

The consistency check for mandatory inputs is not not only performed when you create new documents, but also later in the process. It can be executed on each status change.

The following checks are available:

- Check for Fast Entry fields
- Check for business partners
- Check of texts

Some standard fields can be examined by the standard status-dependent check, but this framework can be used in user-defined fields as well.

Procedure

1. Switch the current transaction to the next status either directly or by choosing the appropriate action. The check is executed in the background. In case a mandatory input is missing, an error message is displayed.
2. Correct the error by entering the missing value.
3. Repeat the status change.

Locking Fields Against Subsequent Changes

Prerequisites

You have opened the current transaction (for example, a change document) in the WebClient UI.

Context

This functionality provides the possibility to lock fields against changes in a later status (later than the initial one).

Supported are

- Fast entry fields
- Business partners

Procedure

Activate the edit mode for the transaction or switch the transaction to a new status (while you are in edit mode). Several fields are still locked or get locked.

4.8 Cutover Checks and Post-Cutover Activities

Cutover Checks and Post-Cutover Activities reduce the manual effort of cutover activities in N + 1 system landscapes.

Cutover checks and post-cutover activities are performed for a change cycle. If you are using this function, change cycles that are created in a branch that is not the maintenance branch have an additional assignment block *Cutover Checks and Activities* in the WebClient UI, which you can use to execute the cutover checks and the post-cutover activities.

Once you have executed a cutover check, you can choose *Export to Spreadsheet* to export the check results to an Excel spreadsheet.

Prerequisites

- You have the Focused Build add-on (ST-OST 200) installed.
- You are using Change Request Management in a multi landscape.

- You have completed the Customizing activities for cutover checks in Customizing (IMG) under *SAP Solution Manager Implementation Guide* > *SAP Solution Manager* > *Focused Build* > *Change Control Management Extensions* > *Cutover Management*.
- You use the business role `/SALM/SM_PRO`.

Cutover Checks

You perform the cutover checks **before the cutover** in order to check and minimize the risks that can arise during the cutover into the maintenance landscape.

1. In the WebClient UI, open the change cycle document.
2. In the *Cutover Checks and Activities* assignment block, open the *Cutover Checks* tab page.
3. Choose *Perform Checks*.

The cutover checks check the following:

- Have all retrofits been executed in the parallel track?
- Are the retrofitted changes active?
- Are there objects in the scope of the cutover that are in conflict with other objects that are currently processed in the target system?

If a check fails, the result list gives feedback about the objects, transports, and changes for which a problem was found. You can then navigate to the affected objects and process them manually.

Post-Cutover Activities

You execute the automated post-cutover activities **after the cutover** has been performed and all software changes have been deployed into the maintenance track. You execute the post-cutover activities for each system of the maintenance landscape individually. Which post-cutover activities are available for a system depends on the role of the system in the landscape and the order of the systems in the transport track.

1. In the WebClient UI, open the change cycle document.
2. In the *Cutover Checks and Activities* assignment block, open the *Post Cutover Activities* tab page.
3. Select a system and choose *Execute Selected*.

4.9 Multitenancy

Standalone extension for Focused Build.

You can use the multitenancy function to fully control all data that is used for Change Request Management and IT Service Management to be separated by respective authorization objects.

This segregation can be realized customer-specific by business partner, or system-specific by configuration item. Both options can also be combined.

All applications within the WebClient UI for Change Request Management and IT Service Management comply with these splitting criteria, for example, without authorizations, it is not be possible to see the data objects in their respective search queries or search helps.

You can use the WebClient UI of IT Service Management and Change Request Management usual to process your incidents, requests for change, or change documents.

Business Partner Dependent Checks

Business partner dependent checks help to control access to the following:

- Business partners in the search help
- CRM transactions through assigned sold-to party

Configuration Item Dependent Checks

Configuration item dependent checks help to control access to the following:

- Systems in the search help
- CRM transactions through assigned systems

Status Check for Transaction Types

Additionally, there is the status check for transaction types, which adds an additional authorization check that provides status-specific control about read and write access to a ticket for additional control.

Whenever the user performs an action, the system checks if the user has the needed authorization.

These actions can be:

- Open or display a document
- Change into edit mode
- Set a document to the next status

4.10 My Checklist Steps

In the *My Checklist Steps* app, you can manage all not completed checklist steps that are assigned to you. You can also display all already completed checklist steps that are assigned to you.

On the landing page, choose the icon to toggle between the checklist steps that are assigned to you and those assigned to your team.

You can filter the displayed checklist steps using the filter parameters in the header:

- *Description (Parent)*
- *ID (Parent)*
- *Process Type (Parent)*
- *Status (Parent)*
- *Status (Step)*
- *Description (Step)*
- *To Do By*
- *Active/Inactive*

In edit mode, you can change the business partner assigned to a checklist step, the status of a checklist step, and the deadline.

> **i Note**
>
> If a status field is grayed out in edit mode, another checklist step must be carried out beforehand.

If a business partner field and the status field are grayed out in edit mode, the checklist step is already completed and cannot be changed anymore.

Moreover, the parent document of each checklist step is accessible by choosing the link in the *Parent Document* column. The parent document then opens in one of the following apps:

- Generic App (for parent documents that are specific to Focused Build Requirements-to-Deploy, such as work packages / work items)
- WebClient UI (for parent documents that are not specific to Focused Build Requirements-to-Deploy)

Each checklist step has a detail view that you can access by choosing the respective row in the *Checklist Steps* area. The detail view provides further information about the checklist step in several areas:

- *Step Data*
- *Texts*
- *Involved Parties*
- *Change History*

In edit mode, you can enter or change the following parameters:

- To do by
- Step status
- Comments and notes
- Business partner

4.11 Focused Build Test Suite Extensions (Standalone)

In Focused Build, the test suite of SAP Solution Manager is extended by additional applications and functions.

For test management, you can use the following Focused Build applications:

- To create *Test Steps* test cases, use the *Test Steps Designer* application.
- To define parameters used as placeholder in test cases or test steps, and the respective variable values for a test plan, test package, or tester, use the *Test Steps Parameters* application.
- To execute test cases use the *My Test Executions* application.
- To monitor the status of the testing, use *Test Suite Dashboard*.

4.11.1 Test Steps Designer

Use the *Test Steps Designer* to create and edit test steps test cases (test cases of type *Test Steps*) and to describe test activities. In test steps test cases, the test steps (test activities) are assigned to process steps in Solution Documentation.

You can start the *Test Steps Designer* app from within a solution in Solution Documentation or from the SAP Solution Manager launchpad.

Features

With the *Test Steps Designer* app, you can do the following:

Create and Edit Individual Test Cases

- Create test steps test cases (test cases of type *Test Steps*) based on process steps in Solution Documentation.

  > → Recommendation
  >
  > SAP recommends that you create test steps from within a solution in Solution Documentation because this method automatically provides the solution context, which is a prerequisite for the selection of executables.

- Create test steps test cases (test cases of type *Test Steps*) directly in the *Test Steps Designer* app and assign them later to executables in Solution Documentation.
- Edit test steps test cases (test cases of type *Test Steps*).
- Find all test plans, test packages, and sequences that contain the selected test case.
- Copy test cases ( ).
  When you copy a test case, you can assign the new test case a name, select a destination folder, and select a status schema and a branch. You can also activate the *Copy Solution Assignment* function to link the test case directly into the same position in Solution Documentation.

Manage Multiple Test Cases

- Use parameters as placeholders for test plan-specific values in text fields in the header section of a test case or in a test step.
- Create template test cases that make it easier to create, maintain, and update test step test cases with similar content.
- Upload test cases from Excel files.
- Mass update the header details of multiple test cases.

Use Groups and Folders

Groups and folders help you find your test cases in the *Test Steps Designer* app.

There are several **groups** including the following:

- *My Test Cases*
  Test cases owned or changed by you.
- *Favorite Test Cases*
  Test cases bookmarked as favorites.
- *Recently Changed Test Cases*

When creating or editing a test case in the *Test Steps Designer* app, you can select a folder in which the test case can later be found.

Related Information

Linking Test Cases to Solution Documentation Processes [page 94]
Editing Test Cases of Type Test Step [page 95]
Test Steps Parameters [page 100]
Template Test Cases [page 96]

4.11.1.1 Linking Test Cases to Solution Documentation Processes

If you want to add executables to a test step, the test step must be assigned to the Solution Documentation process step.

> → Recommendation
>
> While you can create a test case directly in the *Test Steps Designer* app and assign it later, SAP recommends creating it from within a solution. This method automatically provides the solution context for the test steps.

To create test step test cases from within a solution in Solution Documentation, do the following:

1. In Solution Documentation, navigate to the business process, subprocess, or process for which you want to create a test case.
2. To create a new test case, select the Solution Documentation elements for which you want to create the test case and, in the context menu, choose *New* > *Test Cases* > *Test Steps (Create)*.
   The *Test Steps Designer* app opens and you can edit the test case. For each process step, a test step on the *Test Steps* tab exists. The executables of the process steps are automatically assigned to the test steps.
3. In the *Test Steps Designer* app, edit and complete the test case.

You can also assign an existing test case to process steps in Solution Documentation. To do so, in the context menu, choose *New* > *Test Cases* > *Test Steps (Assign)* and select the test case that you want to assign.

4.11.1.2 Editing Test Cases of Type Test Step

In the *Test Steps Designer* application, each test case has the following tabs that you can use to change or further specify the test case:

- *Header*
  Edit general properties and settings such as the version, version title, testing mode, status, priority, owner, strict step sequence, duration, description, prerequisites, or exit criteria. Wherever you can enter a long text, you can use the parameters you defined in the *Test Steps Parameters* app.
  You can customize which fields are mandatory and which fields must be hidden.
  You can edit multiple test cases at once with the mass update function.

> → Recommendation
>
> SAP recommends that you only add test cases of type Test Step with the status *Released* to test plans.

- *Test Steps*
  Each step is defined with a description, instruction, and expected result. Wherever you can enter a long text, you can use the parameters you defined in the *Test Steps Parameters* app. If the test case is assigned to Solution Documentation, you can add an executable. You can also do the following:
  - Create substeps.
  - Include a checkbox that the testers must select as evidence for certain steps (for example, by attaching a screenshot).
  - Set additional test result attributes.
    You can specify for which test step a result attribute is relevant. For example, whether the result attribute is mandatory and for which step it is mandatory. You can set result attributes to *Inactive* if they are not used anymore. You can also define result attributes as *Public* to make them visible in *Test Sequences*. Public result attributes are also shown as *Previous Results from Test Sequence* in the *My Test Executions* app.
  - Upload an attachment for the step.
    You can upload document files and attach them to the step by using the drag and drop function or by adding links.
- *Attachments*
  You can upload document files or add links on this tab page.
- *Notes*
  You can add notes.
- *Relationships* (only relevant if you are using template test cases)
  In a template test case, you see the test cases derived from the template.
  In a test case derived from a template, you see the related template.
- *Where-Used*
  You can see the version of a test case that is used in a test plan. The tab content shows you where the test case is used by listing the test plans with information about the version of the test case that is currently being used.
- *Change Log*
  You see the changes that were made for the test case.

Adding New Solution Documentation Content to Test Steps

If the Solution Documentation content has been changed, you can display the changed Solution Documentation content to update the test case. For example, if new process steps have been added, you can create new test steps accordingly.

To display the Solution Documentation content, on the *Test Steps* tab, choose ↻ *Add from SolDoc* and select the new Solution Documentation content that you want to use in the test case.

Related Information

Test Steps Parameters [page 100]

4.11.1.3 Uploading Test Cases from Files

You can upload test cases that you have prepared as an Excel or a CSV (UTF-8 encoding only) file to the *Test Steps Designer* app. The *Test Steps Designer* app converts them to a test step test case (a test case of type *Test Step*), which, for example, can be executed with the *My Test Executions* app.

To upload a test case, on the start page of the *Test Steps Designer* app, choose ↑ (*Upload New Test Case from File*) and follow the steps in the wizard.

> → Tip
>
> You can download a sample Excel file and use it as a template for your test cases as follows:
>
> 1. Choose ↑ (*Upload New Test Case from File*).
> 2. In the *Upload Test Cases* wizard, choose ↓ *Download Sample File*.

With the download/upload function, you can also create new versions of existing test cases that have been created with the upload function. If you update the test case in the CSV or Excel file and then upload this file with the same test case title as the existing test case, the *Test Step Designer* app creates a new version of the test case.

4.11.1.4 Template Test Cases

Template test cases make it easier to create, maintain, and update test cases with similar content.

The *Relationship* tab of a template test case displays the test cases that have been created based on the template. On the *Relationship* tab of a test case derived from a template test case, you can choose the corresponding template test case and choose *Pull Updates* to import changes made in the template into the derived test case.

Creating Template Test Cases

You create template test cases as follows:

1. In the *Test Steps Designer* application, choose + (*Create New Test Case*).
2. In *Test Case Properties*, switch the toggle at *Template Test Case* to *Yes*.
3. Select a solution and a branch.

   > i Note
   >
   > The solution and the branch are copied into all the test cases that are created based on this template test case.

4. Choose *Create*.
5. Define the properties and test steps of the template test case.
6. Release the template test case.

Template test cases are not used for testing. When you change or update a template test case, the updates can be imported into all the test cases that have been created based on the template test case.

Creating Test Cases Based on Template Test Cases

For the actual testing, you create new test cases based on the template test case.

To create a new test case based on a template test case, do the following:

1. Open the template test case in the *Test Steps Designer* application.
2. In the tool bar, choose *Create New Test Case from Template*.
3. Choose whether you want the updates in the template to be automatically pushed into the new test case.
4. Choose *Create*.

4.11.2 Test Steps Parameters

When you design test steps test cases (test cases of type *Test Steps*), enter parameters as placeholders to put test data values directly at the right place for the right tester during test execution. Use this application to manage the parameters and check missing assignments.

Basic Terms and Concepts

Parameters make it easy to reuse one common test case with slightly different information. You don't need to create a separate test data sheet with specific instructions for different test packages or testers. Instead, you use the parameters as placeholders in test steps test cases (test cases of type *Test Steps*) and assign specific values to it.

For every test plan that uses a parameter, at least one **value** must be assigned. You can define several values for the same parameter and distinguish them based on test packages, test cases, and testers. During test execution, the most specific value is shown. For example, if you assigned different values for testers, test cases, and test packages, the testers see the value individually assigned to them, regardless of the general test package value.

For test cases with the testing mode *Shared Results*, the value assignment of the test plan or test package level is considered only. Value assignments on tester level are ignored. This ensures that testers work with the same parameter values as they share instructions and results in this kind of test case.

For a better overview, every parameter must be in a **group**. When you design test steps test cases (test cases of type *Test Steps*) with parameters, groups help you find and add them.

Prerequisites

- For value assignments, at least one test plan containing one or more test steps test cases (test cases of type *Test Steps*) with parameters exists.
- To see the change log of value assignments in a test plan, you have been assigned the authorization object `FB_TS_CLOG`.

Features

The *Test Steps Parameters* application gives an overview of the test steps parameters that have been created in SAP Solution Manager and helps you to find missing value assignments and empty values.

If a test step test case (test cases of type *Test Steps*) with parameters is used in a test plan and has no value assigned, the tester only sees the parameter name in brackets instead of a specific value during test execution. The tester can refer to the parameter name to inform the test manager about a missing test data value.

Parameter Overview

- You can see the existing parameters in their groups and whether test plans without assigned values exist.
- You can add new groups and parameters and directly access value assignment.
- You can delete empty groups.
- You can search for parameter names or parts of names.

Parameter Details

- For each parameter, you see a list of the test cases that use it and the test plans that contain those test cases. You can also search for specific test cases and test plans.
- You can directly access the test steps test cases (test cases of type *Test Steps*) that contain the selected parameter.
  After selecting a parameter under *Test Plan Assignment*, you can filter the test plan list to find the test plans that are missing a value.
- When you select a test case, you go directly to the *Test Steps Designer* application and you can use the parameters in long-text fields within the header and test steps.
- You can delete parameters that are not used in any test cases.

Value Assignment

- After selecting a test plan, you can use a switch to filter for the parameters that are empty for this particular test plan.
- You can also mass upload value assignments and download the values assigned to a test plan.

Related Information

Test Steps Designer [page 93]

4.11.3 Test Suite Dashboard (Standalone)

As a test manager, you use the *Test Suite Dashboard – Test Suite* app to monitor the test status of solutions. This app offers a unique way to analyze data step-by-step from different perspectives, to investigate a root cause through drilldown, and to act on transactional content.

The *Test Suite Dashboard – Test Suite* app offers the following functions:

- Adaptable overview page
- Interactive details page for detailed customized reports on test execution and defect status
- Customize and share a details page as a page variant with other users
- Chart visualization to spot relevant data more quickly
- Export data to a spreadsheet file

Procedure

To check the status testing for a project in the *Test Suite Dashboard - Test Suite* app, follow these steps:

1. Start the application by choosing *Test Suite Dashboard – Test Suite* on the SAP Solution Manager launchpad.
2. In the *Solution* dropdown, select at least one solution. In the *Project* dropdown, select at least one project. You can limit the search by selecting additional attributes.
3. Choose *Go*.

> **i** Note
>
> In the *My Views* dropdown, you can configure, save, and share views.
>
> Choose *Save As* to save a view as default or public. The settings for the whole page are cosidered.
>
> To load a view, select the view from the list. To change or delete a view, choose *Manage*.

Cards

In the dashboard, you have access to the following cards:

- *Test Status Progress*
  This card shows the progress of all aggregated test execution status values based on the filters and the selected time frame.
- *Test Status*
  This card shows the number of test cases by the aggregated test execution status grouped by test plans. Additionally, it shows the number of test cases that are not passed yet.
- *Critical Test Executions*
  This card shows a list of test cases with test execution status *Red*, sorted by priority and open defects.
- *Test Steps Progress Monitor*
  This card shows all test steps test cases in relation to the filter settings sorted by status and open steps.

- *Defect Status*
  This card shows the number of test cases by the aggregated test execution status grouped by test plans. You can switch the view of the card between *Priority* and *Priority and Status*. Additionally, it shows the number of open defects.
- *Critical Defects*
  This card shows a list of defects with priority *High* or *Very High* sorted by priority and status.
- *Defect Status Progress*
  This card shows the progress of all aggregated defect status values based on the filters and the selected time frame.

You use the `/SALM/TRACEABILITY_MATRIX` report to get detailed reporting on requirements, work packages, work items, and test cases assigned to work packages and their relations. Additionally, you can also get detailed reporting on test management data such as test plans, test packages, test cases, test case execution data, and defects and defect corrections created.

Details Pages

From the overview page, you can navigate to the following details pages by selecting the relevant card:

- *Test Status*
- *Test Steps Progress Monitor*
- *Critical Test Executions*
- *Defect Status*
- *Critical Defects*
- *Test Status Progress*
- *Defect Status Progress*

The details page provides further information for analysis, view building, chart visualization, sharing and export mechanisms, filtering, and interactive chart and table data visualization. A details page has a filter bar as well as a chart and table view.

4.11.4 My Test Executions

As a tester, you can use the *My Test Executions* app to document your test cases and report defects for the test cases.

You open the *My Test Executions* app from the SAP Solution Manager launchpad.

The app opens with the *My Packages* page. Under *Test Packages*, you find the test packages assigned to you, categorized by status:

- *Ready to Test*: all test packages with test cases that are ready to be tested
- *Released*: all test packages that are not locked
- *Protected*: all test packages that are locked
- *Assigned*: all test packages assigned to the current user

> **i Note**
>
> To display and access the test packages of another tester, you can choose (On Behalf), search and select the tester, and log on on behalf of this tester.

My Packages

In the *Test Packages* list, you can do the following:

- Filter and sort the test packages, for example, by status, test plan, test package name, or empty test package priority.
- Select a test package to open the test package in the test package view.

Test Package View

In the test package view, you can do the following:

- View general information about the test package and read attached documents.
- Get an overview of the status of the test cases in the selected test package.
- Select a test case to manage and document it in the test case view.

Test Case View

In the test case view, you can find information about the test case and read attached test case descriptions.

For test cases that are ready to test, you can do the following:

- Document the test case execution.
- Record TBOMs for the test document and test steps.
- Enter a comment in the *Comment* field on the *Header* tab page.

  > **i Note**
  >
  > The *Comment* field has to be activated in the Customizing for SAP Solution Manager (transaction **SPRO**) at *SAP Solution Manager* > *Focused Build* > *Test Suite Extensions* > *Central Settings for Test Suite*.

- If this is enabled in the standard test suite, testers can also digitally sign test results and test notes.
- Report a new defect for the test case.
  Choose *Create Defect*. Select the defect type *Defect*, the system, and a priority and enter a defect title and a description. You can select categories to further specify the defect. If there is an evidence document attached to the test case, you can choose to take it over as a defect attachment.
  You can later find and further specify the defect in the *My Defects* app. Defects are used to notify developers of errors that have been identified during testing. If necessary, a defect correction for the defect can be created in *My Defects* and later be processed in *My Defect Corrections*.

  > **i Note**
  >
  > Setting an error for a test case or a test step automatically calls up the *Create Defect* dialog, if in the Customizing for SAP Solution Manager (transaction **SPRO**) at *SAP Solution Manager* > *Focused Build* > *Test Suite Extensions* > *Central Settings for Test Suite* the *Open Defect Dialog on Error* function is active.

> If the other *Allow Personalization* function is set to active, the *Create Defect* dialog only starts if the settings in transaction `SU01` are either set to *Yes* or *Default*.
>
> The *Create Defect* dialog shows the defect type (taken from the personalization) and takes over information on the system, the client (if the executable is assigned to a test case), and the actual and expected results.

- Report an incident.
  Choose *Create Defect*. Select the defect type *Incident*, the system, and a priority and enter an incident title and a description. You can select categories to further specify the incidents.
  Incidents are processed using IT service management.
- Assign an already existing defect to the test case.
  Choose *Assign Defect*. Search for known defects related to the function tested in the test case, select the defect and assign it to the test case.
- Change the status of the test case.
  You can change the status of the test cases from the default *Set to "OK"* status to the statuses that you have customized.
- *Results* tab page:
  - Upload files, for example, screenshots, to document the test results.
  - View the results that other testers had for the same test case.
- *Attachments* tab page:
  Upload test result documents such as screenshots for the test case.

Test Steps

The *My Test Executions* app displays test steps for test cases that have been created with the *Test Step Designer* app. Public result attributes are shown as *Previous Results from Test Sequence*.

A single test steps test case can be executed multiple times. Each time a test case is executed, a new runtime object is created and the previous objects are saved for reference and documentation purposes.

Related Information

Managing Defects and Defect Corrections [page 105]

4.12 Simple IT Request

With the Simple IT Request extension, business users can consume any IT service based on SAP Solution Manager using the service catalog as the single point of entry. The service catalog includes an intuitive user interface for the postprocessing of consumed services.

Context

Simple IT Request supports the following use cases for the consumption and maintenance of IT services with SAP Solution Manager 7.2:

- As a requester, you want to consume a service offered by your IT organization.
- As a service manager, you want to create and offer a new service using the service catalog.

Consuming Services

As a requester, you can use the following features to consume a service:

- In the service catalog, the predefined content of the transaction templates is displayed as *Services*. To access the service catalog, open the *Service Catalog - Create Request* app on the SAP Solution Manager launchpad.
- As a requester, you select a service type from the list, enter the required information into the service form, and submit the request.
  When a service is consumed, a defined transaction is created based on predefined data from the template and from the information submitted by the requester. For example, a *Missing Authorization* service is defined using an incident template. The requester selects the service in the catalog, adds information about the authorization that they are missing, and submits the request. This generates an incident transaction with predefined information, such as the support team, as well as the additional information added by the requester.

  > → Tip
  >
  > You can save service request templates that you use often as favorites by choosing ☆ (*Save as a Favorite*) in the request template. The templates saved as favorites are then displayed on the start page of the *Service Catalog - Create Requests* app.

- Requests are processed as transactions in the WebClient UI by assigned message processors, support teams, and others.
- Requesters can use the *My Requests* SAP Fiori app to communicate with the request processors, for example, for queries to and from the requester or to delegate a request. Request processors use the WebClient UI.

Simple IT Request tasks can be integrated into the *My Inbox* SAP Fiori app, so that request approvers can use the tasks in the *My Inbox* SAP Fiori app to approve or reject requests that require an approval.

Maintaining Services

Simple IT Request provides the following features for creating and maintaining the service catalog and its services using the WebClient UI in SAP Solution Manager:

- The *Maintain Service Catalog* application can be accessed from the SAP Solution Manager launchpad.
- The service catalog is based on the multilevel categorization of CRM transactions and can be structured with respect to the business user perspective. The categorization schema can be maintained in the work center service operations
- The services are based on business transaction templates. They can be created and maintained in the WebClient UI of IT Service Management and Change Request Management. The following transaction types are available:
  - Incident template (S4IT)
  - Problem template (S4PT)
  - Service request template (S4ST)

    - Change request template (S4CT)
- When creating or maintaining a service, enter the following information:
    - Description on the general data section. This is the name of your service within the service catalog.
    - Assignment of a category. This is the place within the catalog where the service is shown. If no category is defined, the service is not displayed.
    - Content in the *Description* text field. With this long text field, you can describe the service or ask the service consumer to enter information when requesting this service.
    - In the *Simple IT Request Setup* assignment block, define how to display the service form in the service catalog:
        - Enable or disable the upload of attachments.
        - Select fields that you want to be displayed in the service form and define properties (as mandatory, for example). If you don't define any fields for the service form, the service cannot be consumed properly.
        - You can define authorization groups so that a service is visible only for specific user roles.
- When your service is defined correctly, you can release it for the service catalog by setting the status of the transaction template to *released*.

4.13 Batch Import

The Batch Import function allows a controlled automatic import of transport requests into managed systems.

Features

Each transport request is evaluated as defined in Customizing, with BAdIs, and in the runtime settings. When a transport request passes the evaluation check, Batch Import initiates the automatic import of the transport request.

You can launch a Batch Import manually or use the schedule manager.

Transport Checks

Every transport request must pass multiple transport checks before it is imported into a managed system. Some checks are mandatory, others can be enabled optionally during runtime or in Customizing.

Check	Mandatory or Optional	Description
Buffer Check	Mandatory	Checks that a selected transport exists in the import buffer
System Role Check	Mandatory	Compares the actual system role with the one defined by the Customizing

Check	Mandatory or Optional	Description
Change Document Relation	Optional	Imports a transport with a task list relation, but not a change document relation
Change Cycle Status	Optional	Checks whether the status of the change cycle allows an import
Change Document Status	Mandatory	Checks whether the status of the related change document allows an import
Downgrade Protection	Optional	Checks for existing downgrade conflicts. If you use the transport-related check framework, this includes additional checks beyond classical DGP check, such as cross reference check, ABAP test cockpit (ATC), or custom checks.
Relational Check - Work Item Relations	Optional	If there are predecessor relations between change documents, this check checks if all transports of the predecessors are part of the import set. If not, the transports of the change document and all its predecessors are not imported.
Relational Check - Full Work Package Import	Optional	Checks whether transports of all work packages and work items are part of the import set. This check can be extended by relations between work packages.

BAdIs for Batch Import

Batch Import uses two BAdIs that can extend the functionality of the program:

- BAdI for extending the performed transport checks or import options and adding further transports.
- BAdI for executing user-defined post-import tasks.

Configuration Options

Runtime Settings

The following settings can be adjusted at runtime:

- Transport test restrictions
- Automatic rescheduling of the Batch Import as a background job
- Release definition as transport selection criteria
- Downgrade protection check
- Checks for the relations between change documents and transports

Customizing Options

The transport requests are evaluated according to the setting variants defined in the Customizing. To define a variant, you adjust the following settings in the Customizing:

- Status definition for relevant change documents
- Status definition for change cycles of the change documents
- Automated status change information for a change document (post-import)
- Time and frequency settings for the Batch Import initiation
- Import sequence
- RFC connection type
- Landscape information to define the considered systems

4.14 Retrofit Automation

The Retrofit Automation function automates and optimizes processes in the dual landscape synchronization (retrofit):

- Automated execution of imports in batch mode
- Retrofit target transport creation
- Automatic import into connected consolidation systems
- Extended Retrofit functions
- Automatic e-mail notifications to transport owners

You can activate Retrofit Automation functions for the following scenarios:

- *Transport of Copies as Retrofit Target:* If transports without conflicts are retrofitted with the Retrofit Automation tool, the retrofitted objects are recorded into a ToC which is released and imported into the test system automatically.
- *Original Transport as Retrofit Target*: If transports without conflicts are retrofitted with the Retrofit Automation tool, the retrofitted objects are recorded into an automatically created transport.
- *Change Document as Retrofit Target*: If transports without conflicts are retrofitted with the Retrofit Automation tool, the retrofitted objects are recorded into an automatically created transport. The transport is linked to an automatically created change document.
- *Retrofit for BW Objects*: Retrofit enablement for critical BW objects. The following object types are supported: ISFS, ISMP, ISTS, ROUT, RSDS, RSFO, TRFN.
- *Full Scope*: Extend the Retrofit automation scope by auto-import objects from mixed transports
- *Stop at Failed Retrofit*: The Retrofit Automation report will cancel the processing of further transports if the auto-import for a transport was not successful.
- The following additional functions can be added to the menu of the Retrofit Automation tool:
  - *Display Change Document*: Navigate from the Retrofit Automation tool into the change document.
  - *Call SNOTE Implementation*: Navigate from the Retrofit Automation tool into transaction SNOTE of the Retrofit system
- *Single Retrofit Automation*: Trigger the retrofit automation for a single transport from the retrofit list. The retrofit target transport is created automatically based on the active retrofit scenario. This feature supports auto-import and mixed transports. For example, if you have activated transport of copies as a retrofit target, you can use this function to execute auto-imports with ToCs as target requests in the retrofit screen, for example, for mixed requests with green and red objects.
- *Create Retrofit Target Transport*: Create a target transport (original transport) for a single transport from the retrofit list.

- *Display Conflicts*: For a transport request in the retrofit list with yellow and red objects, show all objects with conflicts in the retrofit system and the corresponding transport requests.
- *Analyze BW Transformations*: If the BW scenario is activated, you can use this function to compare transformations between the development and retrofit system.
- *Traceability Report*: Use report `/SALM/RETRO_AUTO_TRACEABILITY` to see the traceability of automatic retrofits in a list view. This includes the following features:
  - Select by task list or transport ID
  - Select by timeframe
  - Different output views matching the retrofit automation scenario in use
  - Show source, target, and ToC ID
  - Show export and import status
  - Display the corresponding change document
  - Direct access via retrofit list and retrofit automation

4.15 Retrofit for BW

With the Retrofit for BW function, the following critical BW objects can be retrofitted using an automatic retrofit:

- File data sources (ISFS)
- Transfer rules (ISMP)
- Transfer structures (ISTS)
- Data source (RSDS)
- Transformation (TRFN)
- Routines (ROUT)
- BW formulas (RSFO)

For more information about the prerequisites and configuration for Retrofit for BW, see the Configuration Guide for Focused Build for SAP Solution Manager.

4.16 Test System Refresh

To refresh a test system, you make a system copy of the production system to the test system.

You can use the *Test System Refresh* scenario to do the following:

- Save your current developments before you execute a system copy of the production system to the test system.
- Append the saved transports to the import queue of the refreshed test system after the system copy.

By executing a system copy of the production system (source system) to the test system (target system), you bring the test system into a system status that represents the current status of the production system.

To avoid losing all current developments that have been imported into the test system but not yet into the production system (newer versions of Workbench objects and Customizing settings), you can use the *Test System Refresh* scenario to save the current developments before executing the system copy.

You use the *Test System Refresh* scenario to perform a delta calculation: All imported transport requests are compared between the two systems. The system calculates which transport requests were imported into the test system, but not yet into the production system (or another source system you specified). The delta calculation is then saved at operating system level.

In the next step, you perform the system copy by using the known AS ABAP functions (not included in the *Test System Refresh* scenario).

After a successful system copy, you execute the *Re-apply Transports* function in the *Test System Refresh* scenario to append the saved delta calculation of the transports to the import queue of the refreshed test system.

For more information about the prerequisites and configuration for the test system refresh, see the Configuration Guide for Focused Build for SAP Solution Manager.

5 Glossary

Build project	Project type in multi-project management. A build project is a subproject of a main project. Build projects are used to coordinate the development tasks.
Continual cycle	Type of change cycle that - in contrast to the release cycle - is used for development without specific phases. It is used in Enhance Pace only. Within a continual cycle, all changes are implemented and tested in the main phase, which allows phase-independent and individual imports to the preproduction and production systems.
Cross-wave	Special wave in a main project, that is used for testing developments that have been implemented in the waves of the build projects assigned to the main project.
Defect	Change document created during the test phase of a project. Defects are used to notify developers of errors that have been identified during testing. The developer responsible can correct the error using a transport request.
Defect correction	Small change that corrects an error. A defect correction is implemented in the current sprint.
Enhance Pace	Maintenance process used for maintanace activities linked to the Maintenance branch to bundle normal changes that are not bug fixes or standard changes. It leverages urgent changes, standard changes, and normal changes. Normal changes can be bundled in packages and jointly deployed to the preproduction and production system.
Fit	Work package that defines what needs to be done to customize or configure of a component that otherwise does not need to be changed.
Fix Pace	Fix process for Focused Build releases in the *Hypercare* and *Operation* phase after a release go-live. It allows bug fixing with urgent changes and performing preapproved, uncritical changes with standard changes.
Gap	Functional part of a solution that is missing and should be included into the SAP standard and is therefore handed over to SAP development. A gap might be detected during a discovery workshop or during the scoping process of a work package.
Main project	Project type in multi-project management. A main project is the project that is used to coordinate the subordinate build projects. It contains also cross-wave for testing results of the waves of the build projects.
Maintenance project	A maintenance project is a project that is used for correcting errors. It has only a single wave with a single sprint.
Milestone	Milestones are used to mark specific dates in a project plan. Milestones can be, for example, the start and end date of the project, a need for an external review, or input and budget checks. In many instances, milestones do not impact the project duration. Instead, they focus on major progress points that must be reached to achieve success. Therefore, a milestone has a clearly defined due date.
Normal change	A regular change that is done in the maintenance landscape. It is used in the Enhance Pace process. It can be, for example, a new function or a new feature in existing

	functionality. A normal change is usually deployed together with other normal changes in a bigger package.
Quality gate or q-gate	Special milestone in a software build project. A quality gate is scheduled during the hand-over from one project phase or wave to the next. All project stakeholders review the deliverables of the previous phase or wave and decide collaboratively whether the project can move into the next phase or wave. The character of a quality gate is more formal than a review, for example, as the availability of documents is checked rather than their content. A quality gate has a clearly defined due date.
Requirement	Description of new functions or features that are to be implemented, a definition of what must be delivered to provide or increase a company's business value. Requirements are gathered during the discovery workshop. They can be linked to processes, process steps, capabilities, modules or end-to-end processes. There are also requirements that are not linked to any other artefacts.
Release	State of a software component that represents an important milestone or a considerable enhancement of a software component's functionality.
Release component	The systems and applications of the solution that are related to a release.
Risk	An event or condition that, if it occurs, could have a negative effect on one or more project objectives.
Scope change	Unforeseen new requirement that changes the initial scope. For a scope change, the efforts and the budget need to be newly estimated and negotiated with the customer.
Scope extension	Additional work that needs to be done to implement a requirement. If the need for additional work has been identified after a quality gate or a user acceptance test, the initial scope can be extended. A scope extension is a smaller than a scope change. A scope extension does not exceed the efforts and the budget planned for the initial scope.
Sprint	In agile development, a sprint is a defined period of time during which software development has to provide deliverables for review. The backlog of a sprint is based on the prioritization of backlog items, that is requirements.
Standard change	A preapproved, uncritical change that does not require any additional approval for the import to the production system. It can be deployed independently of other change documents. You can use standard changes in Fix Pace and Enhance Pace.
Test case	A document that describes what shall be tested, how the test sequence is to be executed by the tester, and what results are expected at the end of the test sequence.
Test package	Part of a test plan containing all test cases assigned to a tester. A test package contains all the test cases that a tester is to perform within a specific time period.
Urgent change	A change used to quickly fix bugs in the production system. It can be deployed independently of other change documents. You can use urgent changes in Fix Pace and Enhance Pace.
Wave	Well-defined functional scope of work packages that belong to a release and are implemented during a defined period of time. A wave is formally signed-off by customer key-users.

Work item	Document that describes a normal or a general change. A work item is derived from a work package. A work item can be divided into single tasks that can be assigned to developers.
Work item - general change	Change that doesn't use a transport request. For example, a new work flow, a change in third-party software or administration changes.
Work item - normal change	Change that uses a transport request.
Work package	Document that defines what needs to be done to implement a requested feature. A work package is usually based on a requirement, but it can also be created directly. The solution architect uses the work package to plan and document the implementation of the requirement. A work package is broken down into work items.
WRICEF	Abbreviation of work flows, reports, interfaces, conversions, enhancements, and forms. A WRICEF is a requirement that goes beyond the scope of a customizing or configuration and requires that components of a standard process are enhanced or that new components are development and documented.

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