

**Configuration Guide****CUSTOMER**

Focused Build for SAP Solution Manager  
Document Version: 1.38 – 2018-01-23

# Focused Build for SAP Solution Manager

ST-OST 200 SP 1

# Typographic Conventions

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

# Document History

Version	Date	Change
1.00	2016-12-28	<i>Initial Version</i>
1.10	2017-07-31	Support package stack 1 (SPS1) Documentation for standalone extensions added.
1.11	2017-08-01	Added SAP notes
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1.30	2017-12-20	Chapter 3.13 Cross Landscape Distribution added
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# 1 Introduction

This document helps you to configure Focused Build Requirement-to-Deploy scenario for SAP Solution Manager with SAP Solution Manager 7.2. SPS 5 or higher as well as the standalone extensions. You don't have to work through the guide from A to Z. Just utilize the chapter with your specific scenario or use case you have in scope.

- The chapter **Configuration of Focused Build Requirement-to-Deploy** comprises the configuration for the entire **requirement to deploy scenario**.

In the chapter **Configuration of Standalone Extensions**, you find information about the configuration required for each **standalone extension** delivered in ST-OST.

The document does not cover the following topics:

- SAP Reporting and Dashboarding Service: Dashboard Factory
- SAP Solution Manager Rapid Deployment Solution for Change Control Management
- SAP Solution Manager Rapid Deployment Solution for Solution Documentation

## 1.1 Target Group

This document targets technical consultants, application consultants, and support consultants who plan to perform the configuration of the component `ST-OST 200` (Focused Build).

## 1.2 Overview of Focused Build for SAP Solution Manager

Focused Build for SAP Solution Manager is a turnkey solution that starts with the creation of requirements in Process Management (Solution Documentation). For these requirements, you create work packages, which are then broken down to work items, which are subsequently implemented. The go-live process can involve individual changes, groups of changes, or planned releases that are in line with a release plan and controlled by release phases.

## 1.3 General

You can download the setup and configuration guide for Focused Build 'Refresh Test System' from the SAP Software Download Center at [support.sap.com/swdc](https://support.sap.com/swdc).

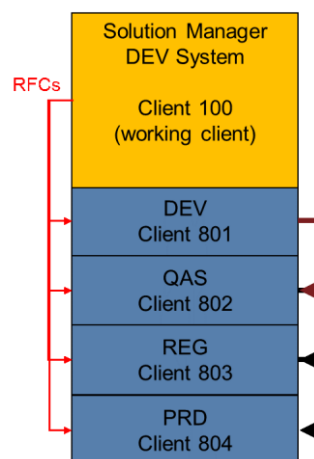
For more information about Focused Build Solutions, refer to the SAP Support Portal at <https://support.sap.com/en/solution-manager/focused-solutions.html>

## 2 Configuration of Focused Build Requirement-to-Deploy

### 2.1 Basic Configuration of SAP Solution Manager

#### 2.1.1 Creating a Demo Landscape in SAP Solution Manager

You create clients, for example, 801 (development system), 802 (quality assurance system), 803 (regression testing), and 804 (productive system), in your SAP Solution Manager development system to simulate a transport landscape (DEV-QAS-REG-PRD).



The following sections describe how you can generate a new client or copy an existing client.

##### Generating Clients

1. Call transaction **SCC4** and create a new client.
2. Log off from the system.
3. Log on to the new client with user **SAP\*** and password **PASS**.

##### Copying Clients

1. Call transaction **SCCL**.
2. Use the following parameters:  
Profile: **SAP\_CUST** (if disk capacity is an issue, you can choose **SAP\_ALL** instead)  
Source Client: **001**

If required, you can copy existing users from the working client with profile **SAP\_USER**.

## Note

Creating transport routes and RFC destinations is described in section [Error! Reference source not found.](#)

## 2.1.2 Configuring Transport Management System (TMS)

The following sections describe how you configure the Transport Management System (TMS).

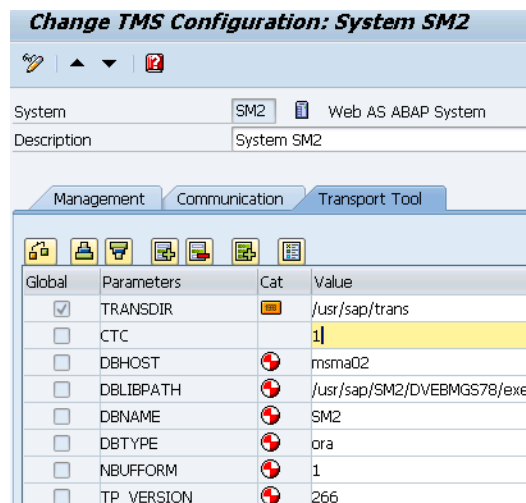
## Note








Make sure that your transport domain has been configured correctly. For more information, call transaction [STMS](#) and choose [Help](#) → [Application Help](#) → [Transport Management System](#).

Existing settings should already have been configured for the **working** client in SAP Solution Manager. Do not change these settings. Create additional entries only for simulation clients.

### Activating Extended Transport Control

1. Call transaction [STMS](#).
2. Choose [Overview](#) → [Systems](#).
3. Double-click the row containing your system.  
The [Change TMS Configuration: System <system ID>](#) screen appears.
4. Choose the [Transport Tool](#) tab page.
5. If it is not already there, add a row for the CTC parameter: In the [Parameters](#) column, enter [CTC](#).
6. In the [Value](#) column, enter [1](#) for the CTC parameter.
7. Save your entries.



Global	Parameters	Cat	Value
<input checked="" type="checkbox"/>	TRANS DIR		/usr/sap/trans
<input type="checkbox"/>	CTC		1
<input type="checkbox"/>	DBHOST		msma02
<input type="checkbox"/>	DBLIBPATH		/usr/sap/SM2/DVEBMGS78/exe
<input type="checkbox"/>	DBNAME		SM2
<input type="checkbox"/>	DBTYPE		ora
<input type="checkbox"/>	NBUFFORM		1
<input type="checkbox"/>	TP_VERSION		266

### Configuring the Transport Strategy

The QA approval procedure is not compatible with the approval procedure used in Change Request Management. In the Transport Management System, you therefore must deactivate the QA approval procedure in transport tracks in which the software distribution is controlled by Change Request Management.

You also activate the single transport strategy because this prevents you from accidentally executing *Import All*. All transports within the system landscape of Change Request Management must be processed by project imports.

Proceed as follows:

1. Call transaction **STMS**.
2. Choose *Overview* → *Transport Routes*.
3. Double-click your system.

You see the *Display System Attributes* dialog box.

4. In the *Transport strategy group* box, select *Single transports* (because only *Import Single* and *Import Project All* are used).
5. In the *Quality assurance* group box, deselect *Delivery after confirmation*.
6. Choose *Continue*.

## Checking TMS Parameters

1. Call transaction **STMS**.
2. Choose *Overview* and then *Systems*.
3. Double-click your system.

You see the *Display TMS Configuration: System <system ID>* screen.

4. Check that the parameters are set as follows:

Parameter	Value
CTC	1
IMPORT_SINGLE_ONLY	1
IMPORT_SINGLE_STRATEGY	1
NO_IMPORT_ALL	1
WORKFLOW_STRATEGY	0



## Activating TMS Trusted Services for All Transport Domains Involved

TMS Trusted Services are used by Change Request Management to trigger transports in managed systems remotely. You must activate this service in all domain controller systems that may be involved in Change Request Management processes.

1. Log on to the domain controller system in client 000.
2. Call transaction **STMS** and choose *System Overview*.
3. Choose *Goto* and then *Transport Domain*.
4. On the *Management* tab page in the *Security Options* group box, set the trusted services to *Active*.
5. Save and distribute this configuration.

**Change TMS Configuration: Domain DOMAIN\_SM2**

Domain: DOMAIN\_SM2  
Short Description: Transport domain SM2

Management | Workflow Engine | QA Approval Procedure

**Workflow Engine**  
Status: Workflow Engine is not active  
Changed by:   
Changed on:  00:00:00

**QA Settings**  
Status: No QA system defined  
Changed by:   
Changed on:  00:00:00

**Security Options**  
Trusted Services: ☒ Active ☐ Inactive  
SNC Protection: ☐ Active ☒ Inactive

## Creating a Transport Layer

1. Call transaction **STMS** and choose *Transport Routes*.
2. Switch to change mode and choose *Edit*.
3. Choose *Transport Layer* and then *Create*.
4. Create transport layers **ZPRJ** (for project) and **ZMAN** (for maintenance).

**Create Transport Layer**

Transport layer: ZMAN  
Short description: for Maintenance

✓ ? ✗

## Creating a Transport Route

1. Call transaction **STMS** and choose *Transport Routes*.
2. Switch to change mode and choose *Edit*. Choose *Transport Route* and then *Create*.
3. Create a consolidation.

4. Place the cursor on the *Transport Routes* entry and choose *Create*.
5. Activate the extended transport control (press **F6**).
6. Create a delivery.

### **i** Note

The following screenshots are examples only.

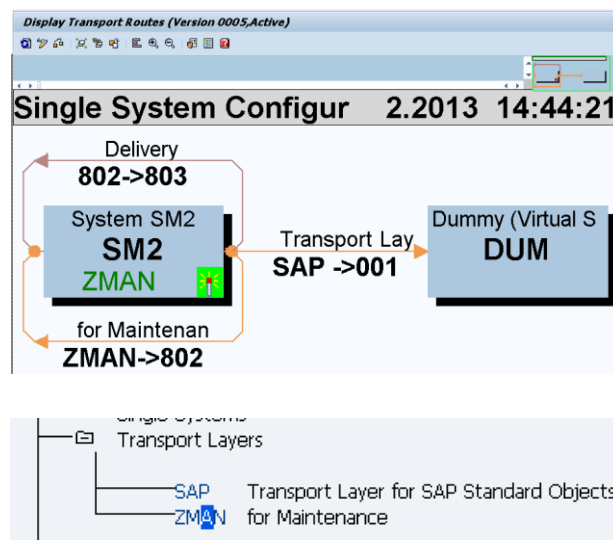
The screenshot shows the 'Create Transport Route' dialog box. The 'Consolidation' radio button is selected. The fields are filled as follows:

Field	Value
Integration system	SM2
Transport layer	ZMAN
Consolidation target	SM2.802

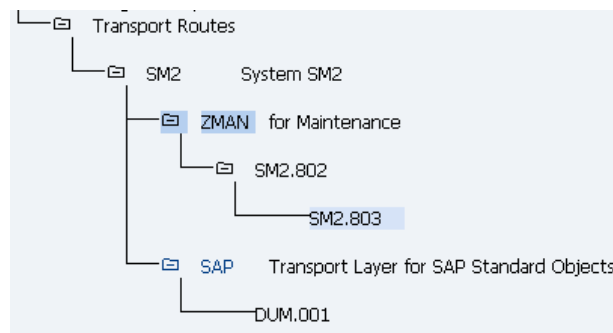
The 'Delivery' radio button is unselected. Its fields are empty.

The screenshot shows the 'Create Transport Route' dialog box. The 'Delivery' radio button is selected. The fields are filled as follows:

Field	Value
Integration system	
Transport layer	
Consolidation target	
Delivery source	SM2 . 802
Delivery target	SM2.803



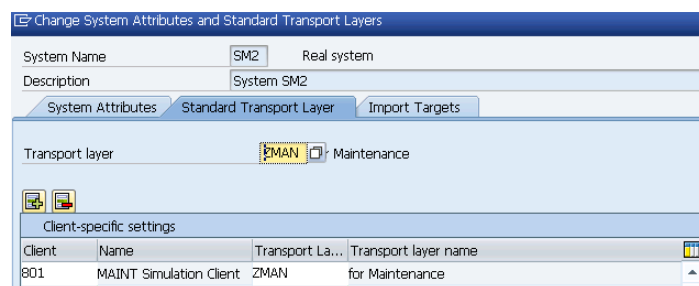
7. Adopt the existing transport routes.



## Assigning a Transport Layer to a Client

In your simulation landscape, assign the transport layer that you have created earlier to the development system client (801).

1. Call transaction **STMS**.
2. Choose **Overview** and then **Transport Routes**.
3. Double-click your system.  
You see the **Display System Attributes** dialog box.
4. Choose the **Standard Transport Layer** tab page.
5. Create an entry at the client level for the development system client (801) and the transport layer.
6. Save and distribute.



## Setting the Mandatory Project Assignment

1. Call transaction **SE03**.
2. Under **Administration**, double-click **Display/Change Request Attributes**.
3. Double-click the attribute **SAP\_CTS\_PROJECT**.
4. Make sure that the client-specific settings contain an entry for the development system client (801) and that the **Required** checkbox is selected.



### Caution

Do not activate this parameter system-wide! Only activate it for the development system client.

Attribute Required for Requests	
Default for All Clients	Not mandatory
Client-Specific Setting	
Client	Required
801	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

## 2.1.3 Implementing Mandatory SAP Notes

SAP Note	Description	SAP Solution Manager	Managed System
2395850	CL_AI_CRM_IM_CATE_HELP=>GET_MULT_CATE_LIST_F4 does not return correct category levels	X	
<a href="#">1818804</a>	Change Request Management: Enable client restriction for import subsets		X
<a href="#">1731806</a>	Change Request Management: Support of multi-client import		X
2468171	ChaRM: Dump DBIF_RSQL_TABLE_UNKNOWN for table /SDF/TMW_ADM on shadow systems	X	X
2335056	ChaRM: runtime error PERFORM_PARAMETER_MISSING during creation of transport of copies		X

## 2.1.4 Maintaining Number Ranges

To maintain the number ranges, check that in SAP Solution Manager Configuration (transaction [solman\\_setup](#)) in the [Change Request Management](#) scenario in the [Check Prerequisites](#) step (1.1), the activity [Adapt Number Ranges](#) is executed successfully.

## 2.1.5 Related Documentation

For more information about SAP Change Request Management, go to SAP Help Portal at [https://help.sap.com/viewer/p/SAP\\_Solution\\_Manager](https://help.sap.com/viewer/p/SAP_Solution_Manager), select version **7.2 SPS 3**. Open the application help and select **Change Request Management**.

For more information about assigning roles, see the security guides for SAP Solution Manager at [https://help.sap.com/viewer/p/SAP\\_Solution\\_Manager](https://help.sap.com/viewer/p/SAP_Solution_Manager).

### Setting Up Component ST-OST 200

Where necessary, the support consultant must perform the following activities along with the basis team of the customer.



#### Caution

It is important that you follow the sequence of set-up steps described in the following sections. In particular, you have to activate the piece list before you activate the BC sets.

## 2.1.6 Activating the Piece List

Call transaction **scc1** in your working client and activate the piece list **/SALM/72\_CUSTOMIZING**, which will supply your system with the predefined customizing. Copy the customizing by putting the piece list into the the Transport Request field. The result of this activation can be verified in transaction **scc3**.

## 2.1.7 Important SAP Notes

Before you set up component **ST-OST 200**, make sure that you have read and considered the central SAP Note:

SAP Note	Description
2541761	Focused Build: Release Planning
2483056	Central Note for Focused Build 2.0 SP01 for SAP Solution Manager 7.2



#### Note

SAP Note 2483056 must be implemented via transaction **sNOTE** after the piece list activation (refer to chapter Error! Reference source not found. Error! Reference source not found.).

## 2.1.8 Transaction Types

Focused Build uses the following transaction types:

Transaction Type	Description	Usage
S1MT	Master Work Package	

Transaction Type	Description	Usage
S1IT	Work Package	Project Management without Portfolio Management
S2IT	Work Package	Project Management with Portfolio Management (SAP Portfolio and Project Management)
S3IT	IT Requirement	Without Project Management
S1CG	Work Item	Work Item without transport requests
S1CR	Request for Change (RM)	
S1HF	Urgent Change with TMS (Project Management)	
S1MJ	Work Item	
S1MR	Release	Release Cycle Document
S1RK	Risk	
S1TM	Defect Correction IT	Correction of a defect during testing
S1TR	Test Request	
S1DM	Defect Message	
S3CR	Request for Change	
S4CT	Request for Change Template for Simple Service Request	Simple Service Request
S4IT	Incident Template for Simple Service Request	Simple Service Request
S4PT	Problem Template for Simple Service Request	Simple Service Request
S4ST	Service Request for Simple Service Request	Simple Service Request

## 2.1.9 Setup Steps

It is important that you follow the sequence of set-up steps in this outline.

### Maintain Transaction Types

To perform the customization, call transaction **DNO\_CUST04** and enter the following data:

Field Name	Sequence No	Field Value
CHARM_ADD	According to customer requirements	S1IT
CHARM_ADD	According to customer requirements	S1RK
CHARM_ADD	According to customer requirements	S1CR
CHARM_ADD	According to customer requirements	S1MJ
CHARM_ADD	According to customer requirements	S1CG
CHARM_ADD	According to customer requirements	S1TR
CHARM_ADD	According to customer requirements	S1HF
CHARM_ADD	According to customer requirements	S1BR
CHARM_ADD	According to customer requirements	S1MT
CHARM_ADD	According to customer requirements	S1IR
PROCESS_TYPE_ADD	According to customer requirements	SMFG
PROCESS_TYPE_ADD	According to customer requirements	S1DM
SMUD_TYPE_S1BR	According to customer requirements	FBRR

## Project Management Configuration

To get the project management working, standard customizing entries from client 000 must be copied into the working client.

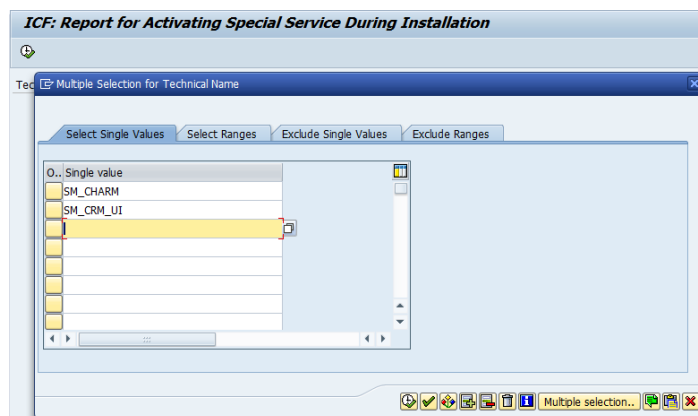
1. Call transaction **/n/RPM/CUST\_COPY**.
2. Copy all customizing tables, starting with **/RPM/\*** and **INM\***, to the current / working client from client 000.

## Activating Services

Activate all services for IT Service Management, Change Request Management, and Product and Portfolio Management.

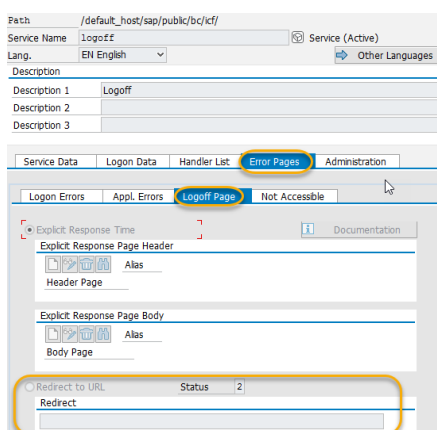
1. Call transaction **SICF\_INST** and activate the following services:
  - o SM\_CHARM
  - o SM\_CRM\_UI





If the services are activated successfully, you see a green traffic light icon.

2. Go to transaction **SICF** and activate all of the services below the `/default_host/sap/bc/bsp/salm` and `/default_host/sap/bc/webdynpro/salm` nodes.
3. Activate all services in `/default_host/sap/bc/ui5_ui5/salm`.
4. Activate all services in `/default_host/sap/bc/ui5_ui5/stdf/libs`
5. Activate all services in `/default_host/sap/bc/webdynpro/rpm`.
6. Activate all services in `/default_host/sap/opu/odata/salm`.
7. Activate the UI5 library services `/default_host/sap/bc/bsp/stdf/ui5` and `libs`.
8. If you like to add the log off page for the SAP Solution Manager launchpad follow the instructions under: [http://help.sap.com/fiori\\_bs2013/helpdata/en/c6/a414539196e50be10000000a441470/content.htm?fira\\_meset=/en/b7/383953fcabff4fe10000000a44176d/frameset.htm&current\\_toc=/en/fc/4a4c52eea9c871e10000000a44176d/plain.htm&node\\_id=8](http://help.sap.com/fiori_bs2013/helpdata/en/c6/a414539196e50be10000000a441470/content.htm?fira_meset=/en/b7/383953fcabff4fe10000000a44176d/frameset.htm&current_toc=/en/fc/4a4c52eea9c871e10000000a44176d/plain.htm&node_id=8)
9. Here you should enter the following URL at *Redirect to URL*:  
**`http://<host>:<port>/sap/bc/ui5_ui5/ui2/ushell/shells/abap/Fiorilaunchpad.html`**



## Checking and Maintaining System Roles

The initially delivered set of customizing is based on the following set of system roles:

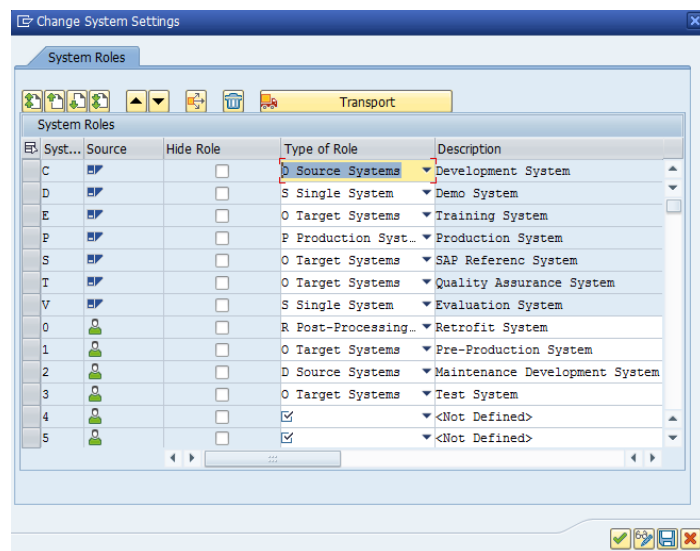
System Role	Source	Type of Role	Description
C	SAP	D - Source System	Development System

System Role	Source	Type of Role	Description
D	SAP	O - Target System	Demo System
T	SAP	O - Target System	Quality Assurance System
E	SAP	O - Target System	Training System
P	SAP	P - Production System	Production System
S	SAP	O - Target System	SAP Reference System
V	SAP	S - Single System	Evaluation System
0	CUSTOMER	R - Post-Processing System	Retrofit System
1	CUSTOMER	O - Target System	Pre-Production System
2	CUSTOMER	O - Target System	Maintenance Development System
3	CUSTOMER	O - Target System	Test System

The existing roles can be checked via transaction **SM30** via view **SMSY\_ROLES**. If the given system has a different set of system roles there are 2 options:

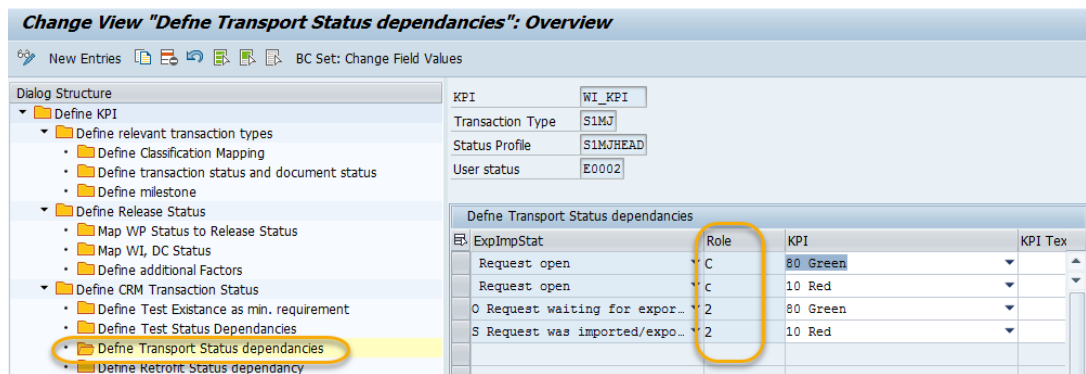
1. Adjust the release dashboard customizing or
2. Adjust the system roles, if possible.

Create additional (or adjust) system roles via transaction **MAINT\_ROLES**:



Use up- and down- buttons to change order of system roles according to sequence transport landscape. If of an already defined set of system roles at the customer the customizing of the release dashboard and batch import must be adjusted accordingly.

In the Customizing of SAP Solution Manager, choose **SAP Solution Manager** → **Focused Build** → **Dashboard Configurations** → **Document KPI Framework** you can adjust the system role dependencies.



## ➔ Recommendation

It is recommended to have different system roles for different systems, e.g. the development system in the development branch gets the system role C-Development System and the other development system in the maintenance branch 2-Maintenance Development System.

## Maintain the Table HTTPURLLOC

Go to transaction **SE16** and maintain the new **/WEBDYNPRO/SALM/\*** entry in table HTTPURLLOC.

Depending on the current configuration in table HTTPURLLOC, a new entry needs to be maintained to open Web Dynpro applications of Focused Build with the correct URL.

If the table is maintained, add the new **/WEBDYNPRO/SALM/\*** entry after the entry **/WEBDYNPRO/SAP/\***, but before entry **/\***.

## i Note

Further information can be found here: [How to maintain the table HTTPURLLOC](#)

## Background Processing

### Import Control in Requirement-to Deploy

The *Import Control in requirement-to-release* scenario provides various options for mass deployment. Standard Import Customizing defines deployment rules for imports executed from a task list that import normal changes as preliminary import status and urgent changes.

Batch Import Customizing defines deployment rules for imports in a release context.

/SALM/BATCH\_IMPORT\_TRIGGER manages the import of normal changes.

After successfully activating the piece list you can continue with adjustments of the standard customization and maintaining the system related data. The following import variants are delivered via the piece list:

- /SALM/COLLECTIVE\_IMPORT

For imports between 2 releases.

- /SALM/RELEASE

For imports into PRE-PRD and PRD of everything included into 1 release.

- /SALM/INTEGRATION\_TEST

For imports of Defect Corrections while release test phase into PRE-PRD.

- /SALM/QAS

For imports into QAS.

Proceed as follows:






1. In the Customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Deployment and Batch Import* → *Configure Release Deployment & Batch Import*. A default customization is already provided by the piece list. Thus, an adjustment of the *Batch Import Variants* node is not mandatory. Data you can adjust are *Date & Time Validity* and *Weekday Specifications*.

## ➔ Recommendation

If you would like to adjust the batch import variants, you should copy the respective variant to avoid any interferences with future Support Packages and piece lists of ST-OST.

2. Configure the *Import Strategies* according to your requirements and system landscape. A standard customizing is already provided after the activation of our piece list. But the *Import Config* of the *Import Strategies* is depending on the system role (*SysRole ID*). If the given system roles are different from our recommended set of system roles, the *Import Config* must be copied to adjust the *SysRole ID*. For further information in terms of recommended system roles refer to chapter Error! Reference source not found..
3. Select *Maintain Landscape Data* and maintain your system landscape per *Import Config* which has been defined previously. As *Solution ID* you can maintain '\*' or any dedicated solution. Usually there are more than 1 system per *Import Config*. For special use cases where imports must be performed sequentially system after system (e.g. ERP and BW) the *Sequence* column can be utilized. If such a use case is not given the sequence can always be '10'. If of a non-ABAP system check the *Non-ABAP check-box*.

Change View "Maintain Landscape Data": Overview

 New Entries    

Dialog Structure

Batch Import Variants

Date & Time Validity

Weekday Specifications

Import Strategies

Import Customizing: Status

Batch Import: Parameters

Valid Phases for Import of Project to certain Syst

Independent System Settings

Maintain Landscape Data

Maintain System Clients

Maintain Landscape Data

Import Config	Solution ID	Cycle Type	System	Sequence	Non-ABAP
IMPORT_COLLECTIVE_P_*	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>
IMPORT_COLLECTIVE_P_*	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>
IMPORT_COLLECTIVE_Q_*	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>
IMPORT_INTEGRATION_*	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>
IMPORT_PRODUCTION	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>
IMPORT_QAS	*	* All Types _ ▾ L71	L71	10	<input type="checkbox"/>

4. The next step is to maintain the clients per *Import Config* and system. There is again a *Sequence* which can be utilized in the same way as for the systems previously and the standard *RFC Type* is **Trusted RFC**.

Change View "Maintain System Clients": Overview

New Entries

Dialog Structure

Batch Import Variants

- Date & Time Validity
- Weekday Specifications
- Import Strategies
  - Import Customizing: Status
  - Batch Import: Parameters
  - Valid Phases for Import of Project to certain Syst
- Independent System Settings

Maintain Landscape Data

- Maintain System Clients

Import ConfigIMPORT\_QAS

System NameL71

Maintain System Clients

Client	SysRole ID	Comm.Clt	RFC Type	Sequence
802	I	802	Trusted RFC	10

Additional authorization is required for communication (for example, for reading the import buffer etc.). The user of the RFC that connects to the managed system (TMW RFC for the communication client) must have authorization for the `TMW_PROJECT_LOCK` function group in the managed system for the `S_RFC` authorization object. The fallback solution is a client 000 connection.

## ➔ Recommendation

If you configure several systems for batch import (ideally parallel imports), several background processes must be available with job class C. For example, 10 parallel systems require ideally 10 background processes.

## ⚠ Caution

If you have several valid systems or clients for the same variant, you must maintain the *Batch Import: Parameters* accordingly in terms of the sequence.

**Display View "Batch Import: Parameters": Overview**

Dialog Structure		Variant	Batch Import: Parameters									
Batch Import Variants		/SALM/INTEGRATION_TEST_QPM	Sequence	Active?	Prel. Imp.	Reimport	Overw. Ori.	Overw. Rep.	Ignore	Ignore QA	Ign. Predec	Ign. C.Vers
Batch Import Variants	System Role	4	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## ➔ Recommendation

For the described use case, we recommend that you use only one single sequence number.

- If you like to execute `/SALM/BATCH_IMPORT_TRIGGER` regularly, check the automatic rescheduling flag and define the frequency.
- Go to transaction **SE38**, execute `/SALM/BATCH_IMPORT_TRIGGER`. Afterwards select relevant *Release to Import*.

**Start/Schedule Import based on Variant**

General Options

Release to Import

☐ Import into Production Systems

Import Variant

☐ Allow Transports of Task List without Change assigned

☒ Test Mode (No Import)

☐ Enable Async. Import Process

☐ Process only Testtransports

☐ Import with Import Again

Scheduling Options

☐ Enable Automatic Rescheduling

Minutes until auto restart

Check Options

Downgrade Protection

☐ Downgrade Protection on

☐ Skip downgrade Transports

Relational Checks

☐ Enable Relation Checks

☐ Check Change Doc Predecessors

☐ Check for complete WP Import

☐ Check predecessors of Work Packages

☐ Check complete Master WP

## 1 Note

The first release in the context of your release component is always the active one. Completed releases are not shown in this list.

7. The next step is to select the relevant *Import Variant*.

**Start/Schedule Import based on Variant**

General Options

Release to Import: 8000000294

☐ Import into Production Systems

Import Variant: /SALM/UNIT\_TEST

☐ Allow Transports of Task List without Change assigned

☐ Test Mode (No Import)

☐ Enable Async. Import Process

☐ Process only Testtransports

☐ Import with Import Again

Scheduling Options

☒ Enable Automatic Rescheduling

Minutes until auto restart: 10

8. Repeat the previous step for all required variants. In standard for /SALM/QAS.



### Data Extraction for Solution Readiness Dashboard

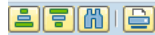
/SALM/DATA\_EXTRACTION\_PPMITSM extracts data for the dashboard. We recommend that you run this job daily, or manually before meetings. If project activity is high, run the job hourly. You can use the following variants as of SP02:

Variant	Description
Focused_Build1	With Project and trend data without Portfolio
Focused_Build2	With Project but without trend data and portfolio
Focused_Build3	With projects and portfolio as well as trend data creation
R2D	Without PPM and trend data

Before you can configure easily as shown below:

### ABAP: Selections of Variant FOCUSED\_BUILD1



Catalog  Values  Attributes



Objects for selection screen

Selection Screen	Field name	Type	I/E	Option	frm
1000	Status for Project Close	P			z006
1000	Time Zone	P			CET
1000	No Portfolio But Projects	P			X
1000	No Portfolio No Projects	P			
1000	Create Trend Data History	P			X
1000	Extract from last succ ext	P			X
1000	Select projects to extract	S			
1000	The project statuses allo...	S			
1000	The project types allow...	S	I	EQ	/SALM/BUILD
1000	The project types allow...	S	I	EQ	/SALM/COMPLETE
1000	The project types allow...	S	I	EQ	/SALM/MAINT
1000	The project types allow...	S	I	EQ	/SALM/SINGLE
1000	Team Partner Type	S	I	EQ	2
1000	Use Simple process mod...	P			
1000	Use Multi process mode	P			
1000	CRM length of data frag...	P			700
1000	PPM length of data frag...	P			50
1000	Maximum CRM threads al...	P			0
1000	Maximum PPM threads al...	P			0

### ABAP: Selections of Variant FOCUSED\_BUILD2

Catalog  Values  Attributes



Objects for selection screen

Selection Screen	Field name	Type	I/E	Option	frm
1000	Status for Project Close	P			z006
1000	Time Zone	P			CET
1000	No Portfolio But Projects	P			X
1000	No Portfolio No Projects	P			
1000	Create Trend Data History	P			
1000	Extract from last succ ext	P			X
1000	Select projects to extract	S			
1000	The project statuses allo...	S			
1000	The project types allow...	S	I	EQ	/SALM/BUILD
1000	The project types allow...	S	I	EQ	/SALM/COMPLETE
1000	The project types allow...	S	I	EQ	/SALM/MAINT
1000	The project types allow...	S	I	EQ	/SALM/SINGLE
1000	Team Partner Type	S	I	EQ	2
1000	Use Simple process mod...	P			
1000	Use Multi process mode	P			
1000	CRM length of data frag...	P			700
1000	PPM length of data frag...	P			50
1000	Maximum CRM threads al...	P			0
1000	Maximum PPM threads al...	P			0



ABAP: Selections of Variant <b>FOCUSED_BUILD3</b>					
Catalog  Values  Attributes					
Objects for selection screen					
Selection Screen	Field name	Type	I/E	Option	frm
1000	Status for Project Close	P			z006
1000	Time Zone	P			CET
1000	No Portfolio But Projects	P			
1000	No Portfolio No Projects	P			
1000	Create Trend Data History	P		X	
1000	Extract from last succ ext	P		X	
1000	Select projects to extract	S			
1000	The project statuses allo...	S			
1000	The project types allow...	S	I	EQ	/SALM/BUILD
1000	The project types allow...	S	I	EQ	/SALM/COMPLETE
1000	The project types allow...	S	I	EQ	/SALM/MAINT
1000	The project types allow...	S	I	EQ	/SALM/SINGLE
1000	Team Partner Type	S	I	EQ	2
1000	Use Simple process mod...	P			
1000	Use Multi process mode	P			
1000	CRM length of data frag...	P			700
1000	PPM length of data frag...	P			50
1000	Maximum CRM threads al...	P			0
1000	Maximum PPM threads al...	P			0

ABAP: Selections of Variant <b>R2D</b>					
Catalog  Values  Attributes					
Objects for selection screen					
Selection Screen	Field name	Type	I/E	Option	frm
1000	Status for Project Close	P			z006
1000	Time Zone	P			CET
1000	No Portfolio But Projects	P			
1000	No Portfolio No Projects	P		X	
1000	Create Trend Data History	P			
1000	Extract from last succ ext	P		X	
1000	Select projects to extract	S			
1000	The project statuses allo...	S			
1000	The project types allow...	S	I	EQ	/SALM/BUILD
1000	The project types allow...	S	I	EQ	/SALM/COMPLETE
1000	The project types allow...	S	I	EQ	/SALM/MAINT
1000	The project types allow...	S	I	EQ	/SALM/SINGLE
1000	Team Partner Type	S	I	EQ	2
1000	Use Simple process mod...	P			
1000	Use Multi process mode	P			
1000	CRM length of data frag...	P			700
1000	PPM length of data frag...	P			50
1000	Maximum CRM threads al...	P			0
1000	Maximum PPM threads al...	P			0

For the Solution Readiness Dashboard trend (or historical) data is required. Select the relevant variant and schedule the report in background as recommended earlier.

Additionally, it is recommended to run a data compression for the trend data on monthly, quarterly and yearly basis. Therefore, schedule a job for /SALM/DATA\_EXTRACTION\_DELETE avoiding performance impacts.

**Program /SALM/DATA\_EXTRACTION\_DELETE**

Time interval to delete extractor data

From Date

To Date ☒

Time unit on which data compression will take place

☒ Monthly compress data

☐ Quaterly compress data

☐ Yearly compress data

### Additional Job for Release Dashboard

With SP01 we are introducing 2 additional jobs which are triggered by the event SAP\_EXTRACTOR\_EXTENT thrown by /SALM/DATA\_EXTRACTION\_PPMITSM:

- /salm/transport\_buffer\_fill

This job reads all open transports contained in the transport buffer. **This job is only valid for ST-OST SP01.**

- /salm/create\_release\_cache

After the job /SALM/DATA\_EXTRACTION\_PPMITSM has run, all caches are invalidated. The scheduling of this job is optional, because it could run quite long, and it is just required if you require very high performant dashboards.

### Data Extraction for Test Management Dashboard

Schedule /SALM/TSD\_DATA\_EXTRACTION daily by utilizing transaction **SM36** Job Wizard.

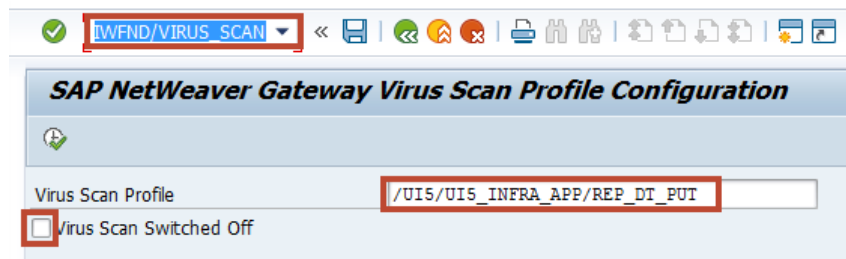
ABAP program name:	/SALM/TSD_DATA_EXTRACTION
Date/time:	<end of day> (recommended)
Period:	daily

### Transferring Recorded Times

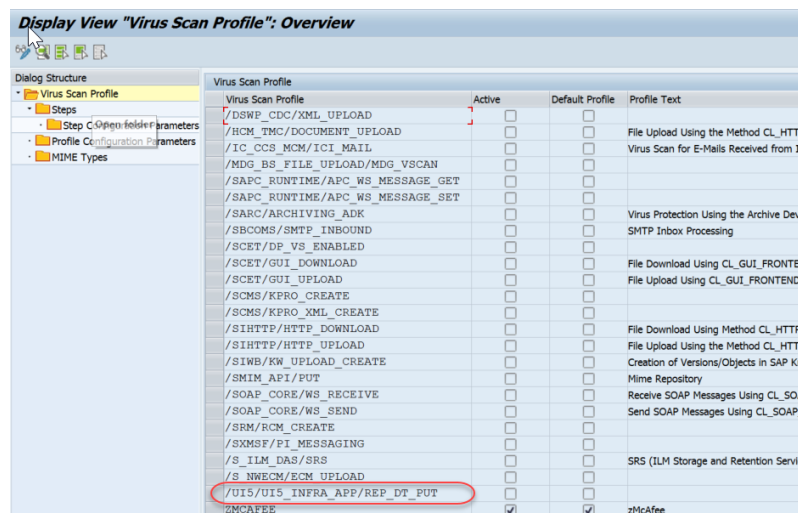
Schedule DPR\_CATS\_CPR\_TRANSF to run daily (overnight) to transfer recorded times back into the project.

## 2.1.10 Activation of Virus Scan Profiles

To activate the virus protection in your development system, go to transaction **/IWFND/VIRUS\_SCAN**, search and activate the virus scan profile **/UI5/UI5\_INFRA\_APP/REP\_DT\_PUT**.



Can be checked upfront in transaction **VSCANPROFILE**.



### 1 Note

Just in case you have not configured any virus scanner for your SAP Solution Manager system you can deactivate it easily.



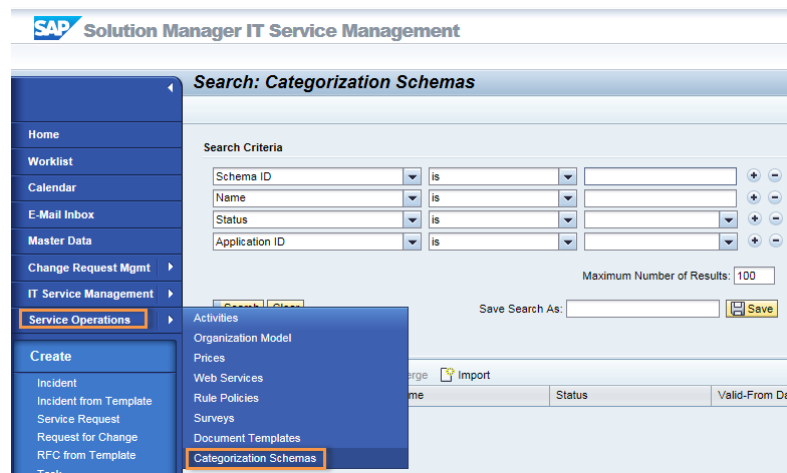
## 2.1.11 Multilevel Categorization

Multilevel categorization lets you sort business transactions (for example, incidents) into as many as four levels. It integrates functions such as auto-completion and item determination based on categories, and searches for related problems, knowledge articles, and change requests. **Schema samples** can be found attached to SAP Note 2483056.

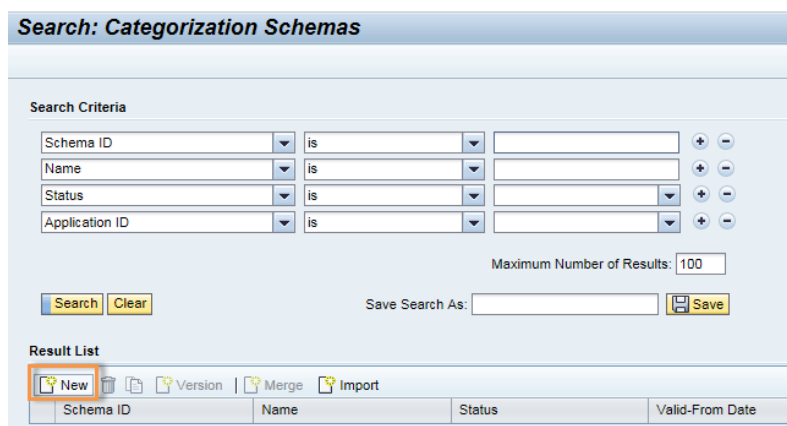
For more information, see the [Multilevel Categorization](http://wiki.scn.sap.com/wiki) guide on the SAP Community Network at <http://wiki.scn.sap.com/wiki>.

To set up multilevel categorization for Focused Build proceed as follows:

1. Call transaction **SM\_CRM**
2. Choose *Service Operations* and then *Categorization Schemas*.



3. Create a new categorization schema and call it **FOCUSED\_BUILD**.



4. Assign the application areas as follows:

Application Areas			New	Reset Content Analysis
Application ID	Parameter	Value		
Service Order	Transaction type / Catalog C.	Business I		
Service Order	Transaction type / Catalog C.	Urgent Ch		
Service Order	S1IT/D	IT Requirement / Defect Locations/Object Parl		
Service Order	S1MJ/D	Normal Change / Defect Locations/Object Par		
Service Order	S1RK/C	Risk / Overview of Damage/Defects/Reasons		
Service Order	S1RK/D	Risk / Defect Locations/Object Parts		
Service Order	S1TM/D	Defect Correction IT / Defect Locations/Object		
Service Order	S2IT/C	IT Requirement / Overview of Damage/Defect		
Service Order	S2IT/D	IT Requirement / Defect Locations/Object Parl		
Service Order	Transaction type / Catalog C.	IT Require		

- o Application ID: *Service Order*

- o Parameter: *Transaction Type / Catalog Category*
  - o Choose all *S1\*/D* except *S1TR/D* (test requests) and save your selection.
5. Assign the application areas as follows:
- o Application ID: *Service Request*
  - o Parameter: *Transaction Type / Catalog Category*
  - o Choose *S1DM/D* and save your selection.
6. Upload the categorization schema *FB\_General.txt*:
- o Call transaction **CATEGOTOOL** and import the schema.

**Export and Import Categorization Schema**

Processing Option

☐ Export Schema  
☒ Import Schema  
☐ Import Names and Descriptions

Export

Schema ID:   
 Schema Name:   
 Schema Description:   
 Language:  to

Import

Filename:

- o Import the uploaded schema into the schema previously created in the WebClient UI.

**Create a Draft Schema Referring to The Selected Schema**

Import

Schema Identifier	Schema Name	Status	Valid-From Date	Valid-From Time	Valid-To Date	Valid-To Time	Changed By	Changed On	Chgd. At	B
FOCUSED_BUILD	Focused Build	Active	10.01.2017	09:00:00	31.12.9999	23:59:59	SOLMAN	09.01.2017	16:56:19	1

- o In transaction **SM\_CRM**, navigate to the categorization schema search and choose *FOCUSED\_BUILD*.

General Data

General

Schema ID: ONE\_SERVICE

Name: One Service

Description: One Service

Status: Released

Valid-From Date: 28.10.2014

Valid-From Time: 13:20

Valid-To Date: 31.12.9999

Valid-To Time: 23:59

Logical Structure: Hierarchical Categorization

Authorization Mode: OR Combination

Subject Profile:

Changes

Changed On: 27.10.2014

Changed At: 13:15

Changed By:

- o Choose a future date and time, and then release the schema.
- 7. Repeat steps 1–4 to create a second categorization schema and call it **FOCUSED\_BUILD\_TESTING** for *S1TR* (test requests). Also repeat step 5 but upload the categorization schema *FB\_TESTING\_EN.txt* or *FB\_TESTING\_DE.txt*.

## 2.2 Configuration and Customizing

### 2.2.1 Maintaining AGS\_WORK\_CUSTOM

Goto transaction *SM30* and maintain the following entries in table *AGS\_WORK\_CUSTOM*:

Parameter Key	Parameter Value
IM_CRM_UI_PPF_900	HF_SET_STATUS
IM_CRM_UI_PPF_901	/SALM/COPY_DOCUMENT
PARTNER_FCT_DEVELOPER_S1CG	
PARTNER_FCT_DEVELOPER_S1MJ	
PARTNER_FCT_OWNER_S1BR	
UIC_PROC_TYPE_SPECIFIC_01	AIC_CMCD_H/AICCMCDOverview_S1MR
UIC_PROC_TYPE_SPECIFIC_02	AIC_CMCD_H/AICCMCDHeaderEF_S1MR
UIC_PROC_TYPE_SPECIFIC_03	/SALM/CMCR_H/CMCROVERVIEW_S1MT
UIC_PROC_TYPE_SPECIFIC_04	/SALM/CMCR_H/CMCRDETAILS_S1MT

Parameter Key	Parameter Value
UIC_PROC_TYPE_SPECIFIC_05	/SALM/REL_TRANS/RELATEDTRANSACTIONS_S1MT
UIC_PROC_TYPE_SPECIFIC_SALM_01	/SALM/CMCD_H/CMCDOVERVIEW_S1MR
UIC_PROC_TYPE_SPECIFIC_SALM_02	/SALM/CMCD_H/CMCDDetails_S1MR
USER_STATUS_DESIGN_COMPL_S1BR	
/SALM/BI_MULTIPLE_RELEASES	X

## 2.2.2 Customizing Requirements Management

There are several options to customize Requirements Management, because requirements and work packages can relate in various ways to each other. The main purpose of this customizing activity is to check if the work packages and the business requirements transaction types are customized correctly and maintain them if needed.

In the customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Work Package Configuration* → *Define IT Requirements*.

Attributes	Value
Process Type: BR Requirement	S1BR
Process Type: Defect Message	S1DM
Process Type: Work Item (with TR)	S1MJ
Process Type: Work Item (without TR)	S1CG
Process Type: Urgent Change	S1HF
Process Type: Work Package	S1IT
Process Type: Master Work Package	S1MT
Process Type: CR for IT Requirement	S1IR
Process Type: Risk	S1RK
Process Type: Defect Correction	S1TM
Process Type: Test Request	S1TR
Required relationship between requirement and work packages	n:m

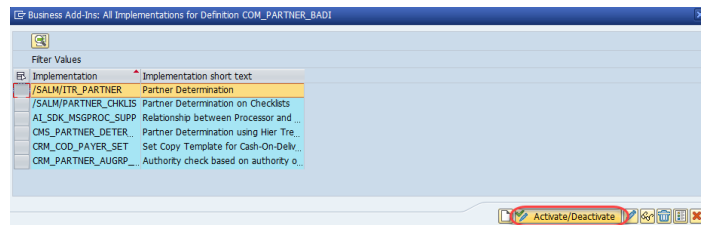
For the last attribute *Required relationship between requirement and work packages* there are several customizing options:

- 1:1
- 1:n
- n:m



## 2.2.3 Activation of Required BadIs

In the customizing of SAP Solution Manager execute *SAP Solution Manager* → *Focused Build* → *Work Package Configuration* → *Activation of required BadIs*

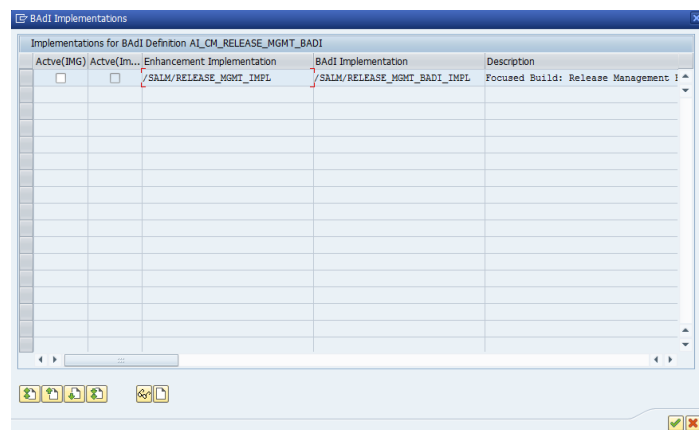


and activate the implementation */SALM/ITR\_PARTNER*.

## 2.2.4 Release Management

To use the enhanced Release Management functionalities of Focused Build, you have to perform the following steps:

1. In the customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Management Configuration* → *Activate Release Cycle BAdI Implementation*



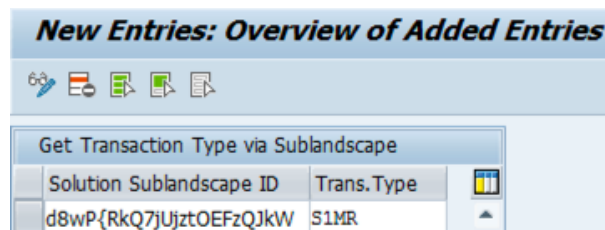
2. Afterwards you should maintain the release transaction type **S1MR** in the Customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Work Package Configuration* → *Define IT Requirements*.

Attributes	Value
Process Type: BR Requirement	S1BR
Process Type: Defect Message	S1DM
Process Type: Work Item (with TR)	S1MJ
Process Type: Work Item (without TR)	S1CG

Attributes	Value
Process Type: Urgent Change	S1HF
Process Type: Work Package	S1IT
Process Type: Master Work Package	S1MT
<b>Process Type: Release Management</b>	<b>S1MR</b>
Process Type: CR for IT Requirement	S1IR
Process Type: Risk	S1RK
Process Type: Defect Correction	S1TM
Process Type: Test Request	S1TR
Required relationship between requirement and work packages	n:m

### Caution

If your SAP Solution Manager system is on Support Package level 6 the Badi AI\_CM\_RELEASE\_MGMT\_BADI isn't functional anymore. Thus you have to goto the customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Capabilities* → *Change Control Management* → *Change Request Management Framework* → *Change Cycles* → *Configure Transaction Type for Sublandscapes and maintain your Solution Sublandscape ID with the relevant cycle transaction type; e.g.*



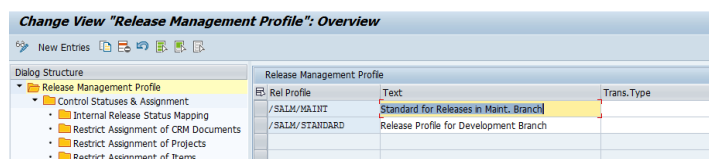
Once the release planning itself is completed you can start with this task. Further information can be found on <http://help.sap.com>.

## Define Release Profile Mapping

### Check Definition of Release Management Profiles

If a new release management profile is required, perform the following customizing activity:

1. In customizing for SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Management Configuration* → *Define Release Management Settings*.
2. Choose the *Define Release Management Profiles* activity.



3. Check if all entries are available (if no entries are available check chapter *Activating the Piece List*)

## Define Release Profile Mapping

If you are creating a new release component or change control landscape, you have to define a release profile mapping.

1. In customizing for SAP Solution Manager, choose *SAP Solution Manager → Focused Build → Release Management Configuration → Release Management Configuration. → Define Release Management Settings.*
2. Choose the *Define Release Profile Mapping* activity.
3. You map the release type together with the release component.

**Change View "Release Component and Mapping Profile": Overview**

Solution Name	Type	Rel Profile	Text
BATCHIMP_SUB_1	MAINT Mainte...	/SALM/MAINT	Standard for Releases in Maint
ACCEPTANCE_TEST_SUB_1	MAINT Mainte...	/SALM/MAINT	Standard for Releases in Maint
CORPORATE_SOLUTION_SUB_2	MAINT Mainte...	/SALM/MAINT	Standard for Releases in Maint
MAINTENANCE_TEST	MAINT Mainte...	/SALM/MAINT	Standard for Releases in Maint
ACCEPTANCE_TEST_SUB_2	MAINT Mainte...	/SALM/MAINT	Standard for Releases in Maint
BATCHIMP_SUB_1	STD Standard...	/SALM/STANDARD	Release Profile for Standard
ACCEPTANCE_TEST_SUB_1	STD Standard...	/SALM/STANDARD	Release Profile for Standard
CORPORATE_SOLUTION_SUB_2	STD Standard...	/SALM/STANDARD	Release Profile for Standard
BI&RELEASE_Test_1	STD Standard...	/SALM/STANDARD	Release Profile for Standard
ACCEPTANCE_TEST_SUB_2	STD Standard...	/SALM/STANDARD	Release Profile for Standard

4. Use F4 help to select *Solution Name* and *Branch Type*. For the *Branch Type* you have the following options:
  - o *MASTER - Production Branch* (Used for Production Branch mapping)
  - o *MAINT - Maintenance Branch* (Used for Maintenance Branch mapping)
  - o *STD - Standard Branch* (Used for all other branch mapping like development, design or import branch)
5. Use F4 help to select *Release Profile*
  - o */SALM/MAINT* for Releases in the *Maintenance Branch*
  - o */SALM/STANDARD* for Standard Branches like development branch
6. Use F4 help to select *Batch Import Var*(iant) which should be used if you execute the *Release Import* from task list.
7. Use F4 help to select *Collective Import Var*(iant) which should be used if you execute the *Collective Import* from task list.

**Change View "Release Component and Mapping Profile": Details**

New Entries

Solution Name: ACCEPTANCE\_TEST\_SUB\_1

Branch Type: STD Standard Branch

Release Component and Mapping Profile

Rel Profile: /SALM/STANDARD (Release Profile for Standard Branches)

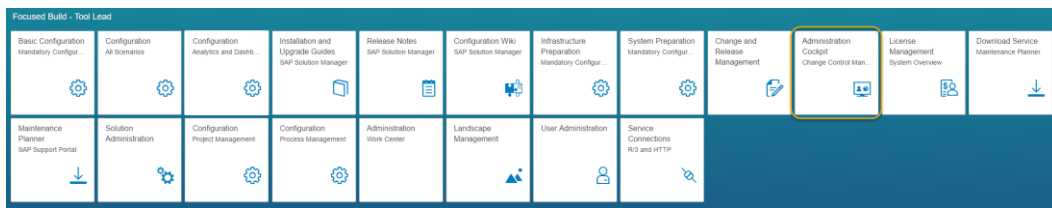
Batch Import Var: /SALM/RELEASE

Collective Import Var: /SALM/COLLECTIVE\_IMPORT

☐ Cross Proj Release Closure

Sublandscape ID: 051MZfr7kQMZhCk9Q8dsG

Activation of Cross-System Lock for Development Clients for the dedicated development system (maintenance and project development systems), you should switch on CSOL (Legacy CSOL). To do so, go to SAP Solution Manager Launchpad:



### Change Control Management - Administration Cockpit

Task Lists	<b>Landscape Overview</b>	Critical Objects	White List Objects	Cross-System Object Locks	Transport Ar
<div>Perform check Deleted Buffered Data Reread Transport Data Into Buffer Display Application Log Export</div>					
System	Lifecycle Status	Client	Upon-Saving Checks		
OFO~ABAP	Active	710	On (Legacy CSOL)		
	Active	711	Off		
	Active	712	Off		
	Active	800	Off		
	Active	810	On (Legacy CSOL)		
	Active	811	Off		
	Active	812	Off		

## 1 Note

Prerequisites:

RFC Connections (incl. [CSOL\\_BACK](#) RFC Destination) are generated,

Required entry in table [BCOS\\_CUST](#) on the managed development system has been created

## Customizing Release Dashboard

1. Goto transaction SE16 and table /SALM/RD\_CUSTOM
2. Adjust the CUST VALUE with the correct client

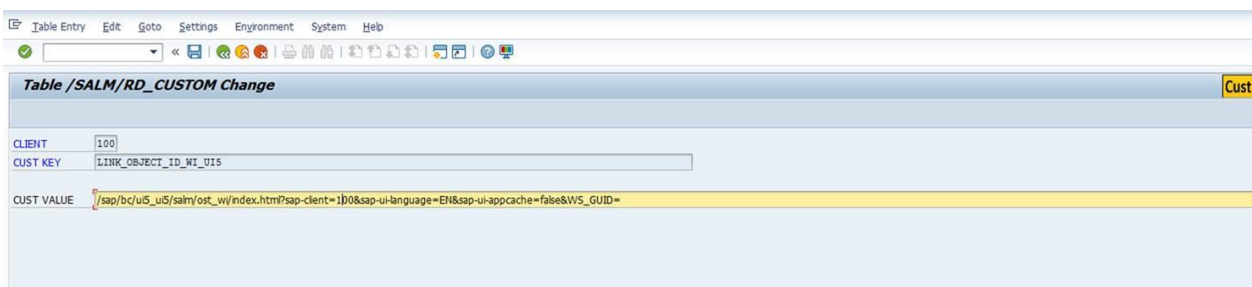


Table /SALM/RD_CUSTOM Change	
CLIENT	100
CUST KEY	LINK_OBJECT_ID_WP_UI5
CUST VALUE	/sap/bc/ui5_ui5/salm/ost_wp/index.html?sap-client=100&sap-ui-language=EN&sap-ui-appcache=false&WP_GUID=

## 2.2.5 Defining System Aliases for oData Services

You configure OData Services for the UI5 applications of Focused Build.

1. Run transaction [/n/IWFND/MAINT\\_SERVICE](#).
2. In the [ICF Nodes](#) service sub-screen, mark the OData entry.
3. Search for services beginning with `/SALM/*` and select one after the other as is appropriate for your use case. Select one [System Alias](#) per service.

Technical Service Name	Use Case	Optional
AI_RELEASE_PLANNING_SRV	Release Planning (Standard)	
/SALM/RELEASE_DASHBOARD_SRV	Release Dashboard	
/SALM/SOL_READINESS_ODATA_SERVICE	Solution Readiness Dashboard	
/SALM/SERVIC_ITSM_DASHBOARD	ITSM Dashboard	X
/SALM/TM_SERVICE	Test Management Dashboard	
/SALM/TM_TWL_SRV	Tester Worklist	
/SALM/TM_TS_DESIGNER_SRV	Test Step Designer	
/SALM/BUSINESS_REQUIREMENTS_SRV	Requirements Management	
/SALM/MC_SRV	Mass Change App	
/SALM/MANGOCRMUI	Work Package Management and Work Item Management	
/SALM/DROP_DOC_SRV	Integrated dropDoc	
/SALM/MY_DOCS_SRV	My Documents	X
/SALM/PARA_CACHE_SRV	Focused Build - Parameter Cache	
/SALM/CRMGENERICAPPCONFIG	My Requirements App	
/SALM/CRM_GENEREIC_SRV	My Requirements App	

4. Choose [Add System Alias](#) and confirm.

5. Choose *New Entries*. Use the input help to search for and insert the services:
  - o [/SALM/RELEASE\\_DASHBOARD\\_SRV\\_0001](#)
  - o [/SALM/SOL\\_READINESS\\_ODATA\\_SERVICE\\_0001](#)
  - o [/SALM/SERVIC\\_ITSM\\_DASHBOARD\\_0001](#)
  - o [/SALM/TM\\_SERVICE\\_0001](#)
  - o [/SALM/TM\\_TWL\\_SRV\\_0001](#)
  - o [/SALM/TM\\_TS\\_DESIGNER\\_SRV\\_0001](#)
  - o [/SALM/BUSINESS\\_REQUIREMENTS\\_SRV\\_0001](#)
  - o [/SALM/MC\\_SRV\\_0001](#)
  - o [/SALM/MANGOCRMUI\\_0001](#)
  - o [/SALM/DROP\\_DOC\\_SRV\\_0001](#)
  - o [/SALM/MY\\_DOCS\\_SRV\\_0001](#)
  - o [/SALM/PARA\\_CACHE\\_SRV\\_0001](#)
  - o [/SALM/CRMGENERICAPPCONFIG\\_0001](#)
  - o [/SALM/CRM\\_GENERIC\\_SRV\\_0001](#)
6. Use the input help to search for and insert a *local connection*. The *Default System* flag should not be set unless you have several system aliases. Save your selection. The system alias appears on the overview screen.

## 2.2.6 Creating Groups

Go to [SCPR20](#) and activate bc-set [/SALM/72SP01/STATUS\\_GROUPS](#).

## 2.2.7 Configuring Test Suite Extensions

To configure the Test Suite extensions for Focused Build, use the following views in customizing for *SAP Solution Manager* → *Focused Build* → *Test Suite Extensions*:

- [Map Test Plan Status to Test Request](#)
- [Map Test Classification to CRM Categories](#)
- [Defect Status Aggregations](#)
- [Define Work Package Status Values for Test Preparation Tiles](#)
- [Test Steps](#)

Alternatively, you can start the Test Suite Administration from the SAP Solution Manager launchpad and access and maintain the views on the Test Suite Extension tab page:

- [Check Report](#) - Check configurations and user authorizations
- [Mapping Test Classification to Test Request Category](#) - Maintain the mapping between test classifications and test request categories
- [Mapping Test Request Status to Project Task](#) - Maintain the mapping between test request statuses and project task statuses

- [Mapping Test Plan Status to Test Request Status](#) - Maintain the mapping between test plan status and test request status
- [Defect Status Aggregations](#) - Maintain the defect status aggregation
- [Work Package Status Values for Test Preparation Tiles](#) - Maintain Work Package Statuses for Test Preparation Tiles of the Test Suite Dashboard
- [Test Steps](#)
  - o Define general settings for the Test Steps application such as execution mode, available languages, status based execution lock and others
  - o Define status settings for status of steps such as label, default status, or evidence required
  - o Define custom fields which can be used as result attributes during design of test steps documents
  - o Define folders in order to group and organize test steps documents in the designer application
  - o Define status aggregation rules which will aggregate step status to test case status during test execution
  - o Define settings of the test steps table view showing steps in design time and execution time

## Checking Test Suite Configurations and User Authorizations

You can use the [Check Report](#) view to check Test Suite configurations and user authorizations.

1. Start the [Check Report](#) from the SAP Solution Manager launchpad.

Select the following:

2. To check if the assignments between the Test Suite and the project or the solution are correct, select [General Checks](#) and a solution or project.
3. To check configurations for the Test Suite, select [Test Suite Checks](#). If you select this option, the following status information is displayed:
  - o Activations for ICF services
  - o Customizing for the Test Suite
  - o Activations for the SAP Business Warehouse
  - o Activations for Business Explorer Queries (BEx-Queries) for the Test Suite Dashboard
4. To check the authorizations related to Test Suite applications for a user, select [User Authorization Checks](#) and select a user.

## Mapping Test Classifications to Test Request Categories

When a test plan is assigned to a project, this automatically creates a test request in the SAP CRM. The Test Suite uses a test classification to categorize test plans. You map the values of the test classifications to the multilevel categorization schema of the test requests.

### Prerequisites

- You have configured the test request transaction type **S1TR**.
- You have enabled a multilevel categorization schema for the test request transaction type.



### Caution

Make sure that the multilevel categorization schema for test request transaction type uses only one level. Test classification can only be mapped correctly to multilevel categorization schemas that use only one level.

## Procedure

1. In the Customizing for SAP Solution Manager, choose [SAP Solution Manager](#) → [Focused Build](#) → [Test Suite Extensions](#) → [Map Test Classification to CRM Categories](#).  
Alternatively, you can access this table by choosing [Mapping Test Classification to Test Request Category](#) on the [Test Suite Extension](#) tab page of the Test Suite Administration.
2. Map the test classification values to the category IDs of the multilevel categorization schema assigned to test request transaction type **S1TR**.

## Mapping Test Request Statuses to Project Task Statuses

When a test plan is assigned to a project, this automatically creates a test request in the SAP CRM and a project task in the project management. To map the test request statuses to the project task statuses, do the following:

1. Start the Test Suite Administration from the SAP Solution Manager launchpad
2. On the [Test Suite Extension](#) tab page go to [Mapping Test Request Status to Project Task](#) and choose [Maintain](#).
3. Map the test request status values to project task status values.

## Mapping Test Plan Statuses to Test Request Statuses

When a test plan is assigned to a project, this automatically creates a test request in the SAP CRM. You map test plan statuses to test request statuses to make sure that after an update of a test plan status the test request status is automatically updated.

1. In the customizing for SAP Solution Manager choose [SAP Solution Manager](#) → [Focused Build](#) → [Test Suite Extensions](#) → [Map Test Plan Status to Test Request](#).  
Alternatively, you can access this mapping table by choosing [Mapping Test Plan Status to Test Request Status](#) on the [Test Suite Extension](#) tab page of the [Test Suite Administration](#).
2. Map the test plan statuses of one or multiple release schemas to the test request statuses.

## Defect Status Aggregations

Customers can use a customized schema for defect processing that uses multiple defect statuses. To get a simplified representation of these defect statuses, you consolidate the multiple customized defect statuses to a limited set of aggregated statuses.

## Example

The customer uses a customized schema for the defect transaction types **S1DM** or **SMIN**. There are multiple status values. Focused Build, however, uses only five aggregated values:

- Created
- In Progress
- Awaiting Information
- Closed
- Confirmed

For example, you could decide to map several defect statuses, such as [Solution Provided](#), [Complete](#) and [Resolved](#) to the aggregated status [Closed](#).

## Procedure

1. In the Customizing for SAP Solution Manager, choose [SAP Solution Manager](#) → [Focused Build](#) → [Test Suite Extensions](#) → [Defect Status Aggregations](#).



Alternatively, you can access this mapping table by choosing [Defect Status](#) on the [Test Suite Extension](#) tab page of the [Test Suite Administration](#).

2. Map the detailed statuses of the defect transaction types to the aggregated values.

### Define Work Package Status Values for Test Preparation Tiles

Customers can define additional tiles for the Test Preparation view of the Test Suite dashboard to display the number of work packages without test cases for a given status values of a work package.

#### Example

The customer can customize the status values of work packages (SUIT) for which he would like to see tiles. Typically, the following status values are from interest:

- To be developed
- In development
- To be tested

#### Procedure

1. In the customizing for SAP Solution Manager, choose [SAP Solution Manager](#) → [Focused Build](#) → [Test Suite Extensions](#) → Define Work Package Status Values for Test Preparation Tiles.

Alternatively, you can access this mapping table by choosing Define Work Package Status Values for Test Preparation Tiles on the [Test Suite Extension](#) tab page of the [Test Suite Administration](#).

2. Add the work package status values for which tiles should be displayed.

### Maintain folders for Test Steps Designer



In customizing activity “Folders for Test Steps Designer” customers can maintain folders to group Test Cases of type Test Steps within the application Test Steps Designer. A sample folder could be “UAT” with label “User Acceptance Tests” which would then comprise test cases related to UAT tests.

#### Maintain custom fields

In the customizing activity “Customer Fields for Test Steps Result Attributes” customers can maintain fields that can be used in Test Steps Test Cases in order to store result values during execution time. A sample field could be “MATERIAL\_DOC” with the label “Material Document”, Data Element “CHAR10”, Rendering “Input Field”, and Multiple “true”.

For continuative configurations please refer to the documentation in the IMG.

### Activation of BEx-Queries

1. Call transaction **RSOR**.
2. Open the BI content.
3. Display the [Object Types](#).
4. Expand the [Query Elements](#). Under [Query](#), choose [Select Objects](#).
5. Select all BEx queries (Business Explorer queries) with the technical name /SALM/SMT\*:
  1. Navigate to [SAP Solution Manager](#) → [Test Management](#) → [Test Management MultiProvider](#).
  2. Display the technical name by choosing  ([Technical Name off/on](#)) (.
  3. Select the following entries:

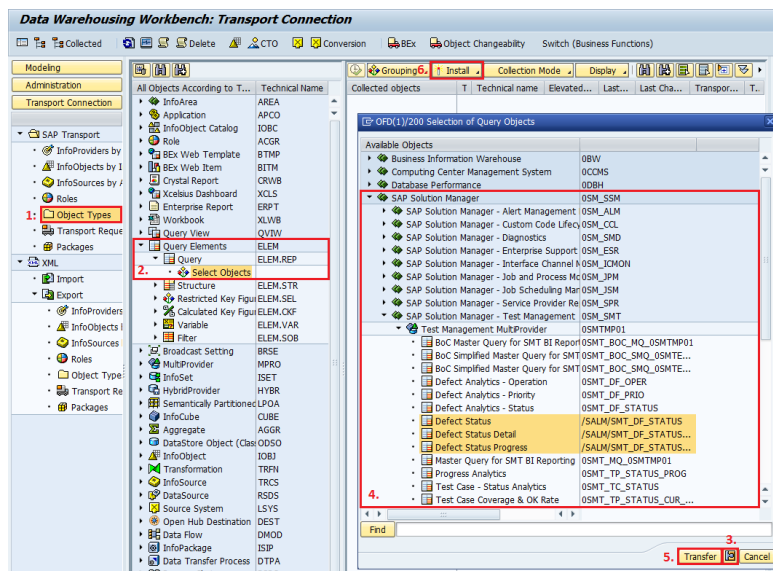
Entry	Technical Name
Defect Status	/SALM/SMT_DF_STATUS
Defect Status Detail	/SALM/SMT_DF_STATUS_DETAIL
Defect Status Progress	/SALM/SMT_DF_STATUS_PROGRESS
Test Package Status Detail	/SALM/SMT_TG_STATUS_DETAIL
Test Plan Status	/SALM/SMT_TP_STATUS
Test Plan Status Detail	/SALM/SMT_TP_STATUS_DETAIL
Test Plan Status Progress	/SALM/SMT_TP_STATUS_PROGRESS

4. To transfer the selected entries, choose **Transfer** (F2)

The queries should be listed in the right area of the window.

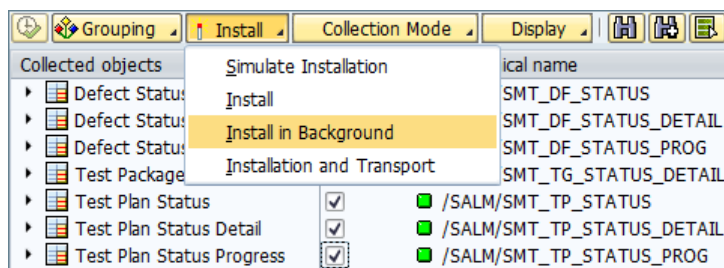
Collected objects	I	M	S	A	Technical name
Defect Status	<input checked="" type="checkbox"/>				/SALM/SMT_DF_STATUS
Defect Status Detail	<input checked="" type="checkbox"/>				/SALM/SMT_DF_STATUS_DETAIL
Defect Status Progress	<input checked="" type="checkbox"/>				/SALM/SMT_DF_STATUS_PROG
Test Package Status Detail	<input checked="" type="checkbox"/>				/SALM/SMT_TG_STATUS_DETAIL
Test Plan Status	<input checked="" type="checkbox"/>				/SALM/SMT_TP_STATUS
Test Plan Status Detail	<input checked="" type="checkbox"/>				/SALM/SMT_TP_STATUS_DETAIL
Test Plan Status Progress	<input checked="" type="checkbox"/>				/SALM/SMT_TP_STATUS_PROG

6. When all queries are selected for installation, choose **Install** and then **Install in Background**.



## ➔ Recommendation

Use the installation in the background because the option **Install** might fail.



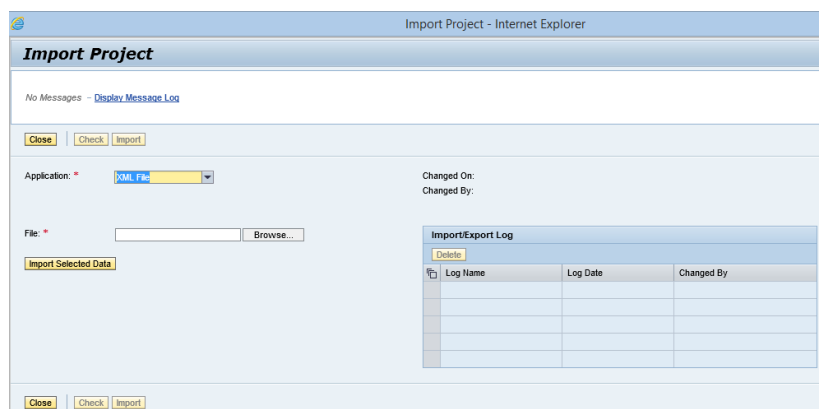
## 2.2.8 Configuring Project Management

### Creating Projects Templates

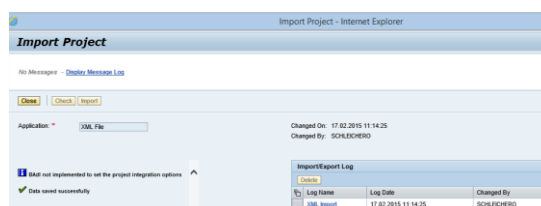
1. Download the project template XML files from SAP Note

SAP Note	Description
2483056	Central Note for Focused Build 2.0 SP01 for SAP Solution Manager 7.2

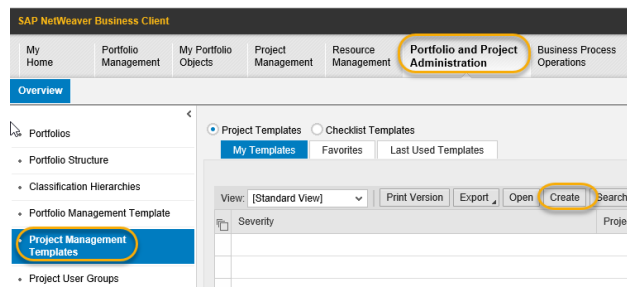
2. To start Project Management, on the SAP Solution Manager Launchpad, choose [My Projects](#).
3. Choose [Projects](#) and then choose [Import Project](#).
4. In the [Application](#) field, select [XML File](#).



5. In the [File](#) field, choose [Browse](#) to navigate to the file that you want to import.
6. Choose [Import Selected Data](#).
7. Under [Data for Import](#), select [Structures and Resources](#).
8. Choose [Check](#).
9. Choose [Import](#).



10. After uploading all XML project files, convert them into a project template.
11. In the Project Management, go to *Portfolio and Project Administration* and choose *Project Management Templates*. Then create template derived from the imported files:
12. On the left navigation pane, choose *Project Management Templates*.



13. Choose *Project Administration* in the top navigation area.
14. Choose *Create*.
15. Enter the following settings to create your template project:

Field	Value
Proj. Template	<Your choosing>
Template Type	Project
Template	One of the projects provided, for example, <Template: Focused Build_Build_Project>
New Checklist Templates	None
Original Language	English

16. Release the project template by setting the status to *released*.
17. After the creation of the templates you can delete the previously uploaded projects again. Please refer to chapter 5.8 Delete of obsolete projects.

## 2.3 Important Links

Batch job scheduling:

[https://help.sap.com/saphelp\\_nw70/helpdata/EN/c4/3a7f87505211d189550000e829fbbd/frameset.htm](https://help.sap.com/saphelp_nw70/helpdata/EN/c4/3a7f87505211d189550000e829fbbd/frameset.htm)

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Learning Map including How to's:

[https://service.sap.com/sap/bc/bsp/spn/esa\\_redirect/index.htm?gotocourse=X&courseid=70324959](https://service.sap.com/sap/bc/bsp/spn/esa_redirect/index.htm?gotocourse=X&courseid=70324959)

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## 3 Project Preparation

### 3.1 Target Group

This chapter targets Methodology and Tool Coach who plans to prepare the project preparation for a Focused Build based implementation project.

### 3.2 Prerequisites

#### 3.2.1 Technical prerequisites

##### Technical Prerequisites and Configuration

- Solution Manager Configuration
  - General (SOLMAN\_SETUP: Mandatory Configuration, Managed Systems Configuration (per System under Test), Embedded Search)
  - Involved standard capabilities (Solution Documentation, ChaRM basic setup, Test Suite, IT PPM)
- Users with required roles and authorization and Business Partners
- Focused Build specific configuration (see Configuration Guide)

## 3.2.2 Content related prerequisites

### Required customer master data for planned Focused Build Project.

The data should be the results of conceptual discussion with the customer on how Process Management / Solution Documentation and Landscape as well as Release Management and Project definition should look like.

Solution				
Name	e.g. Corporate Solution			
Technical Name	e.g. CORP_SOL			
Branches (at least Development and Design)	Production			
	Maintenance			
	Development			
	Design			
	Import			
Document Types and templates	e.g. (BPD) Business Process Description			
	e.g. (CG) Configuration Guide			
	e.g. (FIT) Functional Integration Test			
	e.g. (FS) Functional Specification type WRICEF			
	e.g. (FS) Functional Specification type Gap			
	e.g. (FS) Functional Specification type Interface			
	e.g. (SFT) Single Functional Test			
	e.g. (TD) Technical Design			
	e.g. (UAT) User Acceptance Test			
	e.g. (UC) Use Case			
	e.g. (UG) User Guide			
	e.g. (MO) Mock-up			
	e.g. (TM) Training Material			
Content to be imported (e.g. Best Practice for S/4HANA x.xx US)	e.g. "SAP Best Practices for SAP S/4HANA, on-premise edition 1602 US"			
Involved Systems / Landscape (Logical Component Group(s), Technical Systems)	<b>Log Comp Grp.</b>	<b>System Role</b>	<b>SID</b>	<b>Client</b>
	S4HANA	Sandbox	<SID>	<CLNT>
		Development	<SID>	<CLNT>
		Quality Assurance	<SID>	<CLNT>

		Pre-Production	<SID>	<CLNT>
		Production	<SID>	<CLNT>

Release Management	
Number of planned Releases	2
Duration in days	180
Go-Live Date for 1st Major Release	October 1st 2017

Project Management			
Project Templates	Lean or Activate Roadmap based template		
Master Project	e.g. S/4HANA		
Build Project 1	e.g. Financials		
Build Project 2	e.g. Logistics		
Number of Waves per Project	2		
Start date of 1st wave	April 1st 2017		
Duration of waves	90		
Number of Sprints per Wave	3		
Project/Wave/Release Mapping	Project	Wave	Release Number
	Build Project 1	Wave 1	1.0
		Wave 2	1.0
	Build Project 2	Wave 1	1.0
		Wave 2	1.0

## 3.3 Create Solution with Branches, System Landscape and Document-Type assignment

### 3.3.1 Create Solution

#### Definition:

The solution is the sum of a company's systems, applications and processes. It acts as a container for versions of solution documentation, one of which is the production version.



The general recommendation is to use only one solution to reflect the entire system landscape and its documentation also for large and interconnected companies.

### Assumption:

The customer is not using any Solution yet in his SAP Solution Manager system. At the end of this section, we describe how to deal with customers, who are already using Solution(s) in their system.

### How to create a Solution:

1. Enter "Solution Administration" either via transaction code SOLMADM or via the SAP Solution Manager Launchpad (Section "Project and Process Management" => Solution Documentations). See screenshot below.

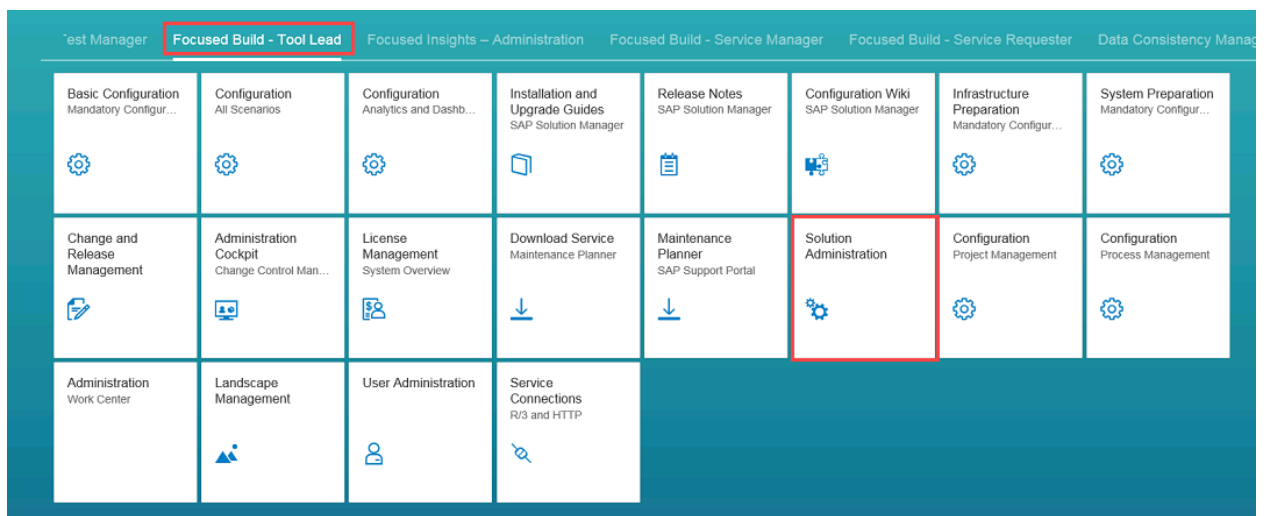


Figure 1 - Navigating to Solution Administration

2. To create a Solution, click on the "Global Functions" icon on the appearing screen and select "Create Solution".

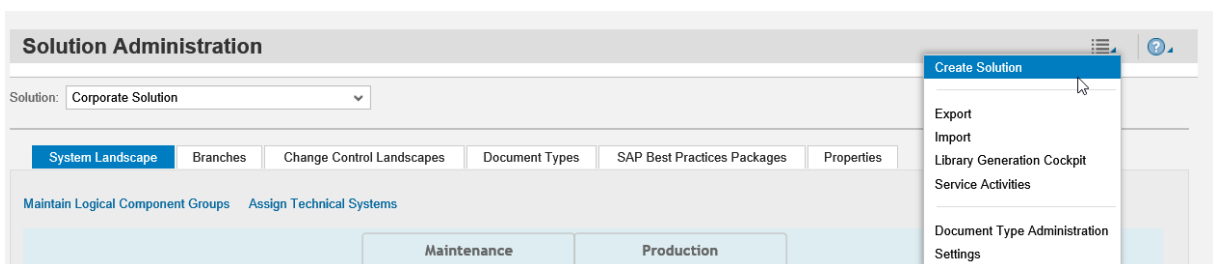


Figure 2 - Create Solution

3. To finalize the Solution creation, provide a name (and technical name) and confirm.

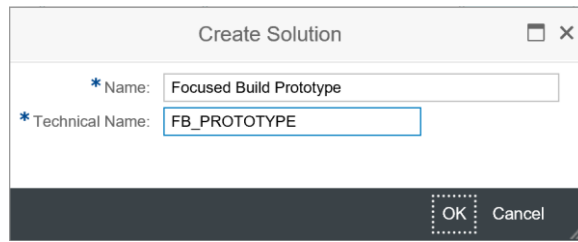


Figure 3 – Provide Solution Names

- Now the Solution is created and always accessible via transaction SOLADM or the SAP Solution Manager Launchpad.

### 3.3.2 Setup up branches

**Definition:** A branch represents a version of the solution documentation containing processes, libraries and systems.

With the branch concept, it is e.g. possible to distinguish between documentation, which describes productive processes and documentation, which describes processes currently in design or build.

Typically, a solution contains a production branch, a maintenance branch and a development branch.

The production branch represents the productive version of the entire solution documentation.

The maintenance branch represents the editable version of the productive solution documentation. It provides a safe environment for performing changes.

The development branch represents the documentation of a future solution documentation.

For a S/4HANA implementation, we recommend the following branch structure.

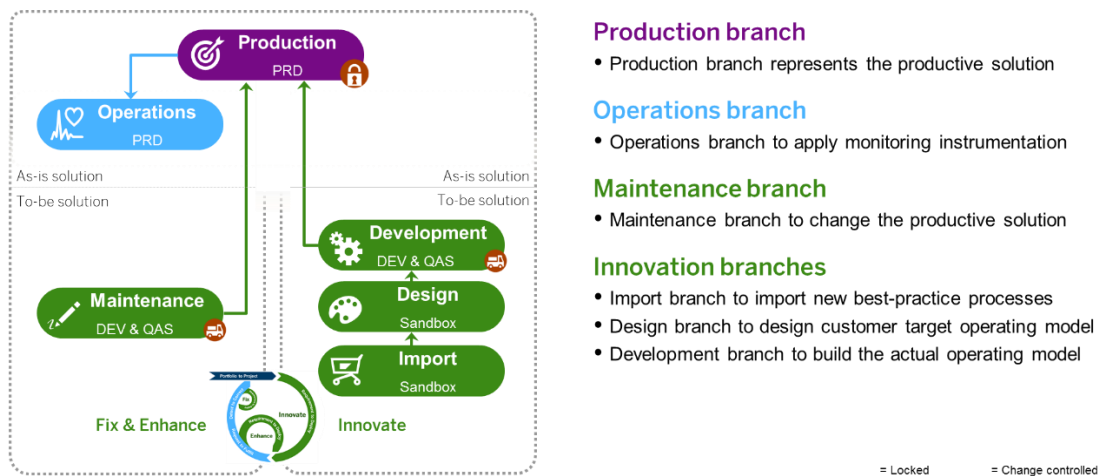


Figure 4 – Branch Setup



### Caution

The development branch must be enabled for [Change Control](#).

#### Production branch

Production branch represents the productive solution

#### Operations branch

Operations branch to apply monitoring instrumentation

For a new implementation the Operations branch is not required during the implementation project.

#### Maintenance branch

Maintenance branch to change the productive solution

For a new implementation the Maintenance branch is not required during the initial implementation project. But it will be anyway created with the creation of a new Solution.

#### Innovation branches

Import branch to import new best-practice processes

Design branch to design customer target operating model

Development branch to build the actual operating model

The design is the branch to be used during Build Design Support.

How to create the best practice branch structure?

1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "Branches". The below screen will appear showing the production and maintenance branch.

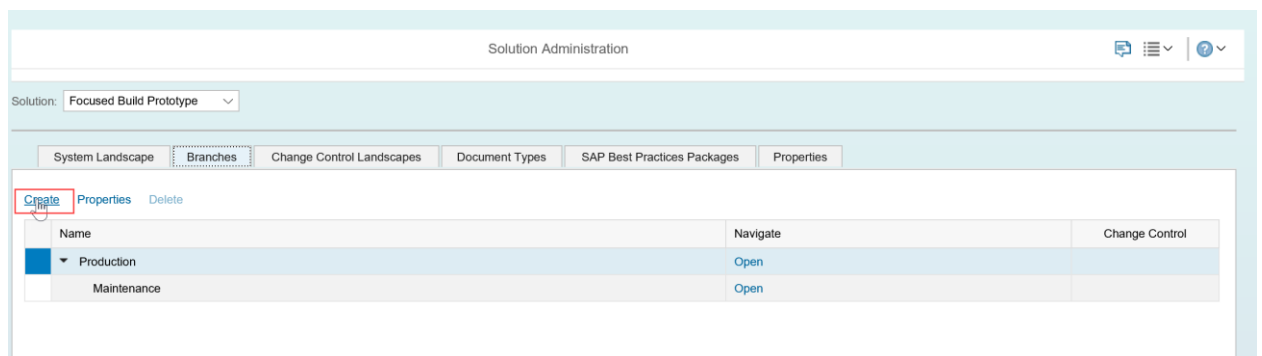


Figure 5 - Creating a Branch

3. Mark the Production Branch and click on "Create"  
The below screen will appear, confirming the parent branch (in this case Production branch). Select the usage as Development branch and not Operation branch (Operation would be used for Business Process and Interface Monitoring), and as name of the new branch "Development" (Technical Name "DEVELOPMENT").



**Create Branch**

Parent Branch: Production

Usage: ☒ Development  
☐ Operation

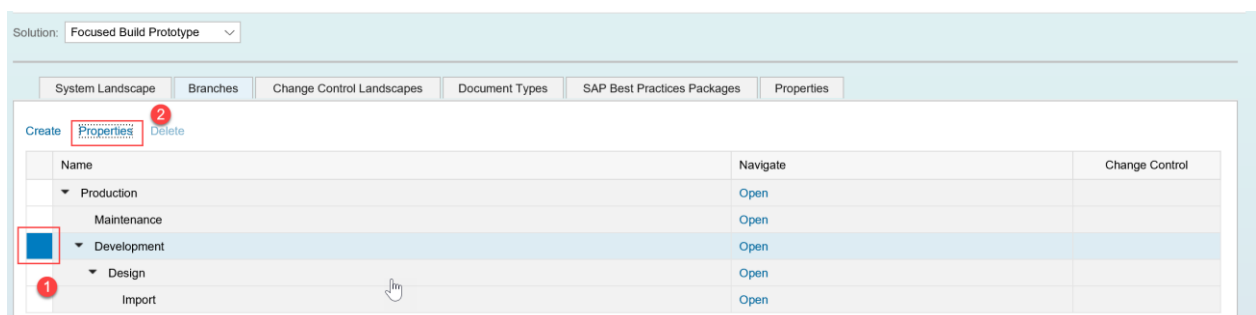
\* Name: Development

\* Technical Name: DEVELOPMENT

OK Cancel

Figure 6 - Branch Creation 1

#### 4. Enable Change Control for Development branch

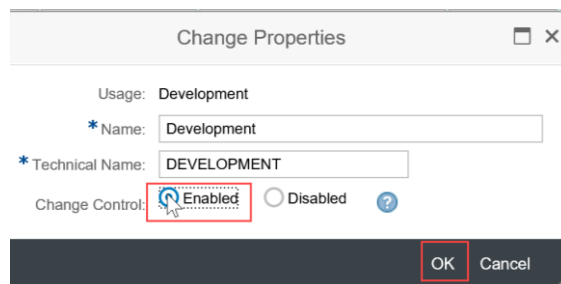


Solution: Focused Build Prototype

System Landscape | Branches | Change Control Landscapes | Document Types | SAP Best Practices Packages | Properties

Create **Properties** Delete

Name	Navigate	Change Control
Production	Open	
Maintenance	Open	
Development	Open	
Design	Open	
Import	Open	



**Change Properties**

Usage: Development

\* Name: Development

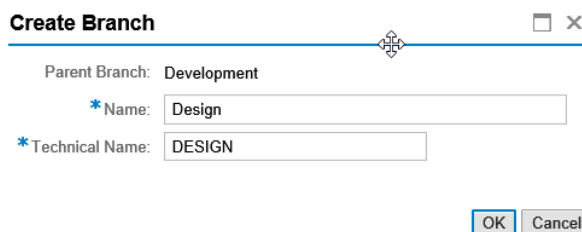
\* Technical Name: DEVELOPMENT

Change Control: ☒ Enabled ☐ Disabled

OK Cancel

Figure 7 – Activate Change Control for Development Branch

- To create the Design branch, mark the development and click again on Create. In the appearing pop up window, ensure that the Development branch is displayed as parent branch. Then enter as name Design and provide a technical name.



**Create Branch**

Parent Branch: Development

\* Name: Design

\* Technical Name: DESIGN

OK Cancel

Figure 8 - Branch Creation 2

- Repeat Step 5 to create the Import branch with the Design Branch as parent.

7. Finally, the branches for the Solution should look like in the below screenshot.

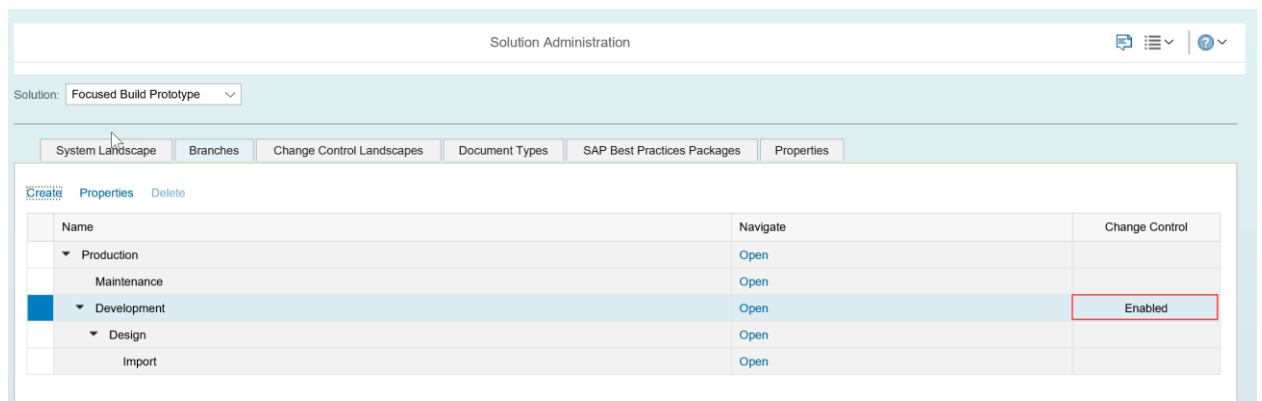


Figure 9 - Branch Setup

Please note: For Focused Build Setup it is mandatory that you create at least one additional branch (e.g. Design) below Development branch.

### 3.3.3 Setup system landscape

Certain functions of SAP Solution Manager (like Solution Documentation) is referring to certain system (e.g. the documentation of a S/4 process in the Design branch refers to a S/4 sandbox system). In the SAP Solution Manager logical component groups and logical components are used to model the system landscape for the use of SolMan functions like Solution Documentation.

#### Definitions:

A logical component group (LCG) is a high level view on an application. It is a group of logical components which contain systems of a kind e.g. S/4HANA, ERP Logistics, ERP Human Resources, CRM or PORTAL.

LCGs are used to depict the execution runtime of e.g. process steps. The LCG is a release independent placeholder for concrete systems

A logical component (LC) refers to the concrete technical systems of a system track typically belonging to the same transport landscape and having the same product version.

The technical systems assigned to logical components are classified according to their system role e.g. development system, quality assurance system.

#### Assumption:

For the prototype we use a Demo landscape which is a simulation of transport landscape using different clients in the same system. Creating of Demo Landscape is described in the appendix.

Create additional System Roles for Sandbox and Preproduction via transaction MAINT\_ROLES:

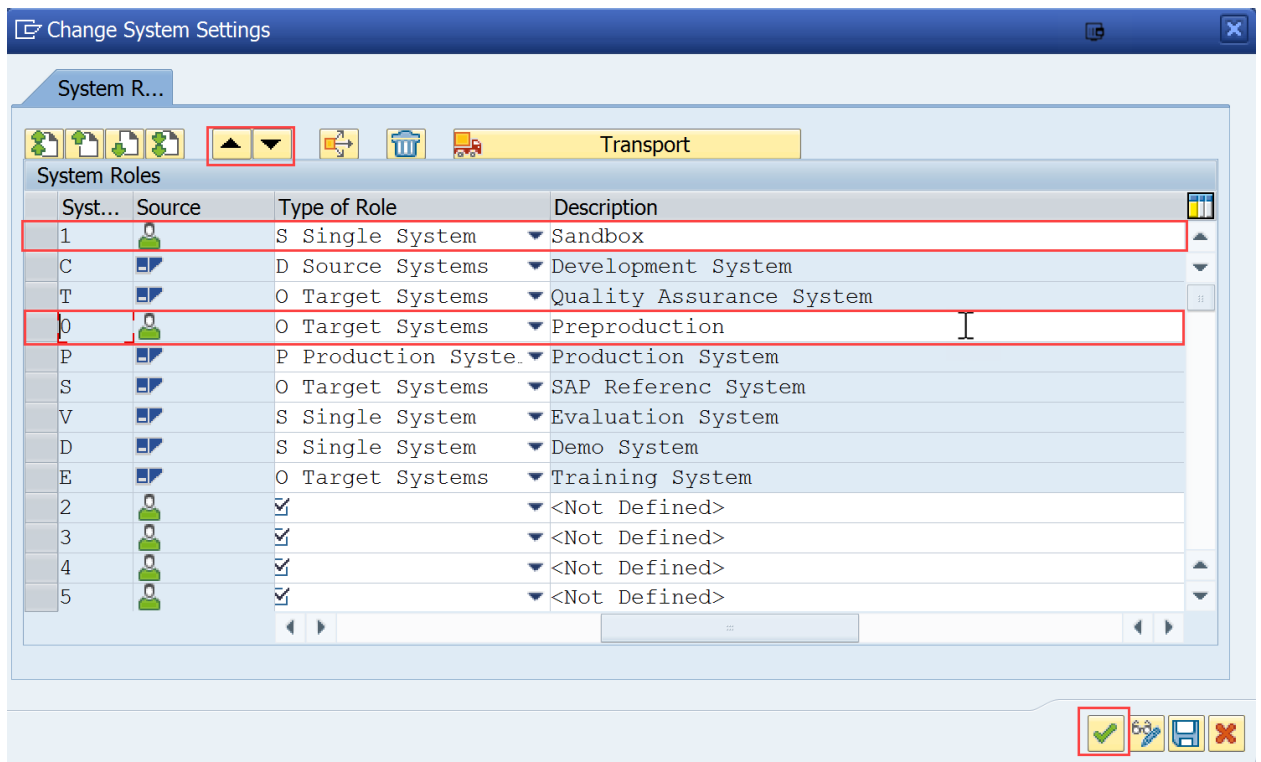


Figure 10 - System Roles

Use up- and down- buttons to change order of system roles according to sequence transport landscape

### How a to create a Logical component group (LCG)?

1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "System Landscape". The branches created will be displayed (see below).
3. Click on "Maintain Logical Component Groups"

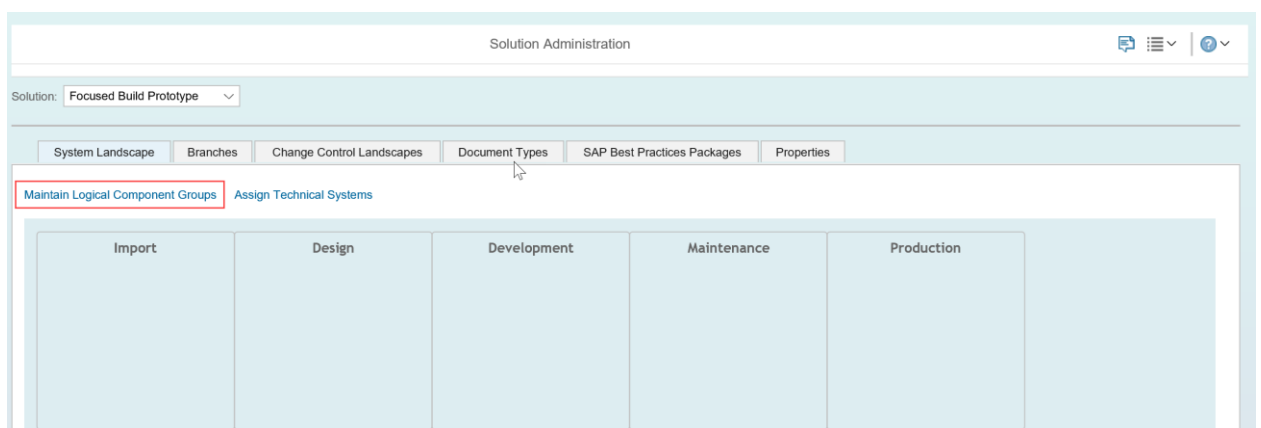


Figure 11 - Logical Component Group Creation 1

4. A screen appears showing all LCGs, which are available for this Solution. Click on “Create” to create a new LCG for the S/4HANA landscape.

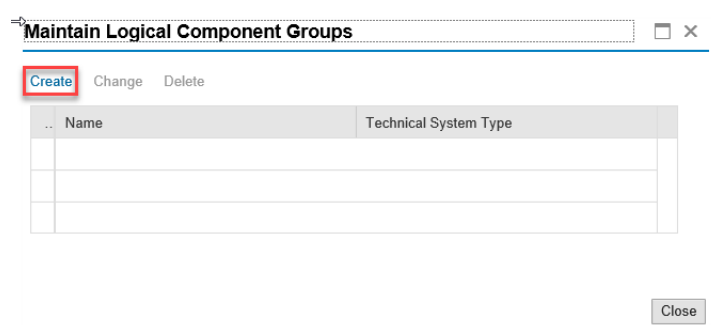


Figure 12 - Logical Component Group Creation 2

5. In the next screen, provide a name and description of the logical component group to be created. Also select the technical system type. For a S/4HANA system the ABAP Application server is applicable.

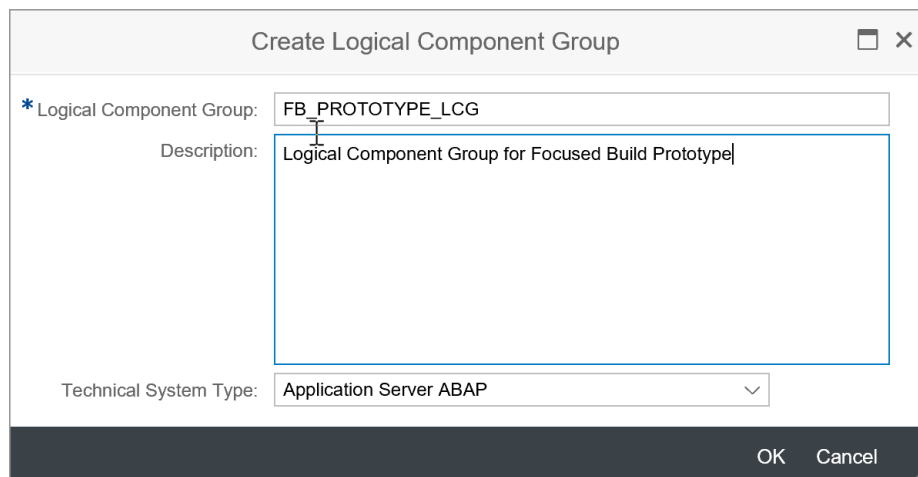


Figure 13 - Logical Component Group Creation 3

6. Close the next screen.  
The result is a logical component group, which is assigned to all branches of the Solution. See below.

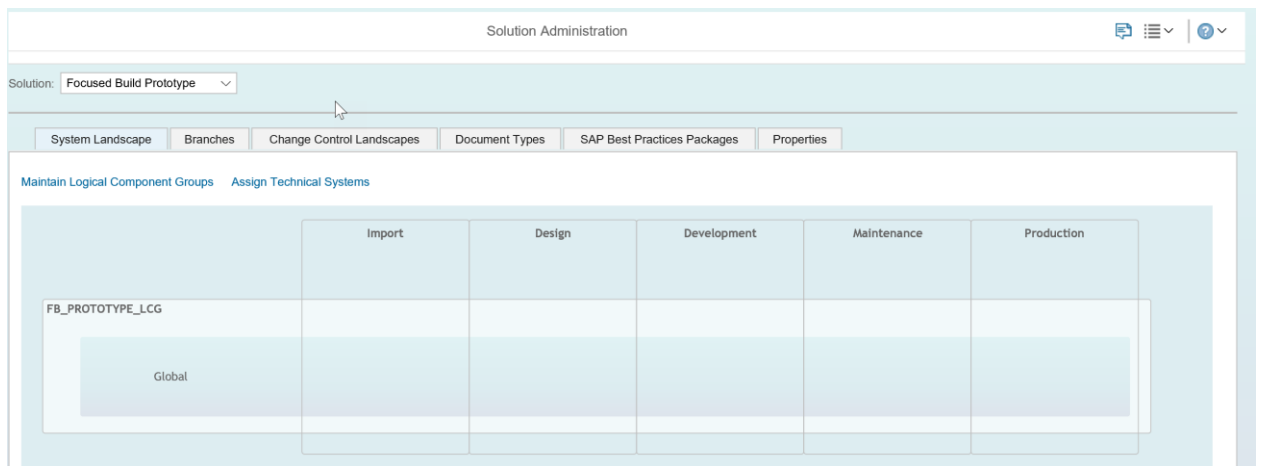


Figure 14 - Logical Component Group Creation 5

7. With this you can already implement best practice content.

### How to assign a system?

At the beginning of a S/4HANA project, the customer might not have built up the full system landscape yet. But the customer will most probably have a S/4HANA sandbox to perform the fit-gap analysis. That means the Sandbox system would be the relevant system for the activities to be documented in the branches Import and Design.

In this example, we assume that a system S4H / client 100 acts as S/4HANA sandbox. In order to assign the system, it must be known to SAP Solution Manager. That means the system must exist in LMDB and an RFC exists (preferable the managed system setup was executed).

For the prototype we use the Demo Landscape instead of a S/4HANA system

1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "System Landscape". The branches and the logical component group created will be displayed (see below).
3. Click on "Assign Technical Systems"



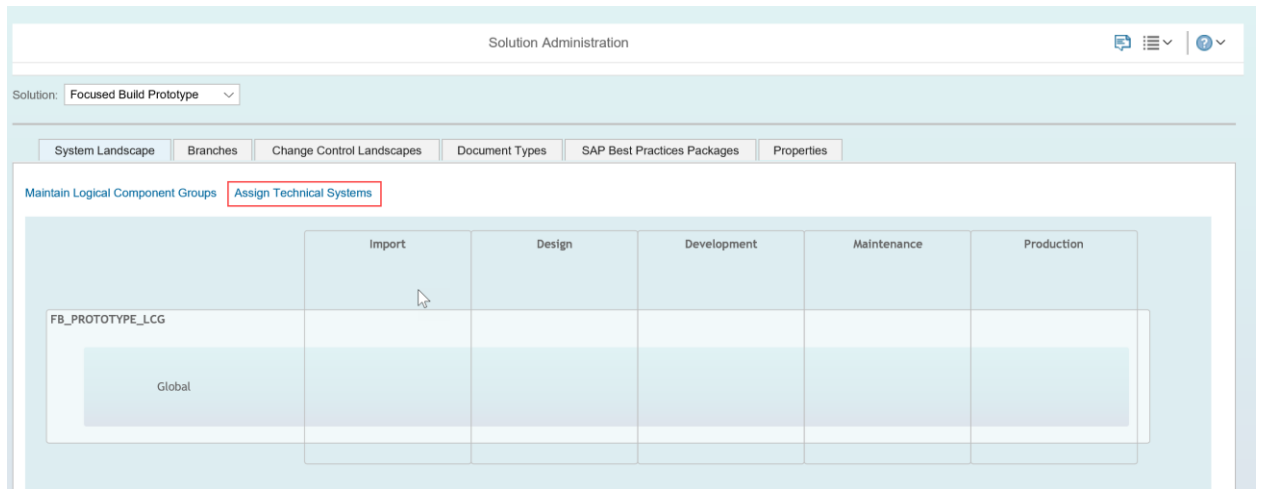


Figure 15 - LCG: Assign Technical Systems 1

4. In the following screen, select the Import branch and as logical component "Import-Global". Then navigate to the field Sandbox System and open the search help to get related system/client for Sandbox role. .

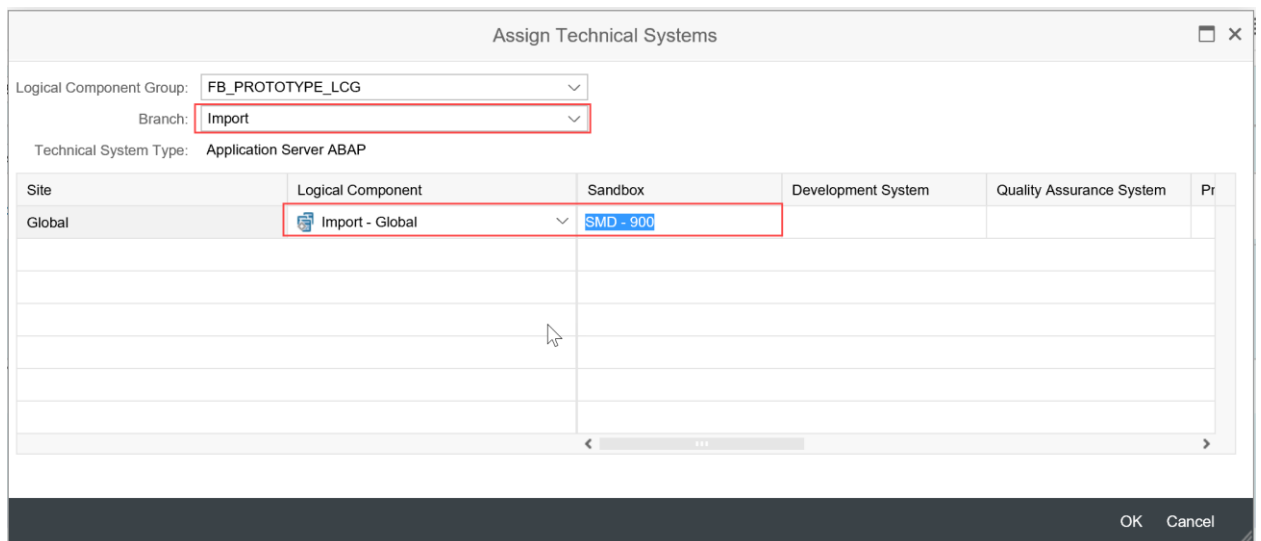
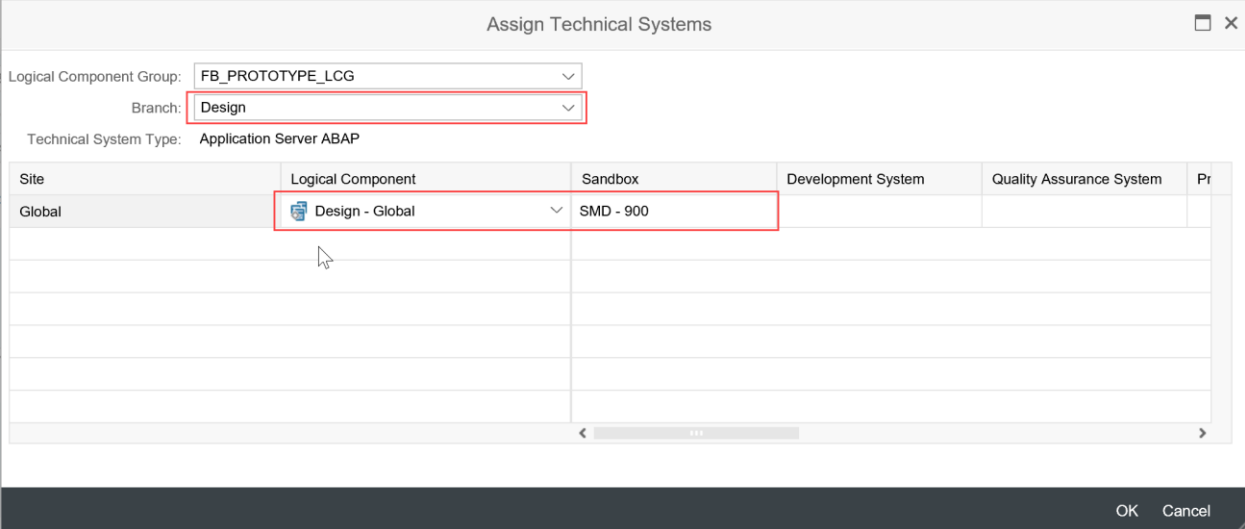


Figure 16 - LCG: Assign Technical Systems 2

5. Click OK and then again 'Assign Technical Systems'
6. For the Design branch we assign the same system/client like for sandbox.



Assign Technical Systems

Logical Component Group: **FB\_PROTOTYPE\_LCG**

Branch: **Design**

Technical System Type: **Application Server ABAP**

Site	Logical Component	Sandbox	Development System	Quality Assurance System	Pr
Global	Design - Global	SMD - 900			

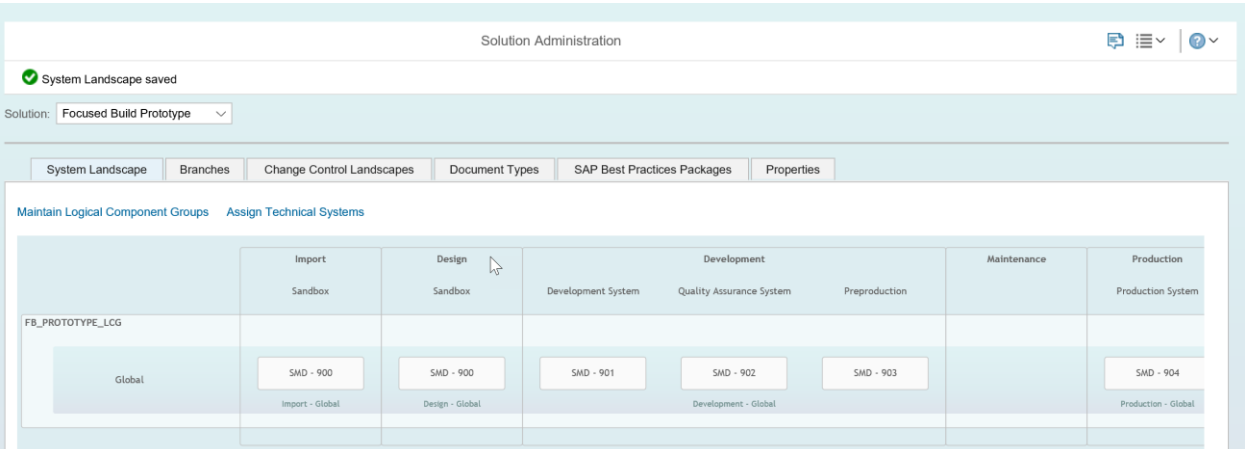
OK Cancel

Figure 17 - LCG: Assign Technical Systems 3

7. On the previous window click "OK".
8. Repeat steps 4 to 6 for all branches according to the systematic of this table and the input from customer's landscape entered in chapter 3.2.2

Logical Component	System:Client (Role)
Import	SMD:900 (Sandbox)
Design	SMD:900 (Sandbox)
Development	SMD:901 (Development)
	SMD:902 (QA)
	SMD:903 (Preproduction)
Production	SMD:904 (Production)

9. In our example, the result looks like this:



Solution Administration

System Landscape saved

Solution: **Focused Build Prototype**

System Landscape | Branches | Change Control Landscapes | Document Types | SAP Best Practices Packages | Properties

Maintain Logical Component Groups | Assign Technical Systems

	Import Sandbox	Design Sandbox	Development Development System	Maintenance Quality Assurance System	Production Preproduction	Production Production System
FB_PROTOTYPE_LCG						
Global	SMD - 900 Import - Global	SMD - 900 Design - Global	SMD - 901 Development - Global	SMD - 902 Development - Global	SMD - 903 Development - Global	SMD - 904 Production - Global

Figure 18 - LCG: Assign Technical Systems 4

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## 3.3.4 Related Documentation

For more information about SAP Change Request Management, go to SAP Help Portal at [https://help.sap.com/viewer/p/SAP\\_Solution\\_Manager](https://help.sap.com/viewer/p/SAP_Solution_Manager), select version **7.2 SPS 3**. Open the application help and select **Change Request Management**.

For more information about assigning roles, see the security guides for SAP Solution Manager at [https://help.sap.com/viewer/p/SAP\\_Solution\\_Manager](https://help.sap.com/viewer/p/SAP_Solution_Manager).

## 3.3.5 Considerations, if process management is already in use

If the customer is already using process management in SAP Solution Manager, there will be already a Solution, which is actively used by the customer. In the very beginning there should be a discussion with the customer, if the same – already created Solution – should be used for the S/4HANA implementation. Keeping the definition of the Solution in mind, it's very likely that the S/4HANA project will use the (or an) already existing Solution.

If there are good reasons to create a separate Solution, the steps described in the previous sections are completely valid.

If an existing Solution should be used the following general considerations apply. If you are unsure, what is the best approach on how to deal with the Solutions/branches in a certain customer situation, please reach out to MCC to request support.

### Branch Setup

Basically, we recommend to separate the S/4HANA implementation from other implementation project or the maintenance of the current Solution. That means that we recommend a branch structure "Development" => "Design" => "Import" (as described in xxx) as a child of the production branch. That can co-exist with other – already existing – child branches to the production branch.

The screenshot below shows an example, how such a branch structure could look like.

In green is an example for two branches, which were already existing and which are used by the customer for maintenance and other projects than the S/4HANA implementation project.

In red is the branch structure for the S/4HANA implementation project.

Both branch structures release their content to the production branch. If the same processes, process steps or other objects are changed in different branches at the same time, there must be a conflict resolution latest when releasing the changes. As the S/4HANA implementation is working with a different set of systems, there shouldn't be the need to invest much efforts in conflict resolution.

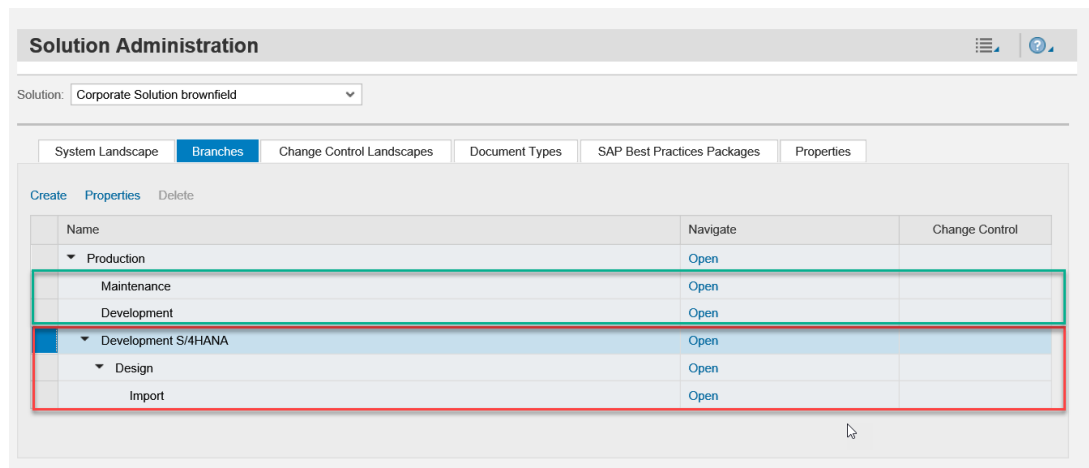


Figure 19 - Branch Setup

### Setup system landscape

There are not too much differences compared to the greenfield situation. Basically, there is the need for a logical component group(s) for the S/4HANA landscape(s), including logical components and systems.

If those are already created by the customer, they should be re-used. If not they must be created as it is described in section xxx.

### Import Best Practice Content

No changes compared to the greenfield situation, the best practice import should be done in the import branch.

## 3.3.6 Create and assign Document Types to Solution

In order to ensure a smooth transition to Build Execution, all results documents should be available (and uploaded to Solution Manager) at the end of the FitGap / Delta Design. The management of these documents obviously becomes easier if...

- All necessary document types are available
- There is no ambiguity in regard to which document type to use
- It is clear where a document of a type should be stored.
- The correct templates for each document type are readily available.
- Examples for Docu Types and Templates are shipped in the name range 'OSAP\_XX'

Description	Document Type	Status Schema
Functional Specification type Gap	OSAP_01	SAP Default Status Schema
Functional Specification type WRICEF	OSAP_02	SAP Default Status Schema
Functional Specification type Interface	OSAP_03	SAP Default Status Schema
Use Case	OSAP_11	SAP Default Status Schema
Technical Design	OSAP_20	SAP Default Status Schema
Configuration Guide	OSAP_25	SAP Default Status Schema

Description	Document Type	Status Schema
Single Functional Test	OSAP_30	SAP Default Status Schema
Functional Integration Test	OSAP_31	SAP Default Status Schema
Business Process Description	OSAP_40	SAP Default Status Schema
User Guide	OSAP_41	SAP Default Status Schema
Mock-up	OSAP_42	SAP Default Status Schema
Training Material	OSAP_50	SAP Default Status Schema

To create your own document types based on standard types:

Go to Solution Administration → 'Global Functions' → Document Type Administration:

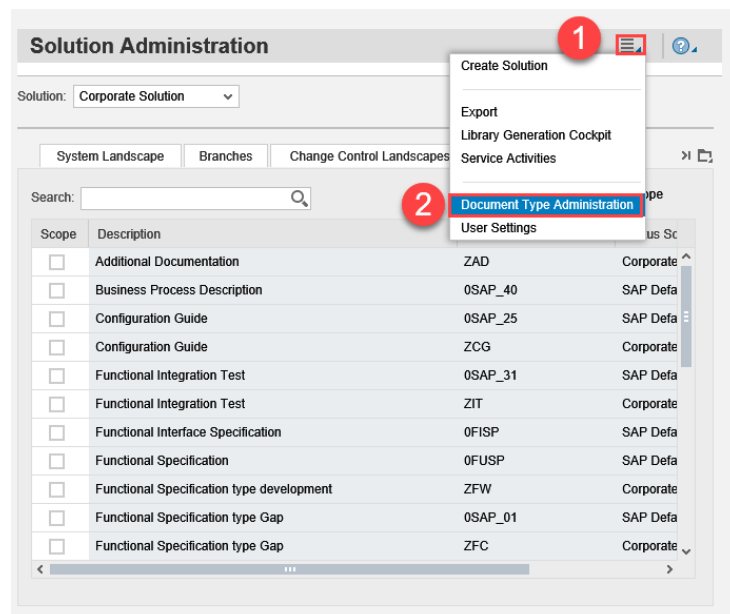


Figure 20 - Accessing Document Type Administration

Reduce the list of document type by entering 'OSAP' in the search field and press Enter. Right click on the entry to be copied and select "Copy":

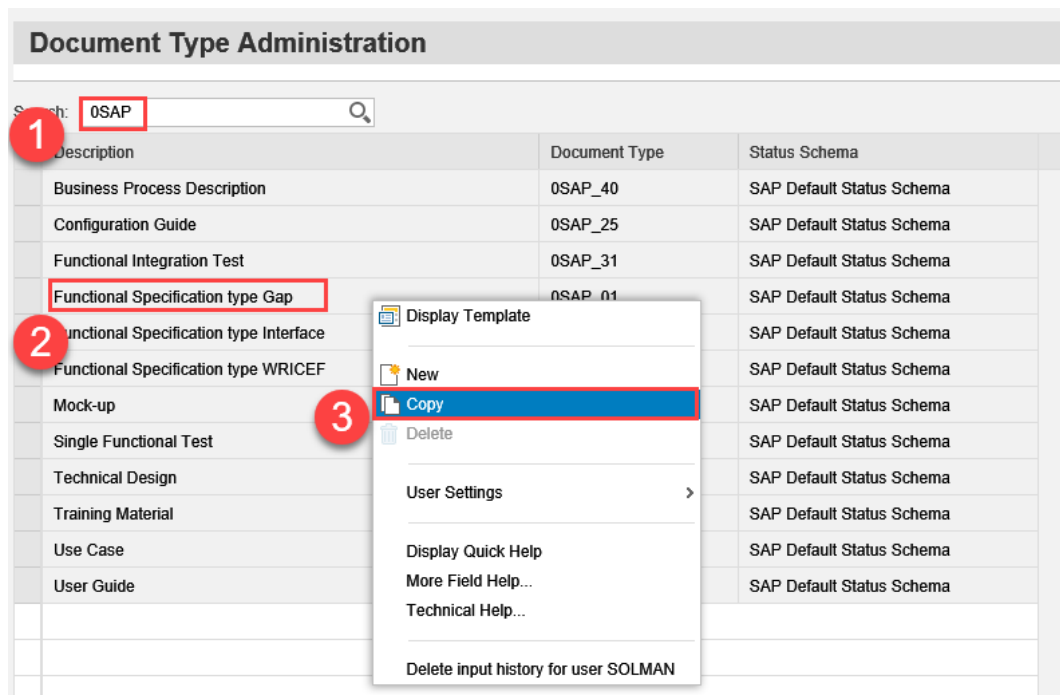


Figure 21 - Creating a new Document Type (1)

In the pop-up enter target document type (e.g. ZSAP\_XX) and related description and confirm with OK:

**Copy Document Type** □ ×

---

**Source**

Document Type: 0SAP\_01

Description: Functional Specification type Gap

**Target**

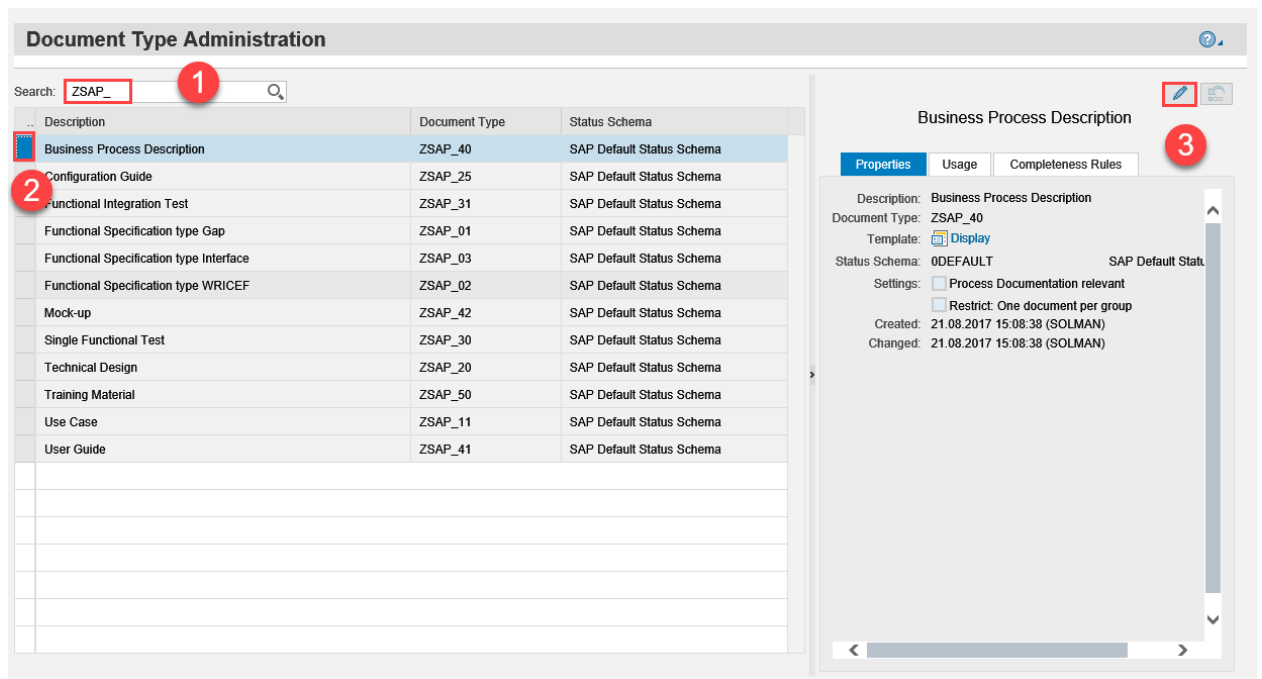
\* Document Type: ZSAP\_01 1

\* Description: Functional Specification type Gap 2

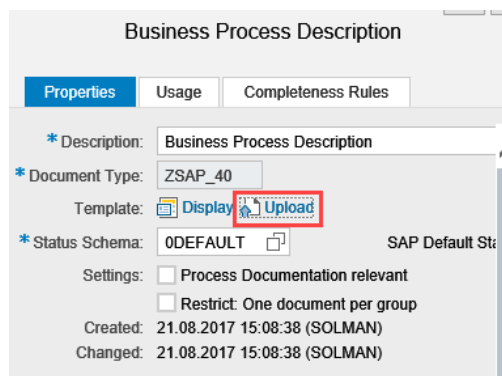
OK Cancel

Repeat this for all standard Document Types (0SAP\_XX)

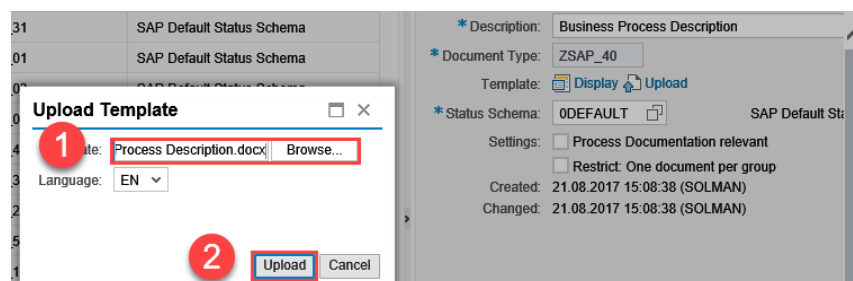
Enter search term that reflects your naming convention (e.g. ZSAP), press Enter, select one of the listed entries and choose 'edit' button



Choose the 'Upload' button to upload your own document template for the selected document type.



Use pop-up to browse for the document template and select 'Upload'



Switch back to view mode (click on the glasses symbol) to save the new document type.

Repeat the upload for all customer Document Types (ZSAP\_XX)

When done exit the 'Document Type Administration' and continue in 'Solution Administration' screen while selecting the 'Document Type' tab. Ensure that 'All' is selected on the right side, enter the search term based on your naming convention (e.g. ZSAP), press Enter and select all relevant entries to put into the scope for your Solution:

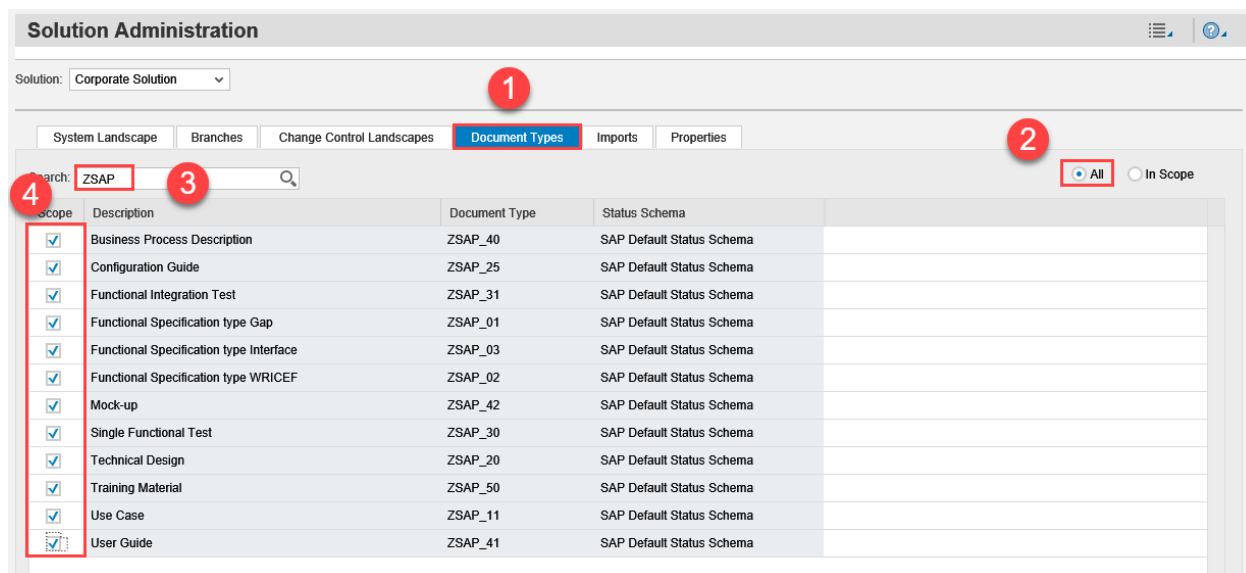
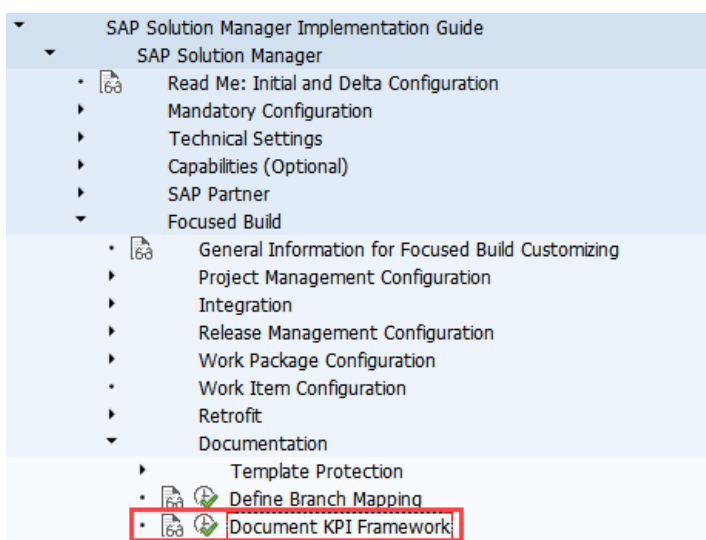


Figure 22 – Add Document Types to Scope of Solution

### 3.3.7 Adjust Customizing for Document KPI Framework

To be able to use the KPI reporting for the created document types you need to adjust the related customizing. To do so start SPRO and open the IMG note for Document KPI Framework:





For following KPIs the Document Types need to be changed from OSAP\_XX to the new types created in the previous chapter:

KPI
FSSPEC
SFTEST
TSPEC

1. Select entry of KPI and then double-click on 'Define relevant transaction types'

**Change View "Define KPI": Overview**

New Entries

Dialog Structure

- Define KPI
  - Define relevant transaction types (2)
  - Define Classification Mapping
  - Define transaction status and document status
  - Define milestone
  - Define Release Status
    - Map WP Status to Release Status
    - Map WI, DC Status
    - Define additional Factors
  - Define CRM Transaction Status
    - Define Test Existence as min. requirement
    - Define Test Status Dependencies
    - Define Transport Status dependencies
    - Define Retrofit Status dependency

Define KPI

KPI	KPI Text	Relevant
DEVL	In Development status for Work Items	<input checked="" type="checkbox"/>
FSSPEC	Functional specification availability	<input checked="" type="checkbox"/> (1)
SFSPEC	Single Functional Spec availability	<input checked="" type="checkbox"/>
SFTEST	Single functional test case availability	<input checked="" type="checkbox"/>
TSPEC	Technical specification availability	<input checked="" type="checkbox"/>
UNIT_TST	Unit Test KPI for Work Item in SRD	<input checked="" type="checkbox"/>
WI_KPI	WI, DC, UC, NC, SC KPI	<input checked="" type="checkbox"/>
WP_KPI	Status KPI for WP/RFC	<input checked="" type="checkbox"/>

2. Select transaction type and then double-click on 'Define Classification Mapping'

**Change View "Define relevant transaction types": Overview**

New Entries

Dialog Structure

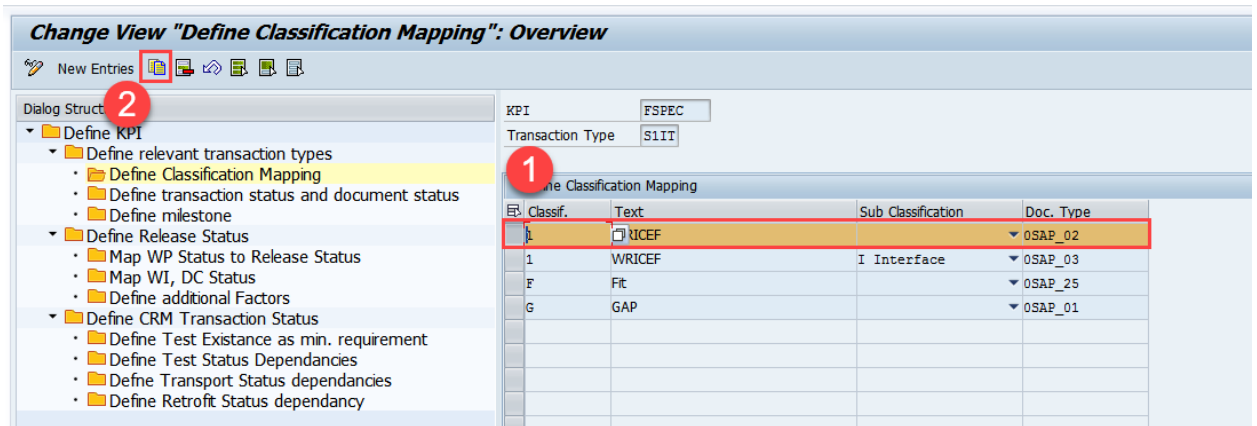
- Define KPI
  - Define relevant transaction types (2)
    - Define Classification Mapping (1)
    - Define transaction status and document status
    - Define milestone
  - Define Release Status
    - Map WP Status to Release Status
    - Map WI, DC Status
    - Define additional Factors
  - Define CRM Transaction Status
    - Define Test Existence as min. requirement
    - Define Test Status Dependencies
    - Define Transport Status dependencies
    - Define Retrofit Status dependency

KPI FSSPEC

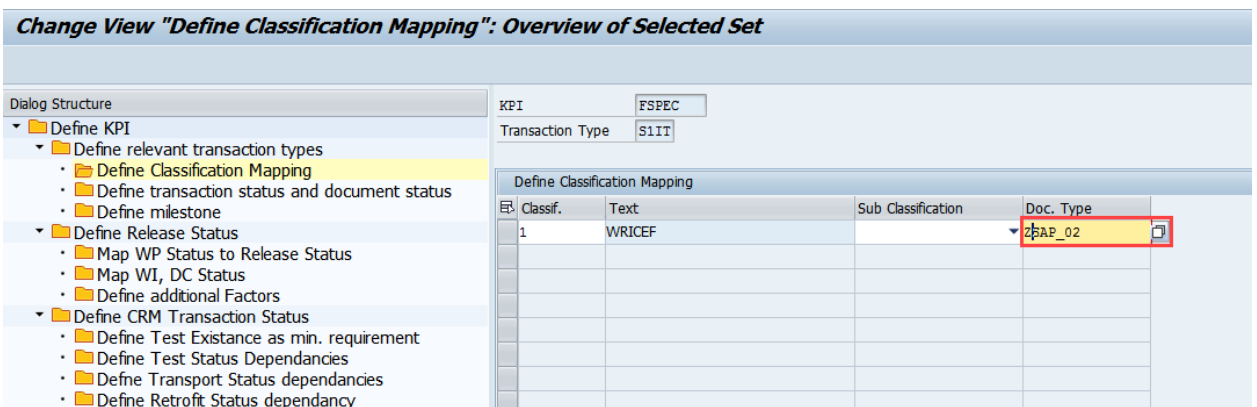
Define relevant transaction types

Trans.Type	Description
S1IT	Work Package with PPM Project

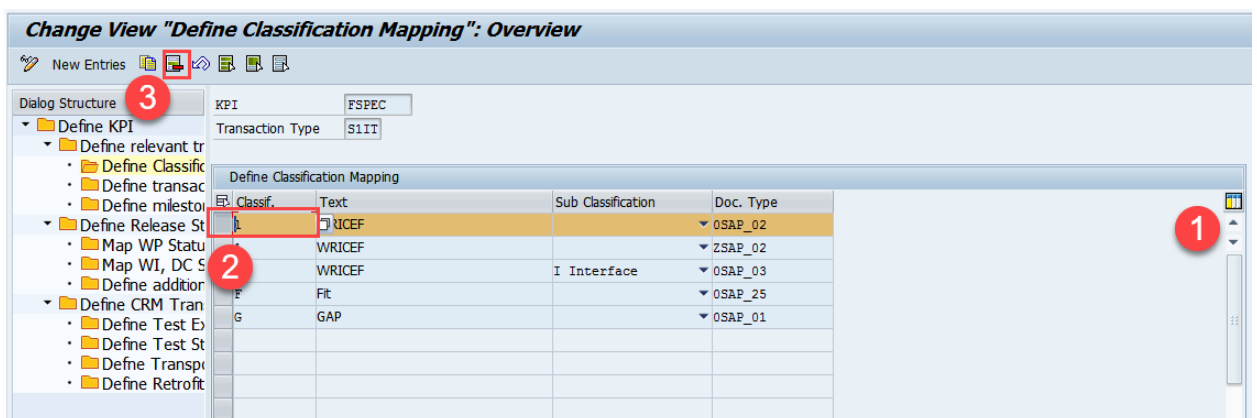
3. Select the first entry and choose 'Copy' button



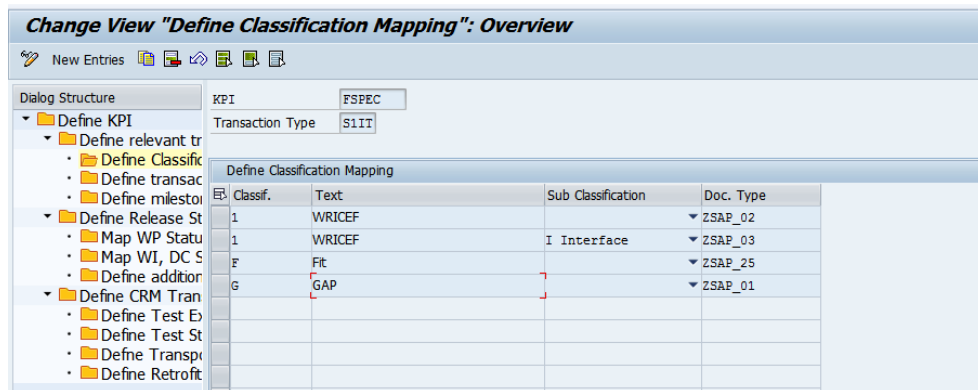
4. Adjust Doc. Type entry and press 'Enter'



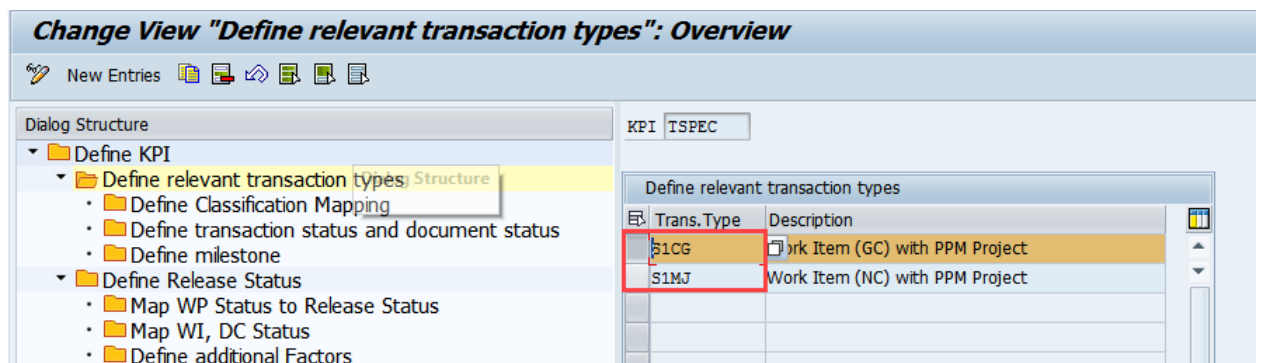
5. Scroll up the table and delete the original entry with 'OSAP\_XX' Doc. Type



6. Repeat steps 3-5 for all Classifications in this table so it looks like this



7. Repeat steps 1 - 6 for KPI 'SFTEST'
8. Repeat steps 1 - 6 for KPI 'TSPEC' for each transaction type S1CG and S1NC



### 3.3.8 Import Best Practice Content into Import Branch

With the steps described above the best practice content can be imported. It is not mandatory to have technical system assigned to the logical component and logical component group. It is enough, if a suitable LCP exists.

Furthermore, it is mandatory that SAP note 2194123 is implemented.

How a to create import best practice content?

1. Ensure that you are in the correct Solution in transaction SOLADM or go via Launchpad group Focused Build - Tool Lead → Solution Administration

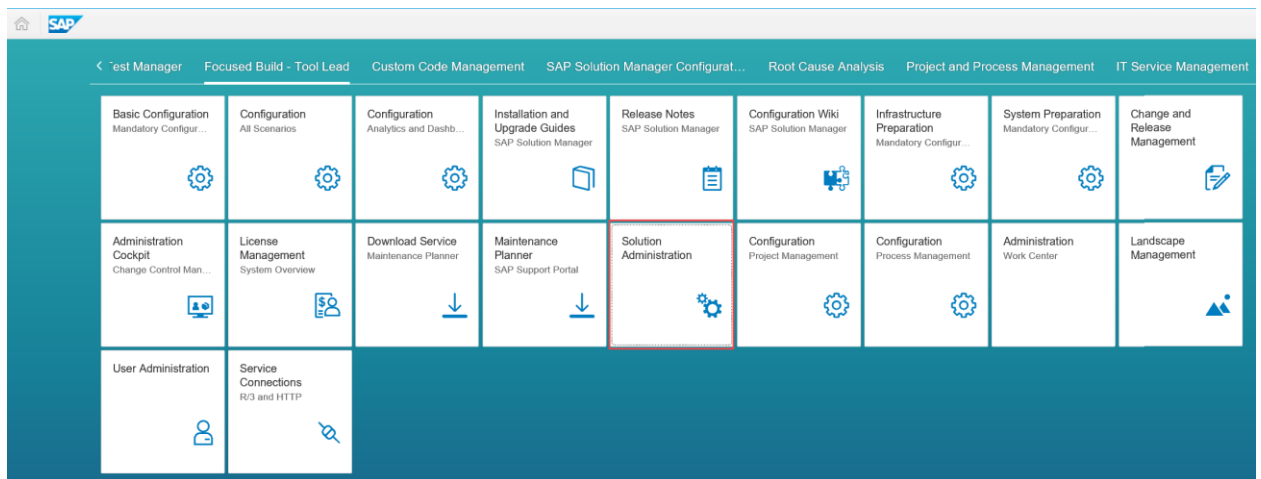


Figure 23 – Launch Solution Administration

2. Select tab "Imports" and then "Import" on the left side.

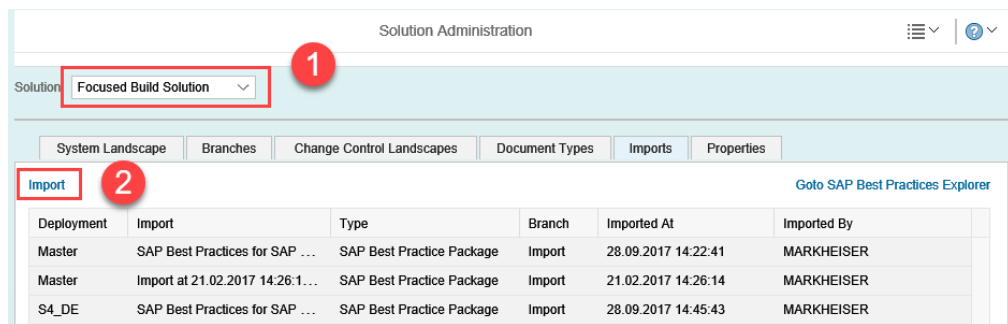


Figure 24 - Importing Best Practice Content (1)

3. In the next screen, select the appropriate best practice package and click "Next".

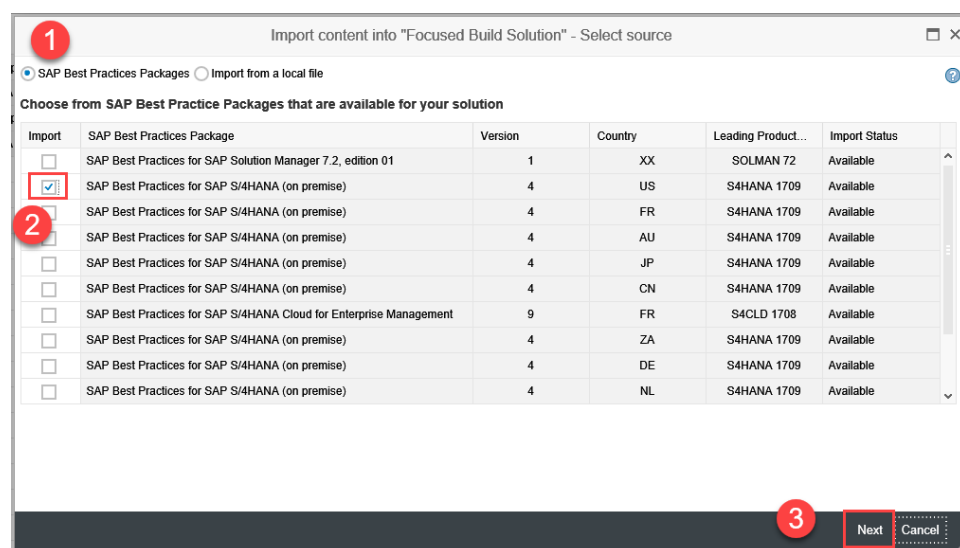


Figure 25 - Importing Best Practice Content (2)

4. In the next screen, please select the right branch to import the best practice content to (that's the Import branch), select 'New deployment' and provide a name for the deployment for your first deployment.

Figure 26 - Importing Best Practice Content (3)

5. Click in "Import". A background job will be triggered to perform the actual import.

Figure 27 - - Importing Best Practice Content 4

6. A success message indicates that the import was successfully done.

### 3.3.9 Release Scope-relevant Processes into Design-Branch

1. First, let's look at what we just imported. From the SAP Solution Manager Launchpad ("Focused Build - Architect") click the "Solution Documentation" Tile.

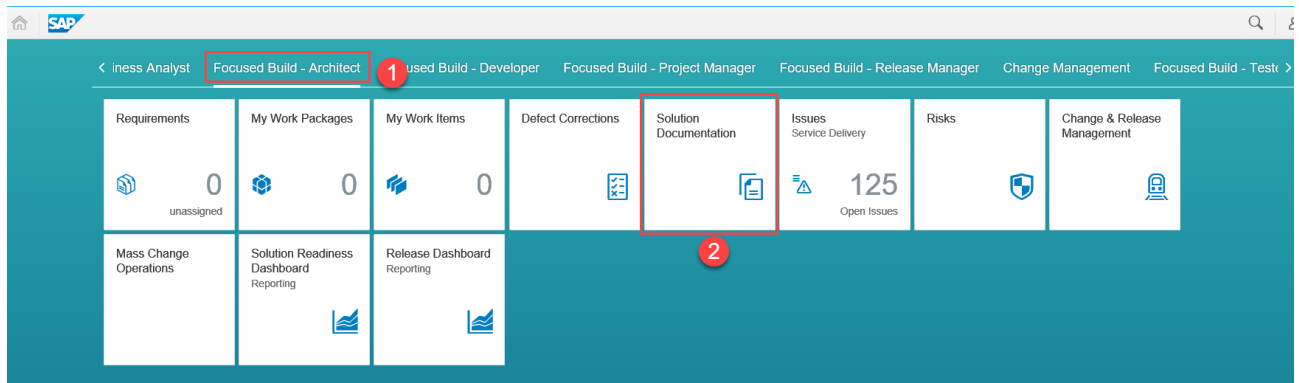


Figure 28 – Launch Solution Documentation

2. The top of the screens indicates which solution/branch is selected. Make sure you are looking at the Import branch of the newly created solution. To switch to another solution, click 'Global Functions' → Solution. To switch to a different branch in the selected solution, use the branch dropdown field.

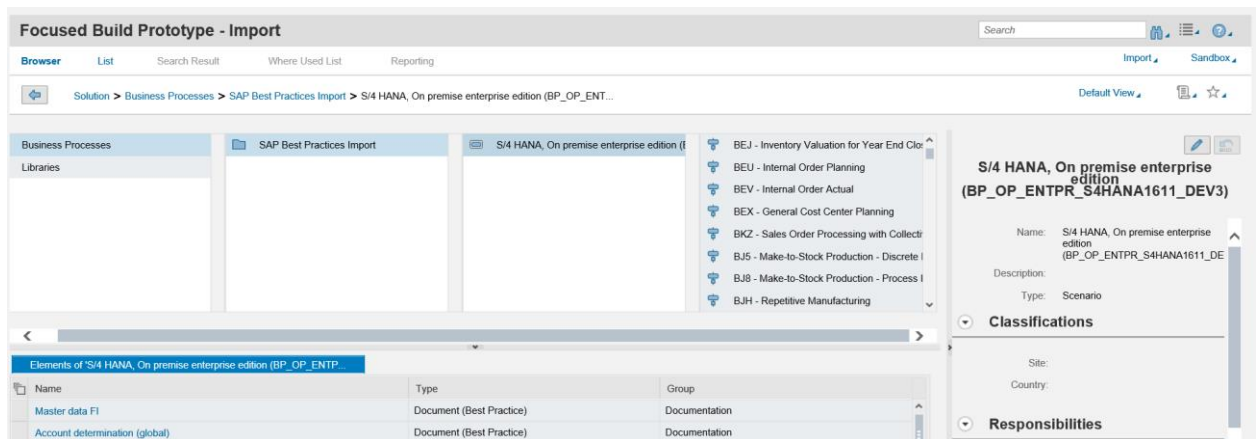


Figure 29 - Solution Documentation Overview 1

3. Once a package is imported into Solution Manager you will see a folder called SAP Best Practice Import – under the folder Business Processes. Within the folder there is a scenario per package – in case you imported multiple best practices. All packages are listed here, the name of the scenario is the name of the best practice package. You can now browse the content by going through the processes (so called scope items) which have a 3 letter code e.g. BD9 and name. For each process you can open the process diagram or navigate to the linked documents, like test cases and configuration guides.
4. Expanding the Import branch's content (Business Processes → Best Practices Import → <Best Practice Package> → <Best Practice Process> → Process Step) reveals the imported best practice content. In the lower half of the screen the elements of the selected item are displayed. Here you can find for example all executables/transactions and configuration relevant for a process but also assets such as process diagrams or links to documentation including test scripts which can be used in scope of the solution validation workshops.

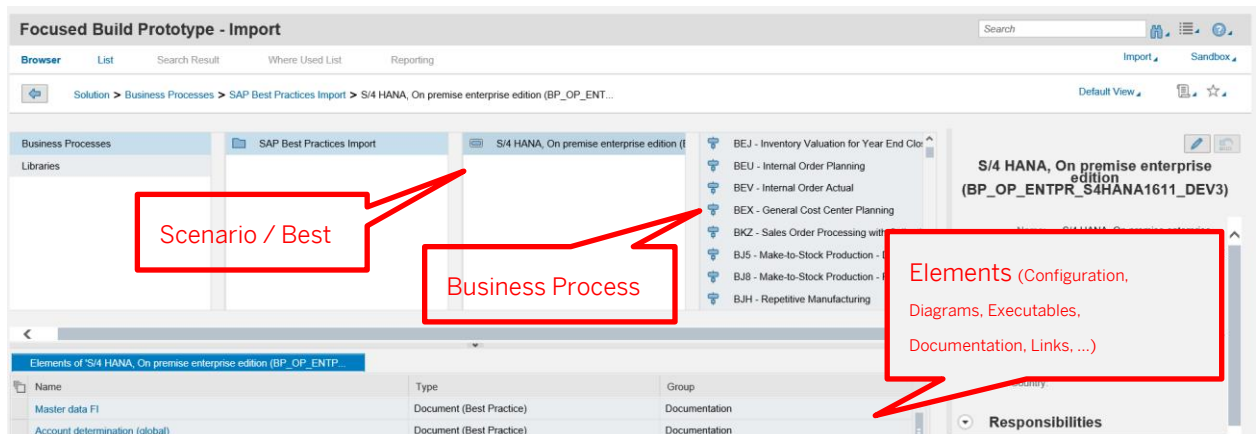


Figure 30 - Solution Documentation Overview 2

- Once the imported best practice processes have been scoped and it is clear, which are relevant for the customer they can be released to the DESIGN branch (The IMPORT branch is merely a staging area for scoping purposes, nothing is changed or modeled here).

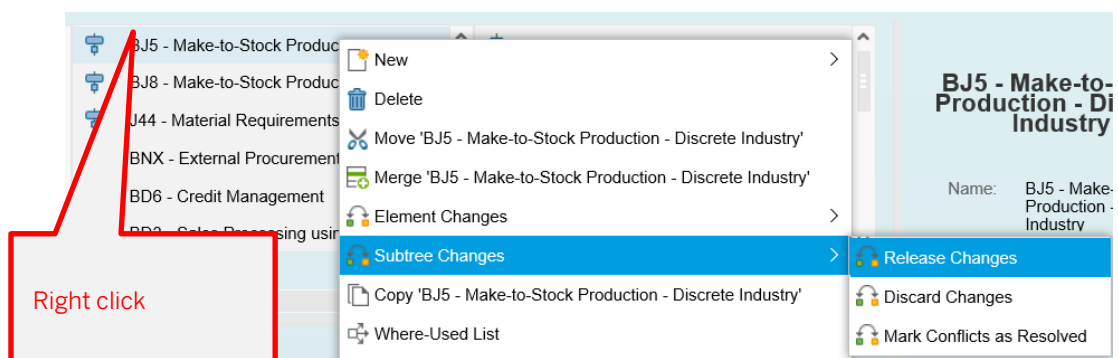


Figure 31 - Release to Design Branch

- To do so, right click on a relevant best practice process, then chose "Subtree Changes" → "Release Changes" and confirm the popup. The selected process has now been released to the DESIGN branch, where gaps will be documented and best practice process can be adjusted.

### 3.3.10 Create Change Control Landscape

Create Change Control Landscape in SOLADM:

- Select right solution and the tab Change Control Landscape
- Right-click on empty area in the table and select new in the drop-down menu

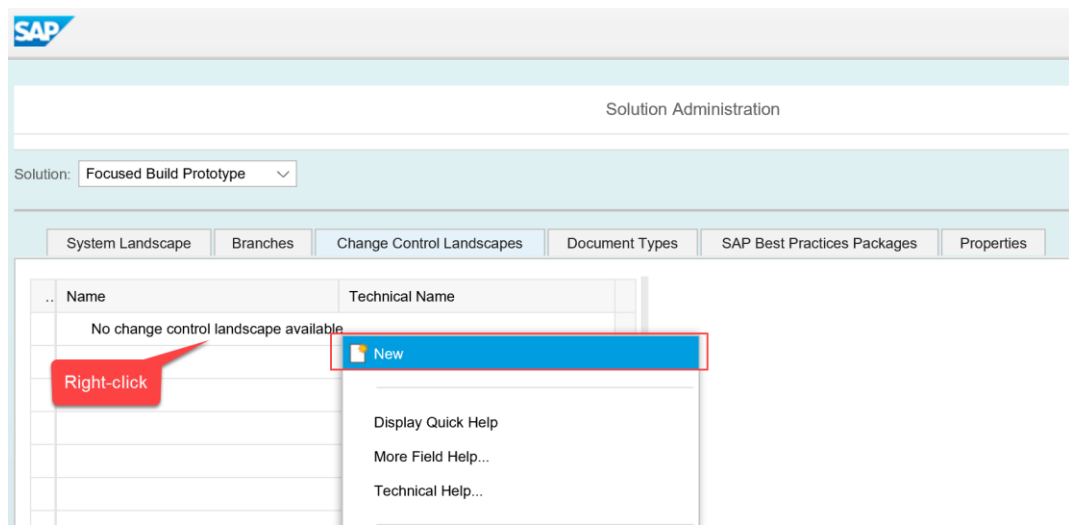


Figure 32 - Creating Change Control Landscape (1)

3. Enter name and technical name

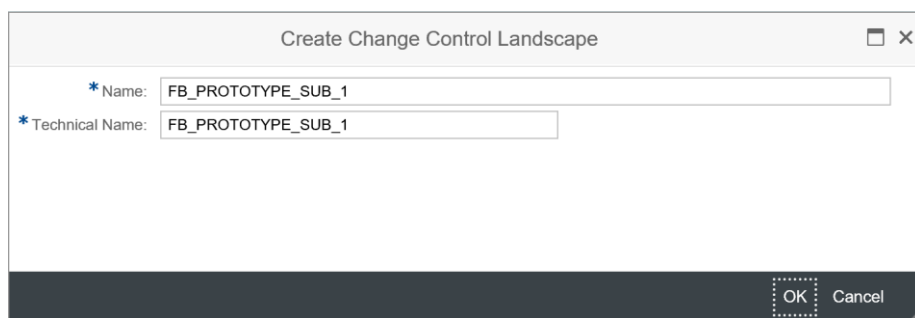


Figure 33 - Creating Change Control Landscape (1)

4. Assign Logical Component Group which is reflected by the Change Control Landscape while selecting the check box 'scope'.

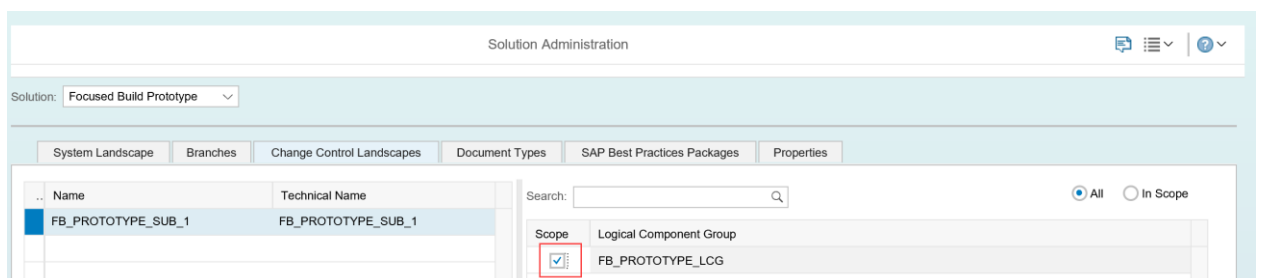


Figure 34 - Creating Change Control Landscape (3)



### 3.3.11 Define Branch Mapping (SPRO)

Except for the maintenance branch and the production branch, all branches are standard type branches. Therefore, you have to define the **design** and **development** branch of your solution sub landscape:

1. In the Customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Documentation* → *Define Branch Mapping*.
2. Select 'New Entries'

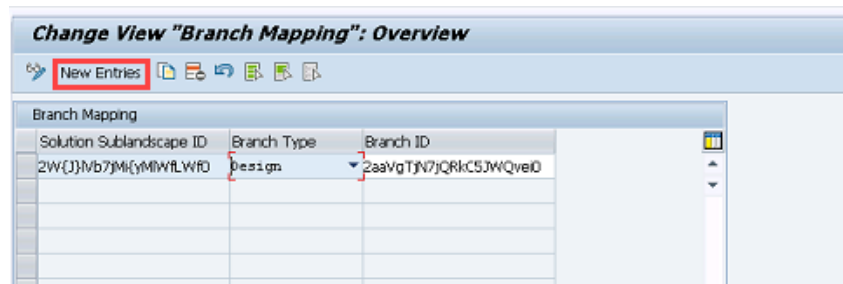


Figure 35 - Branch Mapping for Design Branch (1)

3.

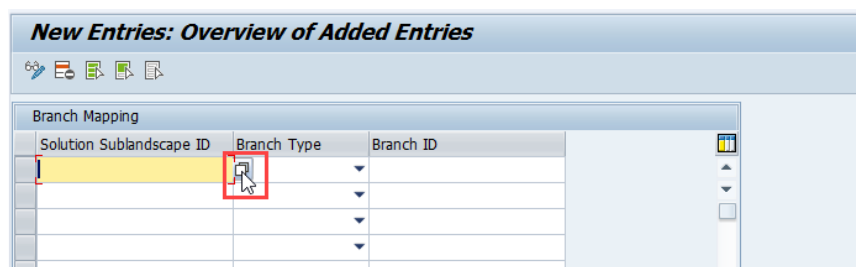


Figure 36 - Branch Mapping for Design Branch (2)

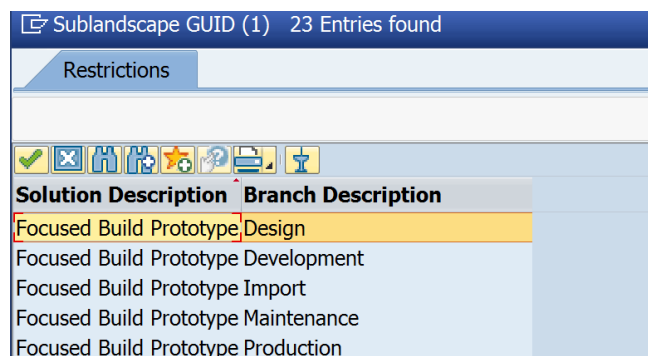


Figure 37 - Branch Mapping for Design Branch (3)

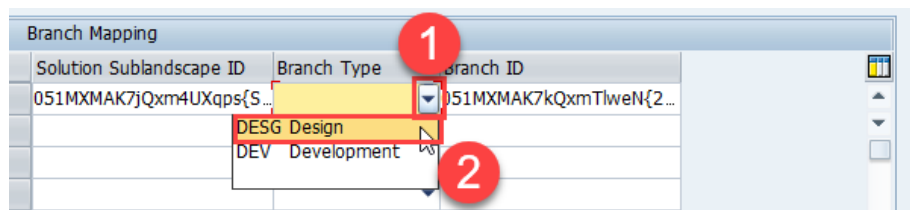


Figure 38 - Branch Mapping for Design Branch (4)

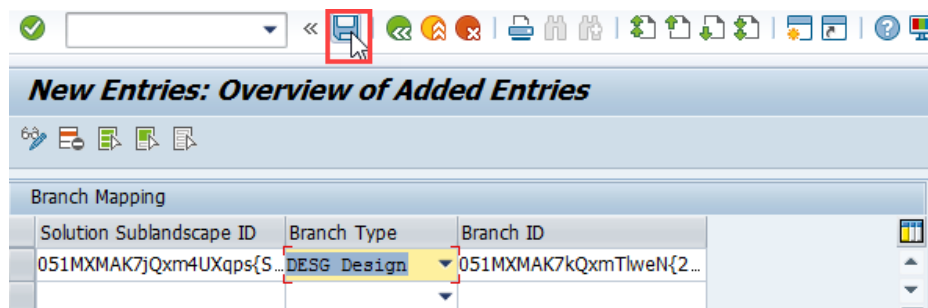


Figure 39 - Branch Mapping for Design Branch (5)

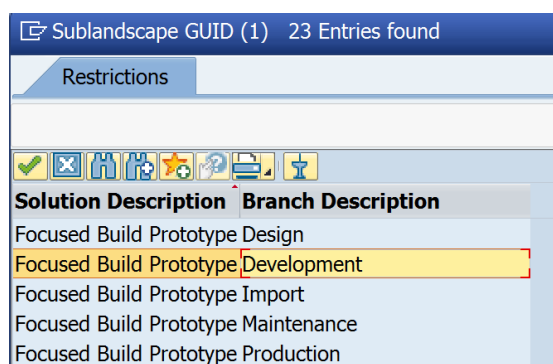


Figure 40 - Branch Mapping for Design Branch (6)

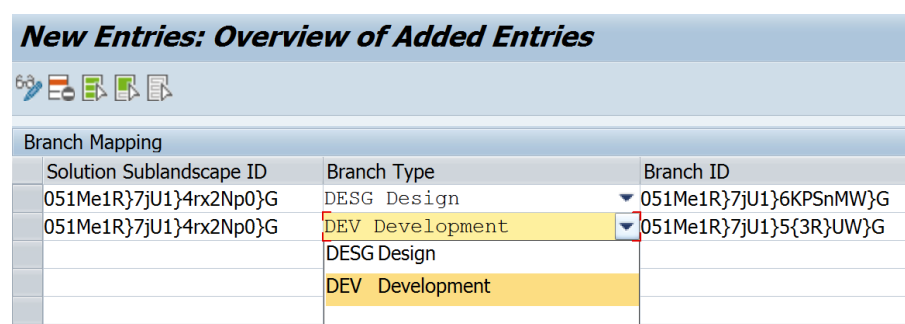


Figure 41 - Branch Mapping for Design Branch (7)

## 3.4 Setup Release Management

### 3.4.1 Release Planning

1. Select Release Management tile in the Launchpad

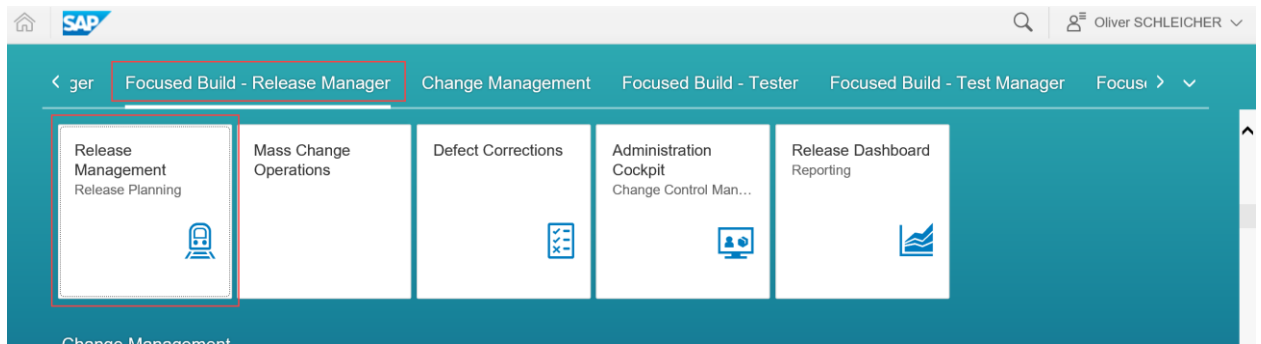


Figure 42 – Navigate to Release Management

2. In the navigation area select 'Focused Build' → Release Planning

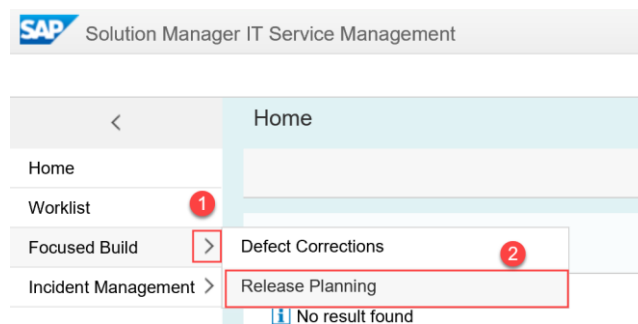


Figure 43 – Navigation to Release Planning (1)

3. Select Create → Major and Minor Releases

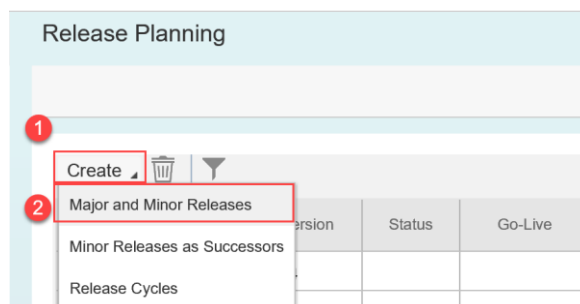


Figure 44 – Navigation to Release Planning (2)

4. Select created Change Control Landscape assign Major Release to Development Branch enter further relevant data

## Major and Minor Releases

Select Change Control Landscape

\*Change Control Landscape

### Major Release

\*Number of Major Releases   
 \*Duration (Days)   
 \*Branch   
 \*Go-Live Day   
 \*Go-Live Date of First Major Release

### Minor Release

\*Number of Minor Releases   
 \*Duration (Days)   
 \*Branch   
 \*Go-Live Day

Create Cancel

Figure 45 – Define Major Release schedule

- Check Major Release schedule and select 'Release Versions' you want to create Release Cycles for

Create								
	Landscape / Release Version	Status	Go-Live	Branch	2017		2018	
					Semester1	Semester2	Semester1	Semester2
1	FB_PROTOTYPE_SUB_1				FB_PROTOTYPE_SUB_1			
2	Major Release 1.0	Planned	30.04.2017	Development	Major Release 1.0			
3	Major Release 2.0	Planned	03.09.2017	Development	Major Release 2.0			
4	Major Release 3.0	Planned	07.01.2018	Development	Major Release 3.0			

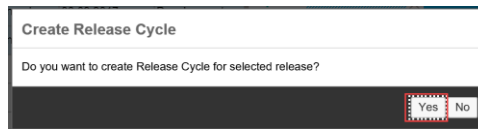
Figure 46 – Display Major Release schedule

- Select Create → Release Cycles

Create								
	Release Version	Status	Go-Live	Branch				
1	FB_PROTOTYPE_SUB_1							
2	Major Release 1.0	Planned	30.04.2017	Development				
3	Major Release 2.0	Planned	03.09.2017	Development				
4	Major Release 3.0	Planned	07.01.2018	Development				

Figure 47 – Create Release Cycle (1)

- Confirm creation of Release Cycle



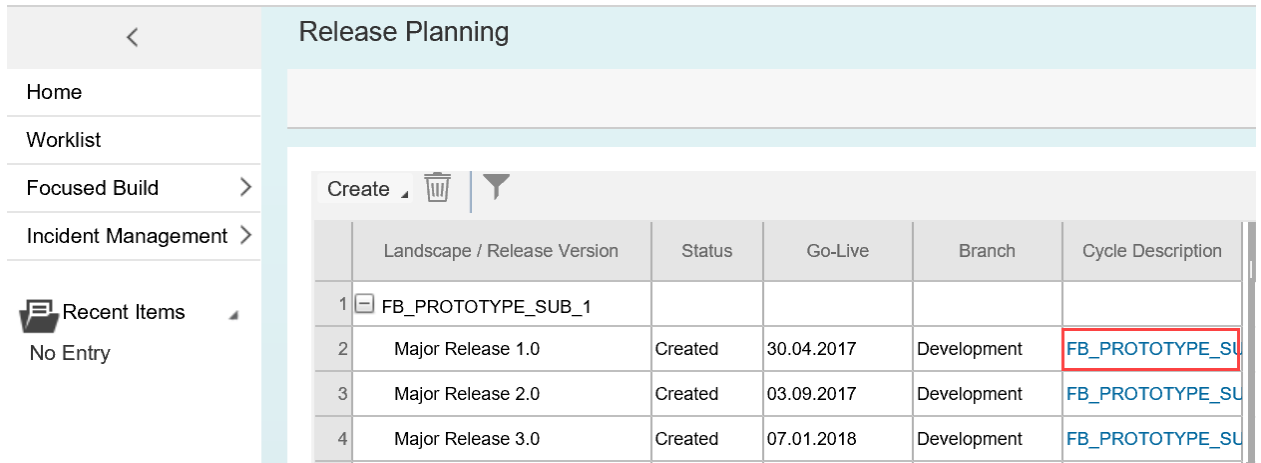
Create Release Cycle

Do you want to create Release Cycle for selected release?

Yes No

Figure 48 – Create Release Cycle (2)

8. Navigate to Release Cycle while clicking on the related entry in the release table



Release Planning					
	Landscape / Release Version	Status	Go-Live	Branch	Cycle Description
1	FB_PROTOTYPE_SUB_1				
2	Major Release 1.0	Created	30.04.2017	Development	FB_PROTOTYPE_SU
3	Major Release 2.0	Created	03.09.2017	Development	FB_PROTOTYPE_SU
4	Major Release 3.0	Created	07.01.2018	Development	FB_PROTOTYPE_SU

Figure 49 – Open Release Cycle

9. Select Business Role of Release Manager



**SAP**

**Select a business role:**

- /SALM/ARCHTC-Architect
- /SALM/DEVEL-Developer
- /SALM/PRJMNG-Project Manager
- **/SALM/RLSMNG-Release Manager**
- /SALM/TESTCO-Test Coordinator
- /SALM/TESTER-Tester
- /SALM/TOLEAD-Tool Lead

Figure 50 – Select Business Role - Release Manager

10. Change to Edit Mode and confirm to assign your Business Partner

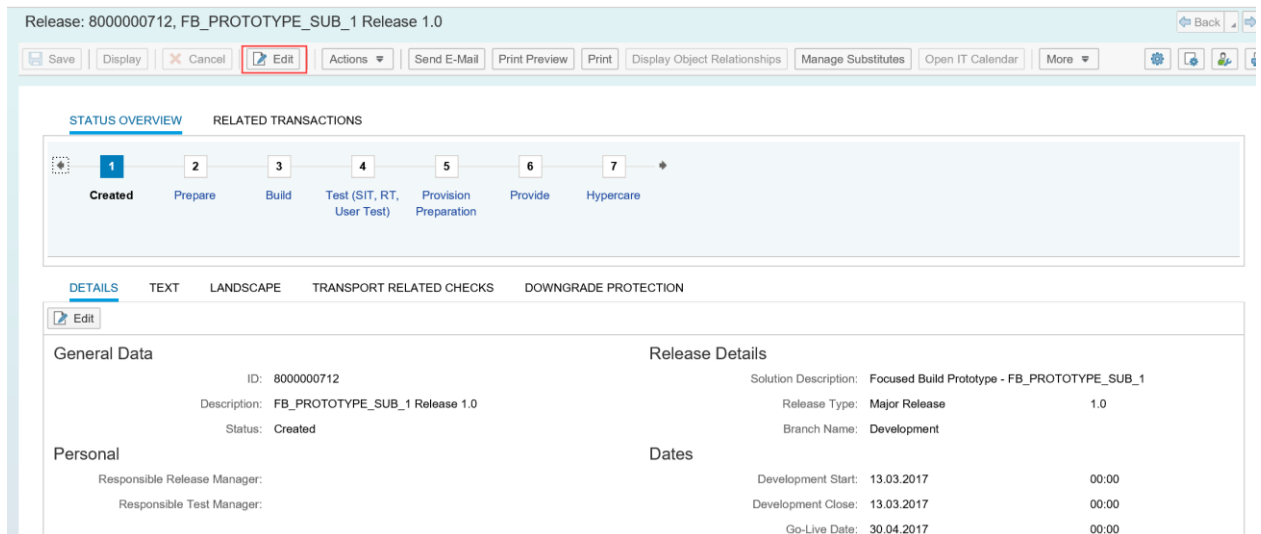


Figure 51 – Change Release Cycle

11. Select Actions → Switch to "Prepare Phase"

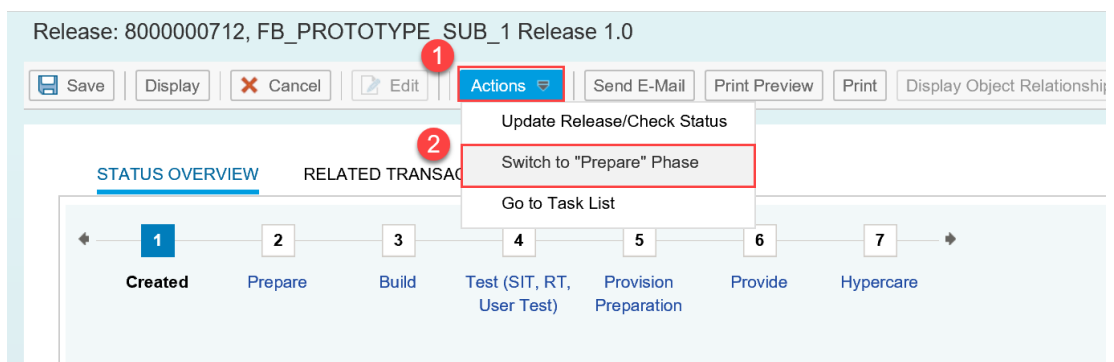


Figure 52 – Switch Release Cycle to "Prepare Phase"

12. Confirm to create the task list

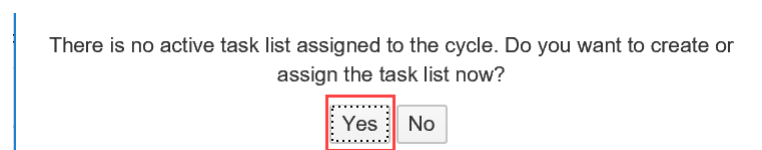


Figure 53 – Confirm Task List creation

13. Click next and check status of prerequisites

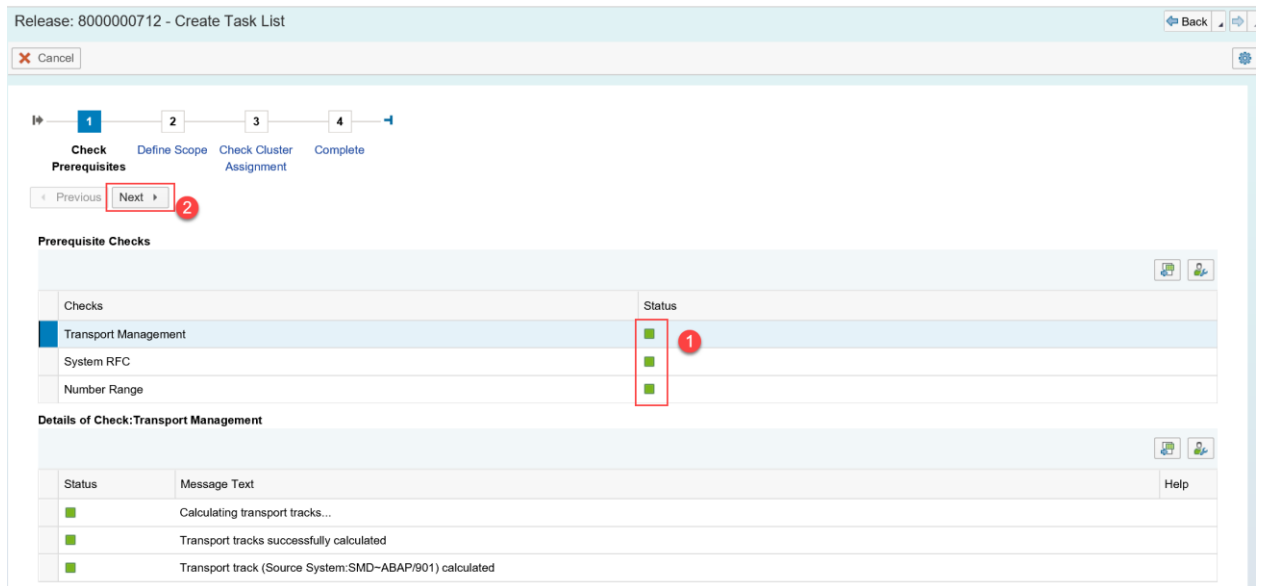


Figure 54 – Check prerequisites of Task List

14. Check that Task List Variant is 'S1RL', branch is Development, assign development system, transport landscape and continue with Next

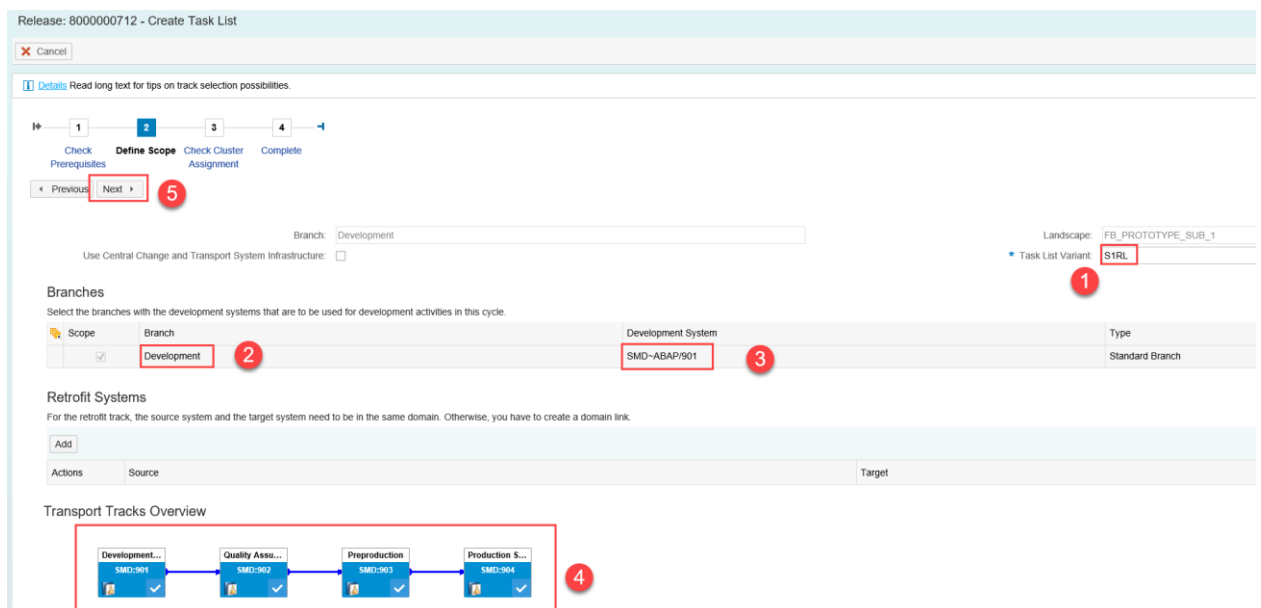


Figure 55 – Define Scope of Task List

15. To complete Task List creation select 'Create'

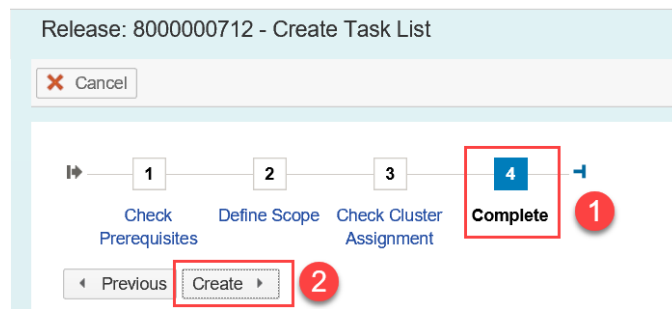


Figure 56 – Complete Task List creation

16. Check message that Task List has been created and Release has been switched to "Prepare" Phase.

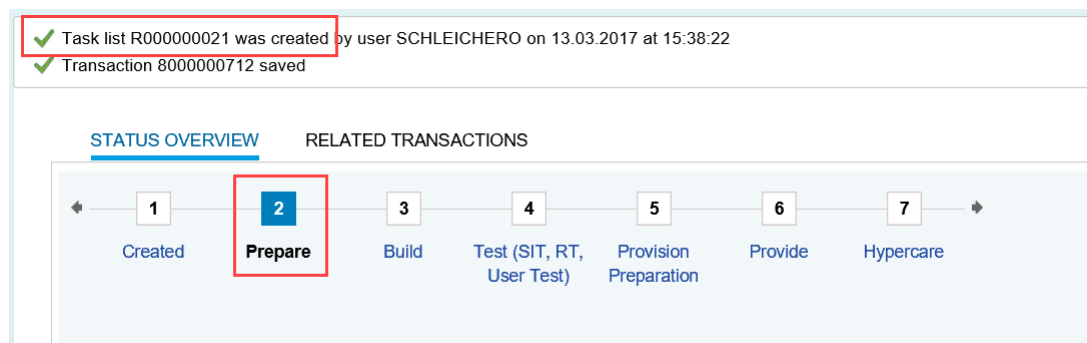


Figure 57 – Task List created

17. Select 'Edit' and then 'Related Transactions' tab and click on the create Task List entry in the column 'Transaction ID'.

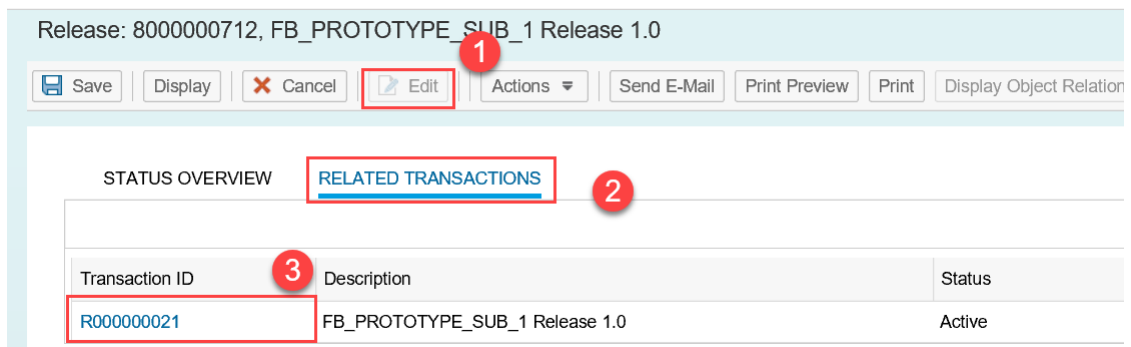


Figure 58 – Open Task List

18. In the Task List drill down to node 'Track (Source System...)', select it, and select 'Lock/Unlock Group'



Details of task list: R000000021

Task List

Monitor

Daily Overview

Transport Requests

Landscape View

Execute

Lock Task List

Change Task Status

Lock/Unlock Group

Task	Status	Availability
▼ FB_PROTOTYPE_SUB_1 Release 1.0		
▸ General Tasks		
▸ Track (Source System SMD~ABAP/901)		
▼ Source Systems		
▼ Development System		
▸ SMD~ABAP/901 (SMD-901, Time Zone: GMTUK)		
▼ Target Systems		
▼ Quality Assurance System		
▸ SMD~ABAP/902 (SMD-902, Time Zone: GMTUK)		
▼ Preproduction		
▸ SMD~ABAP/903 (SMD-903, Time Zone: GMTUK)		
▼ Production Systems		
▼ Production System		
▸ SMD~ABAP/904 (SMD-904, Time Zone: GMTUK)		
▼ Systems Without Transport Connection		
▼ Single System		
▼ Sandbox		
▸ SMD~ABAP/900 (SMD-900, Time Zone: GMTUK)		
General Completion Tasks		

Figure 59 – Unlock Task Group 'Track'

19. Check that status is unlocked for Task Group 'Track'

Details of task list: R000000021				
<div> Task List Monitor Daily Overview Transport Requests Landscape View </div>				
<div> Execute Lock Task List Change Task Status Lock/Unlock Group </div>				
Task	Status	Availability	Mandate	
▼ FB_PROTOTYPE_SUB_1 Release 1.0				
▶ General Tasks				
▼ Track (Source System SMD~ABAP/901)				
▼ Source Systems				
▼ Development System				
▶ SMD~ABAP/901 (SMD-901, Time Zone: GMTUK)				
▼ Target Systems				
▼ Quality Assurance System				
▶ SMD~ABAP/902 (SMD-902, Time Zone: GMTUK)				
▼ Preproduction				
▶ SMD~ABAP/903 (SMD-903, Time Zone: GMTUK)				
▼ Production Systems				
▼ Production System				
▶ SMD~ABAP/904 (SMD-904, Time Zone: GMTUK)				
▼ Systems Without Transport Connection				
▼ Single System				
▼ Sandbox				
▶ SMD~ABAP/900 (SMD-900, Time Zone: GMTUK)				
General Completion Tasks				

Figure 60 –Task Group 'Track' unlocked

20. Close screen and then Save and close also previous screen

Release: 8000001110, FB\_COACH\_XX\_SUB\_1 Release 1.0

Save
Display
Cancel
Edit
Actions
Send E-Mail
Print Preview
Print
Display Obj

Transaction 8000001110 saved

STATUS OVERVIEW
RELATED TRANSACTIONS

Figure 61 –Release Cycle

## 3.4.2 Define Release Profile Mapping

### Check Definition of Release Management Profiles

If a new release management profile is required, perform the following Customizing activity:

1. In Customizing for SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Management Configuration* → *Define Release Management Settings*.
2. Choose the *Define Release Management Profiles* activity.

**Change View "Release Management Profile": Overview**

New Entries

Dialog Structure

- Release Management Profile
  - Control Statuses & Assignment
    - Internal Release Status Mapping
    - Restrict Assignment of CRM Documents
    - Restrict Assignment of Projects
    - Restrict Assignment of Items

Rel Profile	Text	Trans.Type
/SALM/MAINT	Standard for Releases in Maint. Branch	
/SALM/STANDARD	Release Profile for Development Branch	S1MR

Figure 62 – Release Management Profile

3. Check if all entries are available (if no entries are available check chapter Activate the Piece List in Config Guide)

### Define Release Profile Mapping

If you are creating a new release component or change control landscape, you have to define a release profile mapping.

4. In Customizing for SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Management Configuration* → *Release Management Configuration*. → *Define Release Management Settings*.
5. Choose the *Define Release Profile Mapping* activity.
6. You map the release type together with the release component.

**Change View "Release Component and Mapping Profile": Overview**

New Entries

Release Type	Release Component ID	Release Profile	Release Component Name

Figure 63 – Release Profile Mapping (1)

7. Use F4 help to select Release Type for Major Release, Sublandscape and Release Profile and press Enter

**New Entries: Details of Added Entries**

Solution Name: S4HANA\_FB\_RELEASE

Branch Type: Standard Branch

Release Component and Mapping Profile

Rel Profile: /SALM/STANDARD

Batch Import Var: /SALM/RELEASE

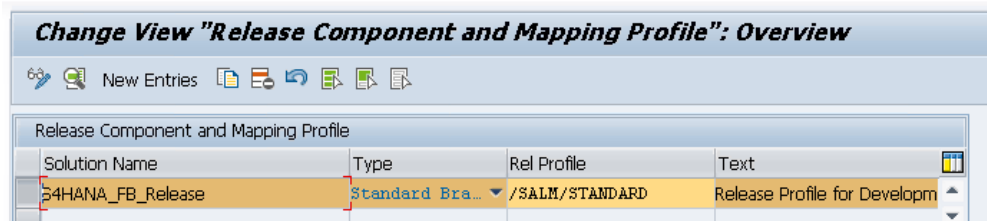
Collective Import Var: /SALM/COLLECTIVE\_IMPORT

☐ Cross Proj Release Closure

Sublandscape ID: 051M120S7jUXWmxOXmg1EW

Figure 64 – Release Profile Mapping (2)

8. Save and exit Details view



The screenshot shows the 'Change View' dialog box for 'Release Component and Mapping Profile'. The dialog has a title bar with the text 'Change View "Release Component and Mapping Profile": Overview'. Below the title bar is a toolbar with icons for 'New Entries', 'Save', 'Cancel', 'Back', 'Forward', 'Print', and 'Help'. The main area of the dialog contains a table with the following data:

Solution Name	Type	Rel Profile	Text
S4HANA_FB_Release	Standard Bra...	/SALM/STANDARD	Release Profile for Developm

Figure 65 – Release Profile Mapping (3)

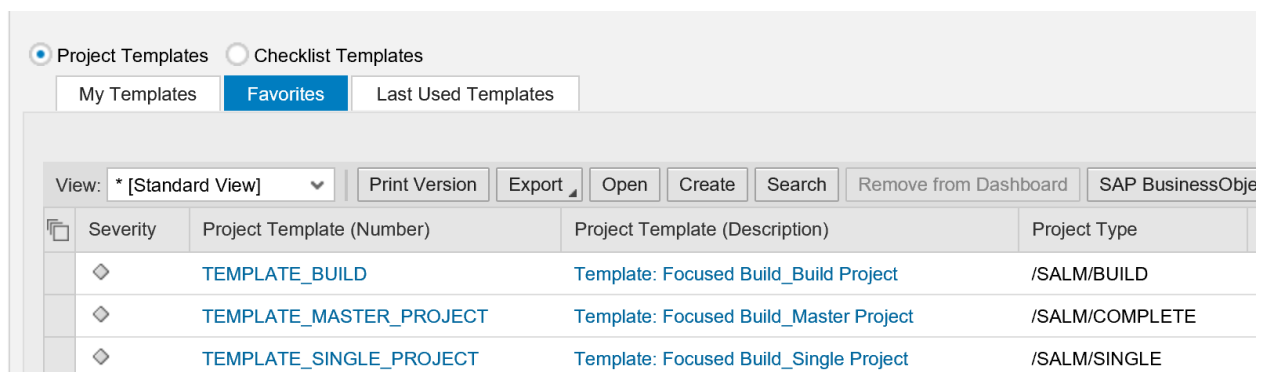
## 3.5 Project Setup

For the prototype example, we create:

- o 1 master project
- o 2 build projects

### 3.5.1 Create Projects

Following template projects can be used for setting up the project structure of the prototype:



The screenshot shows the 'Project Templates' section in SAP. It includes tabs for 'My Templates', 'Favorites', and 'Last Used Templates'. Below the tabs is a table of project templates. The table has columns for 'Severity', 'Project Template (Number)', 'Project Template (Description)', and 'Project Type'. Three templates are listed: 'TEMPLATE\_BUILD', 'TEMPLATE\_MASTER\_PROJECT', and 'TEMPLATE\_SINGLE\_PROJECT'. Each template has a description and a project type.

Severity	Project Template (Number)	Project Template (Description)	Project Type
◆	TEMPLATE_BUILD	Template: Focused Build_Build Project	/SALM/BUILD
◆	TEMPLATE_MASTER_PROJECT	Template: Focused Build_Master Project	/SALM/COMPLETE
◆	TEMPLATE_SINGLE_PROJECT	Template: Focused Build_Single Project	/SALM/SINGLE

Figure 66 – Available Projects Templates for Focused Build

1. From Solution Manager Launchpad select group 'Focused Build - Project Manager' and then tile 'My Project – Project Management'

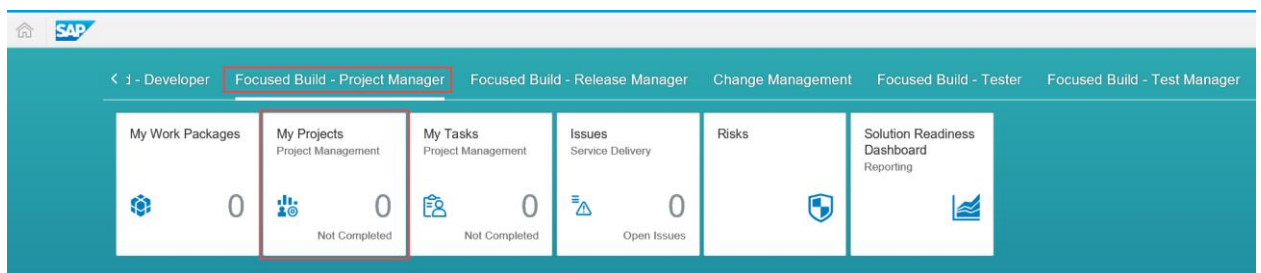


Figure 67 – Open Project Management in Launchpad

2. In the Project Management dashboard select 'Create' and enter target project number, select Template Type 'Project Template' as well as Project Type, select related template project as source project and then select 'Create'.

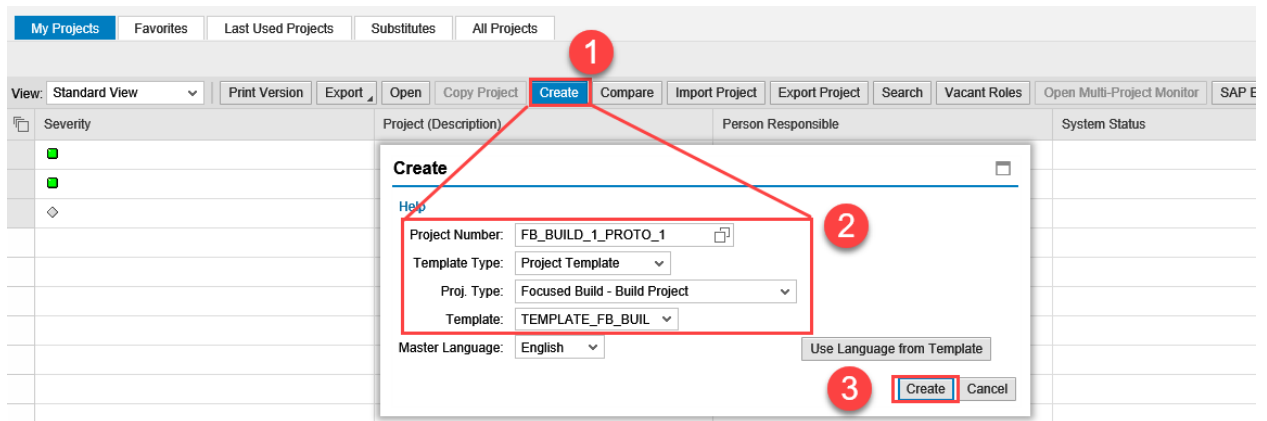


Figure 68 – Create Projects

3. Adjust Project Name and save

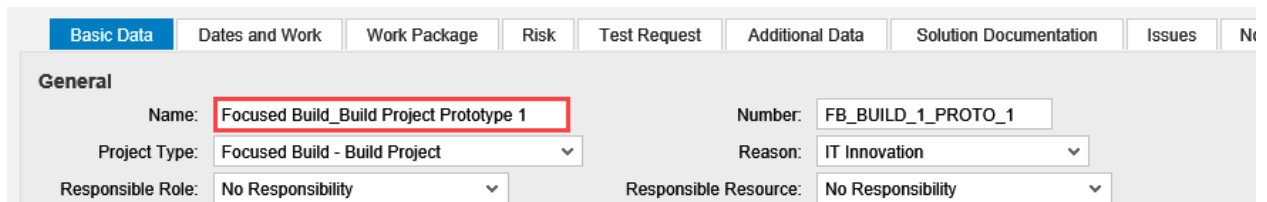


Figure 69 - Adjust Project Name

4. Repeat step 2 and 3 for all projects required for the prototype

## 3.5.2 Assign Release to Projects

1. Assign Actual Release to Build Projects and Master Project

The screenshot shows the SAP S/4HANA Project Management interface. The left sidebar displays the project structure for 'S/4HANA Innovation Project' with phases: Discover & Prepare, Explore, Realize, Deploy, and Run. The main area is the 'General' tab, which contains fields for project details. The 'Actual Release' section is highlighted with a red box, showing the following data:

Actual Release	
Release Component:	S/4HANA_FB_Release
Release Number:	1.0.0
Release Status:	ACTIVE

Figure 70 – Assign Actual Release

2. Check if the Solution that was assigned to the Release has been assigned to Project accordingly:

The screenshot shows the SAP S/4HANA Project Management interface for the 'FB\_BUILD\_1\_PROTO\_1' project. The left sidebar shows the project structure with phases: Prepare, Scope, and Build. The main area is the 'Solution' tab, which displays a table of solutions assigned to the project. The table is highlighted with a red box, showing the following data:

Solution	Branch	Landscapes	Change Cycle	Go-Live Date
Focused Build Prototype	Development	FB_PROTOTYPE_SUB_1	FB_PROTOTYPE_SUB_1 Release 1.0	30.04.2017

Figure 71 – Assignment of Solution

### 3.5.3 Assign sub projects to master project

1. Assign both Build projects to the Master project while using 2 sub tasks of type 'Common Task Type for FB Projects' for
  - Build Project 1
  - Build Project 2

For each Task select it in Structure and assign Sub Project in Basic Data tab and assign Sub Project

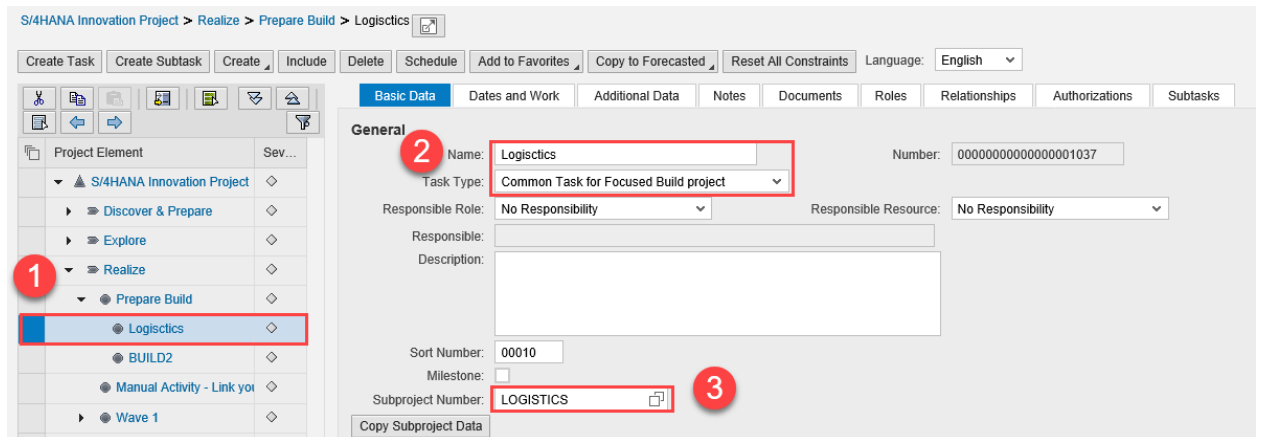


Figure 72 – Assign Sub Projects

### 3.5.4 Maintain project data (optional)

The Template Build Projects are shipped with 2 Waves and 3 Sprints which should be fine for a prototype. If you would like to have additional Waves, please follow the following optional procedure

1. In both Build Projects copy the existing Wave so you get 4 Waves with 3 sprints each. To copy a wave, select an existing wave and select 'Copy'

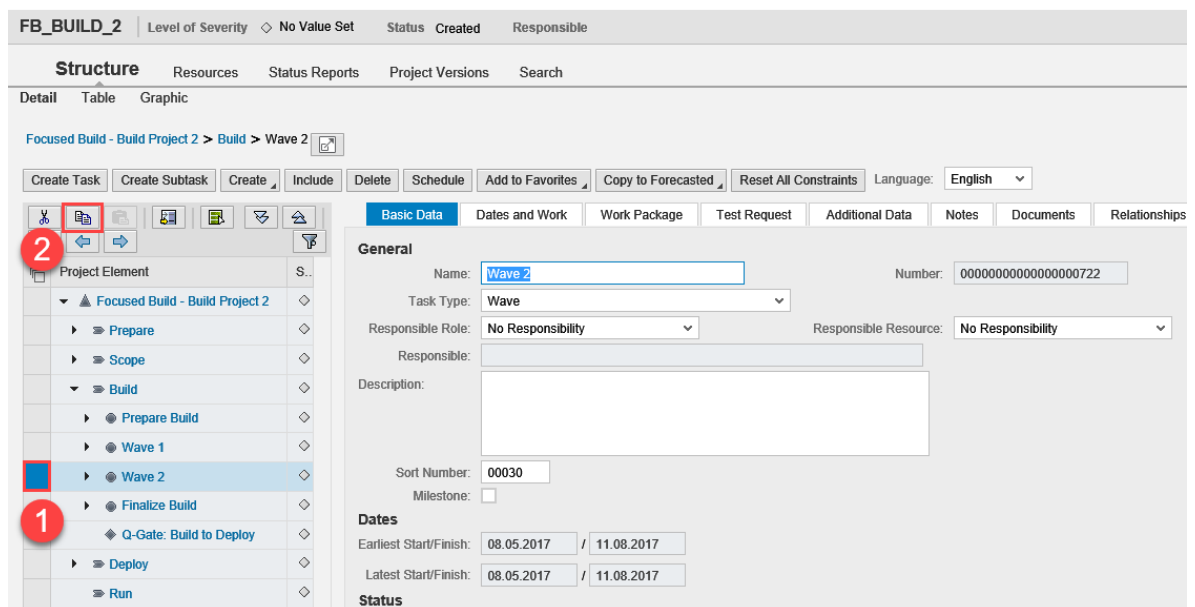


Figure 73 – Copy Wave

2. Select Phase Build and click on 'Insert'





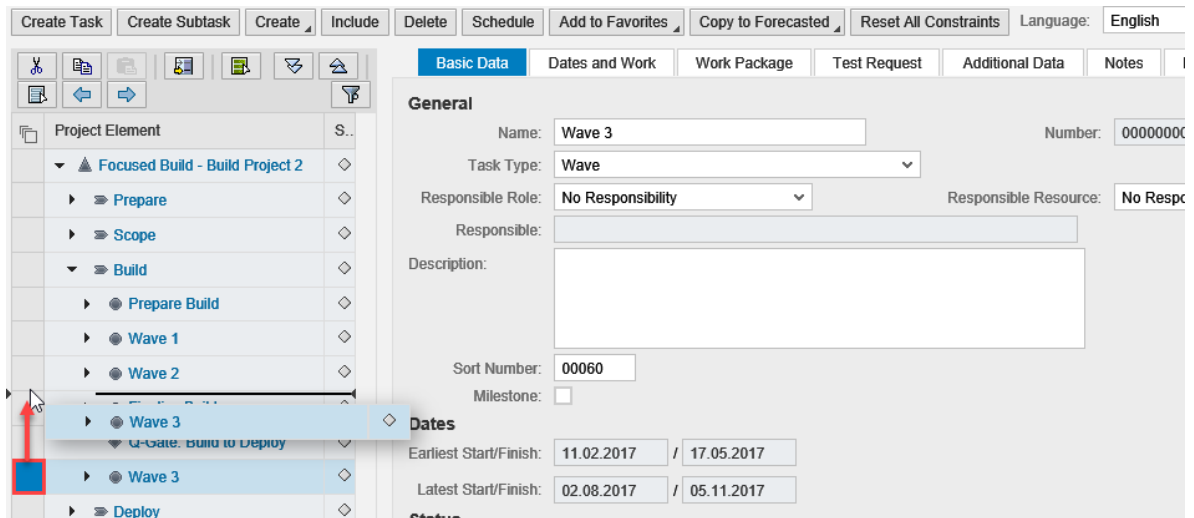


Figure 76 – Move Waves

5. Repeat step 1-4 until you have 4 waves per build project
6. To rename the underlying tasks like sprints select 'Table' view and edit the entries.

FB\_BUILD\_2 | Level of Severity | No Value Set | Status | Created | Responsible

**Structure** | Resources | Status Reports | Project Versions | Search

Detail | **Table** | Graphic

Focused Build - Build Project 2 > Build > Wave 3 > Wave 2: Scope

Create Task | Create Subtask | Create | Include | Delete | Schedule | Add to Favorites | Copy to Forecasted | Reset All Constraints | Language: English

Export Table | List Display

Project Element	Se...	Status	C... Path	Name	Change Status	Responsible Role	Responsible Resource	Respon
▲ Focused Build - Build Project 2	◇	Created		Focused Build - Build Project 2		Project Manager		
▶ Prepare	◇	Created		Prepare		No Responsibility	No Responsibility	
▶ Scope	◇	Created		Scope		No Responsibility	No Responsibility	
▶ Build	◇	Created		Build		No Responsibility	No Responsibility	
▶ Prepare Build	◇	Created		Prepare Build		No Responsibility	No Responsibility	
▶ Wave 1	◇	Created		Wave 1		No Responsibility	No Responsibility	
▶ Wave 2	◇	Created		Wave 2		No Responsibility	No Responsibility	
▶ Wave 3	◇	Created		Wave 3		No Responsibility	No Responsibility	
▶ Wave 2: Scope	◇	Created		Wave 3: Scope		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 1	◇	Created		Wave 2: Sprint 1		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 2	◇	Created		Wave 2: Sprint 2		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 3	◇	Created		Wave 2: Sprint 3		No Responsibility	No Responsibility	
▶ Wave 2: Testing	◇	Created		Wave 2: Testing		No Responsibility	No Responsibility	
▶ Wave 2: Finalize...	◇	Created		Wave 2: Finalize Wave		No Responsibility	No Responsibility	
▶ Wave 2: Q-Gate...	◇	Created		Wave 2: Q-Gate exit criteria fulfillment		No Responsibility	No Responsibility	
▶ Wave 4	◇	Created		Wave 4		No Responsibility	No Responsibility	
▶ Wave 2: Scope	◇	Created		Wave 2: Scope		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 1	◇	Created		Wave 2: Sprint 1		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 2	◇	Created		Wave 2: Sprint 2		No Responsibility	No Responsibility	
▶ Wave 2: Sprint 3	◇	Created		Wave 2: Sprint 3		No Responsibility	No Responsibility	

Figure 77 – Rename Tasks in Table view

### 3.5.5 Define Wave Relationships between Master and Build Projects

1. In Master Project select Project node in Structure → Wave Relationship → Wave in Header area and then add Waves from Sub Projects to the related wave in Master Project

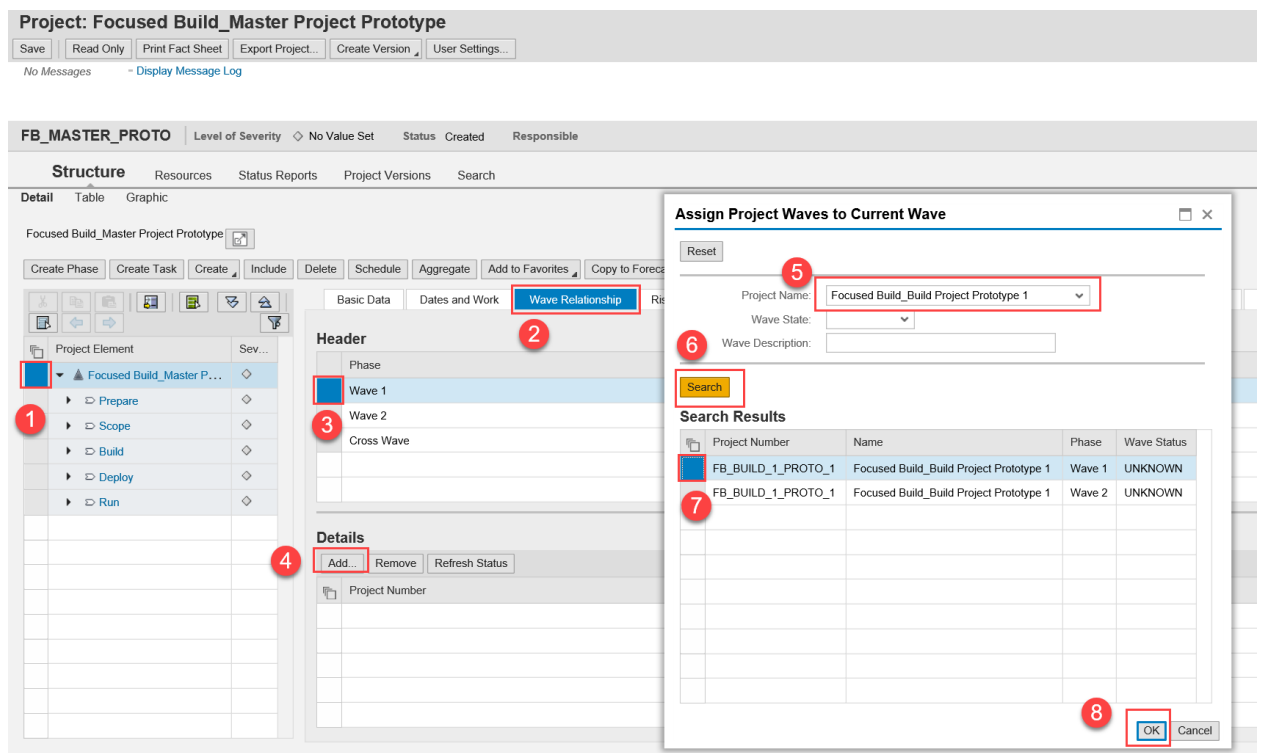


Figure 78 – Wave Relationships

2. Define further relationships according to this table

Master Project	Sub Project
Wave 1	BUILD 1 - Wave 1
	BUILD 2 - Wave 1
Wave 2	BUILD 1 - Wave 2
	BUILD 2 - Wave 2
Cross Wave	All Waves from all sub projects

3. Check Start / End dates and duration of related waves between master and sub projects and adjust if needed

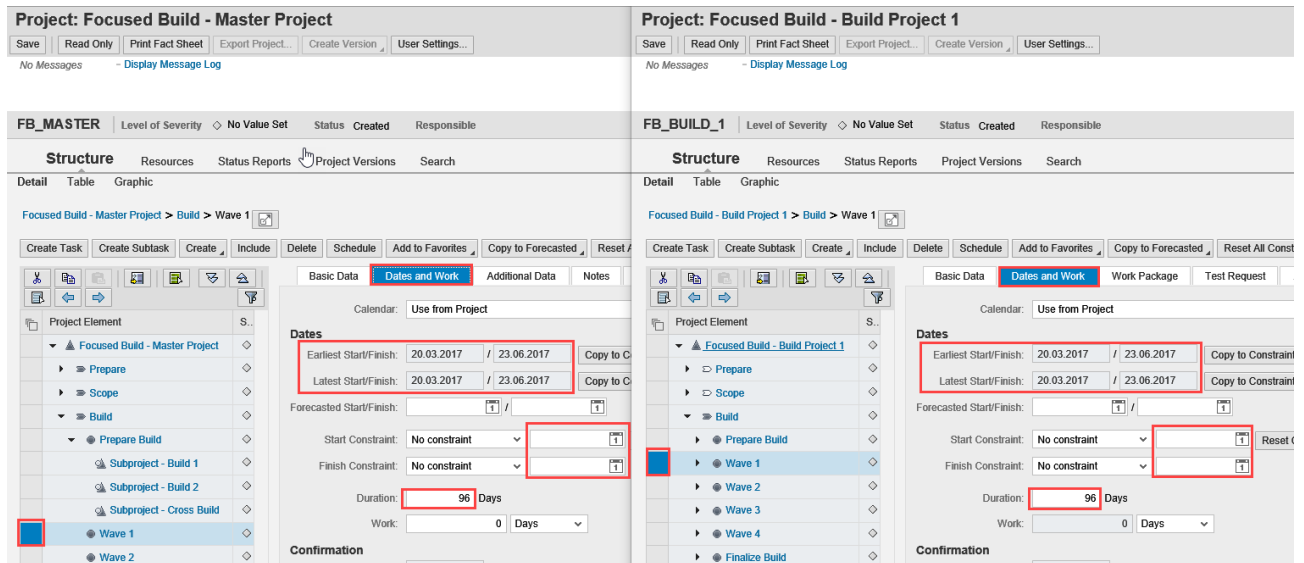


Figure 79 – Wave Relationships and time line

### 3.5.6 Link Q-Gates of Master and Build Projects

1. To Link Q-Gates from Build Projects to Master Project select the relevant Milestone **Task** in Master Project → Create → - Same Level – Mirrored Task

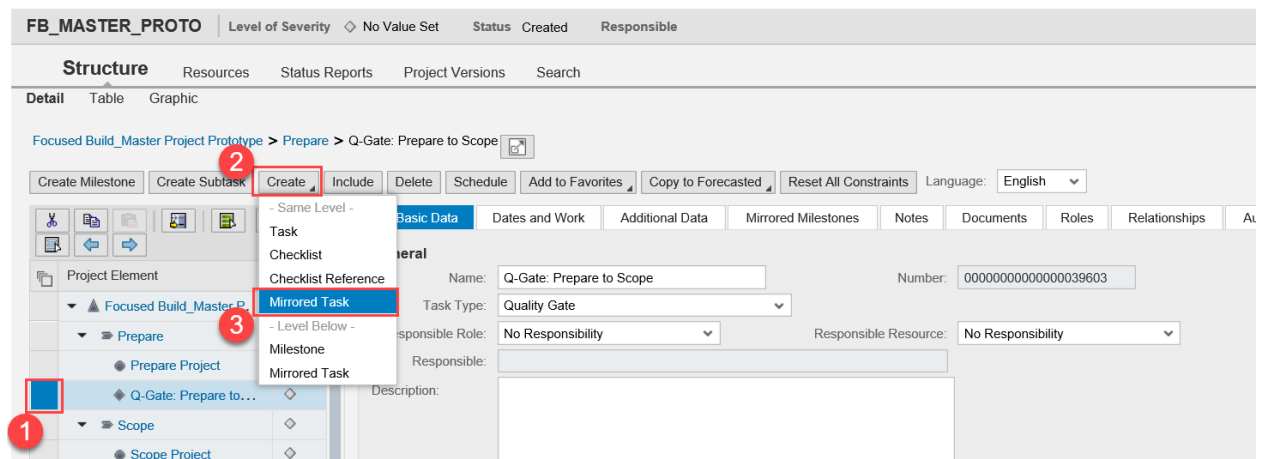


Figure 80 – Create Mirrored Tasks

2. Select 'Assign Original Task by Project', enter Project ID and then select 'Find Task'

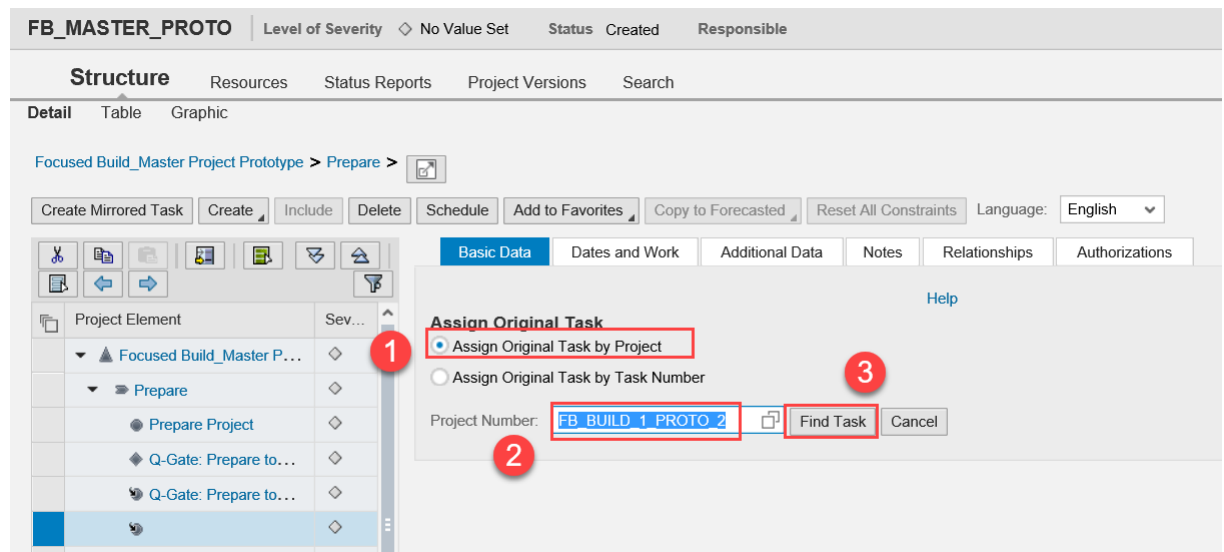


Figure 81 – Assign Original Tasks to Mirrored Task

3. Drilldown and select corresponding Q-Gate from Build Project and select OK

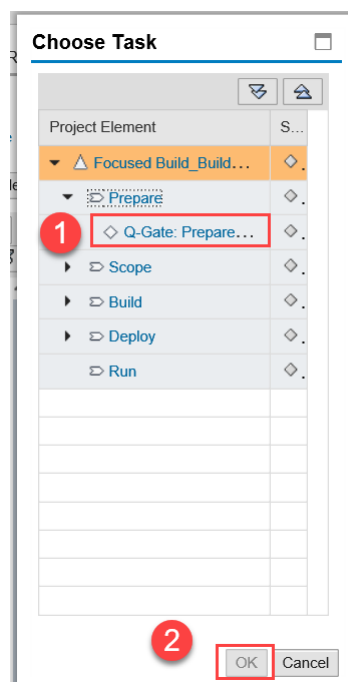


Figure 82 – Select Original Tasks

4. Adjust Name of Mirrored Task and Save

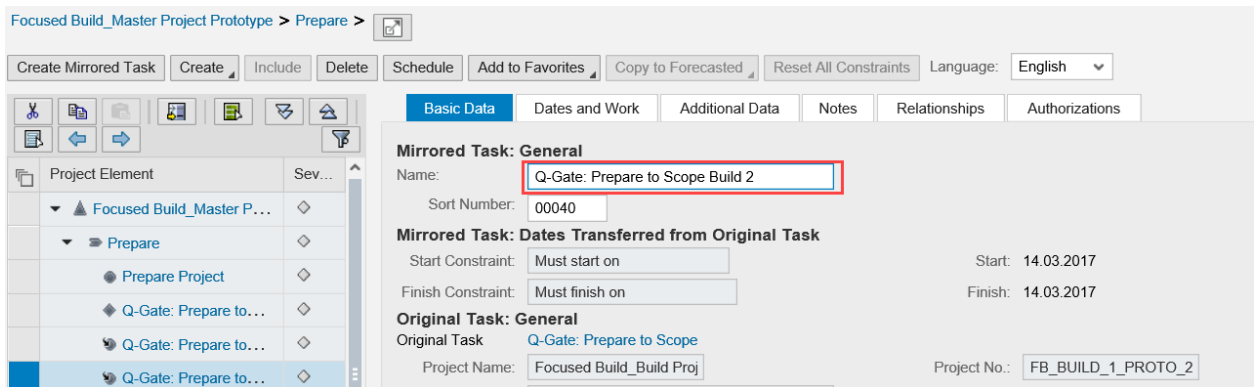


Figure 83 – Adjust name of Mirrored Task

- Repeat step 1-4 for all Q-Gates from Sub Projects that should be visible to Master Project

### 3.5.7 Maintain Project Milestones

If the Solution Readiness Dashboard should provide meaningful data regarding overdue, the related dates for the milestones should be maintained.

#### Single update of milestone

- This can be done for each milestone separately while navigating in the structure to the related milestone

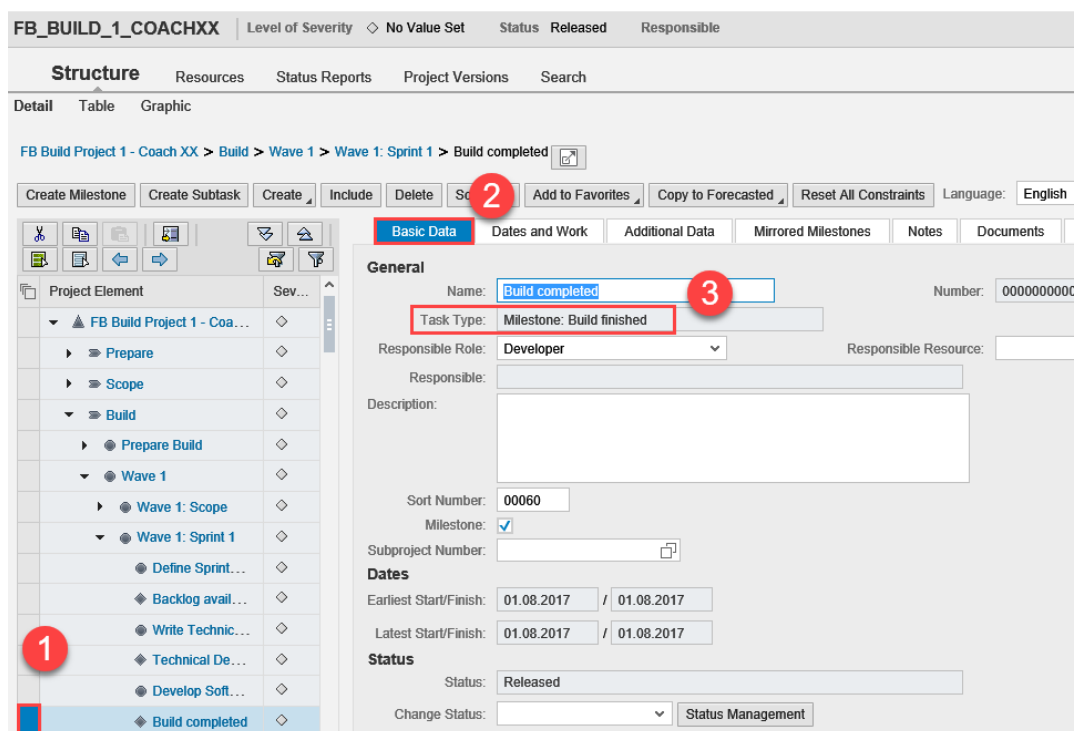


Figure 84 - Maintain Milestones (1)

2. Then selecting the 'Dates and Work' tab and enter the date in 'Finish Constraint'. Constrain type (e.g. Must finish on' is set automatically after pressing Enter or Save.

FB\_BUILD\_1\_COACHXX | Level of Severity ◇ No Value Set | Status Released | Responsible

**Structure** | Resources | Status Reports | Project Versions | Search

Detail | **Table** | Graphic

FB Build Project 1 - Coach XX > Build > Wave 1 > Wave 1: Sprint 1 > Build completed

Create Milestone | Create Subtask | Create | Include | Delete | Schedule | Add to Favorites | Copy to Forecasted | Reset All Constraints | Language:

Basic Data | **Dates and Work** | Additional Data | Mirrored Milestones | Notes | Document

Calendar: Use from Project

**Dates**

Earliest Start/Finish: 01.08.2017 / 01.08.2017 | Copy to Constraints | Copy to Forecasted

Latest Start/Finish: 01.08.2017 / 01.08.2017 | Copy to Constraints | Copy to Forecasted

Forecasted Start/Finish: [ ] / [ ]

Start Constraint: No constraint | [ ] | Reset Constraints

Finish Constraint: Must finish on | 01.08.2017 | [ ]

Duration: 1 Days

Work: 0 Days

**Confirmation**

Actual Start: [ ] | Percent Com

Actual Finish: [ ]

Figure 85 - Maintain Milestones (2)

### Mass update of milestones

1. To update multiple milestones in a table view select view 'Table' and then the 'List Display' button

FB\_BUILD\_1\_COACHXX | Level of Severity ◇ No Value Set | Status Released | Responsible

**Structure** | Resources | Status Reports | Project Versions | Search

Detail | **Table** | Graphic

FB Build Project 1 - Coach XX > Build > Wave 1 > Wave 1: Sprint 1 > Build completed

Create Milestone | Create Subtask | Create | Include | Delete | Schedule | Add to Favorites | Copy to Forecasted

Export Table | List Display

Figure 86 - Maintain Milestones (3)

2. As the table contains many columns we need to create a view to simplify the maintenance via 'Settings' button

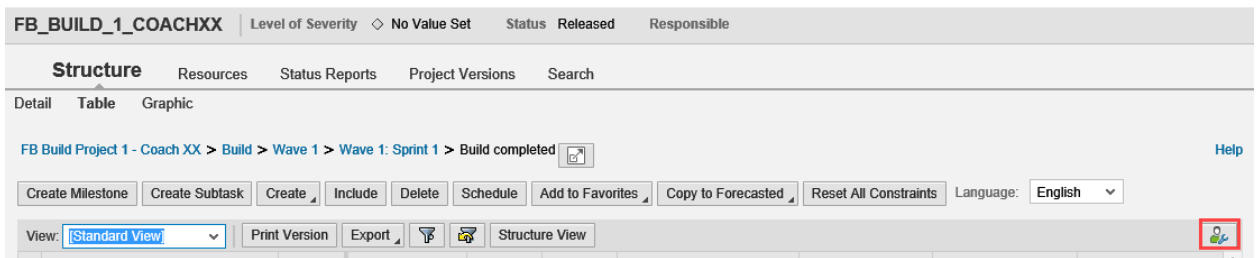


Figure 87 - Maintain Milestones (4)

3. Select view 'Milestone Due Date Maintenance'

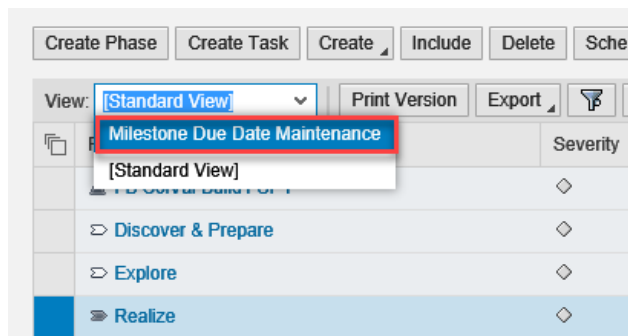


Figure 88 - Maintain Milestones (5)


4. Now you see just the relevant columns to be able to enter / adjust the milestone dates


Project Element	Severity	Superior Element	Type Short Text	Status	Name	Finish
▲ FB SolVal Build1 SP1	◇		Focused Build - Build Project	Created	FB SolVal Build1 SP1	31.01.2018
▷ Discover & Prepare	◇	FB SolVal Build1 SP1	Common Phase for Focused Build Projects	Created	Discover & Prepare	31.05.2017
▷ Explore	◇	FB SolVal Build1 SP1	Common Phase for Focused Build Projects	Created	Explore	30.06.2017
► Realize	◇	FB SolVal Build1 SP1	Sprint Planning	Created	Realize	31.12.2017
● Wave 1	◇	Realize	Wave	Created	Wave 1	30.09.2017
● Wave 1: Scope & Build	◇	Wave 1	Scope Definition	Created	Wave 1: Scope & Build	31.07.2017
● Wave 1: Define Wave scope	◇	Wave 1: Scope & Build	Summary Task for Work Packages	Created	Wave 1: Define Wave scope	21.07.2017
◆ Requirement reviewed	◇	Wave 1: Scope & Build	Milestone: Requirement reviewed	Created	Requirement reviewed	15.07.2017
◆ Functional Specification available	◇	Wave 1: Scope & Build	Milestone: Functional Spec. completed	Created	Functional Specification available	25.07.2017
◆ Scope defined	◇	Wave 1: Scope & Build	Milestone: Wave Scoping completed	Created	Scope defined	28.07.2017
● Wave 1: Sprint 1	◇	Wave 1: Scope & Build	Sprint Execution	Created	Wave 1: Sprint 1	10.08.2017
● Wave 1: Sprint Backlog	◇	Wave 1: Sprint 1	Summary Task for Work Items	Created	Define Sprint Backlog	02.08.2017
◆ Technical Design available	◇	Wave 1: Sprint 1	Milestone: Technical Design completed	Created	Technical Design available	09.08.2017
◆ Workitem Build started	◇	Wave 1: Sprint 1	Milestone: WI Build started	Created	Workitem Build started	
● Build Task	◇	Wave 1: Sprint 1	Common Task for Focused Build project	Created	Build Task	
◆ Workitem Build completed	◇	Wave 1: Sprint 1	Milestone: WI Build completed	Created	Workitem Build completed	08.08.2017
◆ Unit Test completed	◇	Wave 1: Sprint 1	Milestone: Unit Test completed	Created	Unit Test completed	10.08.2017
● Wave 1: Sprint 2	◇	Wave 1: Scope & Build	Sprint Execution	Created	Wave 1: Sprint 2	20.08.2017
● Define Sprint Backlog	◇	Wave 1: Sprint 2	Summary Task for Work Items	Created	Define Sprint Backlog	
◆ Technical Design available	◇	Wave 1: Sprint 2	Milestone: Technical Design completed	Created	Technical Design available	

Figure 89 - Maintain Milestones (6)

5. To make it even more simple you can select a filter for the table that you only see milestones




View: Milestone Due Date ▾ | Print Version | Export ▾ |  | Structure View

 Project Element | Severity | Superior Element

## Set Filter

### Filter Conditions

Filter:  ▾  **1**

**General** **2** **Focused Build Milestone Filter**

☒ Projects ☒ Phases ☒ Tasks ☒ Checklists ☒ Checklist Items

Figure 90 - Maintain Milestones (7)

Project Element	Severity	Superior Element	Type Short Text	Status	Name	Finish
◆ Requirement reviewed	◇	Wave 1: Scope & Build	Milestone: Requirement reviewed	Created	Requirement reviewed	15.07.2017
◆ Functional Specification available	◇	Wave 1: Scope & Build	Milestone: Functional Spec. completed	Created	Functional Specification available	25.07.2017
◆ Scope defined	◇	Wave 1: Scope & Build	Milestone: Wave Scoping completed	Created	Scope defined	28.07.2017
◆ Technical Design available	◇	Wave 1: Sprint 1	Milestone: Technical Design completed	Created	Technical Design available	09.08.2017
◆ Workitem Build completed	◇	Wave 1: Sprint 1	Milestone: WI Build completed	Created	Workitem Build completed	08.08.2017
◆ Unit Test completed	◇	Wave 1: Sprint 1	Milestone: Unit Test completed	Created	Unit Test completed	10.08.2017
◆ Technical Design available	◇	Wave 1: Sprint 2	Milestone: Technical Design completed	Created	Technical Design available	
◆ Workitem Build completed	◇	Wave 1: Sprint 2	Milestone: WI Build completed	Created	Workitem Build completed	
◆ Unit Test completed	◇	Wave 1: Sprint 2	Milestone: Unit Test completed	Created	Unit Test completed	
◆ Technical Design available	◇	Wave 1: Sprint 3	Milestone: Technical Design completed	Created	Technical Design available	
◆ Workitem Build completed	◇	Wave 1: Sprint 3	Milestone: WI Build completed	Created	Workitem Build completed	
◆ Unit Test completed	◇	Wave 1: Sprint 3	Milestone: Unit Test completed	Created	Unit Test completed	
◆ Requirement build finished	◇	Wave 1: Scope & Build	Milestone: WP build completed	Created	Requirement build finished	
◆ Single Functional Test finished	◇	Wave 1: Scope & Build	Milestone: Single Func. Test completed	Created	Single Functional Test finished	
◆ Requirement reviewed	◇	Wave 2: Scope & Build	Milestone: Requirement reviewed	Created	Requirement reviewed	
◆ Functional Specification available	◇	Wave 2: Scope & Build	Milestone: Functional Spec. completed	Created	Functional Specification available	

Figure 91 - Maintain Milestones (8)

## 3.5.8 Release Q-Gate(s)

To get the date for the next Q-Gate visible in the Solution Readiness Dashboard you need to change the status of that Q-Gate to 'Released'.

**Structure** Resources Status Reports Project Versions Search

Detail Table Graphic

FB SolVal Build1 SP1 > Realize > Q-Gate: Realize to Deploy

Create Milestone Create Subtask Create Include Delete Schedule Add to Favorites Copy to Forecasted Reset All Constraints Language: English

Basic Data Dates and Work Additional Data Mirrored Milestones Notes Documents Roles

**General**

Name: Q-Gate: Realize to Deploy Number: 00000000000000022

Task Type: Quality Gate

Responsible Role: No Responsibility Responsible Resource: No Responsibility

Responsible:

Description:

Sort Number: 00030

Milestone: ☒

Subproject Number:

**Dates**

Earliest Start/Finish: 01.07.2017 / 01.07.2017

Latest Start/Finish: 31.12.2017 / 31.12.2017

**Status**

Status: Created

Change Status:

### 3.5.9 Assign dedicated Release Numbers to Waves (optional)

This chapter is only relevant if you have several waves per project and you would like to deploy to production after end of a wave instead of end of the project.

Standard approach without the need of Wave / Release Number mapping

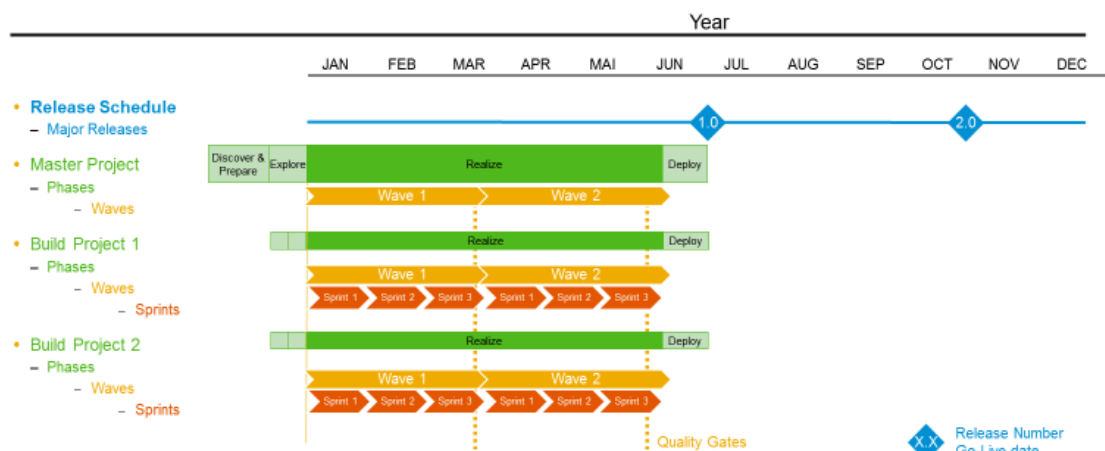


Figure 92 - Example: 2 Waves per Release Number and Project

Special Approach that requires Wave / Release Number mapping

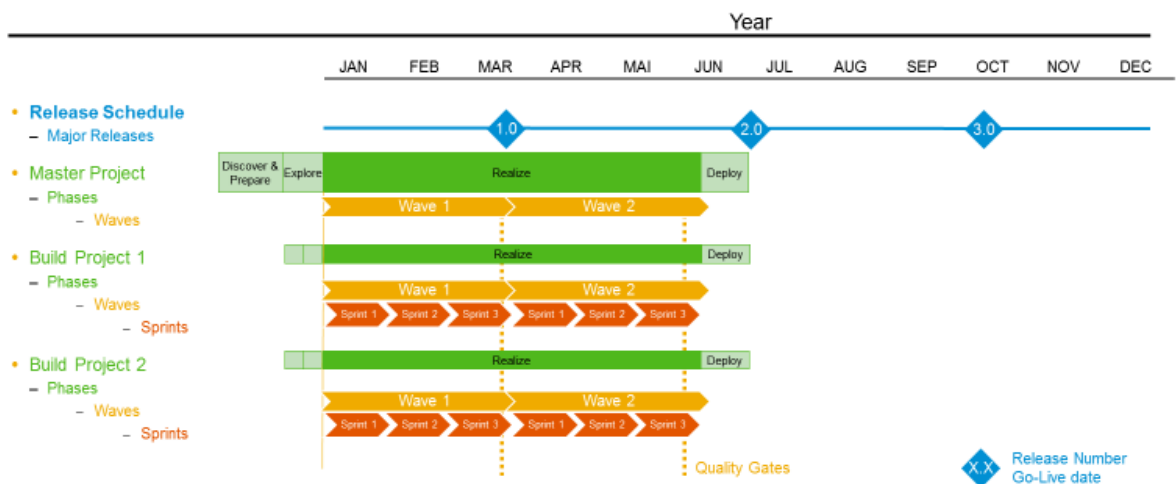


Figure 93 - Example: Project is planned with 2 Waves and 2 Releases

To define Wave / Release Number mapping for this special approach please execute following steps:

1. In the Build Project select the root Project Element in the Structure → 'Work Package' → Schedule

ID	Description	Process Type	Scope	Status	Priority Text	Work	Unit	%C
8000001115	FB Coach training Referenz	Work Package		To be Developed	2: High	0	Con. Day	
8000001128	FB coach trial 3	Work Package		To be Developed	2: High	0	Con. Day	
8000001136	Test 5	Work Package		To be Developed	2: High	0	Con. Day	
8000001120	Trial Run for Coach Training	Work Package		In Development	2: High	0	Con. Day	
8000001124	Trial Run 2	Work Package		In Development	2: High	0	Con. Day	
8000001140	Test 6	Work Package		To be Developed	2: High	0	Con. Day	

Figure 94 - Adjust Release assignment to wave (1)

2. Open search help of field Release Number for the relevant Wave and select corresponding Release Number entry in the list.

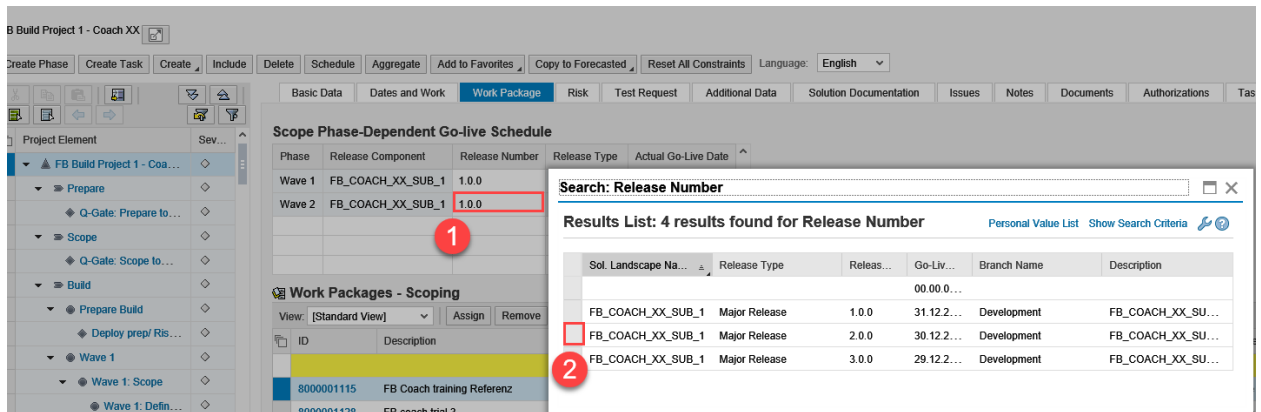


Figure 95 - Adjust Release assignment to wave (2)

### 3. New assignment of Release to Wave

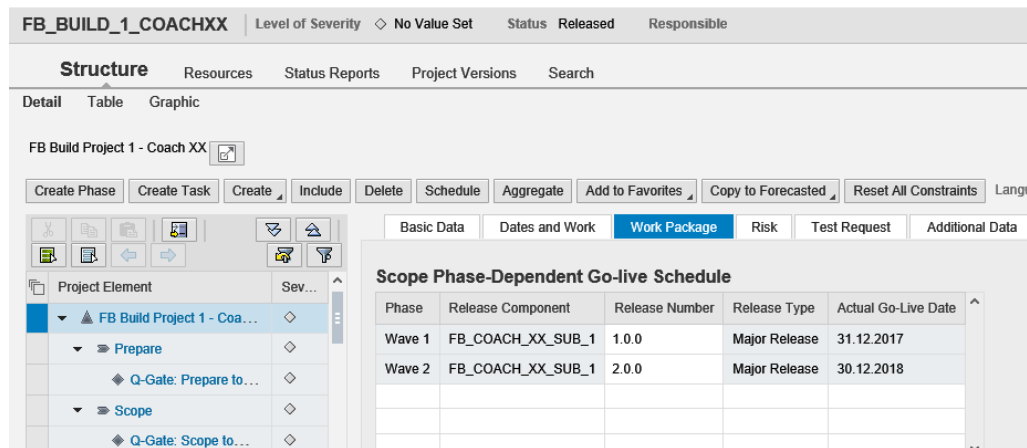


Figure 96 - Adjust Release assignment to wave (3)

## 3.5.10 Prepare first Wave and Sprint

To be able to start Wave or Sprint execution the related Wave and Sprint need to be released in the project structure. To do so please follow the describe procedure below:

1. Navigate to the related Wave / Sprint in the project structure

FB\_BUILD\_1 | Level of Severity OK: Manually Set | Status Released | Responsible Reiner Markheiser

**Structure** | Resources | Status Reports | Project Versions | Search

Detail | Table | Graphic

Focused Build - Build Project 1 > Build > Wave 1 > Wave 1: Sprint 1

Create Task | Create Subtask | Create | Include | Delete | Schedule | Add to Favorites | Copy to Forecasted | Reset All Constraints | Language:

Basic Data | Dates and Work | Additional Data | Notes | Documents | Relationships

**General**

Name: Wave 1: Sprint 1 | Number:

Task Type: Sprint Execution

Responsible Role: No Responsibility | Responsible Resource:

Responsible:

Description:

Sort Number: 00020 | Milestone:

Dates

- In the 'Details' view tab 'Basic Data' click on 'Change Status' and select 'Release' in the drop-down list

**Dates**

Earliest Start/Finish: 06.05.2017 / 28.05.2017

Latest Start/Finish: 17.05.2017 / 08.06.2017

**Status**

Status: Created

Change Status: | Status Management

Release

- Wave / Sprint is now released so Work Packages / Work Items can be handed over to development.

**Status**

Status: Released

Change Status: | Status Management

---

## 4 Configuration of Standalone Extensions

### 4.1 Activities Valid for all Standalone Extensions

#### 4.1.1 Activating the Piece List

Call transaction **scc1** in your working client and activate the piece list */SALM/CHARM\_EXT*, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **scc3**.

### 4.2 Configuration of Refresh Test System

The configuration for the Test System Refresh scenario consists of the following steps:

1. Adjust Task List
  - o Create a Task List Variant for a new customer,
  - o Copy Task List Variant **SAP0** to the new Task List Variant,
  - o Copy Header and Footer Tasks of Task List Variant **SAP0** to the new Task List Variant,
  - o Register the new Task *Refresh Test System*,
  - o Add the Task List Activity *Refresh Test System* to the newly created Task List Variant.
2. Adjust the Phase Controller Configuration accordingly.
  - o Assign new Task List Variant to Participant,
  - o Assign new Task List Variant to Phase Model.
3. Create a Change Cycle and assign the appropriate Landscape and Branch,
  - o Assign your new Task List Variant to your new Change Cycle and create a Task List.

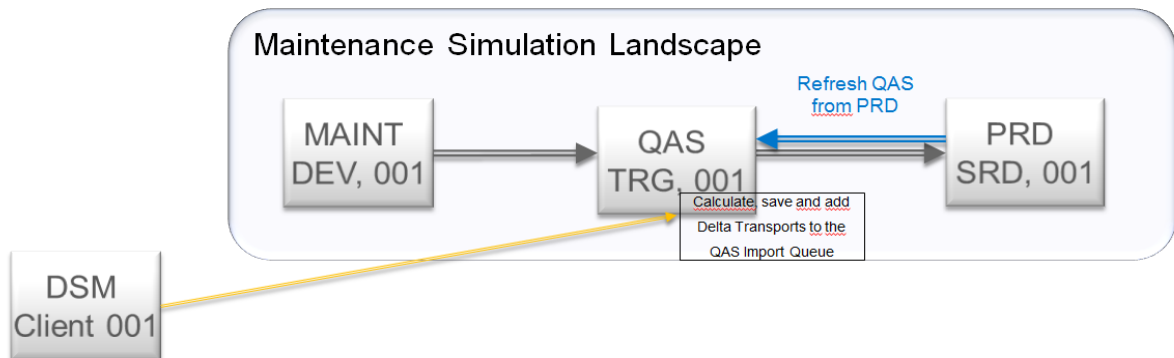
The detailed configuration steps, which are described in this Configuration Guide are based on an example Simulation Landscape for Focused Build *Refresh Test System*.

#### 4.2.1 Prerequisites for Refresh Test Systems

1. The *Task List only* scenario has been established,
2. Transports have been created for the Simulation Landscape via the *Task List only* scenario,
3. The Tracking functionality has been activated for the Simulation Landscape,
4. Grant the authorization object **S\_CTS\_ADMI** to the TMSADM user.

### 4.2.2 Simulation Landscape for Refresh Test System

The Simulation Landscape for Focused Build *Refresh Test System* looks as follows:



### 4.2.3 Activating the Piece List

Call transaction **sccc1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **sccc3**.

#### 4.2.4 Adjusting Task List

## Creating the Task List Variant

As first step a new Task List Variant should be created. In the customizing of SAP Solution Manager, choose [SAP Solution Manager](#) → [Capabilities \(Optional\)](#) → [Change Control Management](#) → [Schedule Manager](#) → [Create Customer-Specific Variant for Task Lists](#).

The new Task List Variant **<GPN1>** is a copy of the Task List Variant **SAP0**:

[illegible]

The new customizing has been saved to the following transport request:

## Copy Variant SAPO to Task List Variant <GPN1> for Project Type Continual Cycle

In the customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Capabilities (Optional)* → *Change Control Management* → *Schedule Manager* → *Define Additional Tasks for Task Lists*

Mark all entries with Task List Variant *SAPO* and Project Type *Continual Cycle*:

Change View "Tasks for Types of System Roles": Overview

Variant	Proj. Ty...	Role T...	Number	Description	Program Name	Variant	Flow Defn...	Transac...	Task Type	Mandat...	Exec. L...	Irrel...
SAPO	Maint...	D	2000	Create Transport Request	/TMWFLOW/SCMA_TRIGGER_CREATE				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	2100	Create Transport Request Task	/TMWFLOW/SCMA_TRIGGER_CREATE				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3000	Perform Connection					Note	Non-M...	Satel...	
SAPO	Maint...	D	3100	Implement SAP Note	/TMWFLOW/SCMA_NOTE_APPLY				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3200	Import Support Package	/TMWFLOW/SCMA_SFPA_CALL				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3900	Create Transport of Copies	/TMWFLOW/SCMA_TRIGGER_FRETRANS				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3925	Decouple Transport Request	/TMWFLOW/SCMA_TRIGGER_DECOUPLE				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3935	Assign Transport Request	/TMWFLOW/SCMA_TRIGGER_ASSIGN				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	3950	Delete Empty Transport Requests	/TMWFLOW/SCMA_TRIGGER_CLEAR	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	4000	Release Transport Request	/TMWFLOW/SCMA_TRIGGER_RELEASE	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	4100	Release Transport Request for Cluster	/TMWFLOW/SCMA_CLUSTER_RELEASE	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	1000	System Logon	/TMWFLOW/SCMA_RSRLGON				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	1940	Import Transport Request for Cluster	/TMWFLOW/SCMA_CLUSTER_IMPORT	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	1950	Preliminary Import	/TMWFLOW/SCMA_PRELIMINARY_IMPORT	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	2010	Schedule Import Job for Transport Reque...	/TMWFLOW/SCMA_TRIGGER_IMPORT	DSMK901			Job	Non-M...	Satel...	
SAPO	Maint...	D	2020	Import into Sandbox	/TMWFLOW/SCMA_TRIGGER_IMPORT_E				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	2100	Display TMS Alert Monitor	/TMWFLOW/SCMA_TMS_ALERT_MONI				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	2200	Display TMS Import Monitor	/TMWFLOW/SCMA_TMS_IMPORT_MONI				Transactio...	Non-M...	Satel...	
SAPO	Maint...	D	2300	Display TMS Import History	/TMWFLOW/SCMA_TMS_IMPORT_HIST				Transactio...	Non-M...	Satel...	

Then press the button *Copy*:

Change View "Tasks for Types of System Roles": Details of Selected Set

Variant of the Task: **GPN1**

Project Type: Maintenance Cycle

Type of Role: D

Number: 1000

Tasks for Types of System Roles

Description: System Logon

Program Name: /TMWFLOW/SCMA\_RSRLGON

Variant:

Flow Definition:

Transaction:

Task Type: Transaction/Online Program

Mandatory: Non-Mandatory Task

Exec. Location: Satellite System

☐ Non-ABAP Irrelevant

Proj. Type Relevance: QGM and Change Request Management

☐ Cluster Track

Perform this step for each selected task of the SAP Task List Variant *SAPO* with Project Type *Continual Cycle* and replace it with the new Task List Variant **<GPN1>**.

As result all tasks of Task List Variant *SAPO* are copied to the new Task List **<GPN1>**:



Change View "Tasks for Types of System Roles": Overview

New Entries

Variant	Proj. Ty...	Role T...	Number	Description	Program Name	Variant	Flow Defn...	Transa...	Task Type	Mandat...	Exec. L...	Irrele...
GPN1	Maint.	D	1000	System Logon	/TMSFLOW/SCM_GSRLOGIN				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	2000	Create Transport Request	/TMSFLOW/SCM_TROORDER_CREATE				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	2100	Create Transport Request Task	/TMSFLOW/SCM_TRTASKS_CREATE				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3000	Perform Correction					Note	Non-M...	Satel.	
GPN1	Maint.	D	3100	Implement SAP Note	/TMSFLOW/SCM_SNOTE_APPLY				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3200	Import Support Package	/TMSFLOW/SCM_SPM_CALL				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3900	Create Transport of Copies	/TMSFLOW/SCM_TROORDER_PRETRANS				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3925	Decouple Transport Request	/TMSFLOW/SCM_TROORDER_DECOUPLE				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3935	Assign Transport Request	/TMSFLOW/SCM_TROORDER_ASSIGN				Transactio...	Non-M...	Satel.	
GPN1	Maint.	D	3950	Delete Empty Transport Requests	/TMSFLOW/SCM_TROORDER_CLEAR	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	D	4000	Release Transport Request	/TMSFLOW/SCM_TROORDER_RELEASE	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	D	4100	Release Transport Request for Cluster	/TMSFLOW/SCM_CLUSTER_RELEASE	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	O	1000	System Logon	/TMSFLOW/SCM_GSRLOGIN				Transactio...	Non-M...	Satel.	
GPN1	Maint.	O	1940	Import Transport Request for Cluster	/TMSFLOW/SCM_CLUSTER_IMPORT	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	O	1950	Preliminary Import	/TMSFLOW/SCM_PRELIMINARY_IMPORT	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	O	2010	Schedule Import Job for Transport Reque...	/TMSFLOW/SCM_TROORDER_IMPORT	DUMMY			Job	Non-M...	Satel.	
GPN1	Maint.	O	2020	Import into Sandbox	/TMSFLOW/SCM_TROORDER_IMPORT_H				Transactio...	Non-M...	Satel.	
GPN1	Maint.	O	2100	Display TMS Alert Monitor	/TMSFLOW/SCM_TMS_ALERT_MONI				Transactio...	Non-M...	Satel.	
GPN1	Maint.	O	2200	Display TMS Import Monitor	/TMSFLOW/SCM_TMS_IMPORT_MONI				Transactio...	Non-M...	Satel.	

## Copy Variant SAPO to Task List Variant <GPN1> for Project Type Urgent Changes

If you are using *Urgent Change*, the referring tasks in Task List Variant *SAPO* must be copied to the new Task List <GPN1> as well.

Click on the IMG node *Define Additional Tasks for Task Lists* and mark all entries with Task List Variant *SAPO* and Project Type *Urgent Change*.

Then press the button *Copy*.

Perform this step for each selected task of SAP Task List Variant *SAPO* with Project Type *Urgent Change* and replace it with the new Task List Variant <GPN1>.

As result all *Urgent Change* related tasks of Task List Variant *SAPO* are copied to the new Task List Variant <GPN1>.

## Copy Variant SAPO to Task List Variant <GPN1> for Project Type Phase Cycle

If you are using *Phase Cycle*, the referring tasks in Task List Variant *SAPO* must be copied to the new Task List <GPN1> as well.

Click on the IMG node *Define Additional Tasks for Task Lists* and mark all entries with Task List Variant *SAPO* and Project Type *Phase Cycle*.

Then press the button *Copy*.

Perform this step for each selected task of SAP Task List Variant *SAPO* with Project Type *Phase Cycle* and replace it with the new Task List Variant <GPN1>.

As result all *Phase Cycle* related tasks of Task List Variant *SAPO* are copied to the new Task List Variant <GPN1>.

## Copy Variant SAPO to Task List Variant <GPN1> for Project Type Release Cycle

If you are using *Release Cycle*, the referring tasks in Task List Variant *SAPO* must be copied to the new Task List <GPN1> as well.

Click on the IMG node *Define Additional Tasks for Task Lists* and mark all entries with Task List Variant *SAPO* and Project Type *Release Cycle*.

Then press the button *Copy*.

Perform this step for each selected task of SAP Task List Variant *SAPO* with Project Type *Release Cycle* and replace it with the new Task List Variant <GPN1>.

As result all *Release Cycle* related tasks of Task List Variant *SAPO* are copied to the new Task List Variant <GPN1>.

## Copy Variant SAP0 to Task List Variant <GPN1> for Header and Footer Tasks

Launch transaction **SPRO** and choose the following customizing of SAP Solution Manager: *SAP Solution Manager* → *Capabilities (Optional)* → *Change Control Management* → *Schedule Manager* → *Create Customer-Specific Header and Footer Tasks* Mark all entries with Task List Variant **SAP0** and Project Type **Continual Cycle**:

**Change View "General Tasks in Header or Footer of Task List": Overview**

New Entries

Variant	Proj. Type	Hdr/Footer	Number	Description	Program Name
SAP0	Phase Cycle	Task Plan He.	4300	Perform Transport Tasks in Several Systems	/TMNFWLW/SCMA_TROORDER_MULT_SYS
SAP0	Phase Cycle	Task Plan He.	5000	Process Critical Objects	/TMNFWLW/SCMA_CRIT_OBJ_APPR
SAP0	Phase Cycle	Task Plan He.	6000	Reassign Change	/TMNFWLW/SCMA_REASSIGN_CHANGE
SAP0	Phase Cycle	Task Plan He.	6500	Ignore Downgrade Protection Conflict	/TMNFWLW/SCMA_IGNORE_DOP_CONF
SAP0	Continual C.	Task Plan He.	1100	Open Test Plan Management	/TMNFWLW/SCMA_STWB_2
SAP0	Continual C.	Task Plan He.	1200	Open Cycle Transaction	/TMNFWLW/SCMA_SOCH_CRM_GO_TO_I
SAP0	Continual C.	Task Plan He.	2050	Correct Import (Repair Flag)	/TMNFWLW/SCMA_SET_REPAIR_FLAG
SAP0	Continual C.	Task Plan He.	2800	Lock/Release Transport Tracks incl. Role Types	/TMNFWLW/SCMA_UNLOCK_TRACK
SAP0	Continual C.	Task Plan He.	3000	Log On to System	/TMNFWLW/SCMA_RSLOGIN_HEADER
SAP0	Continual C.	Task Plan He.	4000	Display TMS Alert Monitor	/TMNFWLW/SCMA_TMS_ALERT_MONI_H
SAP0	Continual C.	Task Plan He.	4100	Display TMS Import Monitor	/TMNFWLW/SCMA_TMS_IMP_MONI_H
SAP0	Continual C.	Task Plan He.	4200	Display TMS Import History	/TMNFWLW/SCMA_TMS_IMP_HIST_H
SAP0	Continual C.	Task Plan He.	4300	Perform Transport Tasks in Several Systems	/TMNFWLW/SCMA_TROORDER_MULT_SYS
SAP0	Continual C.	Task Plan He.	5000	Process Critical Objects	/TMNFWLW/SCMA_CRIT_OBJ_APPR
SAP0	Continual C.	Task Plan He.	6000	Reassign Change	/TMNFWLW/SCMA_REASSIGN_CHANGE
SAP0	Continual C.	Task Plan He.	6500	Ignore Downgrade Protection Conflict	/TMNFWLW/SCMA_IGNORE_DOP_CONF

Then press the button **Copy**:

**Change View "General Tasks in Header or Footer of Task List": Details**

Variant of the Task: **SAP0**

Project Type: **Continual Cycle**

Header/Footer: **Task Plan Header**

Number: **1100**

General Tasks in Header or Footer of Task List

Description: **Open Test Plan Management**

Program Name: **/TMNFWLW/SCMA\_STWB\_2**

Variant:

Flow Definition:

Transaction:

Task Type: **Transaction/Online Program**

Mandatory: **Non-Mandatory Task**

Exec. Location: **Central System with Solution Manager**

Proj. Type Relevance: **Change Request Management Only**

☐ Cluster Track

☐ Restrict Task Exec.

Perform this step for each selected Header and Footer Task of SAP Task List Variant **SAP0** with Project Type **Continual Cycle** and replace it with the new Task List Variant **<GPN1>**.

As a result all header and footer Tasks of the Task List Variant **SAP0** are copied to the new Task List **<GPN1>**:

Change View "General Tasks in Header or Footer of Task List": Overview

New Entries

Variant	Prgr. T...	Hdr/Footer	Description	Program Name	Variant	Flow Definiton	Transac...	Task Type	Mand...
GP01	Main	Task Plan Fo	Overview of All Change Procedures in	/ZIMFLOM/SCM_COMPLETE_CYCLE				Transaction/Online Program	Non-M
GP01	Main	Task Plan Fo	Check for Completion of Maintenance	/ZIMFLOM/SCM_MAINTCYCLE_CHECK_DOWN				Job	Non-M
GP01	Main	Task Plan Fo	Complete CTS Projects	/ZIMFLOM/SCM_CTS_RELEASE				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Project Administration in Solution Mana	/ZIMFLOM/SCM_SOLAR_PROJECT_AD				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Configuration in Solution Manager	/ZIMFLOM/SCM_SOLAR02				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Test Plan Management in Solution Man	/ZIMFLOM/SCM_STWB_2				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Change Transaction in Service Desk	/ZIMFLOM/SCM_SCM_CRM_GO_TO_I				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Correct Import (Repair Flag)	/ZIMFLOM/SCM_SET_REPAIR_FLAG				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Assign a Project Project to the Mainta	/ZIMFLOM/SCM_CPROJECTS_ASSIGN				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Access Project Project for the Mainta	/ZIMFLOM/SCM_CPROJECTS_CALL				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Remove Project Project from Mainta	/ZIMFLOM/SCM_CPROJECTS_SUSPEND				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Lock/Release Transport Tracks incl. Rol	/ZIMFLOM/SCM_UNLOCK_TRACK				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	System Logon	/ZIMFLOM/SCM_BSLLOGIN_HEADER				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Import Support Packages	/ZIMFLOM/SCM_QUEUE_IMPORT				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Display TMS Alert Monitor	/ZIMFLOM/SCM_TMS_ALERT_MONIT_H				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Display TMS Import Monitor	/ZIMFLOM/SCM_TMS_IMP_MONIT_H				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Display TMS Import History	/ZIMFLOM/SCM_TMS_IMP_HIST_H				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Perform Transport Tasks in Several Sys	/ZIMFLOM/SCM_TBORDER_MULT_SYS				Transaction/Online Program	Non-M
GP01	Main	Task Plan Ho	Register transport requests in task list	/ZIMFLOM/SCM_TBORDER_ASSIGN				Transaction/Online Program	Non-M

## Copy Variant SAP0 to Task List Variant <GPN1> for Urgent Change Related Header and Footer Tasks

If you are using Urgent Changes, the referring header and footer tasks in the Task List Variant **SAP0** must be copied the new Task List **<GPN1>** as well.

Click on the IMG Node **Create Customer-Specific Header and Footer Tasks** and mark all entries with Task List Variant **SAP0** and Project Type **Urgent Change**.

Then press the button **Copy**.

Perform this step for each selected header and footer task of SAP Task List Variant **SAP0** with Project Type **Urgent Change** and replace it with the Task List Variant **<GPN1>**.

As result all Urgent Change related header and footer tasks of Task List Variant **SAP0** are copied to the Task List **<GPN1>**.

## Copy Variant SAP0 to Task List Variant <GPN1> for Phase Cycle Related Header and Footer Tasks

If you are using Phase Cycle, the referring header and footer tasks in the Task List Variant **SAP0** must be copied the new Task List **<GPN1>** as well.

Click on the IMG Node **Create Customer-Specific Header and Footer Tasks** and mark all entries with Task List Variant **SAP0** and Project Type **Phase Cycle**.

Then press the button **Copy**.

Perform this step for each selected header and footer task of SAP Task List Variant **SAP0** with Project Type **Phase Cycle** and replace it with the Task List Variant **<GPN1>**.

As result all Phase Cycle related header and footer tasks of Task List Variant **SAP0** are copied to the Task List **<GPN1>**.

## Copy Variant SAP0 to Task List Variant <GPN1> for Release Cycle Related Header and Footer Tasks

If you are using Release Cycle, the referring header and footer tasks in the Task List Variant **SAP0** must be copied the new Task List **<GPN1>** as well.

Click on the IMG Node **Create Customer-Specific Header and Footer Tasks** and mark all entries with Task List Variant **SAP0** and Project Type **Release Cycle**.

Then press the button **Copy**.

Perform this step for each selected header and footer task of SAP Task List Variant **SAP0** with Project Type **Release Cycle** and replace it with the Task List Variant **<GPN1>**.

As result all Release Cycle related header and footer tasks of Task List Variant **SAP0** are copied to the Task List **<GPN1>**.

## Registering the New Task Refresh Test System

Launch transaction **SM30**

Enter table **SCMAPROGRAMS** and press the button **Maintain**:

**Maintain Table Views: Initial Screen**

Find Maintenance Dialog

Table/View: **SCMAPROGRAMS**

Restrict Data Range

☒ No Restrictions  
☐ Enter conditions  
☐ Variant

Display Maintain Transport Customizing

Add new entry for the report **/SALM/RTS\_REFRESH\_SYSTEM**:

**Change View "Schedule Manager: Index of Registered SAP Programs": Over**

Schedule Manager: Index of Registered SAP Programs					
Program	Appl.	WL	Sel	Rep	
/SALM/RTS_REFRESH_SYSTEM	CMSCV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## Adding the Task List Activity Refresh Test System to the Task List Variant **<ZSRE1>**

As next step, you must add the new Task List Activity **Refresh Test System** to the customer own Task List Variant **<ZSRE1>**. In the customizing of SAP Solution Manager, choose **SAP Solution Manager** → **Capabilities (Optional)** → **Change Control Management** → **Schedule Manager** → **Define Additional Tasks for Task Lists**. This configuration step can only be performed after the SAP Add On Package ST-OST 200, SP01 has been successfully implemented in your SAP Solution Manager System.

Press the button **New Entries** and create the new entry with

- Project Type = **Continual Cycle**,
- Type of Role = **0**,
- Number = **4000**,
- Description = **Refresh Test System**, and
- Program Name = **/SALM/RTS\_REFRESH\_SYSTEM**.
- Task Type = **Transaction/Online Program**

**New Entries: Details of Added Entries**

Variant of the Task: ZSRE1  
 Project Type: Continual Cycle  
 Type of Role: 0  
 Number: 4000

**Tasks for Types of System Roles**

Description: Refresh Test System  
 Program Name: /SALM/RTS\_REFRESH\_SYSTEM  
 Variant:  
 Flow Definition:  
 Transaction:  
 Task Type: Transaction/Online Program  
 Mandatory: Non-Mandatory Task  
 Exec. Location: Satellite System  
☐ Non-ABAP Irrelevant  
 Proj. Type Relevance: QGM and Change Request Management  
☐ Cluster Track  
☐ Restrict Task Exec.

The new task *Refresh Test System* calling the program */SALM/RTS\_REFRESH\_SYSTEM* is now available for target systems with Role Type 0:

**Change View "Tasks for Types of System Roles": Overview**

Variant	Proj. Type	Role	Number	Description	Program Name	Variant	Flow De...	Trans...	Task Type	Mandatory	Exec. Loc...
ZSRE1	Contin...	0	2500	Synchronize Urgent Changes from Other Test Systems	/TRMFLON/SCM_TRMPS_TEST				Job	Non-Mandat...	Satellite
ZSRE1	Contin...	0	2600	Import Support Package	/TRMFLON/SCM_SPAN_CALL				Transaction...	Non-Mandat...	Satellite
ZSRE1	Contin...	0	4000	Refresh Test System	/SALM/RTS_REFRESH_SYSTEM				Transaction...	Non-Mandat...	Satellite
ZSRE1	Contin...	0	1000	Log On to System	/TRMFLON/SCM_SRLG01B				Transaction...	Non-Mandat...	Satellite

Repeat this activity for each Project Type in scope.

## 4.2.5 Creating Change Cycle and Assign Task List Variant for New Customer to Task List

Next, one or several change cycle(s) need to be defined for your Change Controlled Landscape.

To do this, launch the SAP Fiori Launchpad via transaction **SM\_WORKCENTER** and go to *Change Management*. Then click on the tile *Change and Release Management*.

Select one of the business roles **SOLMANPRO**, or **ZSOLMANPRO**,

Click on *Create* → *Change Cycle* in the left navigation frame,

Two types of change cycles available with SAP Solution Manager Release 7.2 will be offered for selection:

- SMAI Continual cycle
- SMIM Phased cycle

The phased cycle (Transaction Type **SMIM**) can be used for

Implementation projects, as well as for Maintenance and is based on a Consolidated Import for the Change Cycle.

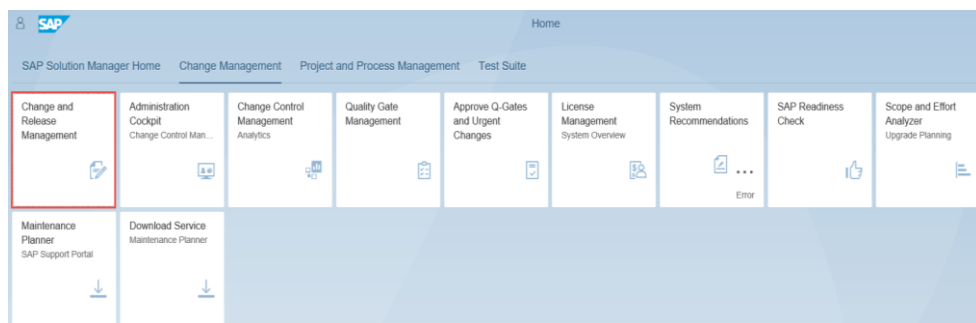
Urgent changes, Preliminary imports and Status-dependent imports can be processed in parallel. The import is executed as Import Subset. The assigned transport requests will stay in buffer for re-import and will be taken into account by the Consolidated Import again.

In contrast, the continual cycle (Transaction Type **SMAI**) should only be used if a deployment of transports on Demand, or daily, or on regular defined weekdays is required.

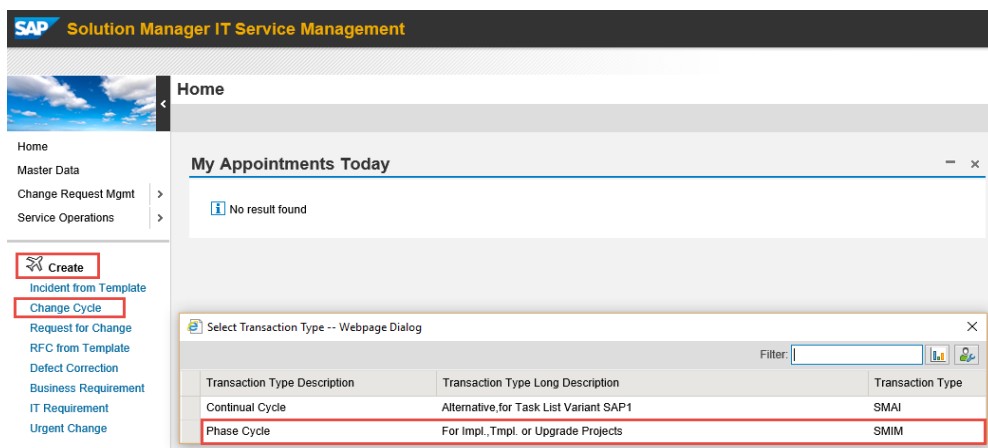
Transports will be imported only once and will not stay in buffer.

## Create a Change Cycle

Launch the SAP Fiori Launchpad via transaction **SM\_WORKCENTER**, go to *Change Management* and click on the tile *Change and Release Management*:



Select **SOLMANPRO** as Business Role, the CRM WebUI opens, next, select *Create* → *Change Cycle* from the left navigation frame, and then choose *Phase Cycle* from the Pop up:



Enter a meaningful description for your new Change Cycle and assign the relevant landscape and maintenance branch:

## Assign Your Task List Variant and Create a Task List for Your Change Cycle

To create a Task List for your phase cycle, press the button **Actions** and select **Set Phase to Scope**:

Quit the next Pop up with **Yes**:

Next, a guided procedure opens.

In the first step **Check Prerequisites** the system automatically shows if all technical prerequisites to generate a Task List for your change cycle are met:

Phase Cycle: 8000040524 - Create Task List

Cancel

1 2 3 4

Check Prerequisites Define Scope Check Cluster Assignment Complete

Previous Next

Prerequisite Checks

Checks	Status
Transport Management	
System RFC	
Number Range	

Details of Check: Transport Management

Status	Message Text
	Calculating transport tracks...
	Transport tracks successfully calculated
	Transport track (Source System: MW5-ABAP/600) calculated
	Transport track (Source System: MW5-ABAP/100) calculated
	Transport track (Source System: MW1-ABAP/100) calculated
	Transport track (Source System: MW5-ABAP/700) calculated

In Step 2 of the guided procedure you define the Scope:

For the mandatory field *Task List Variant*, you must select your Task List variant **GPN1** via the F4-Help:

SAP Solution Manager IT Service Management

Welcome Administrator 55 (CHARM\_ADM\_55) 02.29 Share Personalize Help Center System News Log Off

Phase Cycle: 8000040524 - Create Task List

Cancel

1 2 3 4

Check Prerequisites Define Scope Check Cluster Assignment Complete

Previous Next

Use Central Change and Transport System Infrastruct. ☐

Branch: Maintenance Landscape: ATIR7 T2 COM TEST (DO NOT CHANGE)

Task List Variant: Default Variant for Task List

Branches

Select the branches with the development systems that are to be used for development activities in this cycle.

Scope	Branch	Development System	Type
<input checked="" type="checkbox"/>	Maintenance	MW1-ABAP100/MW5-ABAP100/MW5-ABAP600/MW5-ABAP700	Maintenance Branch

Retrofit Systems

For the retrofit track, the source system and the target system need to be in the same domain. Otherwise, you have to create a domain link.

Add

Actions	Source	Target
---------	--------	--------

Transport Tracks Overview

Development... Quality Assu... Production S...

MW1-100 MW1-200 MW1-300

Proceed with the guided procedure up to Step 4 *Complete*,

Lastly, select *Create*:

SAP Solution Manager IT Service Management

Welcome Administrator 55 (CHARM\_ADM\_55) 02.29 Share Personalize Help Center System News Log Off

Phase Cycle: 8000040524 - Create Task List

Cancel

1 2 3 4

Check Prerequisites Define Scope Check Cluster Assignment Complete

Previous **Create** Next

Branch: Maintenance Landscape: ATIR7 T2 COM TEST (DO NOT CHANGE)

Task List Variant: Default Variant for Task List

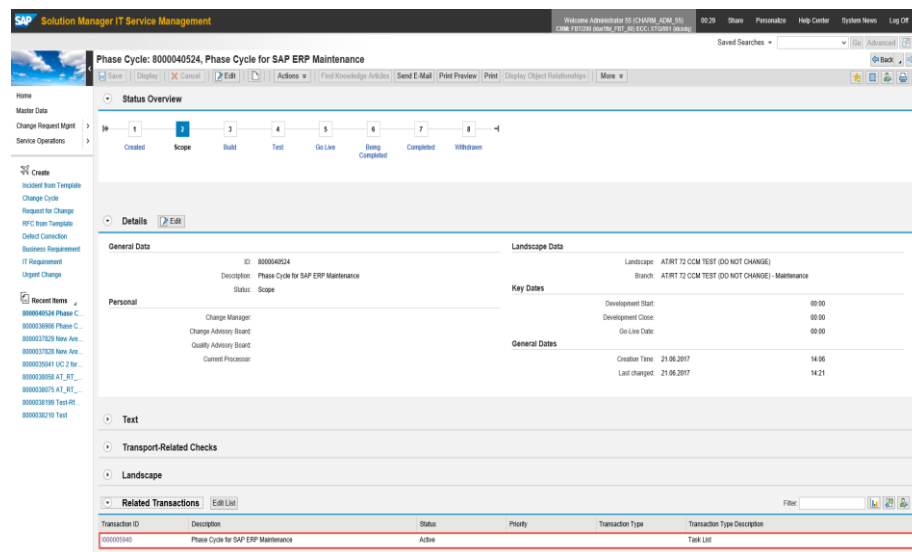
Transport Tracks Overview

Development... Quality Assu... Production S...

MW1-100 MW1-200 MW1-300



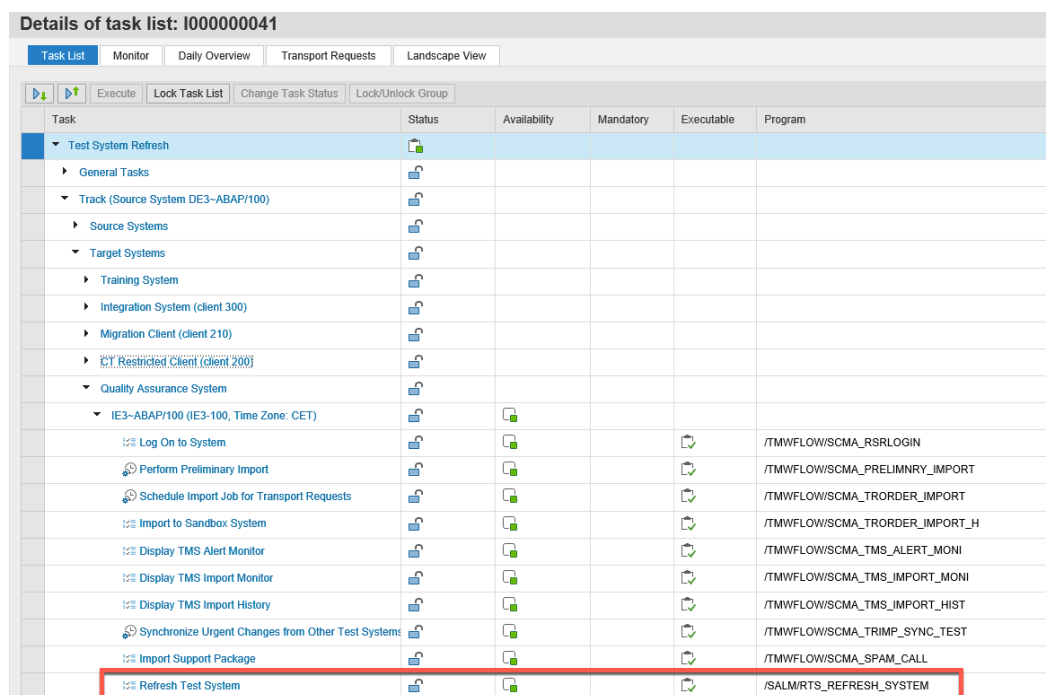
As the scope of your new phase cycle is fully defined, the referring Task List will now be generated automatically:



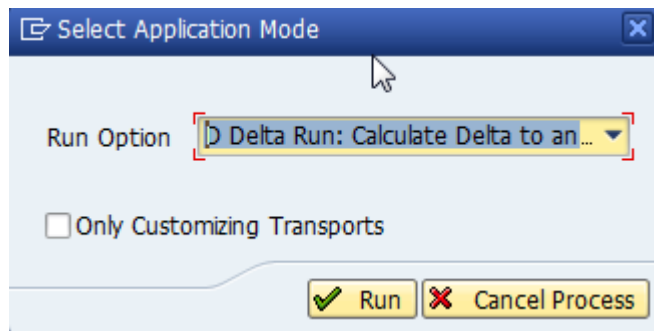
## 4.2.6 Executing the Refresh Test System Scenario

### Execute Delta Run: Calculate the Delta to another System

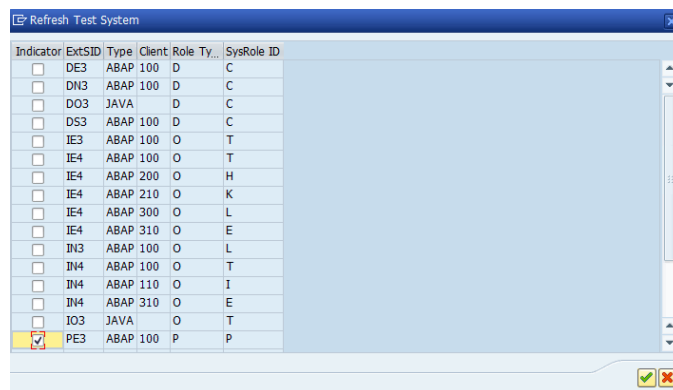
First, execute the new task *Refresh Test System* which is available for the Target System TRG:



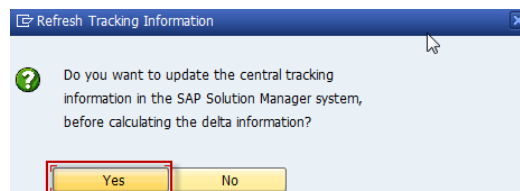
Choose *D: Delta Run: Calculate Delta to another System* from the Drop Down List in the Pop up and press *Run*:



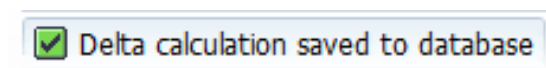
On the next Pop up, select the source system (Production System SRD, Client 001) from the list and press the button **Select**:



At this point in time, you have the option (recommended) to let the system update the central transport tracking information, which the Delta Calculation will be based on. To do so, press **Yes**:



You receive a system message confirming the Delta Calculation was performed successfully:



The Delta Calculation of transports is saved to the following tables:

/SALM/DELTA\_C,

/SALM/DELTA\_H

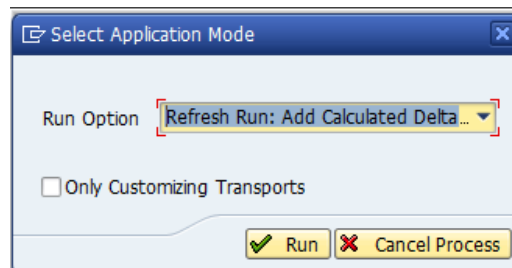
## Perform the System Copy

As a next step, perform the System Copy itself.

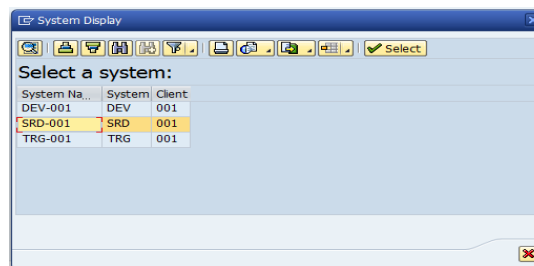
## Execute Refresh Run: Add Calculated Delta to Another System

Execute the Task [Refresh Test System](#) again.

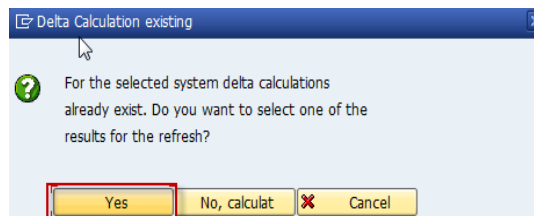
Select the option [Refresh Run: Add Calculated Delta to another System](#) from the drop down list in the pop up and press [Run](#):



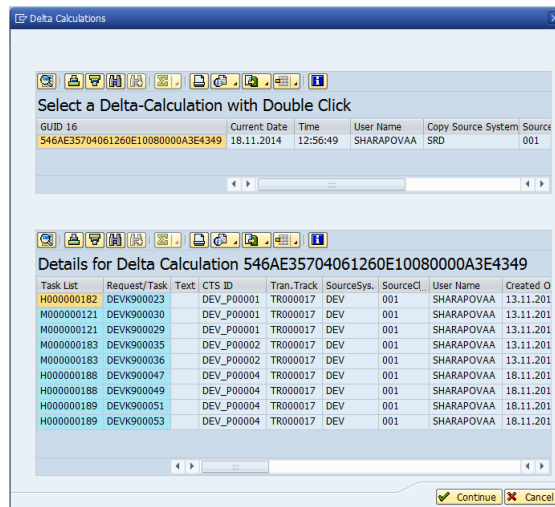
As a next step, select the Source System (Production System SRD, Client 001) from the list and press the button [Select](#):



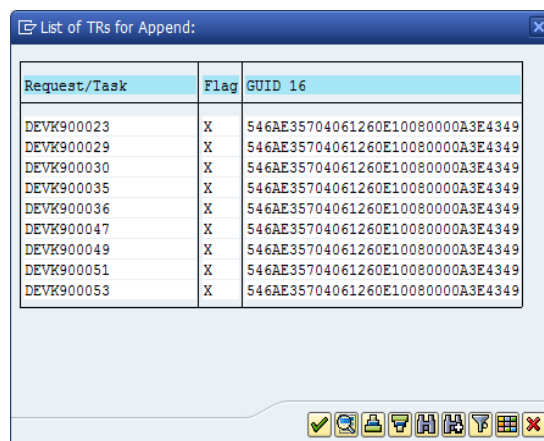
You can now choose the existing Delta Calculation(s):



Select one of the available Delta Calculations. If more than one exists, you would choose the most current one. Mark the selected Delta Calculation with your cursor, and then press the button [Continue](#):



As a result, the list of transports, which is being displayed in the next pop up, will be re-added to the import buffer of the refreshed Test System TRG, if you press the button **ok**:



#### 4.2.6.1 Perform the Import via SAP Change Request Management (Import Project All)

As last step, trigger the import to system TRG via the Task List.

#### 4.2.7 Available BADI Definition: /SALM/RTS\_FILTER\_DELTA\_BAdI

If of specific customer requirements, the Delta Calculation for another system can be influenced with the help of a BAdI Implementation for the BAdI definition [/SALM/RTS\\_FILTER\\_DELTA\\_BAdI](#).

The coding in the BAdI Method must be developed based on the individual customer requirements.

Please refer to documentation of the BAdI [/SALM/RTS\\_FILTER\\_DELTA\\_BADI](#).

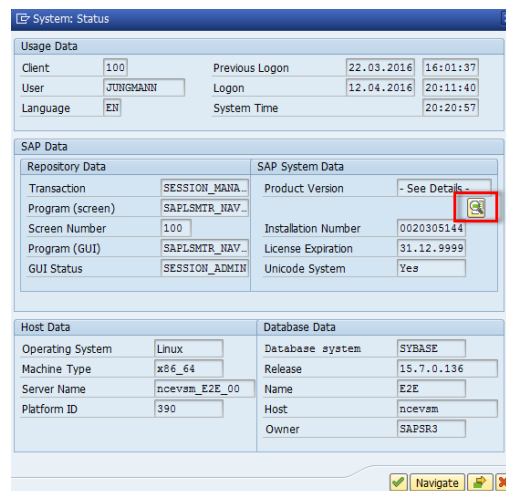
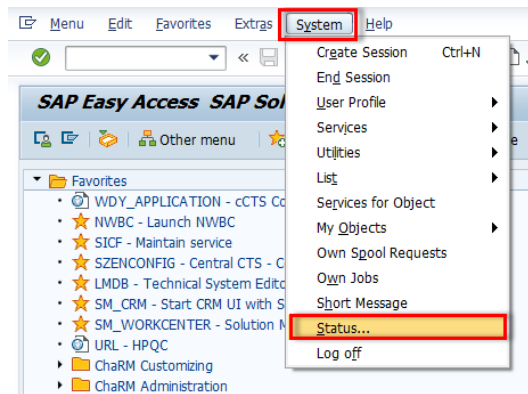
## 4.3 Configuration of Retrofit Automation

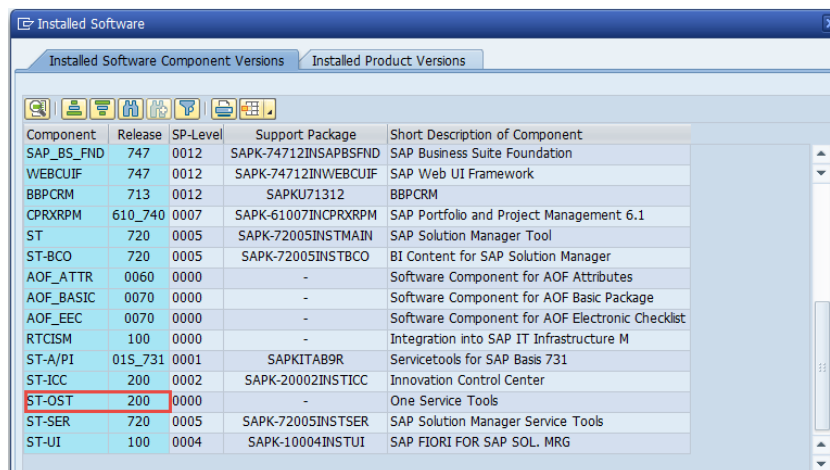
### 4.3.1 Required Activities

Implement or verify the correct implementation of the central SAP Solution Manager Note depending on the SP level of your SAP Solution Manager system.

Before you start the configuration ensure that your Solution Manager 7.2 system has software component ST-OST 200, SP01 installed.

Use path [System](#) → [Status...](#)



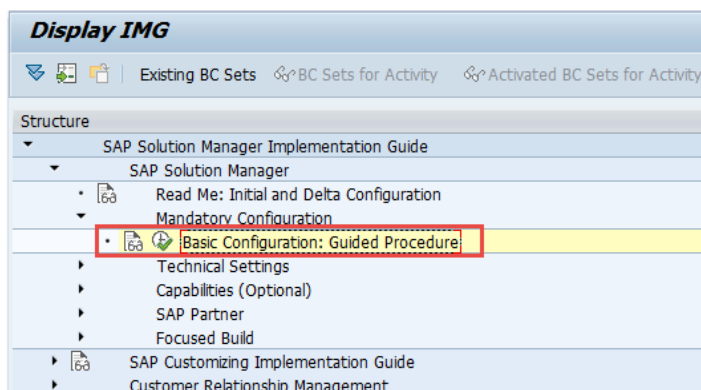


Component	Release	SP-Level	Support Package	Short Description of Component
SAP_BS_FND	747	0012	SAPK-74712INSAPBSFND	SAP Business Suite Foundation
WEBCUIF	747	0012	SAPK-74712INWEBCUIF	SAP Web UI Framework
BBPCRM	713	0012	SAPKU71312	BBPCRM
CPRXRPM	610_740	0007	SAPK-61007INCPRXRPM	SAP Portfolio and Project Management 6.1
ST	720	0005	SAPK-72005INSTMAIN	SAP Solution Manager Tool
ST-BCO	720	0005	SAPK-72005INSTBCO	BI Content for SAP Solution Manager
AOF_ATTR	0060	0000	-	Software Component for AOF Attributes
AOF_BASIC	0070	0000	-	Software Component for AOF Basic Package
AOF_EEC	0070	0000	-	Software Component for AOF Electronic Checklist
RTCISM	100	0000	-	Integration into SAP IT Infrastructure M
ST-A/PI	01S_731	0001	SAPKITAB9R	Servicetools for SAP Basis 731
ST-ICC	200	0002	SAPK-20002INSTICC	Innovation Control Center
ST-OST	200	0000	-	One Service Tools
ST-SER	720	0005	SAPK-72005INSTSER	SAP Solution Manager Service Tools
ST-UI	100	0004	SAPK-10004INSTUI	SAP FIORI FOR SAP SOL. MRG

## 4.3.2 Basic Configuration for SAP Solution Manager

Before starting with the basic configuration of your SAP Solution Manager system you should read the documentation and initial descriptions available in the Implementation Guide (transaction **SPRO**).

Therefore, navigate to [SAP Solution Manager Implementation Guide](#) → [SAP Solution Manager](#) → [Mandatory Configuration](#) → [Basic Configuration: Guided Procedure](#)



Via the transaction **SOLMAN\_SETUP**, you start the initial configuration of the SAP Solution Manager system. In the navigation area on the left under [Mandatory Configuration](#), you can access the following guided procedures which contain configuration steps relevant for the Change Request Management scenario:

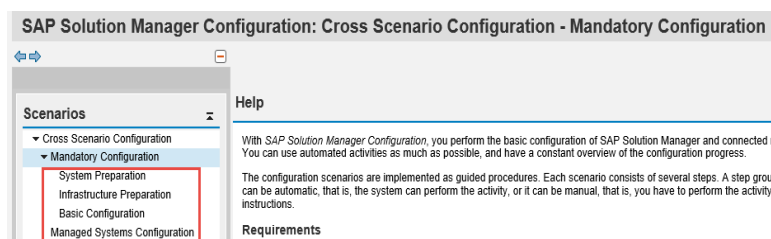
**System Preparation:** In this guided procedure, you define settings preliminary for the Solution Manager Configuration, such as creation of dialog users with the required authorizations, implementation of the central Correction Note and Web Service configuration.

**Infrastructure Preparation:** Within the Infrastructure Preparation, you set up the SLD connections, establish LMDB synchronization and set up the Java connectivity. Furthermore, you will set up SAP BW as well as the E-Mail communication and enable the gateway services.

**Basic Configuration:** This guided procedure leads you through all configuration steps which you have to perform to enable basic scenarios in SAP Solution Manager. As part of the basic configuration, you set up the connection

to SAP, schedule relevant background jobs and activate piece lists which contain important settings, such as standard customizing.

**Managed Systems Configuration:** In the Managed System Configuration, you connect Managed Systems to SAP Solution Manager via RFC. This is important, since SAP Change Request Management requires a READ, TMW and TRUSTED RFC connection to every Managed System/Client. In order to ensure that SAP Change Request Management works perfectly with Managed Systems a minimum SP Level is required. Please check SAP Note 907768 for further details.



Confirm that you have successfully performed those three configuration steps according to the guided procedure documentation.

In addition to the basic configuration for SAP Solution Manager you have to perform the basic configuration for SAP Change Request Management.

### 4.3.3 Piece List Activation

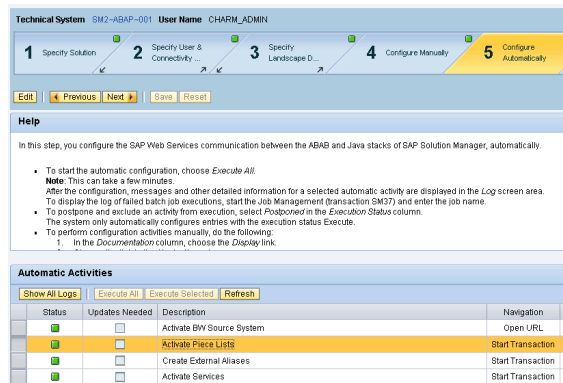
The standard customizing of SAP Change Request Management and all other IT Service Management relevant areas is delivered via a so called customizing piece list. This piece list needs to be activated as part of transaction **SOLMAN\_SETUP** and will copy the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again will overwrite all existing standard customizing with the content of the piece list – therefore it is highly recommended to copy all transaction types into the customer namespace before starting to use SAP Change Request Management.



#### Caution

The existing BC-Sets of SAP Change Request Management are not supposed to be activated within a 7.2 system, since they are replaced by the customizing piece list.



In addition, it is required to activate a dedicated piece list for the standalone enhancement. Therefore call transaction **succ1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **succ3**.

#### 4.3.4 Checking for Correct Retrofit Setup: NO\_CSOL Parameter Must be Active

*SPRO → SAP Solution Manager Implementation Guide → SAP Solution Manager → Capabilities (Optional) → Change Control Management → Retrofit → Define Retrofit Parameters*

**Change View "Configuration Table for Retrofit Extension": Overview**

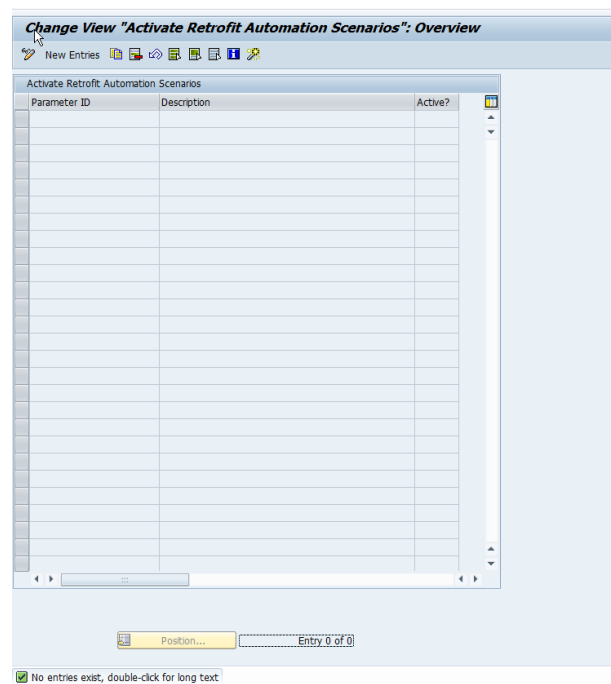
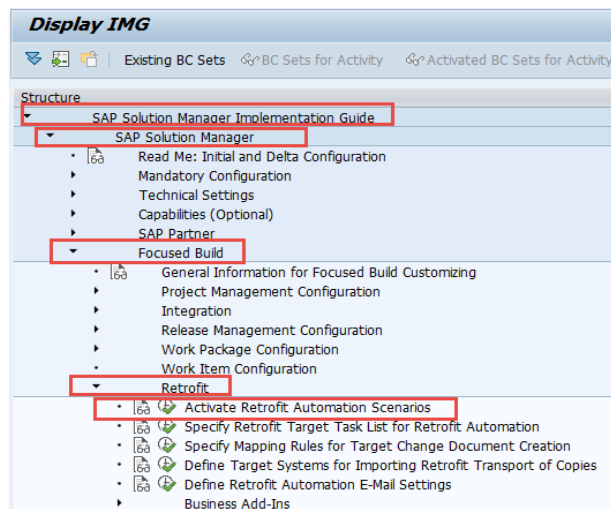
New Entries

Configuration Parameter	Value	Num. Val.
ALL_CAT Allow "Retrofit all...	W Parameter Causes Warning	
CHNGID_DIS Show Change_ID F...	Parameter Inactive	
COPY_ATTRI Copy Attributes	Parameter Inactive	
DWNGRD_CHK Specified Error ...	E Parameter Causes Error	
FLT_SET Set Filter at Call	Parameter Inactive	
IGNORE_SEQ Retrofit only po...	W Parameter Causes Warning	
LOOP_CNT Number of Attempts...	Parameter Inactive	
MAN_BACK Switch Status back...	W Parameter Causes Warning	
<b>NO_CSOL No Cross-System Obj...</b>	<b>X Parameter Active</b>	
RJCT_BACK Switch Status bac...	W Parameter Causes Warning	
SCEN_BW BW Scenario for Ret...	X Parameter Active	
SCEN_MAN Set Objects for Ma...	Parameter Inactive	
SET_ORGSYS Set Original Sys...	X Parameter Active	
SUCCESSMSG Display Retrofit...	X Parameter Active	
WARN_IOC Transport of Copie...	X Parameter Active	

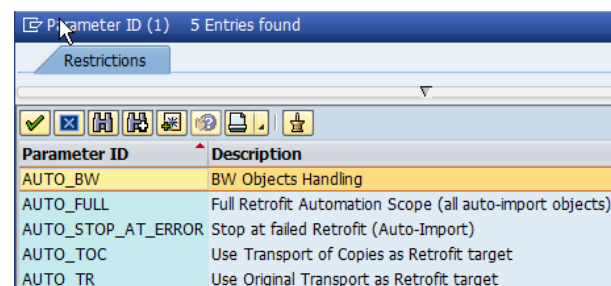
As writing a CSOL entry could trigger a CSOL popup resulting in the cancellation of the background job, we need to set the parameter *No Cross-System Object Lock for import Objects*.



## 4.3.5 Activating Retrofit Automation Scenarios



Create new entries:



---

The following scenarios are available:

#### **AUTO\_BW**

Retrofit for BW: Retrofit enablement for critical BW Objects (supported object types: ISFS, ISMP, ISTS, ROUT, RSDS, RSFO, TRFN)

#### **AUTO\_FULL**

Full Scope: extend the Retrofit automation scope by auto-import objects from mixed transports

#### **AUTO\_STOP\_AT\_ERROR**

Stop at failed Retrofit (Auto-Import): The Retrofit Automation report will cancel the processing of further transports if the auto-import for a transport was not successful.

#### **AUTO\_TOC**

Transport of Copies (ToCs) as Retrofit Target: Transports without conflicts are retrofitted via the Retrofit automation job. The retrofitted objects are recorded into a ToC which can be released and imported into the test system automatically.



IMG Activity: *Define Target Systems for Importing Retrofit Transport of Copies* is needed for this Scenario (see chapter 3.7).

#### **AUTO\_TR**

Original Transport as Retrofit Target: Transports without conflicts are retrofitted via the Retrofit automation job. The retrofitted objects are recorded into an automatically created transport.



IMG Activity: *Specify Retrofit Target Task List for Retrofit Automation* is needed for this Scenario (see chapter 3.5).

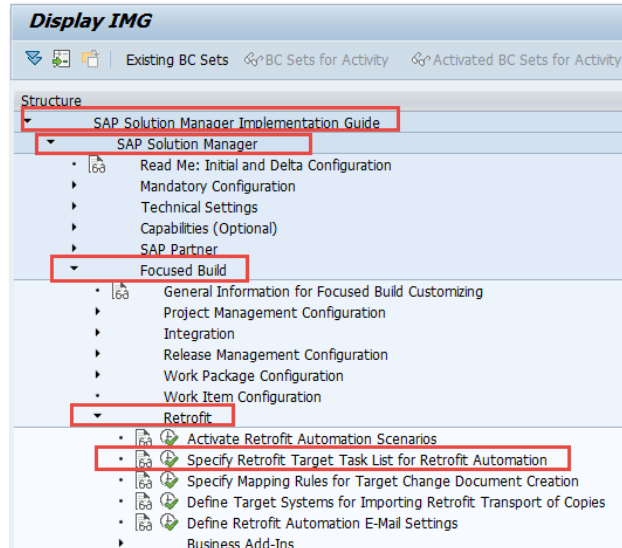
#### **AUTO\_CD**

Change Document as Retrofit Target: Transports without conflicts are retrofitted via the Retrofit automation job. The retrofitted objects are recorded into an automatically created transport. The transport is linked to an automatically created Change Document.



IMG Activity: *Specify Mapping Rules for Target Change Document Creation* is needed for this Scenario (see chapter 3.6).

## 4.3.6 Specifying Retrofit Target Task List for Retrofit Automation



Specify which Task List should be used as Target Task List for the Retrofit Target transport. These settings are relevant for the Retrofit Automation scenario *Original Transport as Retrofit target (AUTO\_TR)* only.

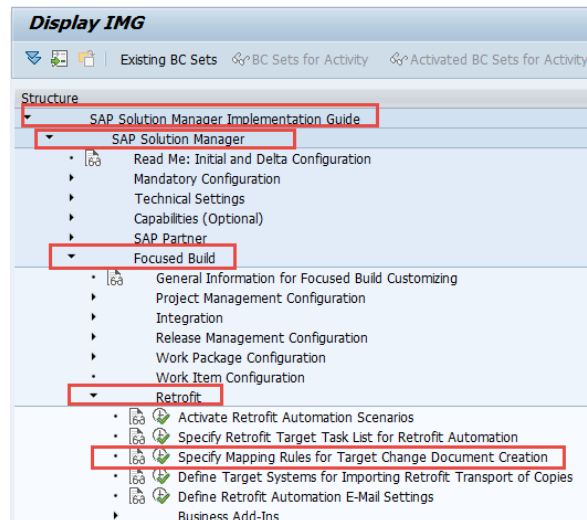
Create an entry for each Source Task List ID and the referring Source and Retrofit system combination including clients and enter the Target Task List ID from the implementation line that you want to use as receiving target.

**Change View "Retrofit Target System and Tasklist Mapping": Overview**

New Entries

Retrofit Target System and Tasklist Mapping					
Source Task List	Source System	Source Client	Retrofit System	Retrofit Client	Target Task List
I000000026	OTO	810	OTO	710	I000000027

## 4.3.7 Specifying Mapping Rules for Target Change Document Creation



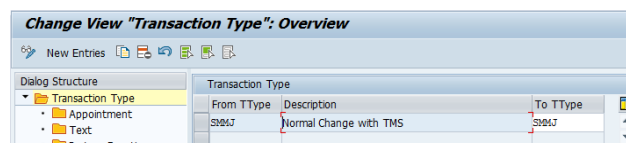
These settings are only relevant for the Retrofit Automation scenario *Change Document as Retrofit Target (AUTO\_CD)*.

Transports without conflicts are retrofitted via the Retrofit automation job. The retrofitted objects are recorded into an automatically created **original** transport request. The transport is linked to an automatically created Change Document.

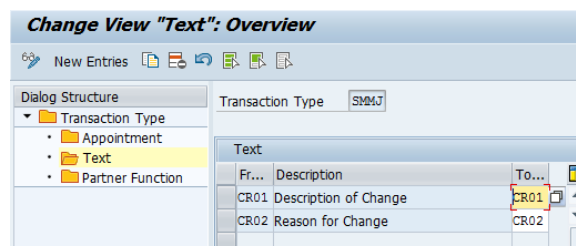
Create an entry for each relevant Source- and Target Transaction Type. If required, define which additional data, such as

- Appointments,
- Texts, or
- Partner Functions

should be mapped on change document creation.

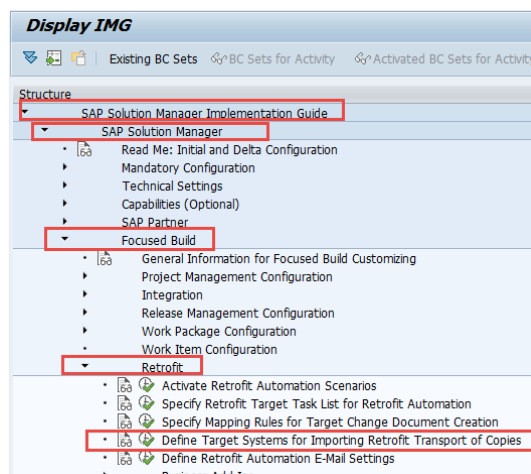


Example for mapping of texts between relevant Source- and Target Transaction Type:



Exemplary mapping of partner functions between Source- and Target Transaction Type:

### 4.3.8 Defining Target Systems for Importing Retrofit Transport of Copies



The configuration activity is relevant for the Retrofit automation scenario *Use Transport of Copies as Retrofit Target (AUTO\_TOC)* only.

Define target system(s) for import of Retrofit ToCs for each source development system in your implementation/project landscape.

Enter a target system/client for each source system/client (Project Development System) in your implementation/project landscape.

## 4.3.9 Defining Retrofit Automation E-Mail Settings

### Configuring Standard Texts

The following Standard Texts are configured as a global definition:

TA-Code **SE61**

The screenshot shows the 'Document Maintenance: Initial Screen' in SAP. It has a top navigation bar with 'Worklist', 'Authorizations', and a trash icon. Below this is a 'Settings' section with 'Document Class' set to 'General text' and 'Language' set to 'English'. The 'Document' section has 'Name' set to '/SALM/RETRO\_MAIL\_SUCCESS'. At the bottom are three buttons: 'Display', 'Change', and 'Create'.

/SALM/RETRO\_MAIL\_SUCCESS for the success mail (successful retrofits)

Dear User,

your retrofit activities have automatically been completed by the systems.  
The retrofitted transports are:

(see below)

Best Regards,  
Release and Change Management

/SALM/RETRO\_MAIL\_ERROR for the error mail (failed retrofits)

Dear User,

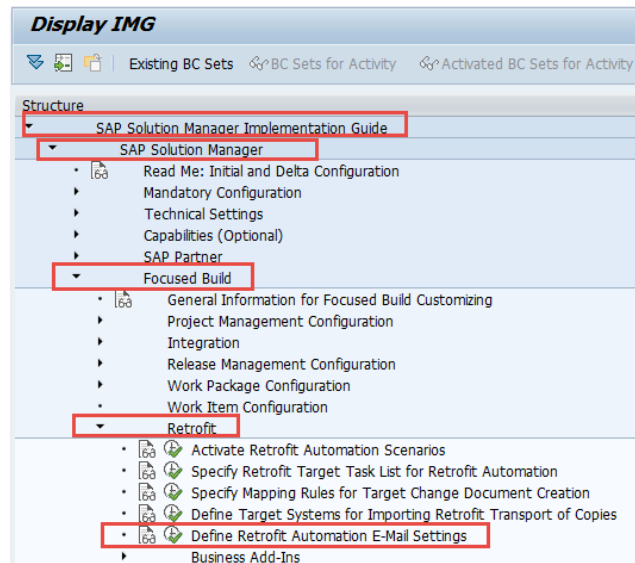
your retrofit activities could not be completed automatically. Please take manual action and complete the retrofit activities at the earliest possibility.  
The relevant transports are:

(see below)

Best Regards,  
Release and Change Management

### Defining Retrofit Automation E-Mail Settings

With AddOn Package ST-OST 200 based on SAP Solution Manager Release 7.2 the new IMG Node [Define Retrofit Automation E-Mail Settings](#), including a detailed Documentation, is available:



With a click on the IMG node, the database table /SALM/RETRO\_MAIL is called:

Retrofit Automation Mail Configuration			
Task List	Success Mail Text Object	Error Mail Text Object	Switch mail off
GLOBAL	/SALM/RETRO_MAIL_SUCCESS	/SALM/RETRO_MAIL_ERROR	<input type="checkbox"/>

Use **GLOBAL** as default or individual Task Lists. Then enter the text objects you want to use for Success and/or Error Mail.

To switch off both email notifications (Success- and Error Mail), set the **Switch mail off** flag.

To switch off a specific type of email notification (Success- or Error Mail), leave the corresponding **Mail Text Object** field empty.

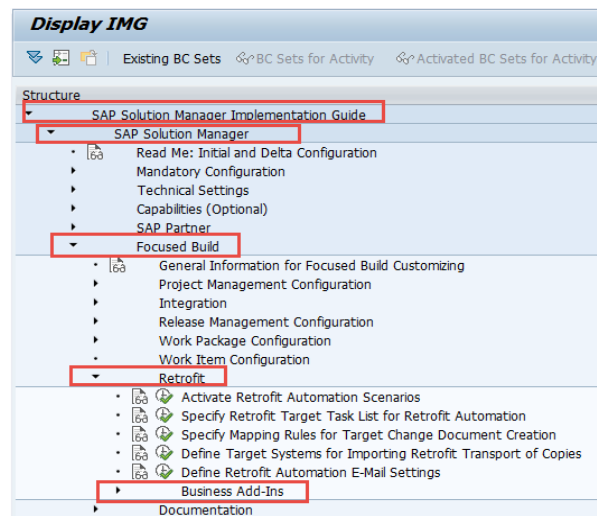
Further Prerequisites:

- Email will only be send out if the email address is maintained properly in the relevant business partner, and the business partner is linked to the USER who is the owner of the TR to be retrofitted,
- In addition, email setup SCOT needs to be setup properly



Use TA SOST to preview the mail before it is send out

## 4.3.10 Activating Relevant Business Add-In Implementations



### Retrofit Release BAdI

Activate BAdI implementation /SALM/RETRO\_RELEASE if you use the Retrofit for BW scenario on top of the retrofit Automation (Parameter **AUTO\_BW**).

Also, the BAdI Implementation /SALM/RETRO\_RELEASE has to be activated in case you want to navigate to the Change Documents which a Transport to be retrofitted or a Retrofit Target Transport is assigned to. (Please refer to chapter 3.10).

### During Retrofit BAdI

You don't need a retrofit automation scenario.

However, if you intend to utilize *Additional Functions* from the Menu of the Retrofit List, the BAdI Implementation /SALM/DURING\_RETROFIT must be activated.

### After Retrofit BAdI

Activate BAdI implementation /SALM/AFTER\_RETROFIT if you choose to use ToCs as targets (**AUTO\_TOC**) and want to automatically release and import them.

Also in combination with the BW scenario this BAdI Implementation must be activated.

### BAdI for Automatic Transport Assignment

Activate BAdI implementation BAdI implementation /SALM/RETROFIT\_AUTO\_IMPL which generates one of the following transport types as Retrofit target:

Transport of Copy

Original Transport

Depending on the Retrofit Automation scenario, parameter you choose:

**AUTO\_TR** (Use Original Transport as Retrofit target)

**AUTO\_TOC** (Use ToC as Retrofit target)



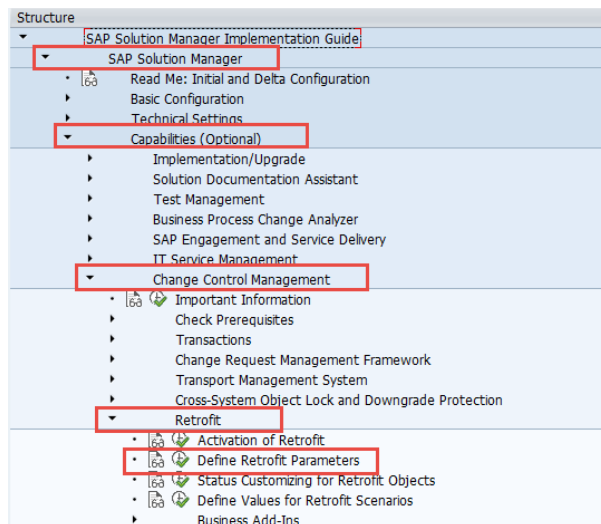
BAdI Implementations				
Implementations for BAdI Definition /SALM/RETROFIT_AUTOMATION				
Active(IMG)	Active(Im...	Enhancement Implementation	BAdI Implementation	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	/SALM/RETRO_AUTO_EXTENSIONS	/SALM/RETRO_AUTO_IMPL	Retrofit Automation Implementation

### 4.3.11 Optional: Enabling Navigation to Change Document

If you use the Full ChaRM Scenario with the Retrofit Automation Scenario **AUTO\_CD**, you might wish to navigate from a transport request (in Status: To be Retrofitted) or a Retrofit target request to the Change Document, In the following chapter, the configuration steps, which are required to enable this functionality, are described in detail.

#### Activating Standard Retrofit Parameter Show Change\_ID Field

As a first step, navigate to the IMG Node *Define Retrofit Parameters*:



Activate the Retrofit standard parameter *Show Change\_ID Field*:

Configuration Table for Retrofit Extension			
Configuration Parameter	Value	Num. Val.	
Allow "Retrofit all Categor...	Parameter Causes Warning		
Show Change_ID Field	Parameter Active		
Copy Attributes	Parameter Inactive		

Result: The Column *Change\_ID* will be displayed on the Retrofit list.

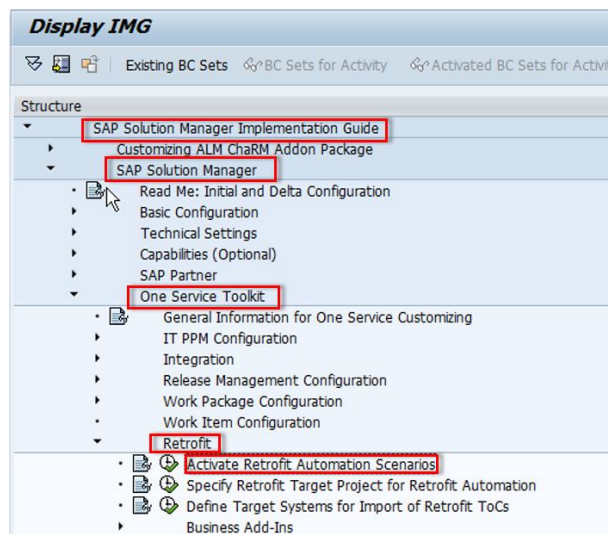
#### Adding Additional Function Display Change Document (Parameter DISP\_CD) to the Menu of the Retrofit Tool

Go to database table /TMWFLOW/ADDFUNC and ensure that an entry for the Code **DISP\_CD** (Additional Function: *Display Change Document*) is available.

Result: The Additional Function will be added to the Retrofit list's menu / Additional Functions.

Next, launch database table /SALM/RFIT\_PARAM and make a *New Entry* for Code **DISP\_CD**.

Then go to the IMG Node *Activate Retrofit Automation Scenarios*:



The Code **DISP\_CD** should now be displayed as Retrofit automation parameter. Finally, set this Parameter to *Active*.

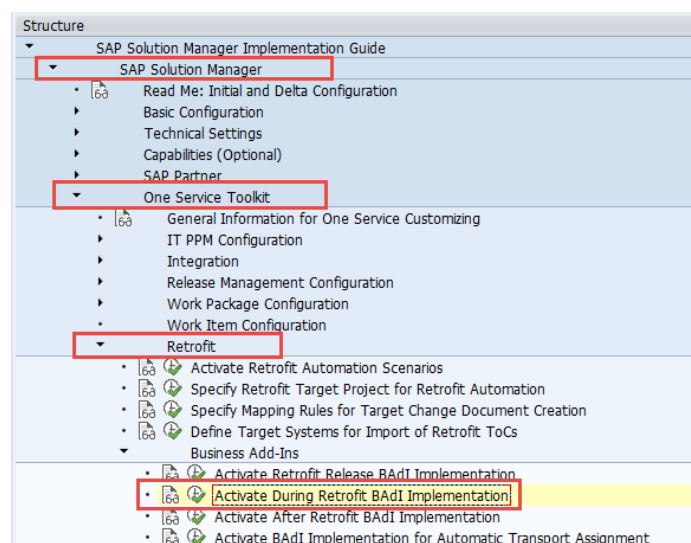
Result: The navigation to the referring Change Document is now enabled. However, the full technical enablement of this additional function still requires the activation of the BAdI implementation '/SALM/DURING\_RETROFIT', which is described in chapter 3.10.3.

In addition, the BAdI implementation /SALM/RETRO\_RELEASE must be *Active* as well in order to fill the field *Change ID* on the Retrofit list. (This will be described in chapter 3.10.4).

### Activating the BAdI Implementation /SALM/DURING\_RETROFIT

The BAdI method contains the coding for the technical enablement of additional functions in the Retrofit list's menu.

If you intend to use additional functions in the menu of the Retrofit tool, you have to set the BAdI implementation /SALM/DURING\_RETROFIT to *Active*:

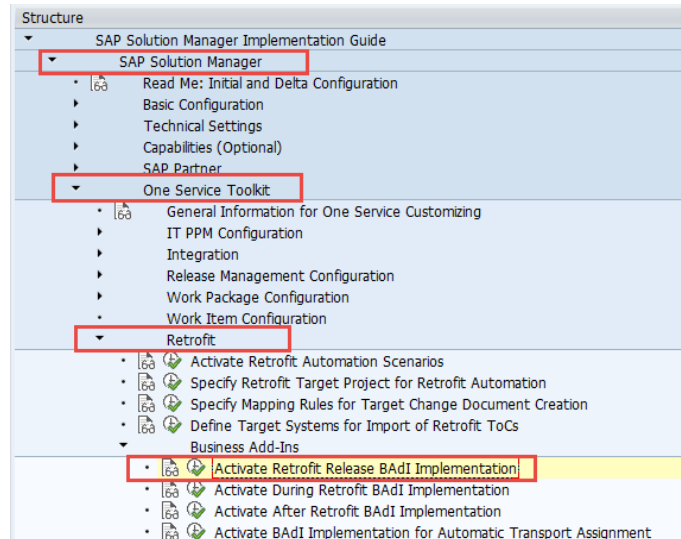


Result: The additional function *Display Change Document* is now technically fully enabled.

### Activating the BAdI Implementation /SALM/RETRO\_RELEASE

The activation of the BAdI implementation /SALM/RETRO\_RELEASE is a prerequisite for the additional function *Display Change Document* as the field *Change ID* on the Retrofit list is automatically filled with the referring Change ID, when an original transport is released and put to the Retrofit list.

(Relevant method: /TMWFLOW/RELEASE\_IF~EDIT\_CHANGE\_ID).



## 4.3.12 Calling Report /SALM/ENH\_RETRO\_AUTOMATION

**SE38:** report /SALM/RETRO\_AUTOMATION →

The screenshot shows the 'Start Automatic Retrofit' dialog box. It contains the following sections:

- Data Selection:** Task List (with a yellow input field and a magnifying glass icon).
- Execution Options:** ☐ Perform Retrofit, ☐ Import Transport of Copies.
- Import Options:** ☐ Overwrite Originals, ☐ Overwrite Repairs, ☐ Ignore Software Component Vrs.

Field *Task List ID*: Enter the current Task List ID for maintenance here  
Start the retrofit automation via this report.

---

### 4.3.13 Creating a Regular Job for Retrofit Automation

The following general recommendations can be made for scheduling the report:

#### Variants

- Create a variant for each retrofit queue

#### Multiple steps

- Do not create multiple jobs
- Create multiple steps in one job with the same program, but different variants which have been defined
- Create only different jobs when there is a different scheduling requirement

#### Scheduling interval and period

- Schedule the job at least daily
- Fast scheduling is possible, e.g. hourly run
- Watch the steps and queue size which should be processed, as some runtime is required

#### Monitor job logs

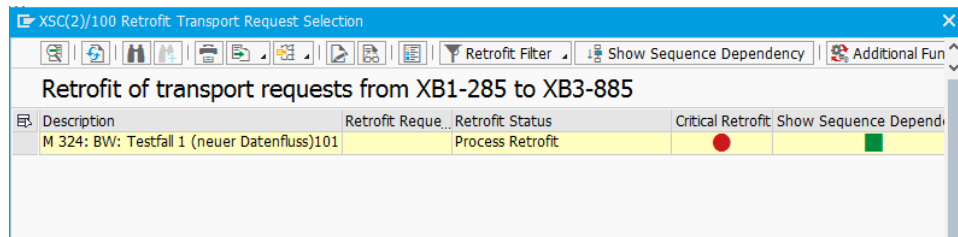
## 4.4 Configuration of Retrofit for BW

### 4.4.1 Enhanced Retrofit Without Implemented Focused Build 'Retrofit for BW'

Before implementing the Focused Build *Retrofit for BW*, the SAP Standard Scenario for Enhanced Retrofit will always classify the following critical BW objects as *Manual Retrofit*:

- File Data Source (ISFS),
- Transfer Rule (ISMP),
- Transfer Structure (ISTS),
- Data Source (RSDS),
- Transformation (TRFN),
- Routine (ROUT),
- BW Formula (RSFO).

This is also valid in case these critical BW objects were newly created in the Maintenance Development System, as the Enhanced Retrofit Scenario cannot detect conflicts between the Source- and the Retrofit Target System.



PgID	Obj.	Object Name	Master Ty...	Master Name Vie...	Table Keys	Sequence-Dependent...	Implementati...
R3TR	DTPA	DTP_0002TRX4E1WWNHNBMABFV2MSP					
R3TR	ISIP	ZPAK_3DXPMO3180DK30QT6T3X3N82					
R3TR	ODSO	ZCHARM1					
R3TR	ROUT	0002TRX4E1WWNHN7U78UDUOS					
R3TR	ROUT	0002TRX4E1WWNHN7U78UE10C					
R3TR	ROUT	0002TRX4E1WWNHNBELEG959YF					
R3TR	RSDS	Z_DS_EKET_RETROFIT XR3CLNT2...					
R3TR	RSFO	0002TRX4E1WWNHN7U78UE7BW					
R3TR	TRFN	07EQVEUJYDL78WW/BSYMRN9G0LIRJAFW					

## 4.4.2 Setup of a Simulation Landscape for Focused Build Retrofit for BW

The detailed configuration steps which are described in this Configuration Guide are based on an exemplary SAP BW Simulation Landscape for Focused Build *Retrofit for BW*:

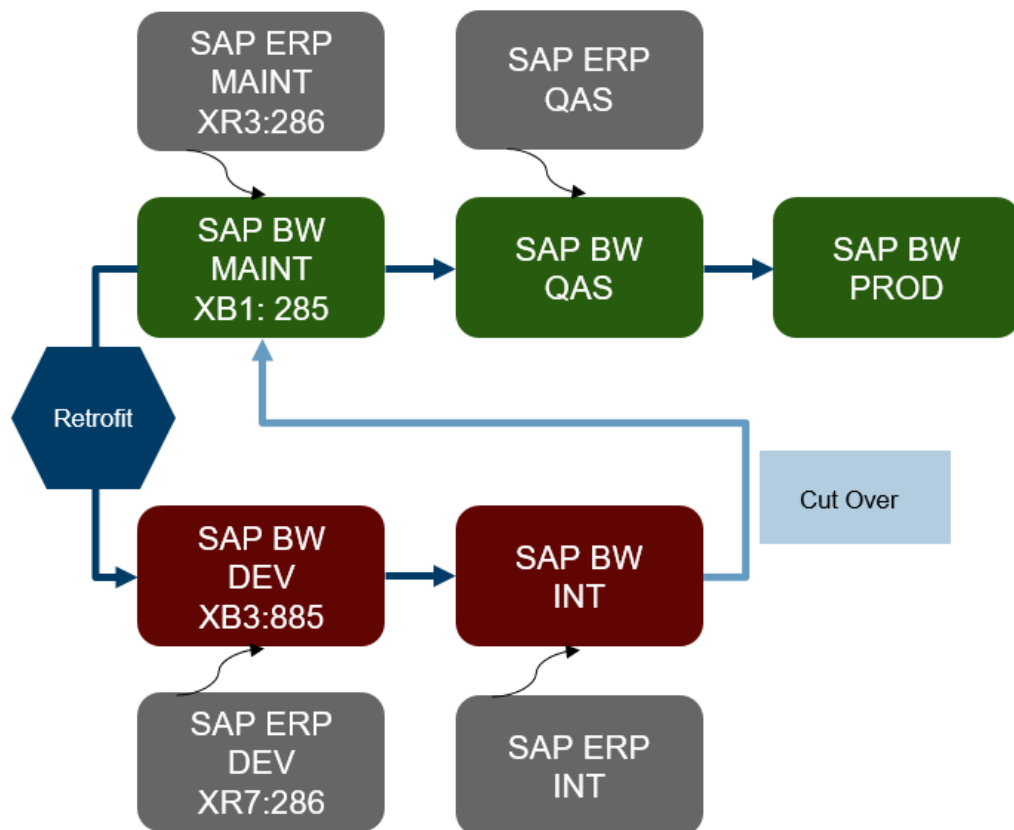
SAP Solution Manager System:	XSC, Client 100,
Maintenance Development System for SAP BW:	XB1, Client 285,
Retrofit Target System for SAP BW:	XB3, Client 885,
Source System for SAP BW MAINT DEV System:	XR3, Client 286,
Source System for SAP BW Retrofit Target System:	XR7, Client 286.

**Be aware, that for successful testing of Focused Build Retrofit for BW, the Simulation Landscape must comprise the Source Systems (e.g SAP ERP) of the SAP BW Development Systems as well.**

For instance, if you intend to create a data source (for instance for a specific database table) in the SAP BW Maintenance Development System (System XB1, Client 285), this object should exist in the referring Source System (System XR3, Client 286) first.

For the Retrofit itself the same prerequisite is valid: This means that, the Source System XR7, Client 286 must be provided with the object in question before the Retrofit of the referring data source from XB1, Client 285 to the SAP BW Retrofit Target System XB3, Client 885 can be executed successfully.

Exemplary Simulation Landscape for Focused Build *Retrofit for BW*:



### 4.4.3 Configuration Steps for Focused Build Retrofit for BW

#### Implementing Required SAP Notes

SAP Note	Description	SAP Solution Manager	Managed System
2180454	Retrofit: all requests from the project are displayed in the Retrofit window when processing Retrofit action from one Change Document	X	
2199925	Retrofit: error "comparison not supported for object type TABU" is raised when comparing source and target system	X	
2205606	Retrofit: incorrect categorization for customizing requests with language key '*'	X	
2208176	Retrofit: error about nonexistence of function module TRINT_GET_TLOGO	X	X
2211446	Retrofit: sequence dependency of transport request is incorrectly calculated when generate Retrofit data again	X	

SAP Note	Description	SAP Solution Manager	Managed System
2216032	Retrofit: runtime error DBIF_RSQI_INVALID_RSQI during Retrofit data creation	X	
2223092	Retrofit: error TK103 during auto-import language objects	X	X
2311560	Function module RSO_GET_RELATED does not work		X
2316496	Errors in retrofit autoimport of BW objects	X	
2339934	Saving queries takes a very long time in retrofit scenario		X
2355901	SP36:Determination of Transformations for Retrofit		X
2362842	Retrofit for BW: Various corrections for ST-OST 100 SP4	X	
2395235	SP37:Determination of Transformations for Retrofit (II)		X
2401952	730SP17:Development class of transformation is reset to \$TMP during re-import		X

SAP Note 2362842 includes manual activities and dependent SAP Notes.

### Preparation of SAP BW-Environment

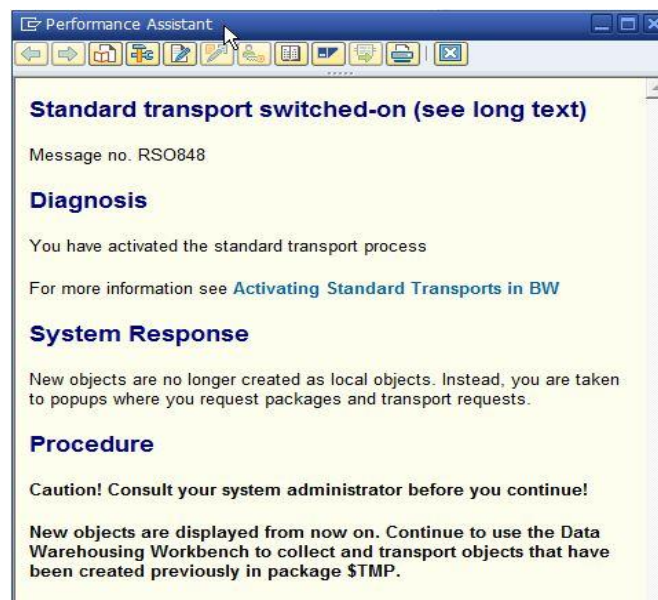
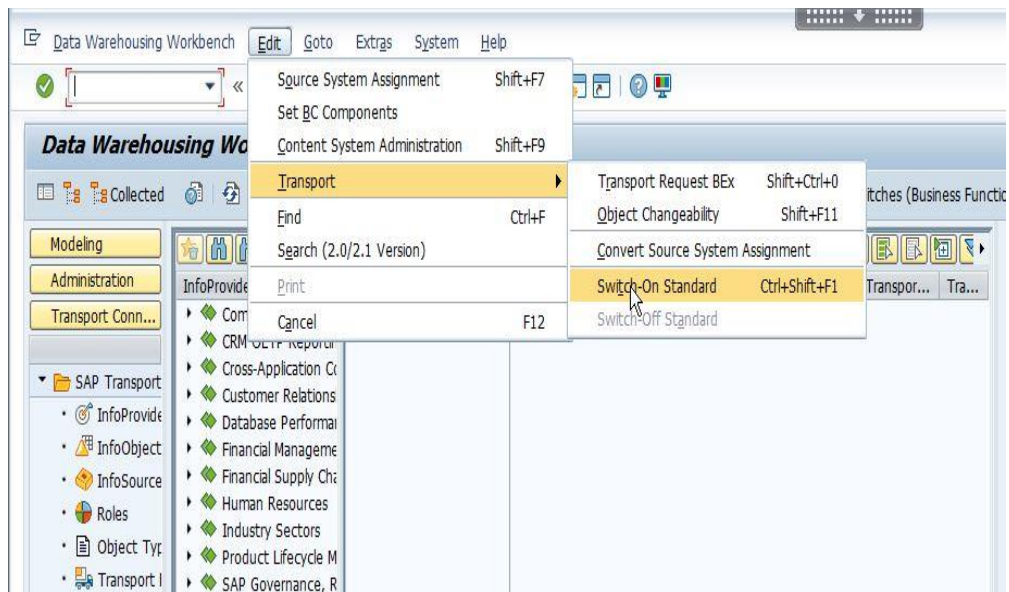
For the usage of SAP Change Request Management (ChaRM) and Focused Build *Retrofit for BW* the BW Transport Connection Tool cannot be used. In the tool, it is possible to store all changed objects locally before they are assigned to a transport request.

**Impact:** When the objects are later assigned to a transport request, the Cross-System Object Lock Entries are not created.

Therefore, it is mandatory to activate the SAP Standard Transport Management Connection (SAP TMS) for SAP BW. In order to do so, perform the following steps in transaction **RSA1**:

Press the button *Transport Connection* in the left navigation frame of transaction **RSA1**.

Menu: Go to *Edit* → *Transport* → *Switch-On Standard*:



Switch to the SAP Standard Transport Management Connection (SAP TMS) **for both** the

- SAP BW Maintenance Development System, as well as on the
- SAP BW Project-/Release Development System.

### Maintenance of Database Table RSLOGSYSMAP

For source system dependent BW objects in table RSLOGSYSMAP it is maintained how the source system should change after a transport is imported with such a source system dependent object.

For instance, the connected SAP ERP source system is different for SAP BW Development and SAP BW QAS system. In this table the original source system (Field: 'LOGSYSORG') must be the source system for SAP BW Development (e.g. SAP ERP DEV) and the target source system (Field: 'LOGSYSNEW') must be the source system for SAP BW QAS (e.g. SAP ERP QAS).



To maintain this mapping, launch transaction **SM30** of your SAP BW systems and make the required entries in table RSLOGSYSMAP.

**Data Browser: Table RSLOGSYSMAP Select Entries**

Table: RSLOGSYSMAP  
Displayed Fields: 3 of 3 Fixed Columns:

	LOGSYSORG	LOGSYSNEW	ONLYNEW
<input type="checkbox"/>	BS6CLNT400	BS8CLNT400	
<input type="checkbox"/>	ES1CLNT801	ES4CLNT310	

### Importing Remote API for Focused Build Retrofit for BW to Source-and Retrofit System

The following transport (Retrofit for BW Extension Remote (Remote API)) was bundled on the SAP Solution Manager System XSC and **needs to be imported in both** the

- SAP BW Project Development System XB3 (Retrofit Target System), as well as in the
- SAP BW Maintenance Development System XB1 (Source System):

Proceed in the following way:

1. Go to Transport Organizer (Transaction **SE09**) in the Customer SAP Solution Manager, choose *Request/Task* → *Create* from the menu and create an empty transport of copies (in our example: XSCK900055).
2. Next, save the development package for the Retrofit for BW Extension Remote API's to your newly created transport of copies:

Launch transaction **SE80**,

Enter **/SALM/\*** as package and press the Input Help (Arrow icon),

Select Development Package /SALM/RETRO\_BW\_MS on the following pop up and press the button *ok*,

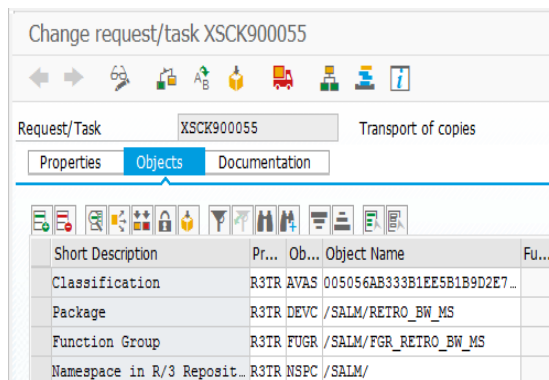
Mark Development Package /SALM/RETRO\_BW\_MS with the cursor, do a right mouse click and press the button *Write Transport Entry* from the menu,

Press the button *All Entries* (All objects of the Development Package are saved to the transport request) on the following pop up

On the next pop up you have to enter the Transport Order No. of your newly created transport of copies as transport order,

By saving Development Package /SALM/RETRO\_BW\_MS to the transport of copies, the required Function Group /SALM/ FGR\_RETRO\_BW\_MS (R3TR FUGR /SALM/FGR\_RETRO\_BW\_MS) will be saved to the ToC as well.

3. Release the objects of your transport of copies.  
As target for the transport of copies you can enter the QAS SAP Solution Manager System.



4. Put the transport of copies to the Import Queues of the Source- **and** Retrofit Target System  
 Launch transaction **STMS** on the QAS SAP Solution Manager System and select **Overview** → **Imports** from the menu.  
 Display the Import Queue of the SAP Solution Manager System,  
 Mark your Transport of Copies (XSK900055) with the Cursor and choose Request → Forward → System from the Menu, and enter the Source System (XB1)  
 As next, forward the Transport of Copies to the Import Queue of the Retrofit Target System as well.
5. Import the Retrofit for BW Extension Remote API's in the Source System and the Retrofit Target System  
 Launch Transaction STMS in the Source System XB1 and choose Menu: Overview → Imports  
 The Import Queue of the Source System XB1 is displayed:

Requests for XB1: 0 / 1 - 05.04.2016 07:24:13

Request XSK900055

Number	Request	Clt	RC	Owner	Project	Short Text	St
3	XSK900055	285	▲	SAPSUPPORT		Retrofit for BW Remote API's	✓

Mark the Transport of Copies (XSK900055) with the Cursor and press the Icon 'Import request'.

Launch Transaction STMS in the Retrofit Target System XB3 and choose Menu: Overview → Imports  
 The Import Queue of the Retrofit Target System XB3 is displayed:

Import Queue: System XB3

Requests for XB3: 0 / 1 04.04.2016 16:30:19

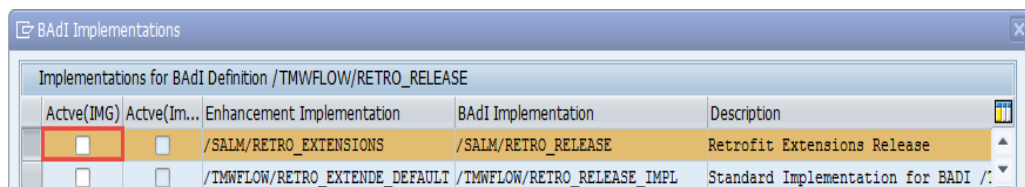
Request XSK900055

Number	Request	Clt	RC	Owner	Short Text	St
11	XSK900055	885	▲	SAPSUPPORT	Retrofit for BW Remote API's	✓

Mark the Transport of Copies (XSCK90055) with the Cursor and press the Icon 'Import request'.

## Activate BAdI Implementation /SALM/RETRO\_RELEASE

In order to activate the BAdI Implementation /SALM/RETRO\_RELEASE (Enhancement Implementation: /SALM/RETRO\_EXTENSIONS) use the following IMG path of SAP Solution Manager, choose [SAP Solution Manager](#) → [Focused Build](#) → [Retrofit](#) → [Business Add-Ins](#) → [Activate Retrofit Release BAdI Implementation](#).



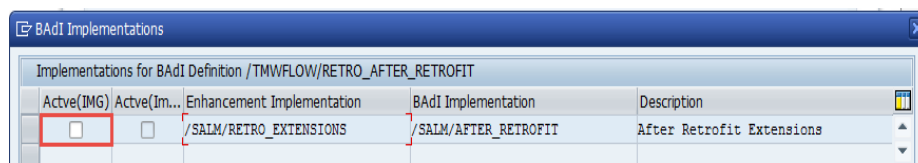
Active(IMG)	Active(Im...)	Enhancement Implementation	BAdI Implementation	Description
<input type="checkbox"/>	<input type="checkbox"/>	/SALM/RETRO_EXTENSIONS	/SALM/RETRO_RELEASE	Retrofit Extensions Release
<input type="checkbox"/>	<input type="checkbox"/>	/TMWFLOW/RETRO_EXTENDE_DEFAULT	/TMWFLOW/RETRO_RELEASE_IMPL	Standard Implementation for BADI /:

Set the [Active\(IMG\)](#) flag to activate the BAdI implementation.

The BAdI Implementation /SALM/RETRO\_RELEASE\_BW is required in order to apply additional logic for the successful conflict detection and object classification at Transport Release regarding the described critical BW Object Types.

## Activate BAdI Implementation /SALM/AFTER\_RETROFIT

In order to activate the BAdI Implementation /SALM/AFTER\_RETROFIT (Enhancement Implementation: /SALM/RETRO\_EXTENSIONS) use the following IMG Path path of SAP Solution Manager, choose [SAP Solution Manager](#) → [Focused Build](#) → [Retrofit](#) → [Business Add-Ins](#) → [Activate Retrofit Release BAdI Implementation](#).



Active(IMG)	Active(Im...)	Enhancement Implementation	BAdI Implementation	Description
<input type="checkbox"/>	<input type="checkbox"/>	/SALM/RETRO_EXTENSIONS	/SALM/AFTER_RETROFIT	After Retrofit Extensions

Set the [Active\(IMG\)](#) flag to activate the BAdI implementation.

In a non-conflict case, the BAdI Implementation /SALM/AFTER\_RETROFIT is required to delete the old BW Object GUID after successful Retrofit, and, in a second step, assign the adequate GUID to the critical SAP BW Object.

In addition, the Original System is adjusted automatically and the critical SAP BW Object is saved to the Retrofit Target Transport Request.

## Maintain Retrofit-Critical Objects

As next, you must maintain the Retrofit-Critical Objects. In the customizing path of SAP Solution Manager, choose [SAP Solution Manager](#) → [Capabilities \(Optional\)](#) → [Change Control Management](#) → [Retrofit](#) → [Define Values for Retrofit Scenarios](#).

In the control table for Objects used in Retrofit Scenarios, you will find an entry for each Critical SAP BW Object Type, as the Enhanced Retrofit cannot perform a conflict detection for these objects. In consequence, the Enhanced Retrofit will put all critical SAP BW Objects to [Manual Retrofit](#).

As we are implementing the Focused Build Retrofit for BW, we must delete the following entries from the table:

Change View "Description of Objects for Retrofit Scenario": Overview

Search New Entries [Delete (Shift+F2)]

Retrofit Scenario	Object	Recalc.	Filter Value for BAdI Implementation
Retrofit Scenario for BW	ISFS		
Retrofit Scenario for BW	ISMP		
Retrofit Scenario for BW	ISTS		
Retrofit Scenario for BW	ROUT		
Retrofit Scenario for BW	RSDS		
Retrofit Scenario for BW	RSFO		
Retrofit Scenario for BW	TRFN		

### Deactivate Retrofit Parameter SCEN\_BW (BW Scenario for Retrofit)

In addition, check if the Parameter BW Scenario for Retrofit is set to *Active*. In the customizing path of SAP Solution Manager, choose *SAP Solution Manager* → *Capabilities (Optional)* → *Change Control Management* → *Retrofit* → *Define Retrofit Parameters*.

The Retrofit Parameter SCEN\_BW (BW Scenario for SAP Standard Functionality of Enhanced Retrofit), is set to *Active* by default. As we do not want to use the BW Scenario for SAP Standard Retrofit, but the Focus Build Retrofit for BW, we must deactivate this Retrofit Parameter:

Change View "Configuration Table for Retrofit Extension": Overview of

Search New Entries [Delete (Shift+F2)]

Configuration Parameter	Value	Num. Val.
BW Scenario for Retrofit	Parameter Active	

### Additional Authorizations for TMW RFC USER on Retrofit Target System required

The TMW RFC User (in our case: SMTMXSC) requires additional authorization for the new Function Group /SALM/FGR\_RETRO\_BW\_MS on the Retrofit Target System XB3:

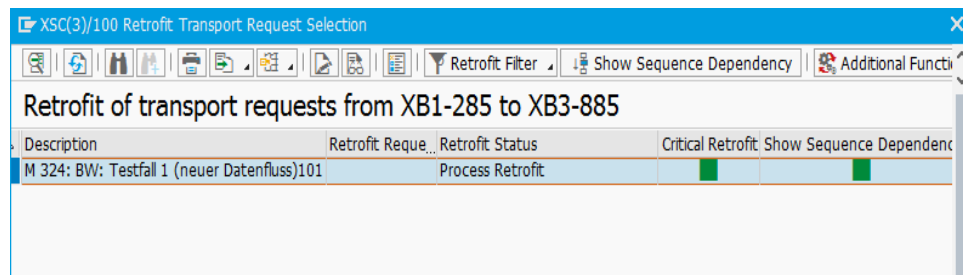
ZRETROFIT\_BW\_TMW\_ADDITIONAL OO Additional Authorization for TMW User (Retrofit BW Scenario)

- OO Manually Cross-application Authorization Objects AAAA
- OO Manually Authorization Check for RFC Access S RFC
- OO Manually Authorization Check for RFC Access T-X384001600
  - Activity 16 ACTVI
  - Name (Whitelist) of RFC object /SALM/FGR\_RETRO\_BW\_MS RFC\_NAME
  - Type of RFC object to which ac FUGR RFC\_TYPE

In addition, the TMW RFC User also requires the authorization for the Function Module 'RS\_TRFN\_GET\_RETROFIT\_TRANIDS'. This RFC Authorization has been embedded in the newest Authorization Profile 'SAP\_SOLMAN\_TMW\_702'.

## 4.4.4 Retrofit with Implemented Focused Build Retrofit for BW

After implementation of the Focus Build 'Retrofit for BW' non-conflicting critical SAP BW Objects will be classified with 'Green' ('Auto-Import').



Description	Retrofit Reque...	Retrofit Status	Critical Retrofit	Show Sequence Dependence
M 324: BW: Testfall 1 (neuer Datenfluss)101	Process Retrofit		■	■

In Conflict Case, a critical BW Object will still be put to *Manual Retrofit* (Classification: 'Red').

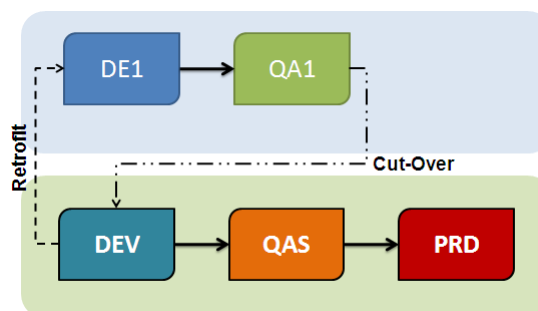
## 4.5 Configuration of Repack for Change Request Management

### 4.5.1 Overview

The purpose of this document is to describe the Repack functionality and configuration.

This functionality addresses complex system landscapes where you may work with dual development tracks delivering one or more production systems.

For example, there is one development track used for maintenance of the production system(s) and another development track used for implementation and enhancement projects. As part of the preparation of the Go-Live of such a project, you need to document this as a change to your up and running production system(s). Therefore, this project needs to be passed as a change through the maintenance track, which would add additional benefit of performing dress rehearsal in this track.



The project that needs to be passed through the maintenance track will consist of many - likely up to 100 and more - changes respectively its transport requests.

---

To improve the performance during the technical transport and the handling during cut over and go live, the transport requests of the implementation project can be repacked into one change (respectively its transport) of the maintenance cycle.

## 4.5.2 Roles and Authorization

### TMW User

The TMW User, maintained in the RFC connection, needs the authorization object **S\_RFC** with the following values:

#### **S\_RFC**

- Activity: *Execute*
- Name of RFC to be protected: **/SALM/CHARM\_REPACK**

Type of RFC object to be protected: *Function Module*

### Change Manager

The user who performs the Repack requires the authorization object **SM\_FIELD** with the following values:

#### **SM\_FIELD**

- Business Transaction Type: *SMHF, SMMJ*
- Field name: **/SALM/REPACK, /SALM/XLD**

The authorization is included in the role **SAP\_OST\_CM\_TRANSPORT\_M**.

## 4.5.3 Package Distribution for Managed System

The Package **/SALM/CHARM\_REPACK\_MS** must be deployed to each managed system, where the Repack is to be performed.

## 4.5.4 Repack Options

During the Repack process, the guided procedure offers several options:

### Step 1: Scenario

- **Repack by Transport**  
In the next step, you will be able to select Transport Requests freely from the Source System.
- **Repack by Change Cycle**

In the next step, you will be able to select Transport Requests assigned to a given Change Cycle.

Scenario

\* Repack Scenario: ☐ Repack by Transport ☐ Repack by Change Cycle

## Step 2: Source (Repack by Transport)

- **Source System**

Select the relevant source system (if multiple are available). The Source System is the system where the Repack takes place.

- **Start Date**

Select a Start Date to show transports requests that were imported into the Source System during a particular period of time.

- **End Date**

Select an End Date to show transports requests that were imported into the Source System during a particular period of time.

- **Show Open Transports**

Select if open transport requests should be shown in the result list (Start and End Date have no effect here).

- **Show ToC**

Select if Transport of Copies should be shown in the result list.

Source

Source System:	<input type="text"/>	Start Date:	<input type="text"/>	<input type="text"/>
Show Open Transports:	<input type="checkbox"/>	Show ToC:	<input type="checkbox"/>	End Date: <input type="text"/> <input type="text"/>

## Step 2: Source (Repack by Change Cycle)

- **Source System**

Select the relevant source system (if multiple are available). The Source System is the system where the Repack takes place.

- **Change Cycle**

Select the Change Cycle to display all assigned transport requests that were imported into the Source System.

Source

Source System:	<input type="text"/>	Change Cycle:	<input type="text"/>
----------------	----------------------	---------------	----------------------

## Step 3: Target

- **Workbench Request**

Select a target workbench request (if multiple are available).

- **Customizing Request**

Select a target customizing request (if multiple are available).

- **Change Originality**

Change Originality of workbench objects to the Source System.

- **Add Directory Locks**

If transport locks exist for objects that should be repacked in the Source System, the function will delete these locks in order to add the locks for the repack target transport request.

- **ToC into Customizing**

Repack Transports of Copies into target customizing transport (otherwise, they will be repacked into target workbench transport).

- **Add CSOL**

Add Cross System Object Lock for the target repack transport request

Target

Workbench Request:	<input type="text"/>	Customizing Request:	<input type="text"/>
Change Originality:	<input type="checkbox"/>	ToC into Customizing:	<input type="checkbox"/>
Add Directory Locks:	<input type="checkbox"/>	Add CSOL:	<input type="checkbox"/>

## 4.5.5 Activating the Piece List

Call transaction [scc1](#) in your working client and activate the piece list [/SALM/CHARM\\_EXT](#), which will supply your system with the predefined customizing. The result of this activation can be verified in transaction [scc3](#).

## 4.5.6 Configuration

This section describes the customizing parameters in the table [/SALM/REPACK\\_CUS](#).

The parameters allow you to set default values for the Repack Options.

Customizing table [/SALM/REPACK\\_CUS](#) contains the following parameters:

- **SET\_CSOL**

Defines the default value for [Add CSOL](#) option. Set to 'X' if this option should be checked by default.



---

- **SET\_DIRLOCK**

Defines the default value for *Add Directory Locks* option. Set to 'X' if this option should be checked by default.

- **SET\_ORIGINALITY**

Defines the default value for *Change Originality* option. Set to 'X' if this option should be checked by default.

- **SHOW\_OPEN**

Defines the default value for *Show Open Transports* option. Set to 'X' if this option should be checked by default.

- **SHOW\_TOC**

Defines the default value for *Show ToC* option. Set to 'X' if this option should be checked by default.

- **SHOW\_TODAY\_MINUS\_DAYS**

Defines the default value for *Start Date* option. Enter a numeric value: Number of days subtracted from the current date.

- **TOC\_TO\_CUSTOMIZING**

Defines the default value for *ToC into Customizing* option. Set to 'X' if this option should be checked by default.

## 4.6 Configuration of Simple IT Request

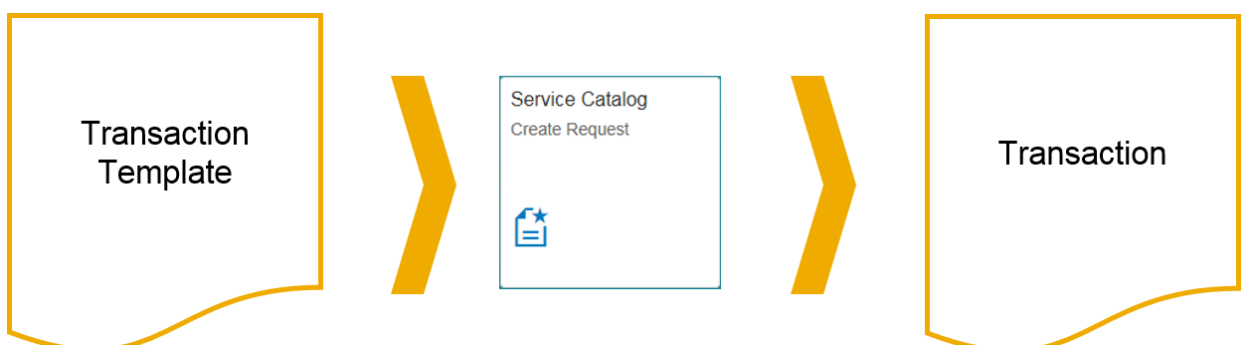
### 4.6.1 Overview

The purpose of this document is to describe the functionality of Simple IT Request and its configuration.

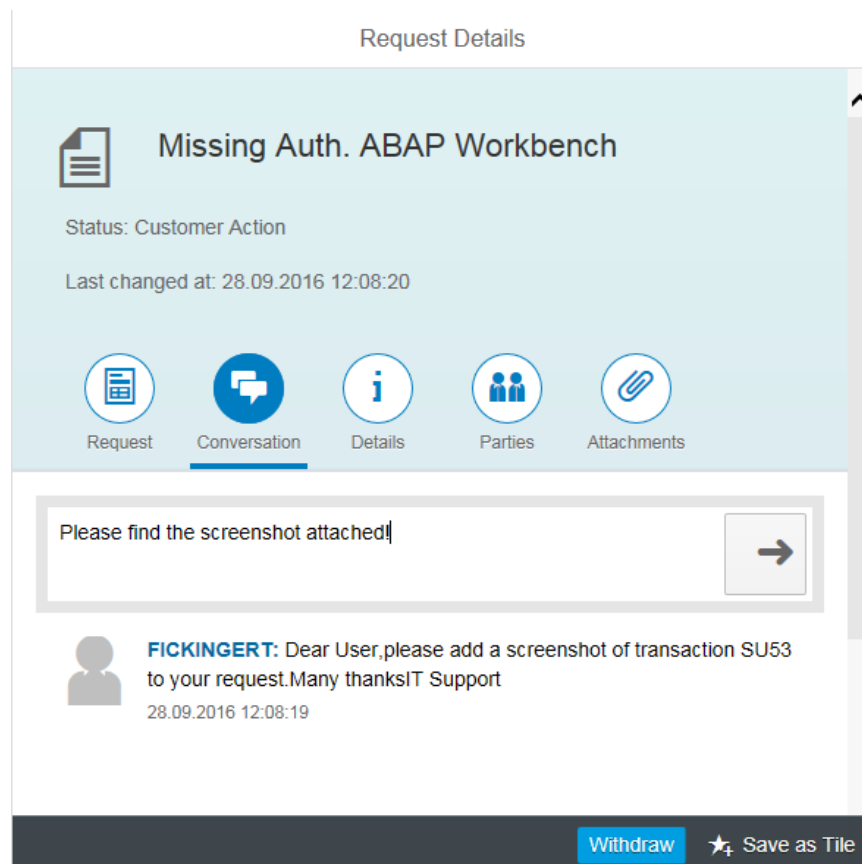
With Simple IT Request Business Users can consume any (Solution Manager based) IT Service via a single point of entry (Catalog Fiori Application) including an intuitive user interface for postprocessing of consumed services (My Requests Fiori Application).

The IT Organization can create and maintain the respective service catalog and its services via CRM UI in SAP Solution Manager. The service catalog is based on the multi-level categorization of CRM transactions and can be structured with respect to the business user perspective. The services are based on CRM transaction templates. They can be created and maintained using standard ITSM and ChaRM functions in SAP Solution Manager.

The service consumption starts in the service catalog where predefined content of transaction templates is displayed as *services*. When a service is consumed, a defined transaction is created based on predefined data from the template and additional information submitted by the service consumer. For example, the service [Missing Authorization](#) is defined via an Incident template. The service consumer finds this service in the catalog, adds information about the authorization he is missing and submits the request. This generates an Incident transaction with predefined information such as the support team as well as additional information added by the service consumer.



The processing of requests is handled just like any other transaction via CRM UI by assigned message processors, support teams and others. Communication in terms of queries to the requester (and vice versa) is done via the My Requests Fiori Application from requester perspective and CRM UI from request processor perspective.



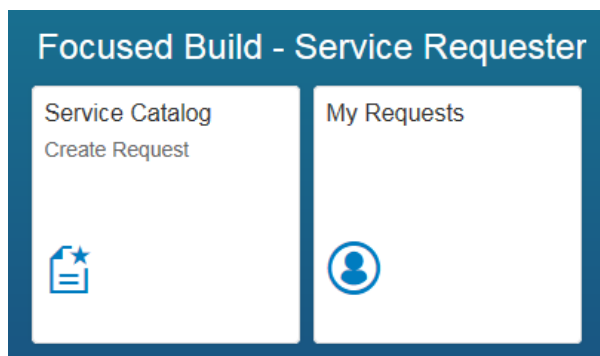
## 4.6.2 Roles and Authorizations

Depending on the role different user interfaces/applications are relevant for Simple IT Request:

### Service Requester

The service requester can access the service catalog via a Fiori App. Furthermore, the requester can access his own services which he requested via the [My Requests](#) app. With the [My Requests](#) app, the requester can review the status of his request, answer to questions raised by the processor, edit/delete/create attachments and set user status via action buttons (withdraw, reject, confirm, etc.). Both apps are accessible via transaction [SM\\_WORKCENTER](#).

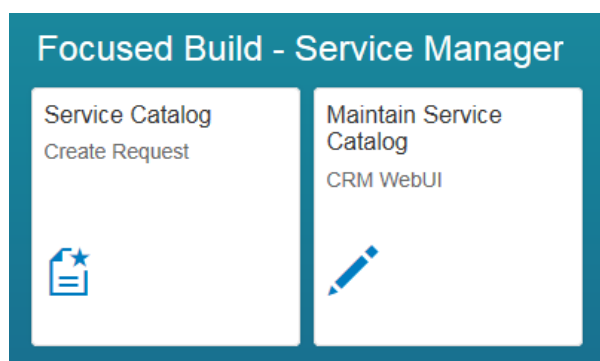
For Service Requesters, the following composite role is available: [SAP\\_OST\\_SSR\\_REQUESTER\\_COMP](#)



### Service Manager

The service manager maintains the service catalog and its hierarchy via CRM UI and a dedicated business role (/SALM/SM\_PRO). Within this business role he can create, maintain or delete transaction templates (=services) such as Incident Template, Service Request Template, and others. Besides the basic definition of the service including its pre-defined data (such as involved parties, priority, and long text) he also defines the layout of the service form in the catalog application. Furthermore, he can maintain the categorization schema in order to define the structure of the services that appear in the catalog application. The service manager also has access to the service catalog via a Fiori App. Both UIs (catalog maintenance in CRM UI, service catalog application) are accessible via transaction [SM\\_WORKCENTER](#).

For Service Managers, the following composite role is available: [SAP\\_OST\\_SSR\\_MANAGER\\_COMP](#)



## 4.6.3 Configuration

Simple IT Request is delivered with predefined customizing, business roles and authorization roles which must be activated via piece list [/SALM/SIMPLE\\_IT\\_REQ](#) (refer to chapter *Error! Reference source not found. Error! Reference source not found.*). This predefined configuration allows direct usage of Simple IT Request without any further adjustments.

However, it is recommended and in most cases, also necessary to adapt the standard configuration to the customer specific implementation of SAP Solution Manager. The following areas need to be considered when adapting the standard configuration:

## Service Catalog Structure

The service catalog structure is maintained by means of categorization schemas via CRM UI. This can be done with the authorizations of the service manager role and CRM business role `/SALM/SM_PRO`. In standard configuration, the standard categorization schema `SAP_SM_TEMPLATE_V2` is used. If this schema does not reflect the structure of your set of services you can create a custom specific categorization schema. This schema then needs to be assigned to the transaction templates and transactions representing services and service requests used in Simple IT Request.

You can also define 2 separate categorization schemas to reflect two different perspectives on your services: 1) to organize your services within the catalog and provide an intuitive navigation for business users. 2) to categorize requested services with IT internal attributes for, e.g., internal routing or reporting. Accordingly, you find two sections of multi-level categorizations in each template transaction (Incident Template, Problem Template, Service Request Template, Request for Change Template).

The screenshot displays the SAP Service Catalog Configuration interface. The left pane shows the 'Category Hierarchy' with a tree structure under 'SAP\_SM\_TEMPLATE\_V2'. The right pane shows the 'General Data' section for the selected schema.

**Category Hierarchy**

ID	Name	Sequ...	Type	Sche...
▼ SAP_SM_TEMPLATE_V2	SAP Solution Manager Te...		Schema	Deplo...
▼ AIC_CAT01	End User Workspace		Category	
▶ AIC_CAT01_01	Office Equipment		Category	
▶ AIC_CAT01_02	Mobile Devices		Category	
▶ AIC_CAT01_03	Software		Category	
▶ AIC_CAT01_04	Printing		Category	
▼ AIC_CAT02	Business Applications		Category	
▶ AIC_CAT02_01	SAP		Category	
▶ AIC_CAT02_02	Non-SAP		Category	
▶ AIC_CAT02_03	Corporate Intranet		Category	
▶ AIC_CAT02_04	User Management		Category	
▼ AIC_CAT03	IT Infrastructure		Category	
▶ AIC_CAT03_01	Networking		Category	
▶ AIC_CAT03_02	File Share		Category	
▶ AIC_CAT03_03	Active Directory		Category	
▶ AIC_CAT03_04	Print Servers		Category	
▶ AIC_CAT03_05	Internet Access		Category	
▶ AIC_CAT03_06	Mail		Category	
▶ AIC_CAT03_07	Virtualization		Category	
▶ AIC_CAT03_08	Physical Servers		Category	
▶ AIC_CAT03_09	Databases		Category	

**General Data**

**General**

Schema ID: SAP\_SM\_TEMPLATE\_V2  
Name: SAP Solution Manager Template V2  
Description: SAP Solution Manager Template V2  
Status: Deployed  
Valid-From Date: 16.08.2016  
Valid-From Time: 10.04  
Valid-To Date: 19.09.2016  
Valid-To Time: 09.52  
Logical Structure: Hierarchical Categorization  
Authorization Mode: OR Combination  
Subject Profile:  
Sequencing: ☐

**Changes**

Changed On: 19.09.2016  
Changed At: 09.49  
Changed By: OST\_SRM\_30

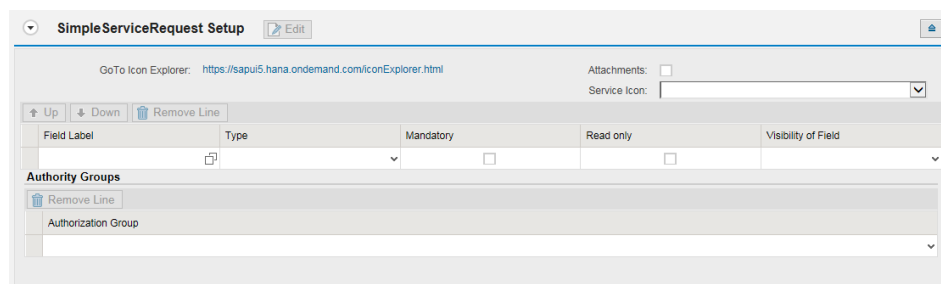
**Application Areas**

Application ID	Parameter	Value
Service Request / Incident	Transaction type / Catalog Cat...	Incident ISV / Defect Locations...
Service Request / Incident	Transaction type / Catalog Cat...	Incident Template / Defect Loc...
Service Request / Incident	Transaction type / Catalog Cat...	Incident (VAR) / Defect Locati...
Service Order	Transaction type / Catalog Cat...	Normal Change / Defect Locati...
Problem	Transaction type / Catalog Cat...	Problem / Defect Locations/Obj...
Problem	Transaction type / Catalog Cat...	Problem Template / Defect Loc...
Service Order	Transaction type / Catalog Cat...	Defect Correction / Defect Loc...

## Business Role

The standard configuration delivers the CRM business role `/SALM/SM_PRO` for maintenance of services and catalog structure by the service manager role via CRM UI. If you would like to include functions of this business role into custom specific business roles you need to take into account the specific navigation bar profile `/SALM/S1SOLMANPRO`. In particular, this profile includes the work centers **S1-CHANGE**, **S1-SUPPORT**, and **SRV-OPERAT** which are relevant for activities of the service manager mentioned above. For instance, the work center **S1-SUPPORT** includes the link groups **S1-IM-CR**, **S1-IM-SR** to create and search for Incident related transactions and templates. These groups contain links such as **S1-IMT-CR** to create Incident Templates. The latter refers to CRM UI component `/SALM/INCIDENTM` via Target ID **S1TIMTCR**.

In addition, the UI configuration(s) also need to be adjusted in case other business roles are used. Therefore, you need to include the assignment block *Simple IT Request Setup* referring to CRM UI component `/SALM/ITSMSRFS` into the configuration of the corresponding business role.



## Transaction Templates and Transactions

In standard configuration, the following transaction types and templates are defined and can be used out of the box:

- S4IT: Incident Template
- S4PT: Problem Template
- S4ST: Service Request Template
- S4CT: Request for Change Template

Based on these template types, services can be created with the service manager role. These services then trigger the generation of a transaction of the defined type (see table [/SALM/ITSM\\_SSRTM](#)):

- S4IT triggers SMIN
- S4PT triggers SMPR
- S4ST triggers SMRQ
- S4CT triggers SMCR

This mechanism follows the general approach of Simple IT Request as described above. If customers would like to integrate custom specific templates or transaction types, this can be done straightforward just like for the standard configuration mentioned above. Please see the chapter *Customizing Options* below where all relevant tables are highlighted which need to be maintained in this case. Adjustments to authorization roles, categorization schemas and CRM business roles including UI configurations also might be necessary in case new/other transaction types will be used for Simple IT Request. Further details can be found in this configuration guide in the referring chapters.

## Authorization Role

Two composite authorization roles are delivered with Simple IT Request covering the activities of service requesters and service managers as described above.

## Service Requester

### **SAP\_OST\_SSR\_REQUESTER\_COMP**

Including the following single roles:

- **SAP\_OST\_SSR\_REQUESTER**
- **SAP\_SM\_CRM\_UIU\_FRAMEWORK**

- `SAP_SM_CRM_UIU_SOLMANPRO_PROC`
- `SAP_SOCM_REQUESTER`
- `SAP_SUPPDESK_CREATE`

## Service Manager

`SAP_OST_SSR_MANAGER_COMP`

Including the following single roles:

- `SAP_OST_SM_CRM_UIU_SM_PRO`
- `SAP_OST_SSR_MANAGER`
- `SAP_SM_CRM_UIU_FRAMEWORK`
- `SAP_SM_CRM_UIU_SOLMANPRO_CHARM`
- `SAP_SM_CRM_UIU_SOLMANPRO_CREA`
- `SAP_SM_CRM_UIU_SOLMANPRO_PROC`
- `SAP_SOCM_REQUESTER`
- `SAP_SUPPDESK_CONFIG`
- `SAP_SUPPDESK_CREATE`

It is recommended to copy these roles into customer namespace, adjust them in case necessary to customer specifics and generate the referring profiles.

The adjustments to customer specifics typically cover the following authorization objects and use cases:

## Service Requester

Role: `SAP_OST_SSR_REQUESTER`

Object: `/SALM/SSRG`

Use Case: restrict access to services by definition of authorization groups (customizing table `/SALM/ITSM_SSRAG`) which can be assigned on transaction template level by the service manager.

Role: `SAP_OST_SSR_REQUESTER`

Object: `CRM_SSCCAT`

Use Case: restrict access to groups of services based on the categorization schema.

Role: `SAP_OST_SSR_REQUESTER`

Object: `CRM_ORD_LP`, `CRM_ORD_PR`

Use Case: restrict access to transaction types of transaction templates and transactions. Especially when having custom specific transaction types such as `ZMIN`, `ZMIT` and others, these need to be added here.

## Service Manager

Role: `SAP_OST_SSR_MANAGER`

Object: `/SALM/SSRG`

Use Case: restrict access to services by definition of authorization groups (customizing table `/SALM/ITSM_SSRAG`) which can be assigned on transaction template level by the service manager.

Role: **SAP\_OST\_SSR\_MANAGER**

Object: **CRM\_SSCCAT**

Use Case: restrict access to groups of services based on the categorization schema.

Role: **SAP\_OST\_SSR\_MANAGER**

Object: **CRM\_ORD\_LP, CRM\_ORD\_PR**

Use Case: restrict access to transaction types of transaction templates and transactions. Especially when having custom specific transaction types such as **ZMIN, ZMIT** and others, these need to be added here.

## 4.6.4 Customizing Options

This section describes the customizing options of Simple IT Request which can be defined in different customizing tables. Further details, standard customizing settings and configuration examples can be found in the corresponding documentation and customizing tables in your SAP Solution Manager system.

Option	Table	Description
<b>Definition of Service Templates for Catalog Selection</b>	/SALM/ITSM_SSRSR	Define the template transaction types that can be used to create catalog services
<b>Template Mapping to Simple IT Request Transaction Type</b>	/SALM/ITSM_SSRTM	Define the mapping between template transaction type and transaction type which is created in case a service is consumed
<b>Copy Control for Transaction Types</b>	CRMV_PR_COPY_MA	Define standard copy control between template transaction types and transaction types
<b>Customizing of General Settings</b>	/SALM/ITSM_SSRST	Define the categorization type which is used to build the catalog hierarchy referring to a selected reference transaction template
<b>Definition of available Layout Fields for Simple IT Request Apps</b>	/SALM/ITSM_SSRLF	Define the transaction fields that can be selected within the layout component during maintenance of a service (e.g., Description, Priority, Urgency, Contact Person, ...)
<b>Define Activities for Simple IT Request</b>	/SALM/ITSM_SSRAC	Define status activities which are visualized as buttons in the My Request App depending on the current user status of the transaction (e.g., "Withdraw" to set a transaction to status "Withdrawn").



Option	Table	Description
<b>Definition of Partner Functions as Requestor by Trans. Type</b>	/SALM/ITSM_SSRRQ	Define the partner function "requester" which will be used during consumption of a service in order to set the consumer as requester.
<b>Customizing of Communication in My Requests App</b>	/SALM/ITSM_SSRCO	Define text type and status (optional) which is set when end users communicate with the IT organization using the My Request App
<b>Visible Tabs in My Requests App by Trans. Type</b>	/SALM/ITSM_SSRRT	Define the tabs which are displayed in the My Request App (e.g., Request, Conversation, Attachments, ...)
<b>Customizing of Authorization Groups</b>	/SALM/ITSM_SSRAG	Define authorization groups that can be used to restrict access to services on transaction template level

## 4.7 Configuration of dropDoc

dropDoc helps as a part of Solution Documentation to manage numerous file types, which simplifies the default usability of file management inside Solution Documentation. dropDoc can be integrated as a part of **work package (WP)**, **work item (WI)**, and **business requirement (BR)** applications. In addition, dropDoc can be implemented directly, as a standalone option in the Solution Documentation scenario.

An extract of dropDoc features are:

- insert files using drag and drop
- mass maintenance of documents and documents type
- change the document status
- delete one or more documents at the same time
- optimized for different screen resolutions

Moreover, the dropDoc is partial web application. The frontend functionality of dropDoc is based on a browser UI technology SAPUI5. We strongly recommend that you always use the latest browser versions for Google Chrome, Firefox, Safari, and especially Internet Explorer.

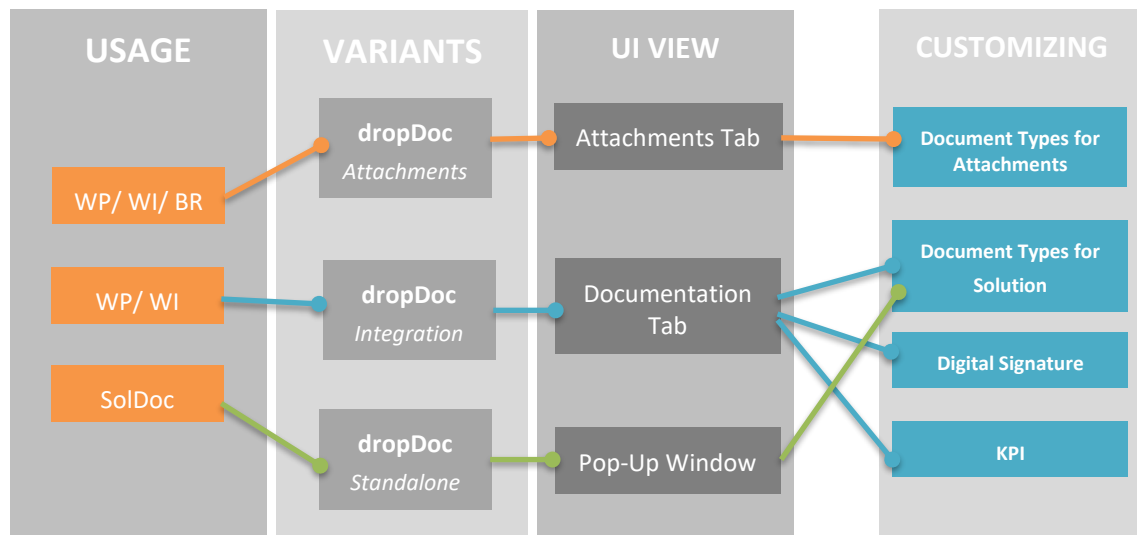
In addition to the standard behavior, the dropDoc allows more detailed configuration, you can define the documentation store type and the expected document types in different surroundings.

### 4.7.1 Prerequisites

Created a solution and assigned document types.

## 4.7.2 Overview of dropDoc Variants

dropDoc is a well-rounded application and it can be used in different variants.



There are three variants of dropDoc:

- First, the attachments variant is used to upload and manage attachments for a solution. It is displayed as *Attachments Tab* as a part of WP or WI. For this dropDoc variant, the *Allowed document types for Attachments* table has to be customized. (For more information, see chapter *Document Types of Attachments*.)
- Second, integration variant is the main dropDoc application for Solution Documentation for the managing of documentation. It is displayed as *Documentation Tab* in WP or WI. In the BR application, this variant is integrated in an attachment panel of a requirement. In addition, it is easily accessible via context menu. For this dropDoc variant, customize the general *Document types for solution*. These are the documents for which the digital signature should be applied and the characteristics of the digital signature in general and the KPI properties must be defined. (For more information, see chapters *3.3 KPI Customization for Work Package and Work Item*, *3.4 Overview of digital signature*.)
- Third, the standalone variant is displayed in a pop-up window directly in Solution Documentation column browser. For this dropDoc variant, define the *Document types for solution* only.

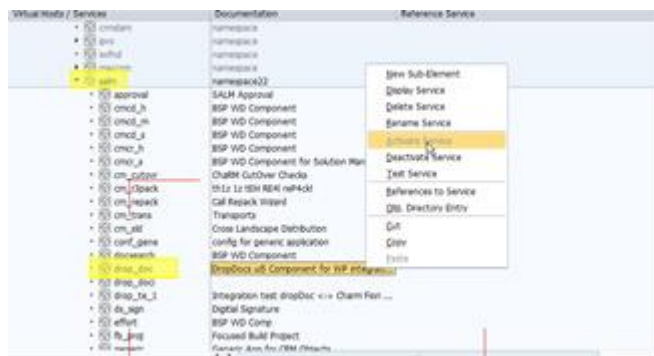
### **i** Note

All dropDoc variants could be used for the same solution or separately.

## 4.7.3 Activation of BSP Services

Run transaction **SICF**, select the execute icon (or **F8**), and follow the path:

**/default\_host/sap/bc/bsp/salm/drop\_doc**. As shown in the screenshot below, activate the service *DropDocs ui5 component for WP integration/SMUD*.



## 4.7.4 Activation of ICF Services

### BSP Services

Run transaction **SICF**, select the execute icon (or **F8**), and follow the path:

**/sap/opu/odata/salm/drop\_doc\_srv**. Activate service **DROP\_DOC\_SRV**.

opu	OData for SAP Products
odata	Standard Mode
aiwg	Namespace
iwfnd	Namespace
salm	Namespace
business_requirements	BUSINESS_REQUIREMENTS_SRV
crmgenericappconfig	
crm_generic_srv	CRM_GENERIC_SRV
drop_doc_srv	DROP_DOC_SRV
ext_integration_srv	EXT_INTEGRATION_SRV
gw_generic_app_srv	GW_GENERIC_APP_SRV
gw_requirement_srv	GW_REQUIREMENT_SRV
gw_red_mat_srv	GW_REO_MGT_SRV

### Activation of OData Services

Run transaction **SICF**, select the execute icon (or **F8**), and follow the path:

**/sap/opu/odata/salm/drop\_doc\_srv**. Activate service **DROP\_DOC\_SRV**.

opu	OData for SAP Products
odata	Standard Mode
aiwg	Namespace
iwfnd	Namespace
salm	Namespace
business_requirements	BUSINESS_REQUIREMENTS_SRV
crmgenericappconfig	
crm_generic_srv	CRM_GENERIC_SRV
drop_doc_srv	DROP_DOC_SRV
ext_integration_srv	EXT_INTEGRATION_SRV
gw_generic_app_srv	GW_GENERIC_APP_SRV
gw_requirement_srv	GW_REQUIREMENT_SRV
gw_red_mat_srv	GW_REO_MGT_SRV

### Definition of a system alias for OData service

Run transaction **/IWFND/MAINT\_SERVICE**, select OData service **/SALM/DROP\_DOC\_SRV**, and add a system alias as described in chapter 1.

**Activate and Maintain Services**

Service Catalog

Type	Technical Service Name	Service Description	External Service Name	Namespace	OAut	Soft State	Status	Is SAP Service
BEP	DAAG_MONOBJ	1 Data Aging Monitor Objects	DAAG_MONOBJ		<input checked="" type="checkbox"/>			
BEP	DSH_SIMULATE_SB_SRV	1 Simulate smart business service	DSH_SIMULATE_SB_SRV		<input type="checkbox"/>	Not Supported		
BEP	/STD/DFL_SERVICE	1 DF Launchpad Service	DFL_SERVICE	/STD/	<input type="checkbox"/>	Not Supported		
BEP	DEWK_DASHBOARD	1 Dashboard service	DEWK_DASHBOARD		<input type="checkbox"/>	Not Supported		
BEP	DIAGLS_FILTERBAR_SRV	1 DIAGLS Filter Bar OData Services	DIAGLS_FILTERBAR_SRV		<input type="checkbox"/>	Not Supported		
BEP	DIAGST_CCDR_READ_SRV	1 CCDR-Read-API for Odata	DIAGST_CCDR_READ_SRV		<input checked="" type="checkbox"/>	Not Supported		
BEP	DSMON_DATA_SRV	1 Odata service for data readiness Monitor	DSMON_DATA_SRV		<input type="checkbox"/>	Not Supported		
BEP	/SALM/DROP_DOC_SRV	1 Odata Service for DropDoc(SMUD)	DROP_DOC_SRV	/SALM/	<input type="checkbox"/>	Not Supported		
BEP	DSXP_CDC_ODATA_SRV	1 Odata service for Cross-Database Comparison	DSXP_CDC_ODATA_SRV		<input type="checkbox"/>	Not Supported		
BEP	DSXP_CDC_SRV	1 Odata service for Cross-Database Comparison	DSXP_CDC_SRV		<input type="checkbox"/>	Not Supported		
BEP	DVM_AGING_SRV	1 DVM Aging	DVM_AGING_SRV		<input type="checkbox"/>	Not Supported		
BEP	DVM_AGING_SRV_01	1 DVM Aging Odata service	DVM_AGING_SRV_01		<input type="checkbox"/>	Not Supported		
BEP	DVM_BW_HOUSEKEEPING_ADMIN_SRV	1 BW Housekeeping & BW Administration	DVM_BW_HOUSEKEEPING_ADMIN_SRV		<input type="checkbox"/>	Not Supported		
BEP	DVM_NLS_UNUSED_IPS_SRV	1 DVM NLS and Potentially Unused IPs	DVM_NLS_UNUSED_IPS_SRV		<input type="checkbox"/>	Not Supported		
BEP	DVM_UNUSED_DATA_SRV	1 dvm unused data	DVM_UNUSED_DATA_SRV		<input type="checkbox"/>	Not Supported		
BEP	DVW_BW_HOUSEKEEPING_ADMIN_SRV	1 BW Housekeeping & BW Administration	DVW_BW_HOUSEKEEPING_ADMIN_SRV		<input type="checkbox"/>	Not Supported		
BEP	EZE_ICDR_OD	1 GW EZE ICDB Service	EZE_ICDR_OD		<input type="checkbox"/>	Not Supported		
BEP	EZE_ICDR_ODATASERVICE	1 EZE IC Dashboard GW Service	EZE_ICDR_ODATASERVICE		<input type="checkbox"/>	Not Supported		
BEP	EZEBPCC_UI_SRV	1 GW project for new BPCC UI	EZEBPCC_UI_SRV		<input type="checkbox"/>	Not Supported		
BEP	EZEEM_MF_TS	1 Technical Service for Message Flow Monitoring	EZEEM_MF_TS		<input type="checkbox"/>	Not Supported		

## 4.7.5 Document Types of Attachments

The only types of documents that are allowed as attachments for the solution are defined in the table [Allowed document types for Attachments](#). This table is accessible by running transaction **SM30** and then using transaction **/SALM/ALLWD\_DOCT**. The table displays a list of allowed document types of attachments for each solution ID.

**Change View "Allowed document types for attachments in BR, WP, WI"**

Allowed document types for attachments in BR, WP, WI

Trans.Type	Solution ID	Doc. Type
01	051Mh1T7xQ1sfYchZ4Dm	0100P
01	051Mh1T7xQ1sfYchZ4Dm	0100P_11
01	051Mh1T7xQ1sfYchZ4Dm	0100P_12
01	051Mh1T7xQ1sfYchZ4Dm	0100P_13
01	051Mh1T7xQ1sfYchZ4Dm	0100P_14
01	051Mh1T7xQ1sfYchZ4Dm	0100P_15
01	051Mh1T7xQ1sfYchZ4Dm	0100P_16
01	051Mh1T7xQ1sfYchZ4Dm	0100P_17
01	051Mh1T7xQ1sfYchZ4Dm	0100P_18
01	051Mh1T7xQ1sfYchZ4Dm	0100P_19
01	051Mh1T7xQ1sfYchZ4Dm	0100P_20
01	051Mh1T7xQ1sfYchZ4Dm	0100P_21
01	051Mh1T7xQ1sfYchZ4Dm	0100P_22
01	051Mh1T7xQ1sfYchZ4Dm	0100P_23
01	051Mh1T7xQ1sfYchZ4Dm	0100P_24
01	051Mh1T7xQ1sfYchZ4Dm	0100P_25
01	051Mh1T7xQ1sfYchZ4Dm	0100P_26
01	051Mh1T7xQ1sfYchZ4Dm	0100P_27
01	051Mh1T7xQ1sfYchZ4Dm	0100P_28
01	051Mh1T7xQ1sfYchZ4Dm	0100P_29
01	051Mh1T7xQ1sfYchZ4Dm	0100P_30
01	051Mh1T7xQ1sfYchZ4Dm	0100P_31
01	051Mh1T7xQ1sfYchZ4Dm	0100P_32
01	051Mh1T7xQ1sfYchZ4Dm	0100P_33
01	051Mh1T7xQ1sfYchZ4Dm	0100P_34
01	051Mh1T7xQ1sfYchZ4Dm	0100P_35
01	051Mh1T7xQ1sfYchZ4Dm	0100P_36
01	051Mh1T7xQ1sfYchZ4Dm	0100P_37
01	051Mh1T7xQ1sfYchZ4Dm	0100P_38
01	051Mh1T7xQ1sfYchZ4Dm	0100P_39
01	051Mh1T7xQ1sfYchZ4Dm	0100P_40
01	051Mh1T7xQ1sfYchZ4Dm	0100P_41
01	051Mh1T7xQ1sfYchZ4Dm	0100P_42
01	051Mh1T7xQ1sfYchZ4Dm	0100P_43
01	051Mh1T7xQ1sfYchZ4Dm	0100P_44
01	051Mh1T7xQ1sfYchZ4Dm	0100P_45
01	051Mh1T7xQ1sfYchZ4Dm	0100P_46
01	051Mh1T7xQ1sfYchZ4Dm	0100P_47
01	051Mh1T7xQ1sfYchZ4Dm	0100P_48
01	051Mh1T7xQ1sfYchZ4Dm	0100P_49
01	051Mh1T7xQ1sfYchZ4Dm	0100P_50
01	051Mh1T7xQ1sfYchZ4Dm	0100P_51
01	051Mh1T7xQ1sfYchZ4Dm	0100P_52
01	051Mh1T7xQ1sfYchZ4Dm	0100P_53
01	051Mh1T7xQ1sfYchZ4Dm	0100P_54
01	051Mh1T7xQ1sfYchZ4Dm	0100P_55
01	051Mh1T7xQ1sfYchZ4Dm	0100P_56
01	051Mh1T7xQ1sfYchZ4Dm	0100P_57
01	051Mh1T7xQ1sfYchZ4Dm	0100P_58
01	051Mh1T7xQ1sfYchZ4Dm	0100P_59
01	051Mh1T7xQ1sfYchZ4Dm	0100P_60
01	051Mh1T7xQ1sfYchZ4Dm	0100P_61
01	051Mh1T7xQ1sfYchZ4Dm	0100P_62
01	051Mh1T7xQ1sfYchZ4Dm	0100P_63
01	051Mh1T7xQ1sfYchZ4Dm	0100P_64
01	051Mh1T7xQ1sfYchZ4Dm	0100P_65
01	051Mh1T7xQ1sfYchZ4Dm	0100P_66
01	051Mh1T7xQ1sfYchZ4Dm	0100P_67
01	051Mh1T7xQ1sfYchZ4Dm	0100P_68
01	051Mh1T7xQ1sfYchZ4Dm	0100P_69
01	051Mh1T7xQ1sfYchZ4Dm	0100P_70
01	051Mh1T7xQ1sfYchZ4Dm	0100P_71
01	051Mh1T7xQ1sfYchZ4Dm	0100P_72
01	051Mh1T7xQ1sfYchZ4Dm	0100P_73
01	051Mh1T7xQ1sfYchZ4Dm	0100P_74
01	051Mh1T7xQ1sfYchZ4Dm	0100P_75
01	051Mh1T7xQ1sfYchZ4Dm	0100P_76
01	051Mh1T7xQ1sfYchZ4Dm	0100P_77
01	051Mh1T7xQ1sfYchZ4Dm	0100P_78
01	051Mh1T7xQ1sfYchZ4Dm	0100P_79
01	051Mh1T7xQ1sfYchZ4Dm	0100P_80
01	051Mh1T7xQ1sfYchZ4Dm	0100P_81
01	051Mh1T7xQ1sfYchZ4Dm	0100P_82
01	051Mh1T7xQ1sfYchZ4Dm	0100P_83
01	051Mh1T7xQ1sfYchZ4Dm	0100P_84
01	051Mh1T7xQ1sfYchZ4Dm	0100P_85
01	051Mh1T7xQ1sfYchZ4Dm	0100P_86
01	051Mh1T7xQ1sfYchZ4Dm	0100P_87
01	051Mh1T7xQ1sfYchZ4Dm	0100P_88
01	051Mh1T7xQ1sfYchZ4Dm	0100P_89
01	051Mh1T7xQ1sfYchZ4Dm	0100P_90
01	051Mh1T7xQ1sfYchZ4Dm	0100P_91
01	051Mh1T7xQ1sfYchZ4Dm	0100P_92
01	051Mh1T7xQ1sfYchZ4Dm	0100P_93
01	051Mh1T7xQ1sfYchZ4Dm	0100P_94
01	051Mh1T7xQ1sfYchZ4Dm	0100P_95
01	051Mh1T7xQ1sfYchZ4Dm	0100P_96
01	051Mh1T7xQ1sfYchZ4Dm	0100P_97
01	051Mh1T7xQ1sfYchZ4Dm	0100P_98
01	051Mh1T7xQ1sfYchZ4Dm	0100P_99
01	051Mh1T7xQ1sfYchZ4Dm	0100P_100

The table is divided into three columns:

- The first column, *Trans.Type*, stands for transition type. These values determine the usage of document types. There is the possibility to define different document types for different usage areas, separated for the WP, WI, or BR.
- The second column, *Solution ID*, displays required identification values for selecting a specific solution.
- The third column, *Doc.Type*, displays values for the documentation types.

### Note

As an example, if five document types have to be defined for the solution, then each document type has to be maintained individually in the table.

### Recommendation

To attach documents without any specific document type, use the wildcard (\*) for all the three parameters in the table.

## Configuration of Document Types for Attachments

1. To navigate to the customizing table for document types, run transaction **SM30**.
2. In the *Table/View* field, use transaction **/SALM/ALLWD\_DOCT**, and choose *Maintain*.
3. Here you can select a customized document type from the list. Select the value help icon to the right of the list for a short description of each document type.
4. Choose *New Entries*. Define one or several of the allowed document types.
5. Define the *Solution ID*, choose *transaction type* and *document type*.
6. Save the parameter and confirm the *prompt for workbench request* or create a new one with the *create request* option.

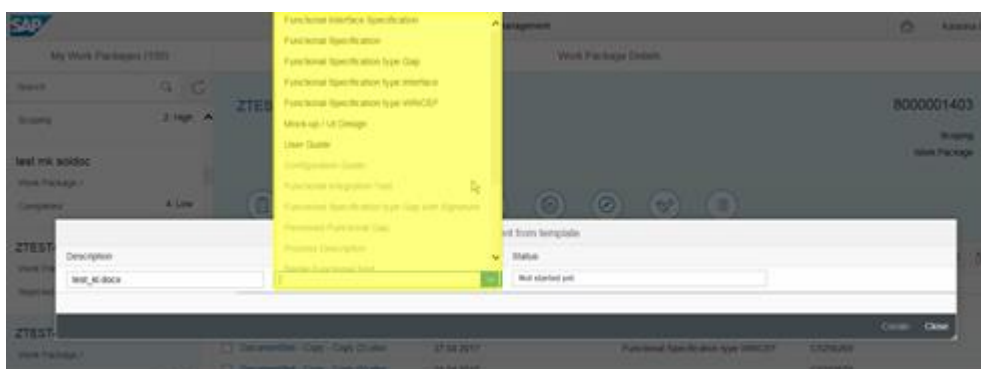
### Note

Use following transaction types:

- **S1IT for WP**
- **S1CG for WI**
- **S1BR for BR**

### Recommendation

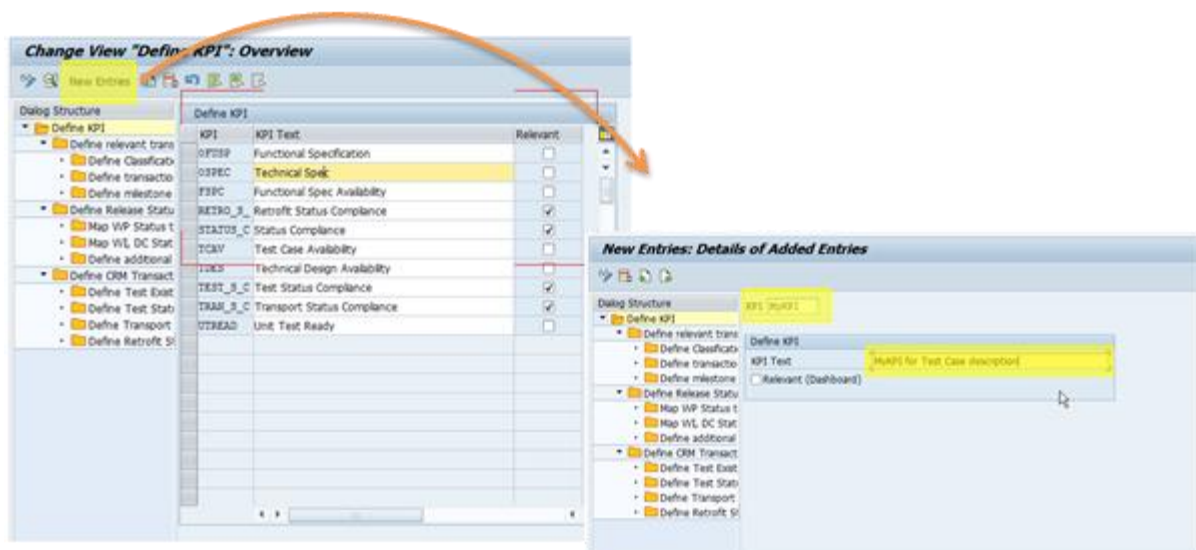
If you want to **upload documents without any specific document type**, just type in the documents type table the wildcard (\*) for all the three parameters (Solution ID, Transaction and Doc.Type).



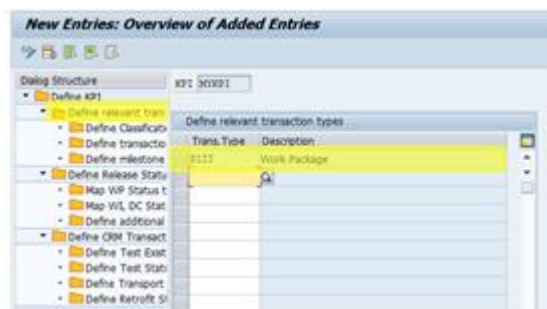
Now the defined document types for attachments will be available in the selected solution. You see the document types in the pop-up window in the dropdown menu of document type's field. The pop-up window is opening by creation of attachment.

## 4.7.6 KPI Customization for Work Package and Work Item

1. To navigate to the customizing table for KPI, run transaction **SM34**.
2. In the input field for a *Table/View*, use transaction **/SALM/VC\_KPI** and choose *Maintain*.
3. Choose *New Entries*, define your new KPI (description is optional), and save the settings. Select the *Relevant* option, because only relevant KPIs are considered.



4. Select your newly-created KPI and choose *Define relevant transaction* in the tree structure on the left side. Select the type of your relevant KPI documents: work package or work item.



## 1 Note

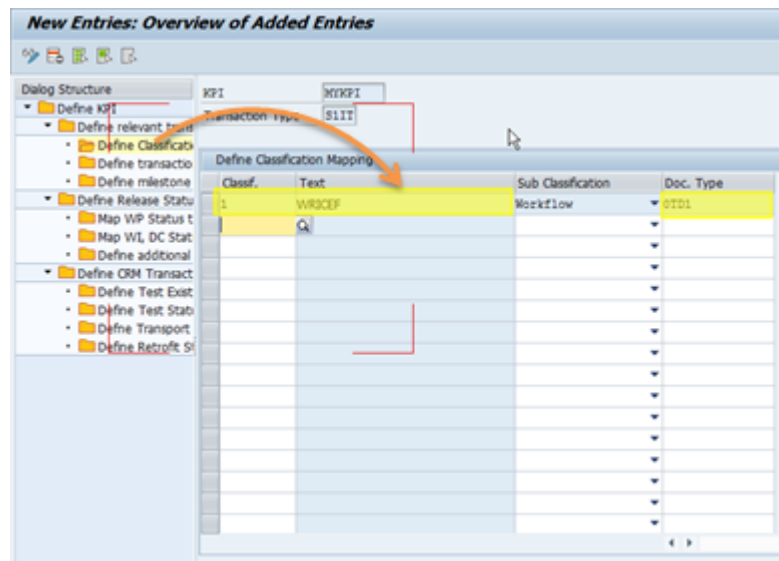
Following two transaction options are available:

- **S1IT** for WP
  - **S1CG** for WI
5. Select your KPI, choose *Define Classification Mapping*, and define the mapping. In first column, select the classification type of WP or WI, then *Sub Classification* in the third column.

If no sub classification is selected, default settings for empty sub classification take effect. Default settings must be defined beforehand.

In the last column, determine the document types for which the KPI should apply. Save your parameters. Select the mapping and navigate to *Define transaction status and document status*.

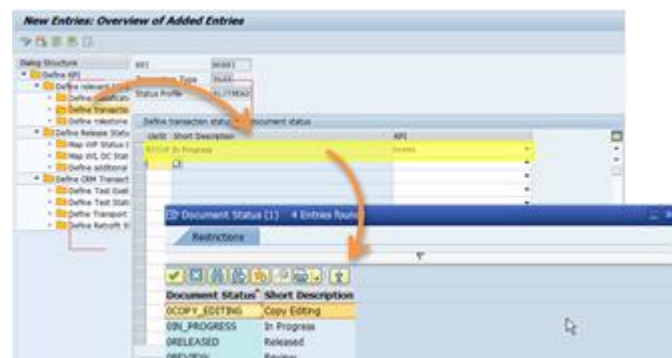
**Now you can see your created KPI for your document type under the documentation tab for the WP or WI application in the *Current Status area*.**



6. Define the status of WP/WI in first column *UstrSt*. Afterwards select *Solution Manager Document Status*, the status of your document type that you defined in step 5. Then specify the KPI behavior in relation to document status in the last column *KPI*. The KPI can have four different states: red, yellow, green, and not applicable.



You can see these parameters in WP/WI applications on the first *Details* tab.



## 4.7.7 Overview of Digital Signature

Digital signature can be defined for one or more specific document types. Digital signature includes a relationship of several parameters of a document. It is defined to control the status change of a document. One or more users with certain roles must digitally sign a document. dropDoc offers two digital signature modes. The **single signature** and the **double signature** mode. In a double signature mode, two different user roles must confirm the document status change.

**Example:** When changing the status of the document type **configuration guide** from **in preview** to **released**, the user with the developer role signs the document and confirms the change.

Double signature settings can specify that the status change has to be confirmed by two different roles, and this



can include, for example, a single user with both the developer role and manager role. Only when both roles have signed, can the document complete its change to its new status.

The definition of a signature can be divided into three large work blocks:

- o Defining a digital signature including *authorization groups*
- o Defining a status schema
- o Assigning a status schema to document type

## Configuration of Digital Signature Settings

Run transaction **solman\_setup**. Navigate to *Process Management* in the scenarios field on the left side. Select the step **3. Configure Digital Signature**. In the *Steps* area, choose *Define Signatures and Authorization Groups*.

OR

Run transaction **spro**, choose *SAP Reference IMG*, and navigate to the path:

**SAP Solution Manager -> Technical Settings -> Digital Signature -> Signature Strategy**

- Define the digital signature:

The screenshot shows the SAP Solution Manager configuration interface. On the left, the 'Scenarios' pane is expanded to 'Process Management'. The main area displays the 'Configure Digital Signature' step, which includes a 'Help Text' and a 'Steps' table. The 'Steps' table has the following data:

Status	Update Needed	Description
+		Configure Basic Settings for Digital Signature
+		Define Signatures and Authorization Groups

An arrow points from the 'Define Signatures and Authorization Groups' step to the 'Manual Activities' table. The 'Manual Activities' table has the following data:

Status	Updates Needed	Activity	Type	Comment	Navigation	Execution Status	Documentation
+		Define Authorization Groups	Optional		Start Transaction	Not Performed	Display
+		Define Individual Signatures	Optional		Start Transaction	Not Performed	Display
+		Define Signature Strategies	Optional		Start Transaction	Not Performed	Display

- Define authorization groups

The screenshot shows the 'Change View Authorization Group for Digital Signatures' dialog box. It has a 'New Entries' button and a list of authorization groups. The list has the following data:

Authorization Group	Description
AGrpDigSig	Authorization group f. digital signature
DEVELOP	Developer Approval
MANAGHT	Manangement Approval
TEST	Tester Approval
ZBUS	Business owner
ZIT	IT Owner



Enter the authorization groups you want to generate. Those groups represent different departments that need to sign a document in order to release it.

- Define individual signatures

**Change View "Individual Signature": Overview**

New Entries

Ind. Signature	Indiv.sig.	AGrpDigSig	Indiv.signature descriptn
	IS_DEV1	DEVELOP	Developer signature
	IS_MGM1	MANAGMT	Management signature
	IS_TST1	TEST	Tester signature
	IS_TST2	TEST	Tester signature
	ZBUS	ZBUS	Business approval
	ZIT	ZIT	IT requester

The individual signatures represent the roles you define in the authorization groups.

- Define signature strategies

**Change View "Define Signature Strategy": Overview**

New Entries

Dialog Structure	Signat. Strategy	SigStrat	Signature Strategy Description	Signature Method	Co
Define Signature Strategy					
Assign individual signatures					
Display Predecessor					
Display release statuses					
Display individual signatures					
		ZBUSIT	IT Req BUS approve	User Signature	Po
		ZDS_1D2T	1 dev and 2 test or 1 managmt	System Signat.	Po
		ZDS_DBL	Double Signature	System Signat.	Po
		ZDS_SMPL	simple Dig Sign for Release	System Signat.	Po

Signatures Release

Those entries describe how a document is signed. Set the method to *System signature with Authorization by SAP User ID/Password*. This means that the signature will be based on the currently logged-in user, who has to enter his or her password to proceed.

1. Select the newly-created signature strategy and choose *Assign individual signatures*. Enter every individual signature that is needed for the scenario.
2. Go back to the strategy overview and select your strategy. Choose *123 Signatures* on the right side of the table. Check the predecessors accordingly to your signing scenario. Save your changes.

### Note

Note, that the **signature sequence controls the order in which a document needs to be signed by the different authorization groups.**

3. Go back to the strategy overview and select your strategy. Choose *Release* on the right side of the table. Check the release states accordingly to your signing scenario. Save your definitions.

**In this context, release means that the signing procedure is finished and the document is locked. The right side displays every combination of individual signatures that can be made. This also takes the Signature Sequence into account.**

By following the above steps, you define a signing strategy as abstraction of your business use case.

The next step is to assign this to a status schema, which is used for a certain documentation type.

1. Run the transaction **solman\_setup**. Choose *Process Management* from the navigation area on the left. Navigate to *4. Customize Document Handling*. Choose the step *4.4 Define Values for Document* and execute. Choose the second step *Define Document Status Schema*.

**Help Text**

In this step, you can create and maintain customer specific values for attributes status, priority, and sensitivity. SAP Solution Manager users can assign these values to documents from the value help. You can also define status schemas that can be assigned to document types. Additionally, you can maintain a mapping for solution categories of Best Practice documents to document types of KW documents.

**Manual Activities**

Status	Updates Needed	Activity	Type	Comment	Navigation	Execution Status	Documentation
■		Define Document Status Values	Optional		Start Transaction	Performed	Display
■		Define Document Status Schemas	Optional		Start Transaction	Performed	Display

**Change View "Status Schema for Solution Manager Documents": Overview**

Menu: Save Back Exit Cancel System Change -> Display New Entries Copy As... Delete Undo Change Select All Select Block Deselect All

**Status Schema for Solution Manager Documents**

Status Schema	Description
00DEFAULT	SAP Default Status Schema
0MIG_TES	Document Status Schema for Migration Testing
ZDS_DBL	Double Signature in review
ZDS_SHPL	Simple Signature in review
Z_SIMPL	Focused Build Document Status Schema

2. Enter the value for the signature strategy you want to use, and select the *Locked* checkbox.

**Change View "Status Values": Overview**

Menu: Save Back Exit Cancel System Change → Display New Entries Copy As... Delete Undo Change Select All Select Block Deselect All

Dialog Structure: Status Schema for Solution Manager

Status Schema: ZDS\_SHP

**Status Values**

Initial Status	Sequence	Lowest	Highest	Locked	Strategy	End Status	Cancel Status	Unlock Status
OCOPY_EDITING	<input checked="" type="checkbox"/>	20	20	20				
OTN_PROGRESS	<input type="checkbox"/>	20	20	30				
RELEASED	<input type="checkbox"/>	30	30	40	ZDS_SHP	RELEASED	OTN_PROGRESS	
RELEASED	<input type="checkbox"/>	40	40	40				

- Enter values for the *end status* and the *cancellation status*.
- Fill in the highest sequences, so that the last status can only be reached from the last but one status.
- Save the changes.

Finally, you must create a new document type for your solution, or just select one of the existing document types and assign to this document your status schema.

- Run transaction **s1an**. Select the solution and navigate to *Document Types*.

**Solution Administration**

Solution: Acceptance Test Solution

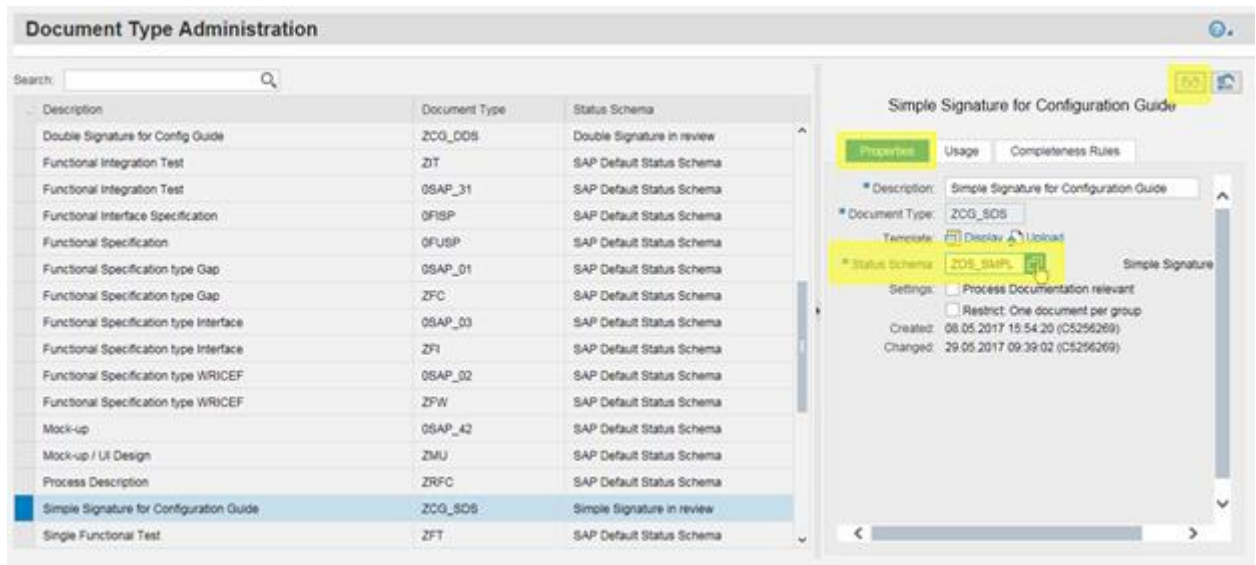
System Landscape Branches Change Control Landscapes **Document Types** Imports Properties

Search:

Scope	Description	Document Type	Status Schema
<input checked="" type="checkbox"/>	Mock-up / UI Design	ZMU	SAP Default Status Schema
<input type="checkbox"/>	Process Description	ZRFC	SAP Default Status Schema
<input checked="" type="checkbox"/>	Simple Signature for Configuration Guide	ZCG_SGS	Simple Signature in review
<input type="checkbox"/>	Single Functional Test	ZFT	SAP Default Status Schema
<input type="checkbox"/>	Single Functional Test	OSAP_30	SAP Default Status Schema
<input type="checkbox"/>	Technical Design	OSAP_20	SAP Default Status Schema
<input checked="" type="checkbox"/>	Technical Design	ZTD	SAP Default Status Schema
<input type="checkbox"/>	Technical Design (DTEDE)	DTEDE	SAP Default Status Schema
<input checked="" type="checkbox"/>	Test Case Description	OTD1	SAP Default Status Schema
<input type="checkbox"/>	Test Note/Test Result for Test Case	OST	SAP Default Status Schema
<input type="checkbox"/>	Training Material	OSAP_50	SAP Default Status Schema

Menu: Create Solution Export Library Generation Cockpit Service Activities **Document Type Administration** User Settings

- Click on the menu icon in the upper right corner.
- Choose *Document Type Administration* from the drop-down menu. Here, you can select or create a document type.
- Select the document type and choose *Edit*. Navigate to *Properties* and select your status schema.



10. End the specification by choosing the toggle edit mode icon.

## 4.8 Configuration of Multitenancy Enhancement

### Use Case Description

The multitenancy function is an enhancement, that allows customers to fully control all data that is used for CHARM and ITSM, to be separated by respective authorization objects.

Some of these authorization objects are already available in SAP Standard and only reused in this configuration guide or added at respective spots where data was not correctly handled.

There are 2 different options available as splitting criteria:

- Configuration item (system-specific)
- Business partner (customer-specific)

The different data available for a normal end-user:

- Transaction Data (Tickets from CHARM and ITSM)
- Business Partner (BP)
- Configuration Items (CI)
- Change Cycles (CHARM Only)
- Process Management Data

All applications within the WebUI for CHARM and ITSM are applicable to splitting criteria. For example, without authorizations it is not possible to see data objects in their respective search queries.

## 4.8.1 Activating the Piece List

Run transaction **SCC1** in your working client and use the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

## 4.8.2 Status Check for Transaction Types

The status check for transaction types adds an additional authorization check. It provides status-specific control regarding read and write access to a ticket.

The system checks whether a user has the needed authorization when the user performs an action such as:

- Open/display a document
- Change into edit mode
- Set next status

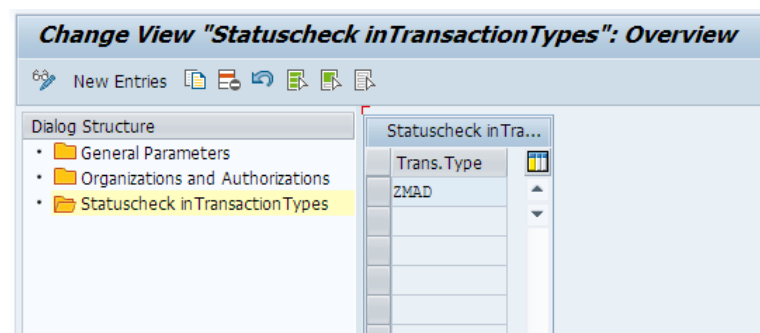
It will be checked, whether the type of the current document belongs to the configured types. In this case, it will be checked the user is authorized display or edit the ticket in the current status.

This chapter describes the necessary configuration you need to do to use the business partner dependent check. They can be combined with Business Partner Dependent Checks and Configuration Item Dependent Checks. You also need to perform the steps described in chapter Activation.

### Specify Transaction Types

It is possible to activate the status check only for specified transaction types. Each transaction type, where this additional check should be applied, has to be added to a configuration table.

1. Run transaction **SPRO** and open [SAP Reference IMG](#).
2. Go to [SAP Solution Manager Implementation Guide](#) → [SAP Solution Manager](#) → [Focused Build](#) → [Change Control Management Extensions](#) → [Multi Tenancy Extensions](#).
3. Start [Define Multi Tenancy Settings](#).
4. Select node [Statuscheck in Transaction Types](#).
5. Add all transaction types to be checked.



6. Save.

## Necessary Adaption to Roles

### Authorization Object /SALM/MTST

The authorization object /SALM/MTST must be added to all process roles used to control access to tickets in WebUI. Otherwise, none of tickets of the added transaction types can be accessed. Depending on their tasks in the process, the values for the authorization fields has to be set.

The authorization object /SALM/MTST has 3 fields:

- STSMA: Status profile of the transaction type to be checked
- ESTAT: User status which can be displayed or created
- ACTVT: Permitted activities are create and display

The object consists of the fields *Activity*, *Status Profile*, and *User Status*.

- *Activity*

Here you define which activities are permitted. Possible values:

- o 02 = Change
- o 03 = Display
- o \* = All activities

- *Status Profile*

Here you define the status profiles of the checked transaction types.

- *User Status*

Here you define the user status values where the user will get authorization to display or edit.



#### Caution

The values for field *User Status* may be not unique for different transaction types and their status profiles. Therefore, it might be necessary to add different entries of this authorization object for each transaction type.

### Changes to Roles

This new object must be added to the authorization roles of each process role, such as **requester**, **developer**, and **change manager**. Depending on their tasks in the process the values for the authorization fields has to be set.

1. Run transaction **PFCG** and open your authorization role in edit mode.
2. Choose *Change Authorization Data* on tab *Authorization*
3. Add new entries for authorization object /SALM/MTST (or edit existing ones)
4. Save your changes and generate the profile.



#### Example

The following screenshot shows authorizations for transaction type **ZMAD**.

The first entry is for granting display access to the specified status of status profile ZMADHEAD. The second one adds edit authorization.

Manually	/SALM/ Authorization Object Class	SALM	
Manually	/SALM/ MTE: Change or Display Transactions per User Status	/SALM/MTST	
Manually	/SALM/ MTE: Change or Display Transactions per User Status	T-OT98031700	
	Activity	03	ACTVT
	User Status	E0001, E0002, E0004, E0009, E0011	ESTAT
	Status Profile	ZMADHEAD	STSMA
Manually	/SALM/ MTE: Change or Display Transactions per User Status	T-OT98031701	
	Activity	02	ACTVT
	User Status	E0001, E0002	ESTAT
	Status Profile	ZMADHEAD	STSMA

### ⚠ Caution

For each status that the user has edit authorization, we recommend you also assign the display authorization.

### ⚠ Caution

If the user can set the next status of a ticket, we recommend you assign display authorization for the target authorization too.

## 4.8.3 Business Partner Dependent Checks

Business partner dependent checks help to control access to:

- Business partners in search help
- CRM transactions via assigned sold-to party

The authorization object for the business partner authorization group, `B_BUFA_GRP`, is used for these checks. The results of the checks display only those business partners within a group to which the user has authorization.

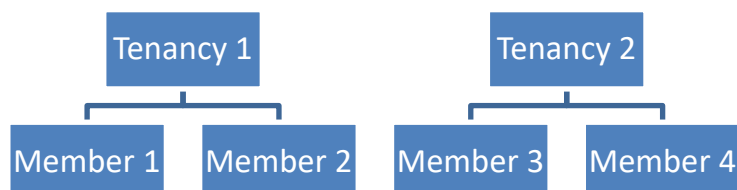
To access a ticket, the user needs to have the authorization for the sold-to party's authorization group. The user doesn't need to be assigned to the same organization.

This chapter describes the necessary configurations to use the business partner dependent check. They can be combined with status check for transaction types and configuration item dependent checks. You also need to perform the steps described in chapter 3.8.12, [Activation](#).

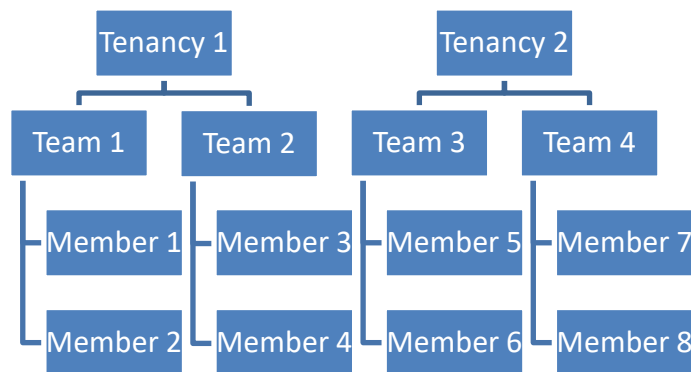
### Organizational Structures

To maintain the master data, also maintain an organizational model in the SAP Solution Manager with one of the two structures.

Simple Relationship Model:



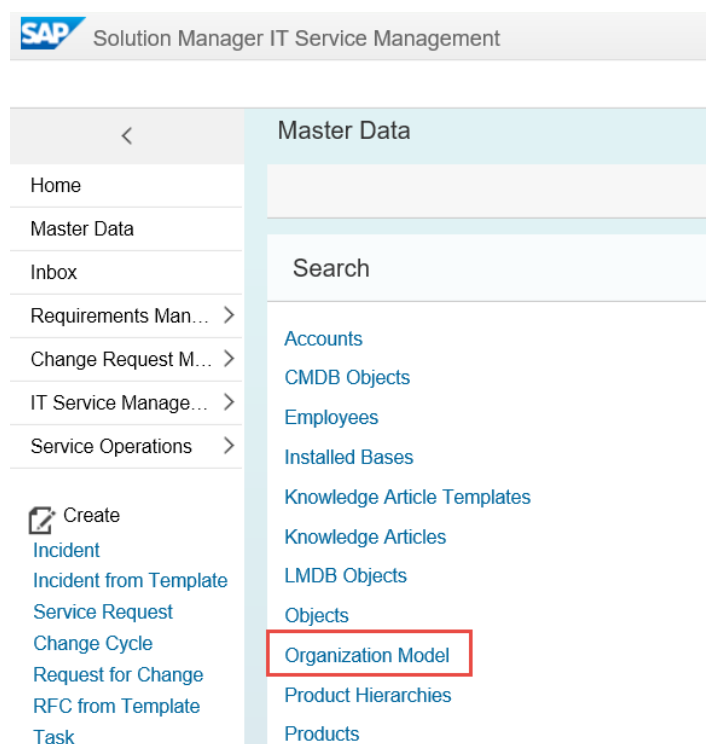
Team-based Relationship Model:



## Create Root Organizations and their Structures

Create your organizational model first. One root organization is needed for each tenant.

Start CRM WebUI, use a business role with access to *Master Data / Organization Model* (for example, /SALM/SM\_PRO or SOLMANPRO).



1. Choose *Create Root Organizational Unit* / Open your root organization (if it exists already).
2. Create Organizational Units and Positions within your root organization according your needs. You will need at least one position to assign all employees.

## Assign Employees

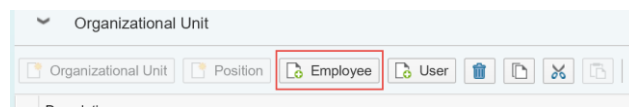
All employees working for one tenant have to be assigned to a root organization responsible for one of their organizational units. This assignment is then used to assign the business partner authorization group automatically by report. As each business partner has only one authorization group assigned to it, the business



partner should be assigned to more than one root organization. Otherwise, the report will take only one assignment into consideration and log an error.

Users need to have the authorization to access the corresponding business partner groups. This can be added independent from the current organizational assignment.

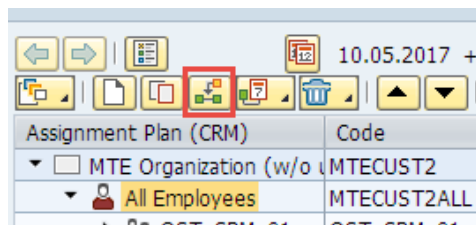
1. Start CRM WebUI, use a business role with access to *Master Data / Organization Model* (for example, /SALM/SM\_PRO or SOLMANPRO).
2. Open your root organization.
3. Navigation to the position, where the employee should be assigned.
4. Choose *Add Employee*.



5. Search for the business partner to be assigned.
6. Select the business partner in the search result list.
7. Repeat for all needed assignments.
8. Save.

Alternatively, it is possible to assign the business partner in the SAP GUI transaction **PPOMA\_PRM**.

1. Navigate to the position, choose *Assign* and select *Owner*.

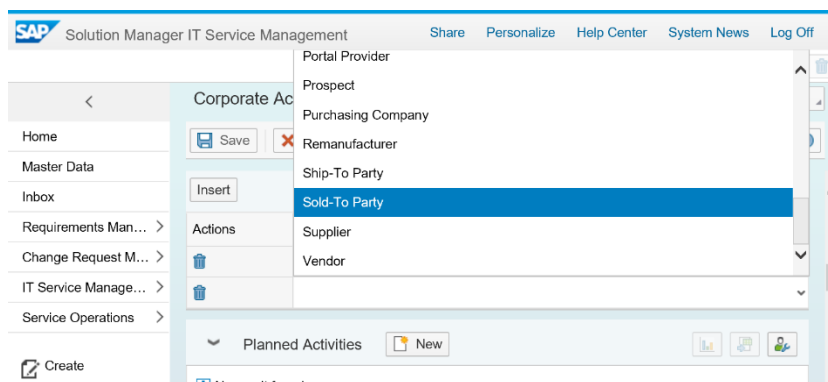


2. Search for the business partner to be assigned.
3. Select the business partner in the search result list. It is possible to select more than one business partners.
4. Save.

## 4.8.4 Add Role Sold-To Party to Business Partner

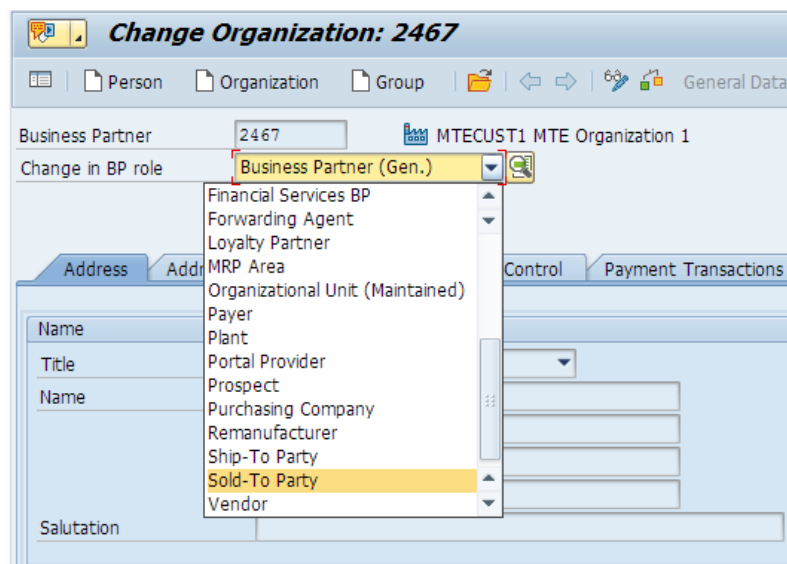
To control the access to the tickets, each ticket should have the root organization entered as *Sold-To Party*. This is only possible, if the corresponding business partner has the role *Sold-To Party*.

1. Start CRM WebUI, use a business role with access to *Master Data / Organization Model* (such as /SALM/SM\_PRO or SOLMANPRO).
2. Open the business partner your root organization.
3. Go to assignment block *Roles*, select the edit list and add new entry for *Sold-To Party*.



4. Save.

Alternatively, run transaction **BP** in SAP GUI, open the business partner and add the BP role.



## 4.8.5 Business Partner Authorization Groups

You can use authorization groups to stipulate which business partners a user is allowed to process.

The system only checks this authorization if you made an entry in the authorization group field for the business partner. Otherwise, any user may process the business partner.

### Create Authorization Groups

Create the authorization groups for business partner first:

1. Run transaction **SPRO**, open *SAP Reference IMG*
2. Navigate to *SAP Customizing Implementation Guide* → *Cross Application Components* → *SAP Business Partner* → *Basic Settings* → *Authorization Management*
3. Choose *Maintain Authorization Groups*

---

Create one authorization group for each tenant and one, which can be used for all business partners, who are not assigned (known as the default authorization group).

### Customize Default Authorization Group

The default authorization group will be assigned to the business partners. Please note that the business partners are not part of a root organization defined in customizing. This is a precondition to execute the report to assign the authorization groups to all business partners automatically.

1. Run transaction **SPRO**, open *SAP Reference IMG*
2. Navigate to *SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions*
3. Choose *Define Multi Tenancy Settings*
4. Choose *General Parameters*
5. Select or create an entry for parameter **DEFAULT\_BP\_AUTHGRP**. Please note that only one entry is applicable.
6. Enter your default authorization group as parameter value.
7. Save.

### Assign Authorization Groups to Root Organizations

You need to define your root organization and assign them an authorization groups. This is a precondition to execute the report to assign the authorization groups to all business partners automatically.

1. Run transaction **SPRO**, open *SAP Reference IMG*
2. Navigate to *SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions*
3. Start *Define Multi Tenancy Settings*
4. Select *Organizations and Authorizations*
5. For each root organization create a new entry, select the corresponding business partner. You may enter a description.
6. Assign the corresponding business partner authorization group.
7. Save.

## 4.8.6 Assign Authorization Groups to Business Partners

Business partners without an authorization group can be accessed by all users with display authorization.

Therefore, we recommend you assign business partners in your system to an authorization group according to their root organization (tenancy). This recommendation also applies to unassigned business partners with restricted visibility (see Assignment by Report section below for more information).

### Manual Assignment

The authorization group can be assigned manually for each business partner:

1. Run the transaction **BP**.
2. Select the business partner to be changed.
3. Go to the *Control* tab.
4. Enter value for field *Authorization group*.

5. Save.

### Assignment by Report

The system can process a multitude of business partners, and as such, a maintenance report automatically assigns authorization groups based on a customizing table where each tenancy is assigned to a specific authorization group. The report assigns a default authorization group to every business partner not otherwise assigned to a tenancy. This prevents unwanted visibility of unassigned business partners.



#### Caution

The user who runs this report may require additional authorizations. The Necessary Authorizations chapter contains a detailed list.

1. Run transaction **SPRO**, open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions*.
3. Start *Update Business Partner Authorization Groups*.
4. Execute the report with the prefilled values first.
  - o *Testmode* activated (no changes will be saved)
  - o *Assign authorization groups* (authorization group will be updated by analyzing the organizational assignment of existing business partners)
  - o *Only assigned business partners* deactivated (Unassigned business partners will get the configured default authorization group)
  - o *Root organizations* (taken from customizing, see chapter 3.8.5 Assign Authorization Groups to Root Organizations)
  - o *Business partner* (prefilled with \* to check all business partners)

5. Check execution log. All needed changes regarding the assigned authorization groups are listed.
6. Repeat execution with deactivated test mode to make permanent changes to business partners.

### Schedule assignment report as background job

Keeping the assigned authorization groups up-to-date is important to control the access to business partners and business partner dependent data. Therefore, it's recommended to schedule a background job which updates the assignments on a regular basis.

## Create a variant for report execution

1. Open report via transaction **SPRO** (*SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions → Update Business Partner Authorization Groups*) or transaction **SE38** (Report Name: /SALM/ITSM\_MT\_BP\_AUTH\_GRP)
2. Deactivate *Testmode*.
3. Save Variant.
  - o Enter name and description for variant
  - o Within *Objects for selection screen* table, change the *Save field without values* field for entry SO\_ROOT to ensure that all root organization from customizing are taken into account

**Variant Attributes**

Copy Screen Assignment ⓘ

Variant Name: ZMA4BGEXEC

Description: Background execution

☐ Only for Background Processing  
☐ Protect Variant  
☐ Only Display in Catalog  
☐ System Variant (Automatic Transport)

Screen Assignment

Created	Selection Screen
<input checked="" type="checkbox"/>	1000

Technical name

Objects for selection screen

Selection Screen	Field name	Type	Protect field	Hide field	Hide field 'BIS'	Save field without values	Switch GPA off	Required field	S
1.000	P_TEST	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1.000	P_ASSIGN	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1.000	P_DELETE	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1.000	P_OABPS	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1.000	SO_ROOT	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1.000	SO_BP	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

4. Save.

## Schedule Background Job

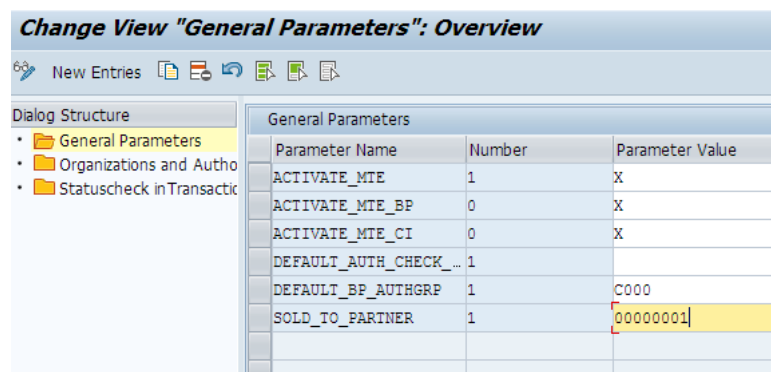
1. Run transaction **SM37**.
2. Enter job name.
3. Create step.
  - o ABAP program name: /SALM/ITSM\_MT\_BP\_AUTH\_GRP
  - o Select your variant
4. Define Start Condition.
  - o Choose *Date/Time*
  - o Enter Start Date and Time (if possible, outside business hours)
  - o Activate *Periodic Job*.
  - o Choose *Period Values* and select a period
5. Save.
6. Save job definition to release the job.

Check the result of the last job run in transaction **SM37** by opening the spool list.

## 4.8.7 Partner Function to Be Checked

Normally the partner function *Sold-To Party* is used to check the accessibility of a ticket. The checked partner function can be changed in customizing. This configuration is valid for all transaction types.

1. Run transaction **SPRO**, and open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions*.
3. Start *Define Multi Tenancy Settings*.
4. Select *General Parameters*.
5. Select or create an entry for parameter *SOLD\_TO\_PARTNER*. There must be only one entry.
6. Add the technical key for the used partner function as parameter value.



Parameter Name	Number	Parameter Value
ACTIVATE_MIE	1	X
ACTIVATE_MIE_BP	0	X
ACTIVATE_MIE_CI	0	X
DEFAULT_AUTH_CHECK_...	1	
DEFAULT_BP_AUTHGRP	1	C000
SOLD_TO_PARTNER	1	00000001

If there is no entry for *SOLD\_TO\_PARTNER*, or if the parameter value is empty, the default value **00000001** (meaning *Sold-To Party*) is used.

### Caution

If the partner function does not exist or has no value for the current ticket, the user can still access the ticket, but it won't be found by any search. Therefore, you need make sure that the business partner of the root organization is added to each transaction.

All used transactions types of ITSM, ChaRM and Requirements Management should have this partner function available within their partner profile and it is defined as mandatory.

### Adapt Partner Profiles

To access the partner profiles customizing, use transaction **SOLMAN\_SETUP: Change Request Management**. Go to Step 3.6 *Setup Business Partner* and select *Define Partner Determination Procedure*.

**SAP Solution Manager Configuration: Change Control Management - Change Request Management**

Technical System: **OFT-ABAP-200** User Name: **MASEKOWITZ** [Create Incident](#)

**Scenarios**

- ▼ Cross Scenario Configuration
  - ▼ Mandatory Configuration
    - System Preparation
    - Infrastructure Preparation
    - Basic Configuration
    - Managed Systems Configuration
    - Embedded Search
    - Usage Logging
    - IT Infrastructure Management
  - Requirements Management
  - Project Management
  - Process Management
  - Custom Code Management
  - ▼ Test Suite
  - ▼ Change Control Management
    - ▼ **Change Request Management**
      - Managed System Setup
    - Application Operations
    - Business Process Operations
    - IT Service Management
    - Engagement and Service Delivery
    - Data Volume Management

**3.5 Set Up E-Mail Notifications** **3.6 Set Up Business Part...** 3.7 Define Text Management 3.8 Define Date Management 3.9 Define Approval Procedures 3.10 Define Change Req... 3.11 Make Settings for Task Lists

Edit < Previous Next > Save Reset

**Help Text**

**Manual Activities**

Show All Logs

Status	Updates Needed	Activity	Type	Comment	Navigation	Execution Status
◇		Define Partner Functions	Optional	◇	Start Transaction	Not Performed
◇		Use Custom Partner Functions	Optional	◇	Start Transaction	Not Performed
◇		Define Access Sequences	Optional	◇	Start Transaction	Not Performed
◇		Define Partner Determination Procedure	Optional	◇	Start Transaction	Not Performed
◇		Assign Partner Schema to Transaction Type	Optional	◇	Start Transaction	Not Performed
◇		Specify Partner Assignment and Check	Optional	◇	Start Transaction	Not Performed
◇		Specify Partner Function Display	Optional	◇	Start Transaction	Not Performed

Alternatively, you could use the corresponding transaction **SPRO** activity.

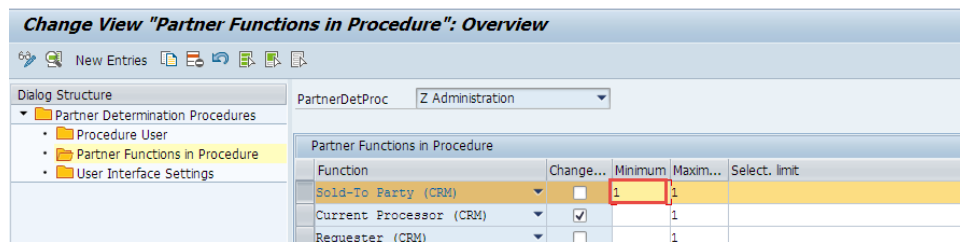
**Display IMG**

Existing BC Sets [BC Sets for Activity](#) [Activated BC Sets for Activity](#) [Release](#)

**Structure**

- ▼ SAP Solution Manager Implementation Guide
  - ▼ SAP Solution Manager
    - Read Me: Initial and Delta Configuration
    - Mandatory Configuration
    - Technical Settings
    - ▼ Capabilities (Optional)
      - Implementation/Upgrade
      - Test Suite
      - SAP Engagement and Service Delivery
      - IT Service Management
      - Requirements Management
      - ▼ Change Control Management
        - Important Information
        - Check Prerequisites
        - ▼ Transactions
          - Use Transaction Type as Template
          - Define Transaction Types
          - ▼ Partner Determination Procedure
            - Partner Processing
            - Define Partner Functions
            - Use of Own Partner Functions
            - Define Access Sequences
            - Define Partner Determination Procedure
            - Assign Partner Schema to Transaction Type
            - Assign Partner Determination Procedure to Installed Base Category
            - Define Status-Dependent Partner Function Assignment

1. Select your transaction type(s).
2. Choose *Partner Functions in Procedure*.
3. Add the partner function, if necessary.
4. Set *Minimum* value to **1**.



5. Repeat for all used transaction types.
6. Save your changes.

## 4.8.8 Necessary Adaption to Roles

### Authorization Object B\_BUPA\_GRP

With the authorization object B\_BUPA\_GRP, define which business partners can be edited based on the authorization group.

The object consists of the fields *Activity* and *Authorization group*.

- Activity  
Here you define which activities are permitted.  
Possible values:
  - o 01 = Create
  - o 02 = Change
  - o 03 = Display
  - o 06 = Delete
  - o \* = All activities
- Authorization group  
Here you define the groups of business partners for which the above activities are permitted.

### Changes to Roles

The object B\_BUPA\_GRP must be added to your authorization roles.

The concrete values for this authorization object are based on the assignment of the business partner of a user to one of the organizations/tenant and not to the business partner's process role. It is recommended to manage this authorization in separate roles per tenant. If necessary, further tenant-dependent objects can be added to these roles.

In this document, only the display permission is taken into consideration since it is assumed that only this is needed within ChaRM and ITSM.

1. Run transaction **PF03** and open your authorization role in edit mode.
2. Choose *Change Authorization Data* on the *Authorization* tab.
3. Add new entries for authorization object B\_BUPA\_GRP (or edit existing ones)
  - o Activity: **03** (= Display)
  - o Authorization Group (refer to 3.6.5 Create Authorization Groups)
4. Save your changes and generate the profile.



---

In general, a user should have the authorization for the authorization group he or she is assigned to. This is the only possibility to access all BP that are assigned to the same organization.

In exceptional cases, a user must access the BP of different organizations. This may apply, for example, for administrators and support staff. In this case, all corresponding (organization) authorization roles should be assigned to the user.

## 4.8.9 Configuration Item Dependent Checks

Configuration item dependent checks help to control access to:

- Systems in search help
- CRM transactions via assigned systems

The authorization object `SM_SDK_IBA` used for these checks.

## 4.8.10 Configuration for Business Partner Dependent Check

This chapter describes the necessary configuration to use the business partner dependent check. They can be combined with Error! Reference source not found. and Business Partner Dependent Checks. You also need to perform the steps described in chapter 3.8.12 Activation.

### Organizational Structures

For using this function, it is required to have an organizational structure with employees assigned. If this has already been done as described in chapter 3.8.1 Organizational Structures, it can be reused here.



### Caution

The organizational units are later assigned to the systems. Each unit with assigned employees must also be assigned to the system. Higher-level units are not considered.

This makes it possible to differentiate the accessible systems within one root organization. However, there might be a higher effort, because several units have to be assigned to the same systems.

### Assign Business Partners to LMDb Objects

Each organizational unit that has employees assigned to it, must also have employees assigned access to the respective systems.

1. Start CRM WebUI, use a business role with access to [Master Data / LMDb Objects](#) ( /SALM/SM\_PRO or SOLMANPRO).
2. Search for the system the business partner(s) should be assigned to.
3. Open system.
4. Go to assignment block [Parties involved](#).
5. Choose [Edit List](#) if you want to add a business partner.
  - o Press [Insert](#)
  - o Select the business partner

- o Set Partner Function to **Service Employees Group**
- 6. Repeat for all business partners.
- 7. Save LMDB Object.

## Adaptions to Roles

### Authorization Object SM\_SDK\_IBA

This authorization object SM\_SDK\_IBA is being used to restrict the IBase components that are being shown to the user.

The object only has the field *Restrict visibility for IBase components*.

Possible values:

- o **ALL** all IBase Components
- o **USERS\_ORG** IBase Components that the BP's organizations are assigned to
- o **USERS\_OWN** IBase Components that the BP itself is assigned to

## Changes to Roles

The object SM\_SDK\_IBA has to be contained in your authorization roles.

The concrete values for this authorization object are based on the assignment of an organizational unit to a system and not to his process role. It is recommended to manage this authorization in separate roles per tenant. If necessary, further tenant-dependent objects can be added to these roles.

1. Run transaction **PFCG** and open your authorization role in edit mode.
2. Press *Change Authorization Data* on tab *Authorization*.
3. Add new entries for authorization object SM\_SDK\_IBA (or edit existing ones).
4. Restrict visibility for IBase components **USERS\_ORG**, **USERS\_OWN**.
5. Save your changes and generate the profile.

In general, a user should have the authorization for the systems their organizational unit is assigned to.

In exceptional cases, a user must access systems of different organizations. Here are two applicable options available for administrators and support staff, for example. There are two option for that:

- Assign authorization object SM\_SDK\_IBA with full authorization (Restrict visibility for IBase components = **ALL** or **\***)
- Assign the organizational units of these employees to each system they should have access.

## 4.8.11 Restricting Access to Solutions and Documentation

It is possible to restrict the access to solutions and their documents. Even the change cycles belonging to a solution/branch can be restricted. For example, a user can be restricted to assign documentations that belong to the user's organization only.

Access the *application security guide* for your specific SP level in SAP Solution manager 7.2: The security guides can be found when you expand the *Operation* column header, chapter *Process Management*, and *Test Suite* /

---

*Scenario Specific Guide: Process Management*. Also, navigate to the section for Main Authorization Objects > Solution Documentation SM\_DOC

Also, see SAP note [2440107 - How to determine Authorization objects for Element Types, Group Type and Attribute Type for Solution Documentation](#)

This document concentrates on the authorization objects needed for ChaRM and ITSM:

- To add documentation to tickets
- To select change cycles in ChaRM transactions

To do so, no activation is necessary, but an adaption of your authorization roles.

## Adaption to Roles

### Authorization Object SM\_SDOC

This object controls the solution documentation maintenance.

Defined fields

- [SLAN](#) restricts authorization by solution.
- [SBRA](#) restricts authorization by branch.
- [SMUDAREA](#) restricts authorization by sections of a solution, by specifying authorization areas within a solution and assigning them to structure elements. Authorization areas are maintained with view cluster [SMUD\\_AUTHG](#), in transaction [SM34](#). A structure element can be assigned to only one authorization area. Child elements inherit the area of their parent, if they do not have their own authorization area. Elements that have no parent assigned to an authorization area, have the virtual authorization area [DEFAULT](#).
- [SMUDAUTHGR](#) restricts authorization to groups of specified element types or attribute types. Authorization groups are maintained with view cluster [SMUD\\_AUTHG](#), in transaction [SM34](#). The virtual authorization group [DEFAULT](#) contains all combinations of objects and attributes that are not in a user-defined authorization group.
- [ACTVT](#) allows restricting authorizations to certain user activities like create, change, display, delete, activate, release, move, discard, override and copy. Display is only checked for elements, not for attributes. If a user is allowed to see an object, all of its attributes are visible to him. For operations on structure elements some activities are only checked for the top element as the following table shows. There you also can see that some complex operations that a source and a target elements trigger multiple elementary authorization that all have to be passed successfully to finish the operation.
  - o Display elements 03 Display All elements
  - o Create elements 01 Create All elements
  - o Delete elements 06 Delete Elements and Sub-elements
  - o Change attributes 02 Change All attributes
  - o Sort elements 02 Change Parent element
  - o Release changes 43 Release for current branch 07 Activate, generate for parent branch Selected and dependent elements
  - o Discard changes 69 Discard Selected and dependent elements
  - o Mark conflict as resolved 94 Override Selected and dependent elements
  - o Move elements 50 Move 01 Create Only moved elements and target parent
  - o Copy elements D1 Copy 01 Create Only copied elements and target parent
  - o Merge elements 06 Delete for parent 02 Change for attributes of target element
  - o 50 Move direct child elements

- o Change target O2 Change Only reassigned element

Forbidden actions are hidden in the context menu. For some actions such as delete or reference to executable library the context menu does only a dirty pre-check because a full check would too long or is not possible, since the context menu entry does not fully define the complete action . Then it can happen that an action is visible and the user gets an error when executing the action.

### **Authorization Object SM\_CM\_FUNC**

Authorization to perform various Quality Gate Management (QGM) and change request management functions.

Defined fields

- SUB\_LAND - Name of the sub-landscape
- BRANCH\_NM - Name of the branch
- CYCLE\_TYPE - Type of change cycle
  - o R - Major release
  - o M - Minor release
  - o E - Emergency release
  - o O - Maintenance cycle
  - o I - Implementation cycle
  - o Q - Quality Gate Management
- CM\_ACTVT - Specific functions to be controlled.
  - o CHCH - Modify change in QGM
  - o CHCR - Create change in QGM
  - o CHDE - Delete change in QGM
  - o CHFI - Complete change in QGM
  - o CHRA - Reassign change in QGM
  - o CHWD - Withdraw change in QGM
  - o CTPR - Assign to Change Request Management cycle
  - o CYDP - Display QGM cycle
  - o CYED - Edit QGM cycle
  - o QBAP - Approve quality gate as Quality Advisory Board member in QGM
  - o QMAP - Approve quality gate as Quality Manager in QGM
  - o SCDP - Display QGM scenario
  - o SCED - Edit QGM scenario
  - o SSDP - Display CTS status switch
  - o SSER - Edit CTS status switch
  - o TACR - Create transport task in QGM
  - o TLCP - Complete task list
  - o TLCP - Create task list
  - o TRAP - Approve/withdraw critical object
  - o TRAS - Assign transport request in QGM
  - o TRCH - Modify transport request in QGM
  - o TRCR - Create transport request in QGM

- o TRDC - Decouple transport request in QGM
- o TRDE - Delete transport request in QGM
- o TRIM - Set/reset import lock in QGM
- o TRRA - Reassign transport request in QGM (obsolete)
- o TRRL - Release transport request in QGM
- o TRTT - Create transport of copies in QGM
- o UCAA - Approve urgent change as Quality Advisory Board member in QGM
- o UCMA - Approve urgent change as Quality Manager in QGM

### Changes to Roles

The objects `SM_SDOC` and `SM_CM_FUNC` must be added to your authorization roles. The concrete values for this authorization objects are based on your existing solution documentation and their structure.

Use `SM_SDOC` to restrict access to solution documentation.

`SM_CM_FUNC` is used for filtering possible change cycles. Enter **CTPR** (Assign to Change Request Management cycle) in field `CM_ACTVT`.

But you could only see cycles assigned to branches, where you have the authorization to display the documentation (`SM_SDOC`). You also need the display authorization for all higher-level entries.

## 4.8.12 Activation

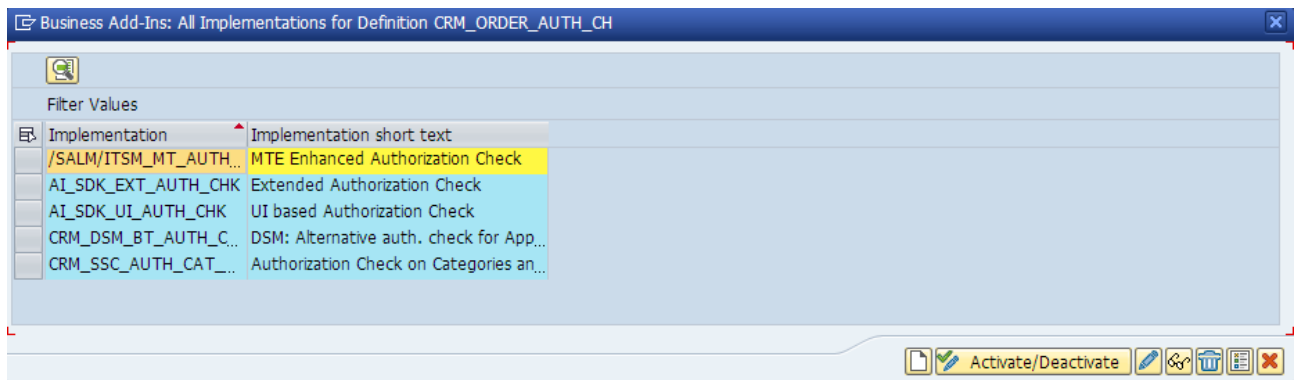
To use the described checks, they need to be activated. Therefore, you need to implement two BAdIs, which hold the implementation of the checks. Additionally, the checks need to be switched on in customizing.

### Activate BAdI for Authorization Check: CRM Business Transaction

The business add-in `CRM_ORDER_AUTH_CHECK` is used to enhance the authorization check in the business transactions. The implementation `/SALM/ITSM_MT_AUTHCK` provides additional checks on current status values, selected business partners and refenced systems.

To use these checks, the implementation needs to be activated first.

1. Run transaction **SPRO**, open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager* → *Focused Build* → *Change Control Extensions* → *Multi Tenancy Extensions*.
3. Start *Activate BAdI for Authorization Check: CRM Business Transaction*.
4. A list of all existing implementations of Business Add-in `CRM_ORDER_AUTH_CHECK` is displayed. Only one of the displayed implementations must be active. The active implementation is highlighted. In general, this is *AI\_SDK\_EXT\_AUTH\_CHK, Extended Authorization Check*, or your own implementation.
  - o select the active implementation
  - o Choose *Activate/Deactivate*
5. Please activate `/SALM/ITSM_MT_AUTHCK`.
  - o Select the row for this implementation
  - o Choose *Activate/Deactivate*



6. Close window.

If you have your own implementation deactivated by the previous steps, but you still need the contained authorization check, you can integrate your implementation via customizing.

1. Run transaction **SPRO**, open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager* → *Focused Build* → *Change Control Extensions* → *Multi Tenancy Extensions*.
3. Start *Define Multi Tenancy Settings*.
4. Select *General Parameters*.
5. Select or create an entry for parameter **DEFAULT\_AUTH\_CHECK\_BADI**. There must be only one entry.
6. Enter the implementing class of the BAdI as value.

For example: To call the implementation of **AI\_SDK\_EXT\_AUTH\_CHK**, you would need to add

**CL\_IM\_AI\_SDK\_EXT\_AUTH\_CHK**.

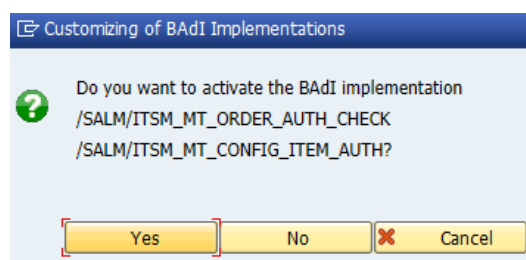
If there is no entry for **DEFAULT\_AUTH\_CHECK\_BADI**, or if the value is empty, the implementation class of **AI\_SDK\_EXT\_AUTH\_CHK** will be called.

### Activate BAdI for Authorization checks on OneOrder Documents

The enhancement implementation **/SALM/ITSM\_MT\_ORDER\_AUTH\_CHECK** also provides additional checks on the referenced configuration items of business transactions.

To use these checks, the implementation needs to be activated first.

1. Run transaction **SPRO**, open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager* → *Focused Build* → *Change Control Extensions* → *Multi Tenancy Extensions*.
3. Start *Activate BAdI for Authorization checks on OneOrder Documents*.
  - o If you see the "Do you want to activate the BAdI implementation ..." message, it means BAdI is currently inactive. Choose **Yes** to activate.



- o If you see the "Do you want to deactivate the BAdI implementation ..." message, it means BAdI is currently active. Choose **Cancel** to close the dialog. The implementation remains active.

## Activate MTE

Finally, you need to activate the multitenancy enhancements in customizing.

1. Run transaction **SPRO**, open *SAP Reference IMG*.
2. Navigate to *SAP Solution Manager → Focused Build → Change Control Extensions → Multi Tenancy Extensions*.
3. Start *Define Multi Tenancy Settings*.
4. Select *General Parameters*.

There are three parameters to switch on the multitenancy checks. Enter value **x** to activate.

- o **ACTIVATE\_MTE**
  - o Activates Multi Tenancy in general. None of the functions (such as business partner or configuration item-dependent checks, status check for transaction types) can be used without this activation.
  - o Please note that some restrictions are not controlled by this parameter. For example, the authorization to display a business partner of a specific authorization group is independent of this parameter. This will work even if MTE is deactivated.
- o **ACTIVATE\_MTE\_BP**
  - o Activates the business partner-dependent check: The user's root organization needs to be entered in a specified partner function of an CRM ticket.
  - o Parameter **ACTIVATE\_MTE** must also be activated.
- o **ACTIVATE\_MTE\_CI**
  - o Activates the checks based on configuration items: The organization of the current user needs to be assigned to the referenced object of a transaction.
  - o Parameter **ACTIVATE\_MTE** must also be activated.

The following tables which checks where performed for a combination of these three parameters.

ACTIVATE_MTE	ACTIVATE_MTE_BP	ACTIVATE_MTE_CI	Executed Checks
X	-	-	Status Check for Transaction Types
X	X	-	Status Check for Transaction Types Business Partner Dependent Checks
X	-	X	Status Check for Transaction Types Configuration Item Dependent Checks
X	X	X	Status Check for Transaction Types Business Partner Dependent Checks Configuration Item Dependent Checks
-	-	-	None
-	X	-	None
-	-	X	None
-	X	X	None

---

## 4.9 Configure Status Dependent Check Framework

### 4.9.1 Use Cases

#### Check for Mandatory Inputs

Consistency check for mandatory field is not only not performed when creating new documents, but also later in the process. It can be executed on status change: As soon as the user tries to set a new status via action or directly the system checks whether there are any mandatory fields, business partner or texts which need to be filled when entering the new status.

Some standard fields can be examined by the standard status-dependent check, but this framework can be used in user-defined fields too.

- Fast entry fields
- Business Partners
- Texts

#### Lock Fields Against Subsequent Changes

Input fields might be locked against changes, but without additional development there is no possibility to do so dependent from the current status.

- Fast entry fields
- Business Partners

### 4.9.2 Activating the Piece List

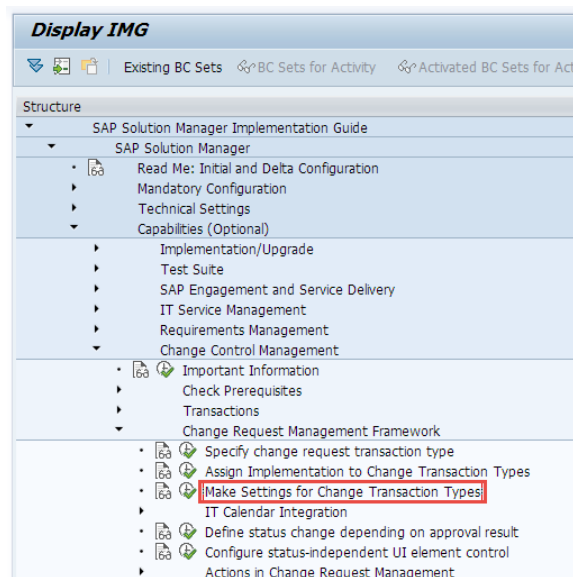
Run transaction **scc1** in your working client and activate the piece list [/SALM/CHARM\\_EXT](#), which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **scc3**.

### 4.9.3 Consistency Checks for Change Transaction Types

Make sure that the used change management transaction types have the consistency check [/SALM/CONS\\_CHECK](#) configured for the used status values. This check is used for all status dependent checks and the field locks described in this guide.

In transaction **sPRO** call SAP Reference IMG and go to SAP Solution Manager → Capabilities (Optional) → Change Control Management → Change Request Management Framework → Make Settings for Change Transaction Types





Select your transaction type and choose [Assign Consistency Checks](#).

Add the check `/SALM/CONS_CHECK` for each status where it should be performed. This condition might be inserted for each existing status. As long as there is no further customizing (as described below), nothing will happen.

**Change View "Assign Consistency Checks": Overview**

Transaction Type: ZMAD  
Status Profile: ZMADHEAD

Dialog Structure:

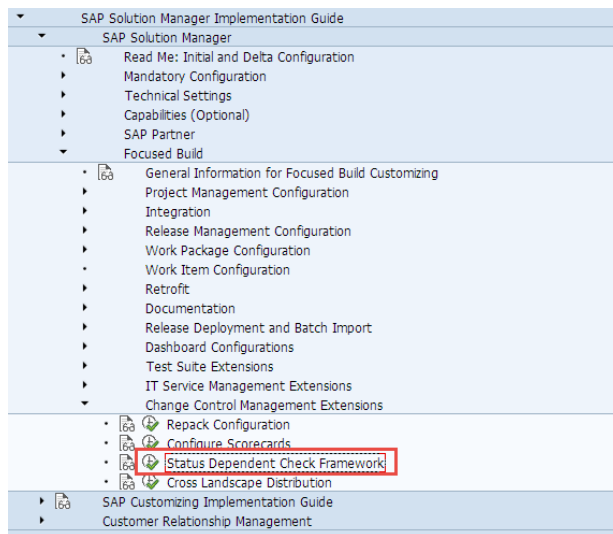
- Create Transaction Type
  - Assign Actions
  - Define Execution Time of Actions
  - Assign Consistency Checks**
  - Define Execution Time of Consistency Checks
  - Specify Status Attributes
    - Specify Status Setting for Predecessor Document
    - Specify Required Status Values for Follow-Up Document
    - Specify Status Setting for Follow-Up Document
  - Specify Partner Assignment and Check
  - Specify Partner Function Display
  - Copy Control Rules
    - Map Text Objects
    - Map Dates Types

User Status	Sequence	Status Transition Consistency Check	Application Area	Message Number	Message Type
E0002	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0002	10	MAINT_INST	SOCM_ACTION_LOG		Cancel
E0002	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0002	50	PREDOC_CAN_BE_SET	SOCM_ACTION_LOG	042	Cancel
E0002	95	CHECK_PPM_STATUS_SET	AI_SMCP	057	Cancel
E0004	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0004	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0004	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0004	95	CHECK_PPM_STATUS_SET	AI_SMCP	057	Cancel
E0009	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0009	10	SAME_USER	SOCM_ACTION_LOG	021	Warning
E0009	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel

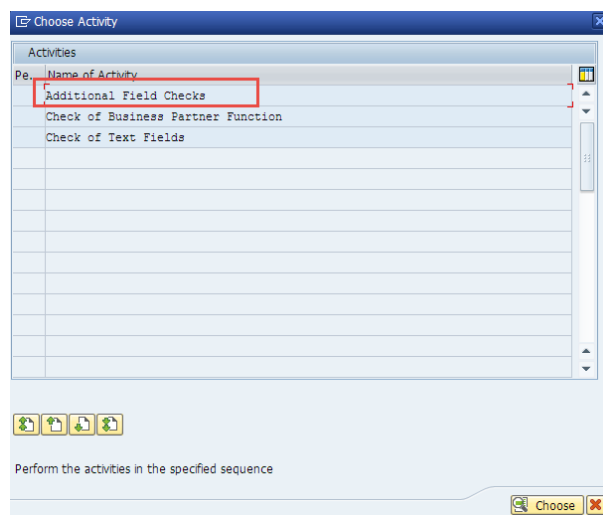
## 4.9.4 Additional Field Checks

In this customizing activity, you can add fields, which need to be checked when a certain status is reached. You can also disable the field for a status, while it can still be edited in other status.

In transaction **SPRO** call SAP Reference IMG and go to SAP Solution Manager → Focused Build → Change Control Management Extensions → Status Dependent Check Framework



Choose Activity *Additional Field Checks* on next screen.



Create an entry for each field and status you like to check.

- First enter transaction type, status profile and user status.
- Select your field by using the columns *Object Name* and *Fieldname – object*.
- The column *Mandatory* indicates whether the specified field has to have a value when the status is reached.
- The column *Display* indicates whether the specified field is disabled in the given status. If you want to keep the field disabled for all follow-up status, you need to add an entry for each status.

### Example

You use the change management transaction **ZMAD** (copy of admin change). You like to check that the *Description* field has a value when the status *In Development* is set.

Add consistency check to **ZMAD** as described in chapter *Activating the Piece List*

Run transaction **SCC1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

*Consistency Checks for Change Transaction Types*

1. Select transaction type **ZMAD**.
2. Choose *Assign Consistency Checks*.
3. Add Entry:
  1. User Status **E0002** (In Development):
  2. Sequence: **15** (or any other unused number).
  3. Status Transition Consistency Check: **/SALM/CONS\_CHECK**
  4. Application Area: **/SALM/ITSM\_CC**
  5. Message Number: **001**
  6. Message Type: **A Cancel**

**Change View "Assign Consistency Checks": Overview**

New Entries

Dialog Structure

- Create Transaction Type
  - Assign Actions
  - Define Execution Time of Actions
  - Assign Consistency Checks**
  - Define Execution Time of Consistency Checks
  - Specify Status Attributes
    - Specify Status Setting for Predecessor Document
    - Specify Required Status Values for Follow-Up Document
    - Specify Status Setting for Follow-Up Document
  - Specify Partner Assignment and Check
  - Specify Partner Function Display
  - Copy Control Rules
    - Map Text Objects
    - Map Dates Types

Transaction Type: **ZMAD**  
Status Profile: **ZMADHEAD**

User Status	Sequence	Status Transition Consistency Check	Application Area	Message Number	Message Type
E0002	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0002	10	MAINT_INST	SOCM_ACTION_LOG		Cancel
E0002	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0002	50	PREDOC_CAN_BE_SET	SOCM_ACTION_LOG	042	Cancel
E0002	95	CHECK_PFM_STATUS_SET	AI_SMCP	057	Cancel
E0004	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0004	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0004	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0004	95	CHECK_PFM_STATUS_SET	AI_SMCP	057	Cancel
E0009	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0009	10	SAME_USER	SOCM_ACTION_LOG	021	Warning
E0009	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel

Add check for input field in activity *Additional Field Checks*

Trans Type: **ZMAD**  
StatProf: **ZMADJHEAD**  
UstrSt: **E0002**

Object Name: *ORDERADM\_H*  
Field name – object: *DESCRIPTION*  
Mandatory: [Checked]  
Display: [Checked]

To disable field *description* in status E002, check the column *Display* too.

**Change View "Consistency Check: Field configuration": Overview**

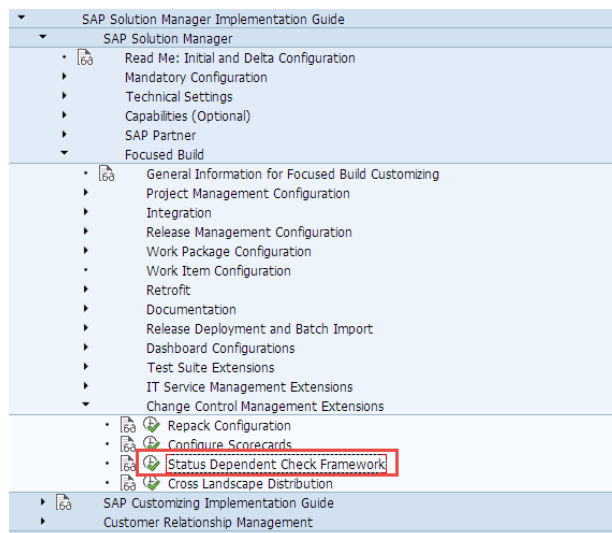
New Entries

Trans.Type	StatProf	UsrSt	Object Name	Field name - object	Mandatory	Display
ZMAD	ZMADHEAD	E0004	ORDERADM_H	DESCRIPTION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

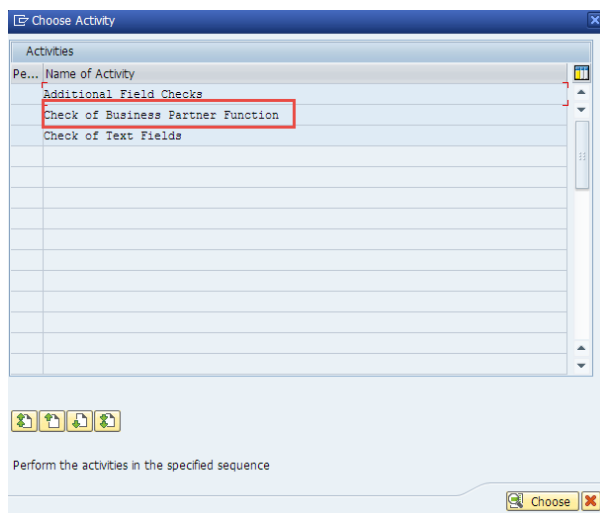
## 4.9.5 Check of Business Partner Function

In this Customizing activity, you can add business partner functions, which needs to be checked when a certain status is reached. You can also disable the business partner input field for a status, while it can still be edited in other status.

1. In transaction **SPRO**, call *SAP Reference IMG* and go to *SAP Solution Manager → Focused Build → Change Control Management Extensions → Status Dependent Check Framework*



2. Choose activity *Check of Business Partner Function* on next screen.



3. Create an entry for each business partner function and status you like to check.
  - o First enter transaction type, status profile and user status.
  - o Select your business partner function by using the column *Function*.
  - o The column *Mandatory* indicates whether the specified business partner function has to have a value when the status is reached.
  - o The column *Display* indicates whether the field for the specified business partner function is disabled in the given status. If you want to keep the field disabled for all follow-up status, you need to add an entry for each status.

**Change View "Consistency Check: Business Partner Functions": ..**

New Entries

	Trans.Type	StatProf	UsrSt	Function	Mandatory	Display
	ZMAD	ZMADHEAD	E0004	SDCR0002	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	ZMAD	ZMADHEAD	E0004	SMCD0003	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### Example

Use the change management transaction **ZMAD** (copy of admin change), and check that the *Change Manager* is specified when the status *To be tested* is set.

#### 4. Add consistency check to **ZMAD** as described in chapter *Activating the Piece List*

Run transaction **SCC1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

Consistency Checks for Change Transaction Types.

1. Select Transaction Type **ZMAD**.
2. Choose *Assign Consistency Checks*.
  - o Add Entry:
    - o User Status **E0004** (In Development):
    - o Sequence: **15** (or any other unused number)
    - o Status Transition Consistency Check: **/SALM/CONS\_CHECK**
    - o Application Area: **/SALM/ITSM\_CC**
    - o Message Number: **001**
    - o Message Type: **A Cancel**

Change View "Assign Consistency Checks": Overview

New Entries

Dialog Structure

Create Transaction Type

Assign Actions

Define Execution Time of Actions

Assign Consistency Checks

Define Execution Time of Consistency Checks

Specify Status Attributes

Specify Status Setting for Predecessor Document

Specify Required Status Values for Follow-Up Document

Specify Status Setting for Follow-Up Document

Specify Partner Assignment and Check

Specify Partner Function Display

Copy Control Rules

Map Text Objects

Map Dates Types

Transaction Type

ZMAD

Status Profile

ZMADHEAD

Assign Consistency Checks

User Status	Sequence	Status Transition Consistency Check	Application Area	Message Number	Message Type
E0002	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0002	10	MAINT_INST	SOCM_ACTION_LOG		Cancel
E0002	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0002	50	PREDOC_CAN_BE_SET	SOCM_ACTION_LOG	042	Cancel
E0002	95	CHECK_PFM_STATUS_SET	AI_SMCP	057	Cancel
E0004	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0004	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0004	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
E0004	95	CHECK_PFM_STATUS_SET	AI_SMCP	057	Cancel
E0009	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0009	10	SAME_USER	SOCM_ACTION_LOG	021	Warning
E0009	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel

#### 5. Add check for business partner in activity *Check of Business Partner Function*.

Trans Type: **ZMAD**

StatProf: **ZMADHEAD**

UstrSt: **E0004**

Function: **SDCR0002** (Change Manager)

Mandatory: [Checked]

Display: [Unchecked]

6. If the business partner should be disabled in status **E004**, check the column *Display* too.

**Change View "Consistency Check: Business Partner Functions": ..**

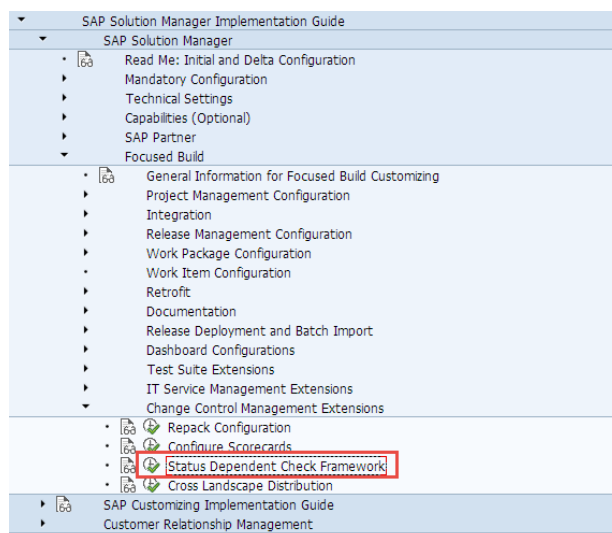
New Entries

Trans.Type	StatProf	UsrSt	Function	Mandatory	Display
ZMAD	ZMADHEAD	E0004	SDCR0002	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ZMAD	ZMADHEAD	E0004	SMCD0003	<input type="checkbox"/>	<input checked="" type="checkbox"/>

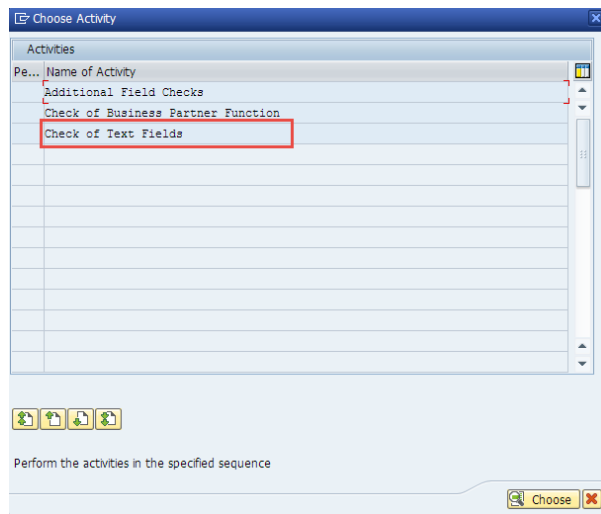
## 4.9.6 Check of Text Fields

In this customizing activity, you can add texts, which needs to be checked when a certain status is reached.

In transaction **SPRO** call SAP Reference IMG and go to *SAP Solution Manager → Focused Build → Change Control Management Extensions → Status Dependent Check Framework*

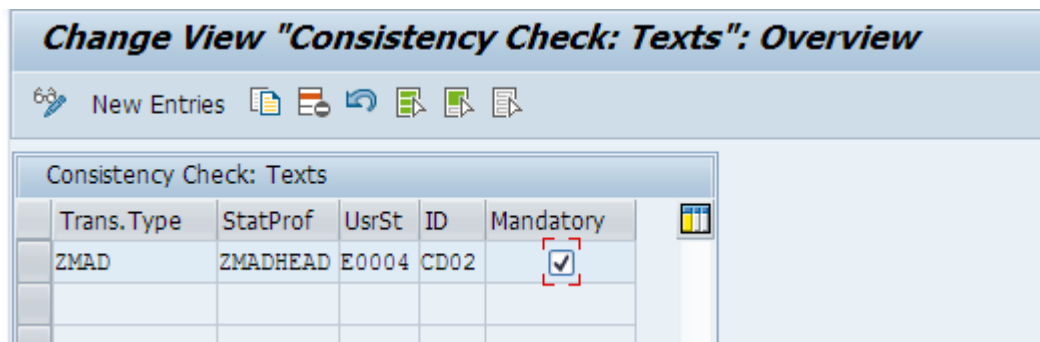


Choose Activity *Check of Text Fields* on next screen.



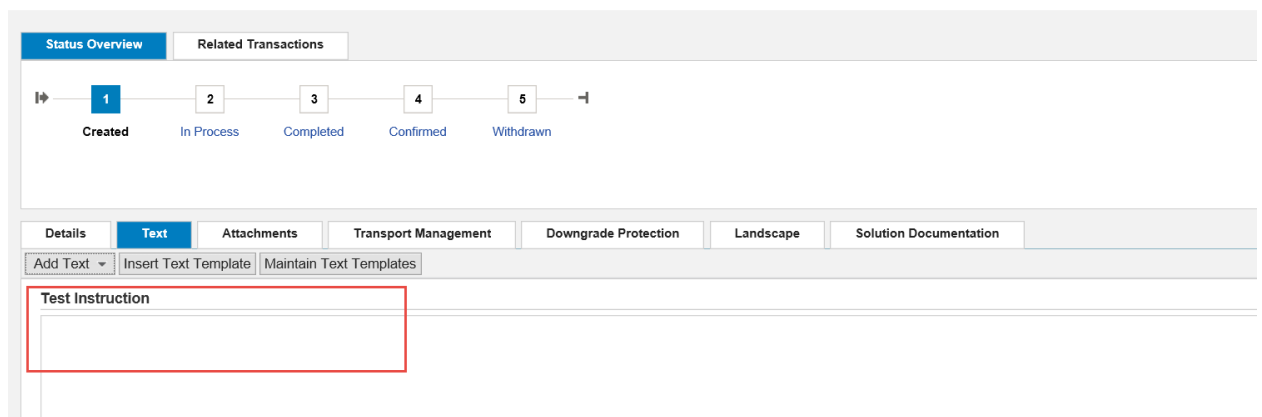
Create an entry for each text and status you like to check.

- First enter transaction type, status profile and user status.
- Select your text type by using the column *ID*.
- The column *Mandatory* indicates whether the specified text has to have a value when the status is reached.



### Example

You use the Change Management Transaction **ZMAD** (Copy of Admin Change). You like to check that the *Test Instruction* is entered when the status *To be Tested* is set.





Add consistency check to **ZMAD** as described in chapter *Activating the Piece List*

Run transaction **SCC1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

#### Consistency Checks for Change Transaction Types

1. Select Transaction Type **ZMAD**
2. Choose Assign Consistency Checks
3. Add Entry:
4. User Status E0004 (In Development):
5. Sequence: 15 (or any other unused number)
6. Status Transition Consistency Check: **/SALM/CONS\_CHECK**
7. Application Area: **/SALM/ITSM\_CC**
8. Message Number: 001
9. Message Type: A Cancel

**Change View "Assign Consistency Checks": Overview**

New Entries

Dialog Structure

- Create Transaction Type
  - Assign Actions
  - Define Execution Time of Actions
  - Assign Consistency Checks**
  - Define Execution Time of Consistency Checks
  - Specify Status Attributes
    - Specify Status Setting for Predecessor Document
    - Specify Required Status Values for Follow-Up Documents
    - Specify Status Setting for Follow-Up Documents
  - Specify Partner Assignment and Check
  - Specify Partner Function Display
  - Copy Control Rules
    - Map Text Objects
    - Map Dates Types

Transaction Type: **ZMAD**  
Status Profile: **ZMADHEAD**

User Status	Sequence	Status Transition Consistency Check	Application Area	Message Number	Message Type
E0002	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0002	10	MAINT_INST	SOCM_ACTION_LOG		Cancel
E0002	15	<b>/SALM/CONS_CHECK</b>	<b>/SALM/ITSM_CC</b>	<b>001</b>	<b>Cancel</b>
E0002	50	PREDOC_CAN_BE_SET	SOCM_ACTION_LOG	042	Cancel
E0002	95	CHECK_FPM_STATUS_SET	AI_SMCP	057	Cancel
E0004	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0004	5	NO_BUSINESS_PARTNER	SOCM_ACTION_LOG	022	Cancel
E0004	15	<b>/SALM/CONS_CHECK</b>	<b>/SALM/ITSM_CC</b>	<b>001</b>	<b>Cancel</b>
E0004	95	CHECK_FPM_STATUS_SET	AI_SMCP	057	Cancel
E0009	1	RFC_DEST	SOCM_ACTION_LOG		Cancel
E0009	10	SAME_USER	SOCM_ACTION_LOG	021	Warning
E0009	15	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel

Add check for text in activity *Check of Business Partner Function*

Trans Type: **ZMAD**  
StatProf: **ZMADHEAD**  
UsrSt: **E0004**  
ID: **CD02** (Test Instruction)  
Mandatory: [Checked]

**Change View "Consistency Check: Texts": Overview**

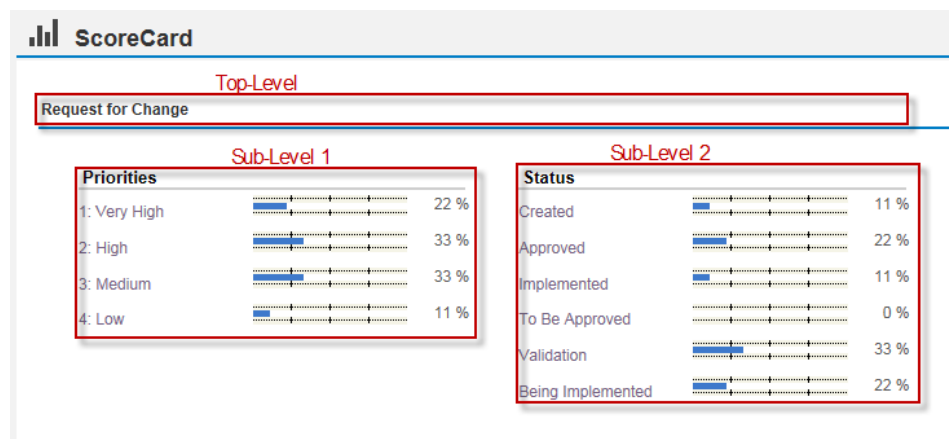
New Entries

Trans.Type	StatProf	UsrSt	ID	Mandatory
<b>ZMAD</b>	<b>ZMADHEAD</b>	<b>E0004</b>	<b>CD02</b>	<input checked="" type="checkbox"/>

## 4.10 Configuration of Change Request Management - Scorecard

### 4.10.1 Use Case

The scorecard provides an aggregated overview on current process types in the context of change request management with a possible drill down into the respective list view and further more 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 (such as priority, status). The following mock-up demonstrates this.



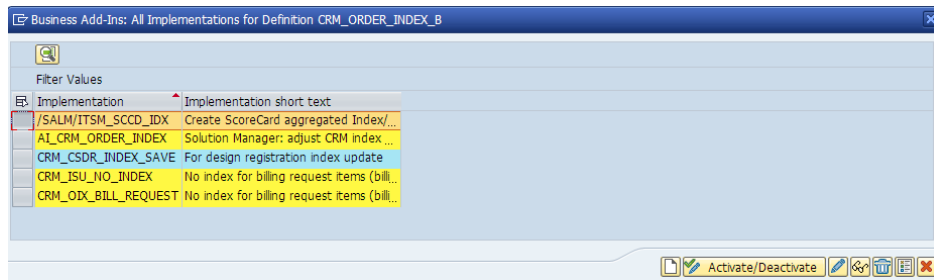
### 4.10.2 Activating the Piece List

Run transaction **scc1** in your working client and activate the piece list **/SALM/CHARM\_EXT**, which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **scc3**.

### 4.10.3 Customizing Scorecard

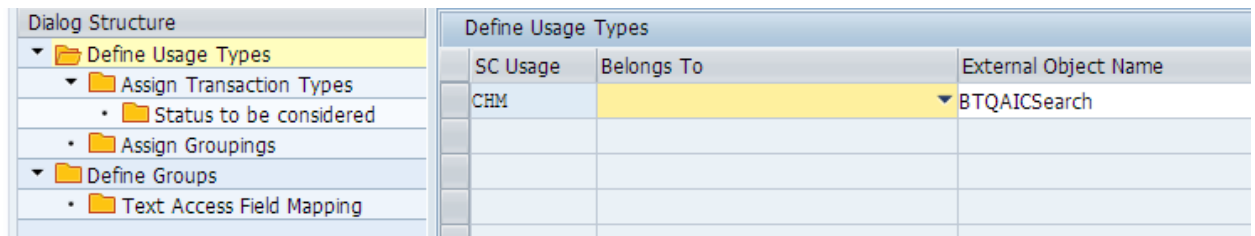
#### Activate BAdI to aggregate data for Scorecard

Make sure the implementation **/SALM/ITSM\_SCCD\_IDX** of definition **CRM\_ORDER\_INDEX\_BADI** is activated. Activate if necessary.



## Configure Scorecards

The configuration of the Scorecard is to be done in a central view cluster accessible via **SPRO** or **SM34** :  
[/SALM/ITSMSC\\_VC](#)



Changes in the Customizing Cluster have to be recorded into a transport request.

## Define Groups

Here you define the aggregation attributes that should form a group in the scorecard.

SC Group	= Group Identifier
Title	= Description of the Group
Component Name	= Field name of the BOL query result structure the values for this group will be retrieved from
Table Name	= Name of the table or view containing the descriptions of the attribute values
Field Name	= Language field name of the text table
Field Name	= description field name of the text table

The following entries will be delivered by default:

SC-Group	Title	Component Name	Table Name	Field Name	Field Name
PRCTP	Process Types	PROCESS_TYPE	CRMC_PROC_TYPE_T	LANGU	P_DESCRIPTION
PRIOT	Priorities	PRIORITY	SCPRIOT	LANGU	TXT_LONG
RELSE	Release	/AICRM/PROJECT_ID	/SALM/ITSMSCVRLS		DESCRIPTION
RESPO	Responsible Person	/AICRM/BP_NO_	BUT000		NAME1_TEXT

SC-Group	Title	Component Name	Table Name	Field Name	Field Name
STATU	Status	STATUS	/SALM/ITSMSCVSTT	SPRAS	TXT30

### Note

Please note that the business partner field **/AIC/BP\_NO\_ used** for the responsible person group RESPO is a generic one. Based on further configuration the field name will be completed with a 2-digit number varying from 01 to 10. (For example, **/AIC/BP\_NO\_03**)

## Define Text Access Field Mapping

Here you define how the fields of the data used for the ScoreCard will be mapped to the text table for each group to read the correct description for the field values.

Scorecard Group	= Group Identifier
Table Name	= Name of the table or view containing the descriptions of the attribute values
Field Name	= Key field of the text table
Field Name	= Field of the ScoreCard data to be mapped to the key field

The following entries will be delivered by default:

SC Group	Table Name	Field Name	Field Name
PRCTP	CRMC_PROC_TYPE_T	PROCESS_TYPE	PROCESS_TYPE
PRIOT	SCPRIOT	PRIORITY	PRIORITY
RELSE	/SALM/ITSMSCVRLS	SMI_PROJECT	/AICRM/PROJECT_ID
RESPO	BUT000	PARTNER	/AICRM/BP_NO_
STATU	/SALM/ITSMSCVSTT	ESTAT	STATUS
STATU	/SALM/ITSMSCVSTT	PROCESS_TYPE	PROCESS_TYPE

## Define Usage Types

Here you define the usage types for the ScoreCard. As the ScoreCard is able to be displayed in the context of Change Request Management, Incident Management and Requirements Management.

SC Usage	= ScoreCard Usage Identifier
Belongs To	= Responsibility of business transactions presented to the user logged on (not in use anymore)
External Object Name	= BOL Query object name used to select the business transactions (not in use anymore)
Bar Color	= HTML Color code used for the ScoreCard bar
Number	= max. number of search result hits (not in use anymore)

The following entries will be delivered by default:

SC Usage	Belongs To	External Object Name
CHM		BTQAICSearch

### 1 Note

Please note that the ScoreCard usage identifier cannot be freely defined. It has to be one of the values defined by the class attribute `/ALM/CL_SCORECARD_SERVICE=>GC_SC_USAGES`.

## Define Assign Transaction Types

Here you assign the transaction types that should be considered to be shown in the ScoreCard for a dedicated usage.

ScoreCard Usage	= ScoreCard usage identifier
Trans. Type	= Business transaction type
Object Type	= UI Object type that represents the transaction type
Sort Order	= Numeric value to setup the sort order for display
Sequence	= Numeric value between 01 and 10 defining the business partner field to be used

The following entries will be delivered by default:

SC Usage	Trans. Type	Object Type	Sort Order	Sequence
CHM	SMAD	AIC_OB_CMCD	50	03
CHM	SMCG	AIC_OB_CMCD	40	05
CHM	SMCR	AIC_OB_CMCR	10	05
CHM	SMHF	AIC_OB_CMCD	20	05
CHM	SMMJ	AIC_OB_CMCD	30	05

## Define Status to Be Considered

Here you configure which status values of each transaction type are relevant to be considered within the Scorecard.

ScoreCard Usage	= ScoreCard usage identifier
Trans. Type	= Business transaction type
UsrSt	= User Status
Sort Order	= Numeric value to setup the sort order for display

The following entries will be delivered by default:

SC Usage	Trans. Type	UsrSt	Sort Order
CHM	SMAD	E0001	10

SC Usage	Trans. Type	UsrSt	Sort Order
CHM	SMAD	E0002	20
CHM	SMCG	E0001	10
CHM	SMCG	E0003	20
CHM	SMCR	E0001	10
CHM	SMCR	E0004	40
CHM	SMCR	E0005	60
CHM	SMCR	E0011	45
CHM	SMCR	E0012	30
CHM	SMCR	E0014	20
CHM	SMCR	E0015	50
CHM	SMHF	E0001	10
CHM	SMHF	E0002	20
CHM	SMHF	E0004	30
CHM	SMHF	E0005	40
CHM	SMHF	E0006	60
CHM	SMHF	E0009	50
CHM	SMMJ	E0001	10
CHM	SMMJ	E0002	20
CHM	SMMJ	E0004	30
CHM	SMMJ	E0009	40
CHM	SMMJ	E0011	50
CHM	SMMJ	E0012	52
CHM	SMMJ	E0013	54
CHM	SMMJ	E0014	60

## Define Assign Groupings

Here you define which groups should be displayed at which level for each usage type.

Scorecard Usage	= ScoreCard usage identifier
Level	= Level of the group (currently 1 or 2)
Counter	= Number of the group entry
SC Group	= ScoreCard group identifier
Indicator	= Flag to indicate that the group label/title will be generic set from the attribute value of this group

The following entries will be delivered by default:

SC Usage	Level	Counter	SC Group	Indication
CHM	1	1	PRCTP	Yes
CHM	2	1	PRIOT	No
CHM	2	2	STATU	No
CHM	2	3	RELSE	No
CHM	2	4	RESPO	No

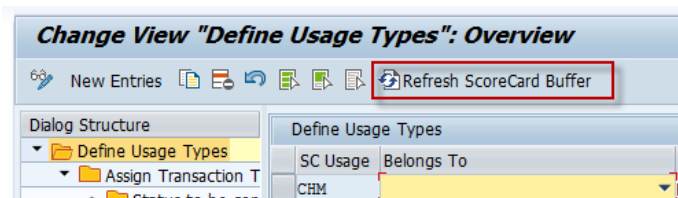
#### Note

On level 1 only **one** group can be assigned.

## 4.10.4 Generating Scorecard data

Once the configuration has been completed, or whenever it has been changed, the initial ScoreCard data has to be generated once.

First in the view cluster `/SALM/ITSMSC_VC` within the step *Define Usage Types* the ScoreCard buffer should be refreshed:



#### Note

The *Refresh ScoreCard Buffer* option is only available in change mode.

Once done, the buffered data can be rebuild using transaction **SA38** and executing report `CRM_INDEX_REBUILD`.

The Scorecard buffer will be automatically filled or updated once a score card relevant business transaction is changed.

## 4.11 Configuring Release Batch Import

### 4.11.1 Piece List Activation

The standard customizing of SAP change request management and all other IT service management-relevant areas is delivered via a *customizing piece list*. This piece list needs to be activated as part of transaction **SOLMAN\_SETUP** and will copy the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again will overwrite all existing standard customizing with the content of the piece list. Therefore it is recommended to copy all transaction types into the customer namespace, before starting to use SAP change request management.

The screenshot shows the 'Configure Automatically' step (Step 5) in the SOLMAN\_SETUP transaction. The technical system is SM2-ABAP-001 and the user is CHARM\_ADMIN. The step involves configuring SAP Web Services communication between the ABAP and Java stacks of SAP Solution Manager, automatically.

**Help**

In this step, you configure the SAP Web Services communication between the ABAP and Java stacks of SAP Solution Manager, automatically.

- To start the automatic configuration, choose *Execute All*.
- Note:** This can take a few minutes.
- After the configuration, messages and other detailed information for a selected automatic activity are displayed in the *Log* screen area.
- To display the log of failed batch job executions, start the Job Management (transaction SM37) and enter the job name.
- To postpone and exclude an activity from execution, select *Postponed* in the *Execution Status* column.
- The system only automatically configures entries with the execution status *Execute*.
- To perform configuration activities manually, do the following:
  - In the *Documentation* column, choose the *Display* link.

**Automatic Activities**

Buttons: Show All Logs, Execute All, Execute Selected, Refresh

Status	Updates Needed	Description	Navigation	Execution Status
	<input type="checkbox"/>	Activate BW Source System	Open URL	Execute
	<input type="checkbox"/>	Activate Piece Lists	Start Transaction	Execute
	<input type="checkbox"/>	Create External Aliases	Start Transaction	Execute
	<input type="checkbox"/>	Activate Services	Start Transaction	Execute

### 4.11.2 Required SAP Note Implementations

Before you start to configure release batch import, review the according master note for SAP change request management that fits to your SP Level and implement the latest version before moving on with configuration.

SAP Note	Description	SAP Solution Manager	Managed System
1818804	Change Request Management: Enable client restriction for import subsets		X



SAP Note	Description	SAP Solution Manager	Managed System
<a href="#">1731806</a>	Change Request Management: Support of multi-client import	X	X
1741751	new remote infrastructure without domain link is required on Managed Systems		X
1384598	Harmonizing RFC communication infrastructure in ChaRM/QGM	X	X
1650265	TMS workflow: 'Ignore Invalid Component Version' missing	X	X
2407691	Focused Build - Next status not set by Batch Import	X	
2411350	Focused Build - No selection of documents caused by communication client	X	
2413018	Incorrect buffer check in Batch Release Import	X	
2435470	Focused Build - Multiple releases with the Release Batch Import cannot be used	X	

### 4.11.3 Creating Import Variants

The release batch import utilizes the status-dependent imports.

The following tables show the best practice settings for the standard transaction types.

Additional customer specific CRM user statuses must be mapped accordingly:

#### Test System:

Transaction	Type Status	Profile Status
ZMTM	ZMTMHEAD	E0004
ZMTM	ZMTMHEAD	E0009
ZMMJ	ZMMJHEAD	E0004
ZMMJ	ZMMJHEAD	E0006
ZMMJ	ZMMJHEAD	E0009
ZMMJ	ZMMJHEAD	E0011
ZMMJ	ZMMJHEAD	E0012
ZMMJ	ZMMJHEAD	E0013
ZMMJ	ZMMJHEAD	E0014
ZMHF	ZMHFHEAD	E0004

Transaction	Type Status	Profile Status
ZMHF	ZMHFHEAD	E0005
ZMHF	ZMHFHEAD	E0006
ZMHF	ZMHFHEAD	E0007
ZMHF	ZMHFHEAD	E0008
ZMHF	ZMHFHEAD	E0009

### Production System:

Transaction	Type Status	Profile Status
ZMTM	ZMTMHEAD	E0009
ZMMJ	ZMMJHEAD	E0006
ZMMJ	ZMMJHEAD	E0009
ZMMJ	ZMMJHEAD	E0014
ZMHF	ZMHFHEAD	E0006
ZMHF	ZMHFHEAD	E0007
ZMHF	ZMHFHEAD	E0008
ZMHF	ZMHFHEAD	E0009

### Note

Some Hints in regards to *Status Dependent Import Control* -> [SCN blog](#)

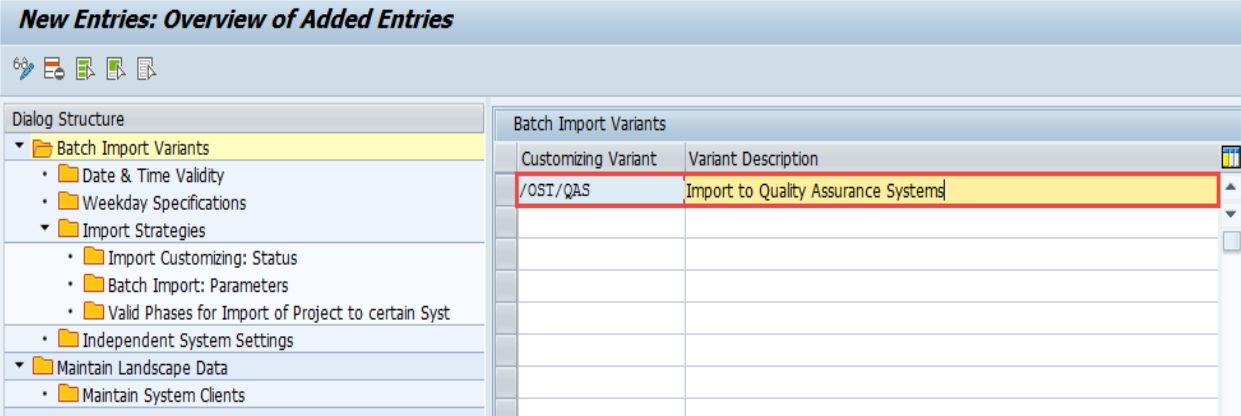
<http://scn.sap.com/community/it-management/alm/solution-manager/blog/2014/09/08/some-hints-to-status-dependant-import-control>

In the Customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Focused Build* → *Release Batch Import* → *Configure Release Deployment and Batch Import*.

### Create Import Variant for QAS

Create new batch import variant */OST/QAS* for the import to the quality assurance system(s):

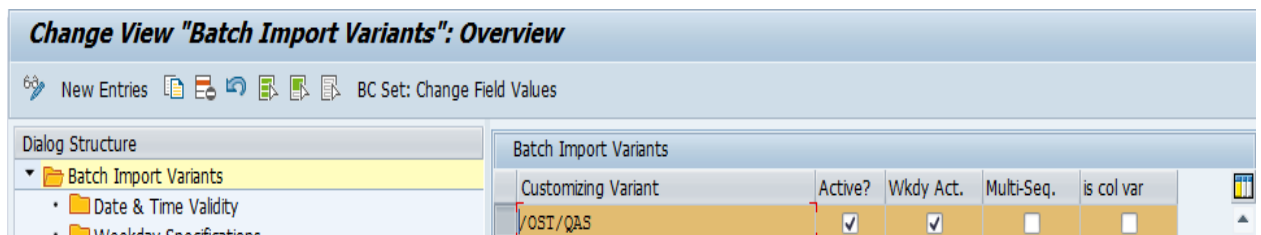
**New Entries: Overview of Added Entries**



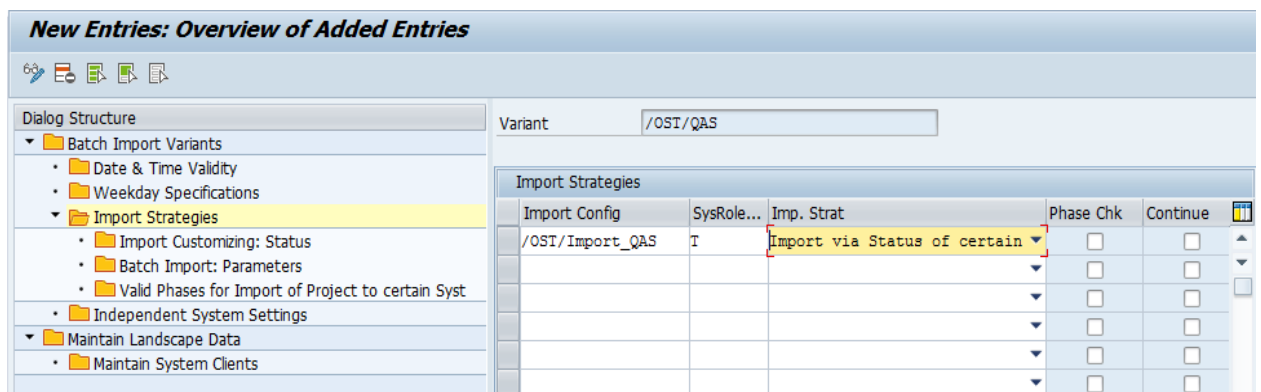
The screenshot shows the 'New Entries: Overview of Added Entries' window in SAP Solution Manager. On the left, the 'Dialog Structure' tree is expanded to 'Batch Import Variants'. On the right, the 'Batch Import Variants' table is displayed with the following data:

Customizing Variant	Variant Description
/OST/QAS	Import to Quality Assurance Systems

Set your import variant to *Active* and activate *Weekday Specifications* as well:



As next step, the import strategy for your newly created import variant */OST/QAS* must be defined:



Set the status dependent import control active for

- Import Config. = */OST/IMPORT\_QAS*
- System Role ID = *T* (Quality Assurance System, *IMPORT\_STA*)
- Import Strategy = Import via status of certain elements is used
- Phase Check = Activate check box, in case you would like to establish a phase check for the import to the QAS System (optional)
- Continue = Activate check box if additional transport requests should be imported, in case that the import of certain transports fails due to DGP or technical issues (optional).

Define up front for which transactions types CRM user status this should be valid:



### Caution

Best practice is to always also put status values that are higher than the value where you want to perform the import, to make sure you are not blocking.

## Import Customizing: Status:

Urgent Change (SMHF):

**New Entries: Overview of Added Entries**

Variant: /OST/QAS  
 Import Config: /OST/IMPORT\_QAS  
 System Role ID: T

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status**
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMHF	SMHFHEAD	E0004	
SMHF	SMHFHEAD	E0005	
SMHF	SMHFHEAD	E0006	
SMHF	SMHFHEAD	E0007	
SMHF	SMHFHEAD	E0008	
SMHF	SMHFHEAD	E0009	
SMHF	SMHFHEAD	E0010	

Please use the CRM user status values of the standard transaction type *Urgent Change* copied to the Customer Namespace (ZMHF).

If the customer has adapted the SAP change request management standard workflow for urgent change, adapt the CRM user status values accordingly.

Normal change (with TR) (SMMJ):

**New Entries: Overview of Added Entries**

Variant: /OST/QAS  
 Import Config: /OST/IMPORT\_QAS  
 System Role ID: T

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status**
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMMJ	SMMJHEAD	E0004	
SMMJ	SMMJHEAD	E0006	
SMMJ	SMMJHEAD	E0009	
SMMJ	SMMJHEAD	E0010	
SMMJ	SMMJHEAD	E0011	
SMMJ	SMMJHEAD	E0012	
SMMJ	SMMJHEAD	E0013	
SMMJ	SMMJHEAD	E0014	

Use the CRM user status values of the standard transaction type *Normal Change* copied to the customer namespace (ZMMJ).

If the customer has adapted the SAP change request management standard workflow for normal change, adapt the CRM user status values accordingly.

Defect Correction (SMTM):

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/QAS  
 Import Config: /OST/IMPORT\_QAS  
 System Role ID: T

Import Customizing: Status

Trans.Type	StatProf	UsrSt	UsrSt
SMTM	SMTMHEAD	E0004	
SMTM	SMTMHEAD	E0009	
SMTM	SMTMHEAD	E0010	

Use the CRM user status values of the standard transaction type *Defect Correction* copied to the customer namespace (ZMTM).

If the customer has adapted the SAP change request management standard workflow for defect correction, adapt the CRM user status values accordingly.



#### Caution

Transports without change belonging to the same cycle type will be deployed in conjunction only when inserting an empty record into import strategies.

Batch Import: Parameters:

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/QAS  
 Import Config: /OST/IMPORT\_QAS

Batch Import: Parameters

Sequence	Active?	Prel. Imp.	Reimport	Overw.Ori.	Overw.Rep.	Ignore	Ignore QA
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Sequence:
  - Enter **10** in the case of a Consolidated Import.
  - In the case of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with sequence **10** for SAP ERP, and one with sequence **20** for SAP BW.
- Set the following checkboxes to *Active*:
  - Active?*
  - Ignore CVers*

Valid Phases for Import of Project to certain System:

This configuration step is optional for the Import to the Quality Assurance System.

[illegible]

- Your QAS System and client,
- Communication Client: Use the Import Client as Communication Client,
- Sequence:
  - o Enter '10' for a consolidated import.
  - o If of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with Sequence '10' for SAP ERP, and one with Sequence '20' for SAP BW.
- RFC Type: Select Trusted RFC.

Date & Time Validity:

[illegible]

CUSTOMER

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**New Entries: Overview of Added Entries**

Variant: /OST/QAS

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications**
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
  - Maintain Landscape Data
    - Maintain System Clients

**Weekday Specifications**

Day	From	To
Monday	00:00:00	24:00:00
Tuesday	00:00:00	24:00:00
Wednesday	00:00:00	24:00:00
Thursday	00:00:00	24:00:00
Friday	00:00:00	24:00:00
Saturday	00:00:00	24:00:00
Sunday	00:00:00	24:00:00

Maintain Landscape Data:

Finally, you must maintain the relevant Landscape Data for which the selected Import Strategy/Import Config. should be executed:

**New Entries: Overview of Added Entries**

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
  - Maintain Landscape Data**
    - Maintain System Clients

**Maintain Landscape Data**

Import Config	Solution ID	Cycle Type	System	Sequence	Non-ABAP
/OST/IMPORT_QAS	*	All Types of Change Cycle	OTO	10	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Set the status dependent import control active for:

- Import Config. = /OST/IMPORT\_QAS,
- Solution ID = Enter your Solution ID; you can also use Wildcard,
- Cycle Type = Possible Values: Major Release, Minor Release, Emergency Release, Continual Cycle, Phased Cycle, QGM Change Cycle or 'All Types of Change Cycles'), and
- System = Enter the relevant System(s),
- Sequence:
  - Enter '10' in case of a Consolidated Import.
  - If a sequential import, for instance for SAP ERP and SAP BW is necessary, two entries, one with Sequence '10' for SAP ERP, and one with Sequence '20' for SAP BW are required!

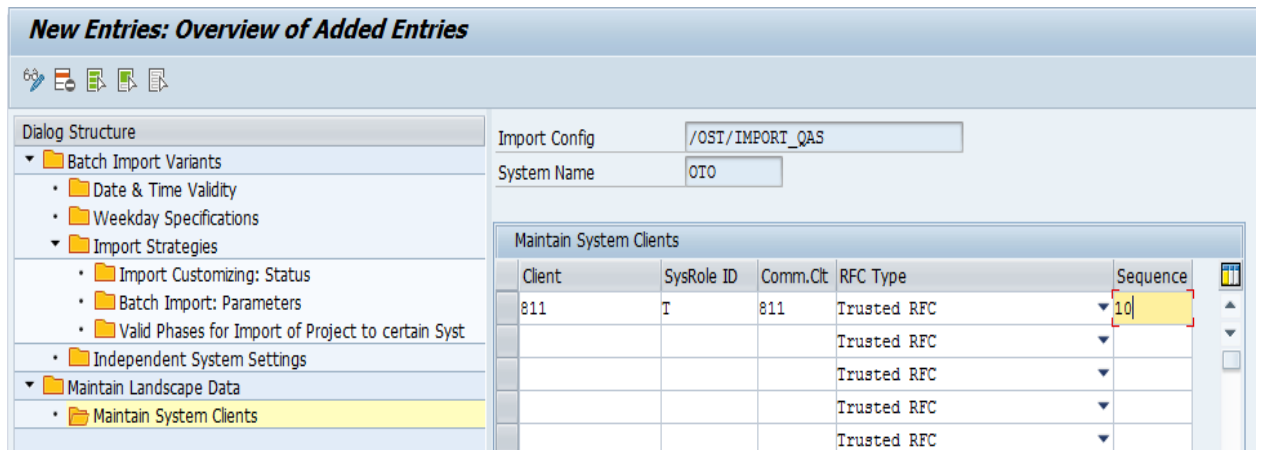
Please keep in mind, that in the latter case, you also need to define the Batch Import Parameters with analogous Sequences for the Import to SAP ERP and SAP BW.

- Non-ABAP.

## Note

Wildcard (\*) is valid for Solution ID

Maintain System Clients:



Client	SysRole ID	Comm.Clt	RFC Type	Sequence
811	T	811	Trusted RFC	10
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	

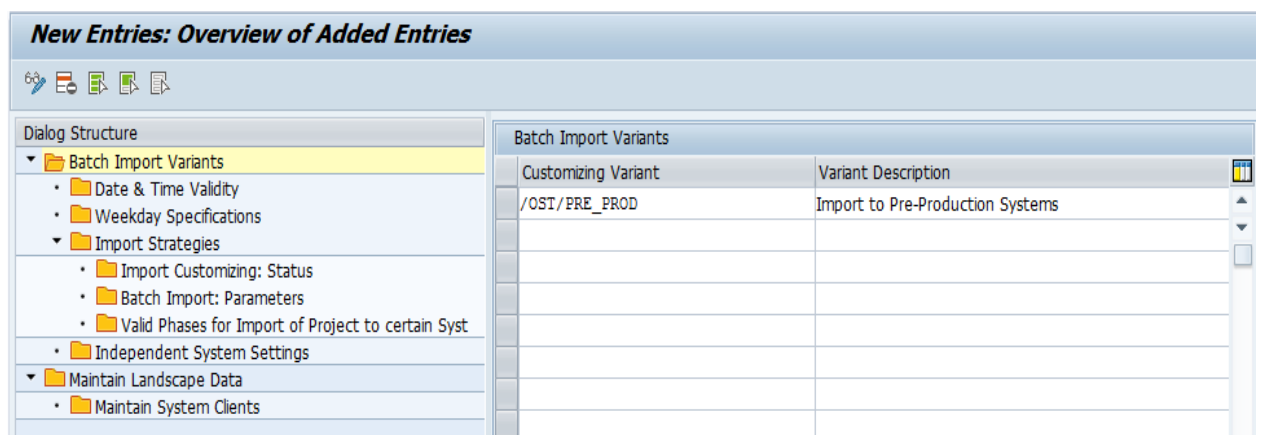
Set the status dependent import control active for:

- Client = Enter the relevant Client for Import to QAS,
- System Role ID = 'T' (for Quality Assurance System),
- Communication Client = You should enter the relevant Client for Import to QAS,
- RFC Type = Select 'Trusted RFC' as RFC Type,
- Sequence
  - Enter '10' in case of a Consolidated Import.

If a sequential import, for instance for SAP ERP and SAP BW is necessary, two new entries, one with Sequence '10' for SAP ERP, and one with Sequence '20' for SAP BW are required!

## Create Import Variant for Pre-Production System

Create the new Batch Import Variant /OST/PRE\_PROD for the Import to the Pre-Production System(s):



Customizing Variant	Variant Description
/OST/PRE_PROD	Import to Pre-Production Systems

Set your Import Variant to *Active*, and activate *Weekday Specifications* as well:



New Entries: Overview of Added Entries					
<div> <div> <div>68</div> <div> </div> </div> <div> <div>Dialog Structure</div> <div> <div>Batch Import Variants</div> <ul style="list-style-type: none"> <li>Date &amp; Time Validity</li> <li>Weekday Specifications</li> <li>Import Strategies <ul style="list-style-type: none"> <li>Import Customizing: Status</li> <li>Batch Import: Parameters</li> <li>Valid Phases for Import of Project to certain Syst</li> </ul> </li> <li>Independent System Settings</li> <li>Maintain Landscape Data <ul style="list-style-type: none"> <li>Maintain System Clients</li> </ul> </li> </ul> </div> </div> </div>					
Batch Import Variants					
Customizing Variant	Active?	Wkdy Act.	Multi-Seq.	is col var	
/OST/PRE_PROD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

As next step the Import Strategy for your newly created Import Variant /OST/PRE\_PROD must be defined:

New Entries: Overview of Added Entries					
<div> <div> <div>68</div> <div> </div> </div> <div> <div>Dialog Structure</div> <div> <div>Batch Import Variants</div> <ul style="list-style-type: none"> <li>Date &amp; Time Validity</li> <li>Weekday Specifications</li> <li>Import Strategies <ul style="list-style-type: none"> <li>Import Customizing: Status</li> <li>Batch Import: Parameters</li> <li>Valid Phases for Import of Project to certain Syst</li> </ul> </li> <li>Independent System Settings</li> <li>Maintain Landscape Data <ul style="list-style-type: none"> <li>Maintain System Clients</li> </ul> </li> </ul> </div> </div> </div>					
Variant <input type="text" value="/OST/PRE_PROD"/>					
Import Strategies					
Import Config	SysRole...	Imp. Strat			
/OST/Import_PRE_PROD 1		Import via Status of certain elements is used			

Set the status dependent import control active for:

- Import Config. = /OST/Import\_PRE\_PROD,
- System Role ID = '1' (Pre-Production (IMPORT\_STA)),
- Import Strategy = 'Import via Status of certain elements is used',
- Phase Check = Activate Check Box, in case you would like to establish a Phase Check for Import to the Pre-production System (optional), and
- Continue = Activate Check Box, if further Transport Requests should be imported, in case that the import of certain Transports fails due to DGP or technical issues (optional).

Now we need to define on top for which Transactions Types in which status this should be valid:



### Caution

Best Practice is to always also put Status Values that are higher than the one, where you want to perform the import to make sure you are not blocking.

Import Customizing: Status:

Urgent Change (ZMHF):

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD  
 Import Config: /OST/IMPORT\_PRE\_PROD  
 System Role ID: 1

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMHF	SMHFHEAD	E0005	
SMHF	SMHFHEAD	E0006	
SMHF	SMHFHEAD	E0007	
SMHF	SMHFHEAD	E0008	
SMHF	SMHFHEAD	E0009	
SMHF	SMHFHEAD	E0010	

Please use the CRM user status values of the standard transaction type *Urgent Change* copied to the Customer Namespace (ZMHF).

If the Customer has adapted the SAP Change Request Management Standard Workflow for *Urgent Change*, adapt the CRM user status values accordingly.

Normal Change (with TR) (ZMMJ):

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD  
 Import Config: /OST/IMPORT\_PRE\_PROD  
 System Role ID: 1

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMMJ	SMMJHEAD	E0006	
SMMJ	SMMJHEAD	E0009	
SMMJ	SMMJHEAD	E0010	
SMMJ	SMMJHEAD	E0011	
SMMJ	SMMJHEAD	E0012	
SMMJ	SMMJHEAD	E0013	
SMMJ	SMMJHEAD	E0014	

Please use the CRM user status values of the standard transaction type *Normal Change* copied to the Customer Namespace (ZMMJ).

If the Customer has adapted the SAP Change Request Management Standard Workflow for Normal Change, adapt the CRM user status values accordingly.

Defect Correction (ZMTM):

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD  
 Import Config: /OST/IMPORT\_PRE\_PROD  
 System Role ID: 1

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMTM	SMTMHEAD	E0009	

Please use the CRM user status values of the standard transaction type *Defect Correction* copied to the Customer Namespace (ZMTM).

If the Customer has adapted the SAP Change Request Management Standard Workflow for Defect Correction, adapt the CRM user status values accordingly.

Batch Import: Parameters:

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD  
 Import Config: /OST/IMPORT\_PRE\_PROD

**Batch Import: Parameters**

Sequence	Active?	Prel. Imp.	Reimport	Overw.Ori.	Overw.Rep.	Ignore	Ignore QA
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Sequence:
  - Enter **10** in case of a Consolidated Import.
  - If of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with Sequence **10** for SAP ERP, and one with Sequence **20** for SAP BW.
- Set the following Checkboxes to 'Active':
  - *Active?*, as well as,
  - *Ignore CVers*.

Valid Phases:

This configuration step is optional for the Import to the Pre-Production System(s).

Independent System Settings:

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
    - Independent System Settings**
    - Maintain Landscape Data
    - Maintain System Clients

**Independent System Settings**

System	Client	Sequence	RFC Type	Non-ABAP
OTO	812	10	Trusted RFC	<input type="checkbox"/>
			Trusted RFC	<input type="checkbox"/>
			Trusted RFC	<input type="checkbox"/>
			Trusted RFC	<input type="checkbox"/>
			Trusted RFC	<input type="checkbox"/>
			Trusted RFC	<input type="checkbox"/>

Create an Entry for

- your Pre-Prod System and Client,
- Communication Client: Use the Import Client as Communication Client,
- Sequence
  - Enter **10** for a Consolidated Import,
  - If of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with Sequence **10** for SAP ERP, and one with Sequence **20** for SAP BW.
- RFC Type: Select Trusted RFC.

This Customizing is only considered, if [Maintain Landscape Data](#) and [Maintain System Clients](#) in this View Cluster are not configured for this Import Variant.

Otherwise, the Configuration of [Maintain Landscape Data/Maintain System Clients](#) will always overrule the Independent System Settings.

Date & Time Validity:

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity**
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
    - Independent System Settings
    - Maintain Landscape Data
    - Maintain System Clients

**Date & Time Validity**

From	To	From	To
01.06.2017	31.12.9999	00:00:00	24:00:00

Weekday Specifications:

**New Entries: Overview of Added Entries**

Variant: /OST/PRE\_PROD

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications**
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

**Weekday Specifications**

Day	From	To
Monday	00:00:00	24:00:00
Tuesday	00:00:00	24:00:00
Wednesday	00:00:00	24:00:00
Thursday	00:00:00	24:00:00
Friday	00:00:00	24:00:00
Saturday	00:00:00	24:00:00
Sunday	00:00:00	24:00:00

Maintain Landscape Data:

Finally, you must maintain the relevant Landscape Data for which the selected Import Strategy/Import Config. should be utilized:

**New Entries: Overview of Added Entries**

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data**
  - Maintain System Clients

**Maintain Landscape Data**

Import Config	Solution ID	Cycle Type	System	Sequence	Not
/OST/IMPORT_PRE_PROD *		All Types of Change Cycle	OTO	10	

Set the status dependent import control active for:

- Import Config. = /OST/IMPORT\_PRE\_PROD,
- Solution ID = Enter your Solution ID; you can also use Wildcard,
- Cycle Type = All Types of Changes (Possible Values: Major Release, Minor Release, Emergency Release, Continual Cycle, Phased Cycle, QGM Change Cycle or 'All Types of Change Cycles'), and
- System = Enter the relevant System(s)
- Sequence:
  - o Enter 10 in case of a Consolidated Import,
  - o If of a sequential import, for instance for SAP ERP and SAP BW, two entries, one with Sequence 10 for SAP ERP, and one with Sequence 20 for SAP BW are required!

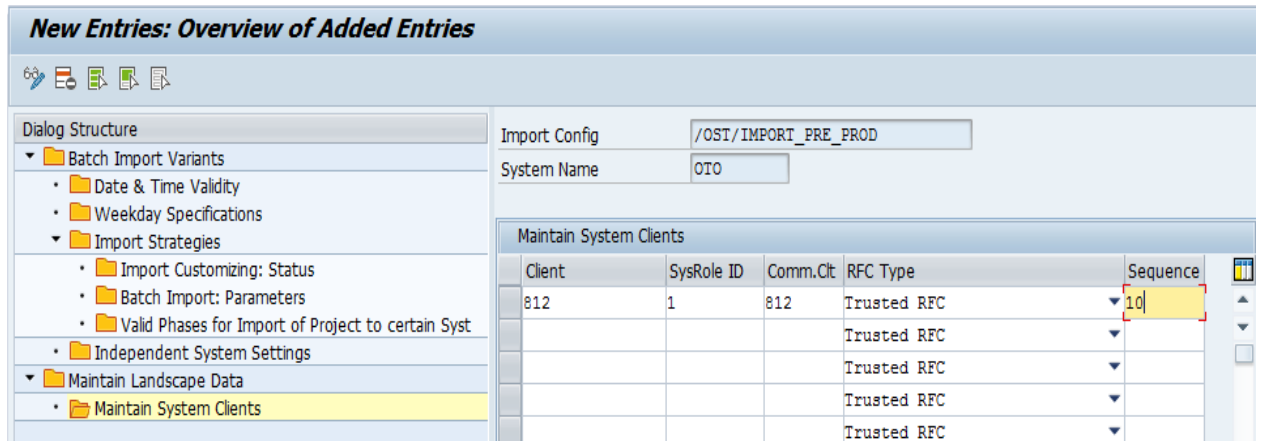
Please keep in mind, that in the latter case, you also need to define the Batch Import Parameters with analogous Sequences for the Import to SAP ERP and SAP BW.

- Non-ABAP.

## Note

Wildcard (\*) is valid for Solution ID

Maintain System Clients:



Client	SysRole ID	Comm.Clt	RFC Type	Sequence
812	1	812	Trusted RFC	10
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	

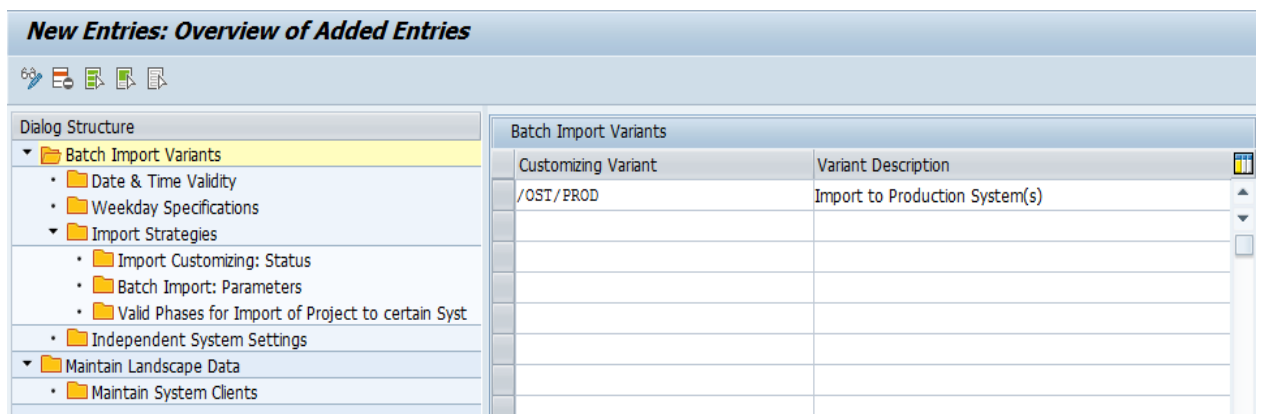
Set the status dependent import control active for:

- Client = Enter the relevant Client for Import to the Pre-Production System(s),
- System Role ID = '1' (for Pre-Production System),
- Communication Client = Enter the relevant Client for Import to Pre-Production System(s),
- RFC Type = Select Trusted RFC as RFC Type,
- Sequence:
  - o Enter 10 in case of a Consolidated Import,

If a sequential import, for instance for SAP ERP and SAP BW is necessary, two new entries, one with Sequence 10 for SAP ERP, and one with Sequence 20 for SAP BW are required.

## Create Import Variant for PRD

Create the new Batch Import Variant /OST/PROD for the Import to the Production System(s):



Customizing Variant	Variant Description
/OST/PROD	Import to Production System(s)

Set your Import Variant to *Active* and activate *Weekdays Specifications* as well:



**New Entries: Overview of Added Entries**

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status**
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/PROD  
 Import Config: /OST/IMPORT\_PROD  
 System Role ID: P

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMHF	SMHFHEAD	E0006	E0007
SMHF	SMHFHEAD	E0009	E0006
SMHF	SMHFHEAD	E0007	E0008
SMHF	SMHFHEAD	E0008	

Normal Change (with TR) (ZMMJ):

**New Entries: Overview of Added Entries**

**Dialog Structure**

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status**
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/PROD  
 Import Config: /OST/IMPORT\_PROD  
 System Role ID: P

**Import Customizing: Status**

Trans.Type	StatProf	UsrSt	UsrSt
SMHF	SMHFHEAD	E0006	E0007
SMHF	SMHFHEAD	E0009	E0006
SMHF	SMHFHEAD	E0007	E0008
SMHF	SMHFHEAD	E0008	

Defect Correction (ZMTM):



**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst.
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/PROD  
 Import Config: /OST/IMPORT\_PROD  
 System Role ID: P

Import Customizing: Status

Trans.Type	StatProf	UsrSt	UsrSt
SMTM	SMTMHEAD	E0009	

Batch Import: Parameters:

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst.
  - Independent System Settings
- Maintain Landscape Data
  - Maintain System Clients

Variant: /OST/PROD  
 Import Config: /OST/IMPORT\_PROD

Batch Import: Parameters

Sequence	Active?	Prel. Imp.	Reimport	Overw.Ori.	Overw.Rep.	Ignore	Ignore QA
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Sequence:
  - Enter **10** in case of a Consolidated Import.
  - If of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with Sequence **10** for SAP ERP, and one with Sequence **20** for SAP BW.
- Set the following Checkboxes to 'Active':
  - Active?*, as well as,
  - Ignore CVers*.

Valid Phases:

For the import to the Production System(s) it is highly recommended(!) to establish a Phase Check. In order to do so a 2-Step Customizing is required:

- At first, we have already activated the Checkbox 'Phase Chk' on the level of the Import Strategies.
- In the following Customizing Step, you define the details of the Phase Check, which shall take place. For instance, if you use the SAP Release Management, the Phase Check will verify, if the Release Cycle Document (SMRE) is in CRM User Status 'E0006' ('Deploy'). If this is not the case, the Program /SALM/BATCH\_IMPORT\_TRIGGER will not perform any imports to the Production System(s):

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
    - Independent System Settings
  - Maintain Landscape Data
    - Maintain System Clients

Variant: /OST/PROD

Import Config: /OST/IMPORT\_PROD

System Role ID: P

Sequence	Trans.Type	StatProf	UsrSt
10	SMRE	SMREHEAD	E0006

If you use a Phase Cycle, the following Customizing Entry is required:

Sequence	Trans. Type	StatProf	UsrSt
10	SMIM	SMIMHEAD	E0006

Independent System Settings:

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
    - Independent System Settings
  - Maintain Landscape Data
    - Maintain System Clients

Variant: /OST/PROD

System	Client	Comm.Ct	Sequence	RFC Type	Non-ABAP
OTO	800	800	10	Trusted RFC	<input type="checkbox"/>
				Trusted RFC	<input type="checkbox"/>
				Trusted RFC	<input type="checkbox"/>
				Trusted RFC	<input type="checkbox"/>
				Trusted RFC	<input type="checkbox"/>
				Trusted RFC	<input type="checkbox"/>

Create an Entry for

- your Production System(s) and Client,
- Communication Client: Use the Import Client as Communication Client,
- Sequence
  - o Enter 10 for a Consolidated Import,
  - o If of a sequential import, for instance for SAP ERP and SAP BW, you need two entries, one with Sequence 10 for SAP ERP, and one with Sequence 20 for SAP BW.
- RFC Type: Select Trusted RFC.

This Customizing is only considered, if *Maintain Landscape Data* and *Maintain System Clients* in this View Cluster are not configured for this Import Variant.

Otherwise, the Configuration of *Maintain Landscape Data/Maintain System Clients* will always overrule the Independent System Settings.

Date & Time Validity:

The screenshot shows the 'New Entries: Overview of Added Entries' dialog. On the left, the 'Dialog Structure' tree is expanded to 'Batch Import Variants' > 'Date & Time Validity'. The 'Variant' field is set to '/OST/PROD'. The main table, titled 'Date & Time Validity', has columns 'From', 'To', 'From', and 'To'. The first row contains the values '01.06.2017', '31.12.9999', '00:00:00', and '24:00:00'. The '24:00:00' cell is highlighted with a red border.

From	To	From	To
01.06.2017	31.12.9999	00:00:00	24:00:00

Weekday Specifications:

The screenshot shows the 'New Entries: Overview of Added Entries' dialog. On the left, the 'Dialog Structure' tree is expanded to 'Batch Import Variants' > 'Display folder contents'. The 'Variant' field is set to '/OST/PROD'. The main table, titled 'Weekday Specifications', has columns 'Day', 'From', and 'To'. The table lists days from Monday to Sunday, each with 'From' and 'To' times set to '00:00:00' and '24:00:00'. The '24:00:00' cell for Sunday is highlighted with a red border.

Day	From	To
Monday	00:00:00	24:00:00
Tuesday	00:00:00	24:00:00
Wednesday	00:00:00	24:00:00
Thursday	00:00:00	24:00:00
Friday	00:00:00	24:00:00
Saturday	00:00:00	24:00:00
Sunday	00:00:00	24:00:00

Maintain Landscape Data:

Finally, you must enter the relevant Landscape Data for which the selected Import Strategy is to be used:

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
  - Maintain Landscape Data (selected)
    - Maintain System Clients

Import Config	Solution ID	Cycle Type	System	Sequence	Non-ABAP
/OST/IMPORT_PROD	*	All Types of...	OT0	10	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Set the status dependent import control active for:

- Import Config. = /OST/IMPORT\_PROD,
- Solution ID = Enter your Solution ID; you can also use Wildcard,
- Cycle Type = All Types of Changes (Possible Values: Major Release, Minor Release, Emergency Release, Continual Cycle, Phased Cycle, QGM Change Cycle or 'All Types of Change Cycles'), and
- System = Enter the relevant System(s)
- Sequence:
  - o Enter 10 in case of a Consolidated Import,
  - o If of a sequential import, for instance for SAP ERP and SAP BW, two entries, one with Sequence 10 for SAP ERP, and one with Sequence 20 for SAP BW are required!

Please keep in mind, that in the latter case, you also need to define the Batch Import Parameters with analogous Sequences for the Import to SAP ERP and SAP BW.

- Non-ABAP.



### Caution

Wildcard (\*) is valid for Solution ID

Maintain System Clients:

**New Entries: Overview of Added Entries**

Dialog Structure

- Batch Import Variants
  - Date & Time Validity
  - Weekday Specifications
  - Import Strategies
    - Import Customizing: Status
    - Batch Import: Parameters
    - Valid Phases for Import of Project to certain Syst
  - Independent System Settings
  - Maintain Landscape Data
    - Maintain System Clients (selected)

Import Config: /OST/IMPORT\_PROD

System Name: OT0

Client	SysRole ID	Comm.Clt	RFC Type	Sequence
800	P	800	Trusted RFC	10
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	
			Trusted RFC	

Set the status dependent import control active for:

- Client = Enter relevant Client for productive Import,
- System Role ID = 'P' (for Production System),
- Communication Client = Enter relevant Client for productive Import,
- RFC Type = Select Trusted RFC as RFC Type,
- Sequence:
  - Enter **10** in case of a Consolidated Import,

If a sequential import, for instance for SAP ERP and SAP BW is necessary, two new entries, one with Sequence **10** for SAP ERP, and one with Sequence **20** for SAP BW are required.



### Caution

Wildcard (\*) is valid for Solution ID and Client, even if offered for System as well. System field must be specified with a value and no wildcard!

## Special Setup in Case of TMW

If you would like to use the TMW RFC Connection instead of TRUSTED RFC, check for RFC User:

**RFC Destination SM\_TT2CLNT100\_TMW**

Remote Logon   Connection Test   Unicode Test  

RFC Destination **SM\_TT2CLNT100\_TMW**

Connection Type **3** ABAP Connection   Description

Description

Description 1 Generated Destination

Description 2

Description 3

Administration   Technical Settings   **Logon & Security**   Unicode   Special Options

**Logon Procedure**

Language

Client 100

**User** SMTQM1 ☐ Current User

PW Status saved

Trust Relationship ☒ No   ☐ Yes   ☐ Logon Screen

Status of Secure Protocol

**SNC** ☒ Inactive   ☐ Active

Authorization for Destination

Additional authorization is required for communication (reading buffer, etc.). The User behind the RFC which is used to the Managed System (TMW RFC for communication client) needs to have authorization for function group TMW\_PROJECT\_LOCK on the Managed System for authorization object S\_RFC. Fall back is Client 000.

The screenshot shows the 'Display Users' transaction in SAP. The user 'SMTMQM1' is selected. The 'Roles' tab is active, showing a table of role assignments. The role 'Z\_SOLMAN\_TMW' is highlighted with a red box. The status bar at the bottom shows 'TT2 (4) 100' and 'dtcgemssmt01 INS'.

Status	Role	T	Start Date	End Date	Short Description	Indi...
✓	Z_SOLMAN_READ	28.01.2013	31.12.9999	Z_SOLMAN_READ	=	
✓	Z_SOLMAN_READ_620	28.01.2013	31.12.9999	Z_SOLMAN_READ_620	=	
✓	Z_SOLMAN_READ_70	28.01.2013	31.12.9999	Z_SOLMAN_READ_70	=	
✓	Z_SOLMAN_TMW	28.01.2013	31.12.9999	Z_SOLMAN_TMW	=	

On top the user need to have authorization for IMPORT!

#### 4.11.4 Starting Import based on Import Variant

Go to transaction **SE38** and enter Program /SALM/BATCH\_IMPORT\_TRIGGER.

Choose Import Variant: /OST/QAS:

**Start/Schedule Import based on Variant**

**General Options**

Release to Import

☐ Import into Production Systems

Import Variant

☐ Allow Transports of Task List without Change assigned

☒ Test Mode (No Import)

☐ Parallel Import Process

☐ Process only Testtransports

☐ Reside in buffer after import

**Scheduling Options**

☐ Enable Automatic Rescheduling

Minutes until auto restart

**Check Options**

**Downgrade Protection**

☐ Downgrade Protection on

☐ Skip downgrade Transports

**Relational Checks**

☐ Enable Relation Checks

☐ Check Change Doc Predecessors

☐ Check for complete WP Import

☐ Check Work Package Predecessors

☐ Check complete Master WP

The Program /SALM/BATCH\_IMPORT\_TRIGGER is used to trigger imports for all relevant System Roles (QAS, Pre-production and Production System).

However, for Pre-production and Production System, the Import should be controlled by the IT-Operator, but not be scheduled automatically by the System.

### Program /SALM/BATCH\_IMPORT\_TRIGGER - General Options

**General Options**

Release to Import

☐ Import into Production Systems

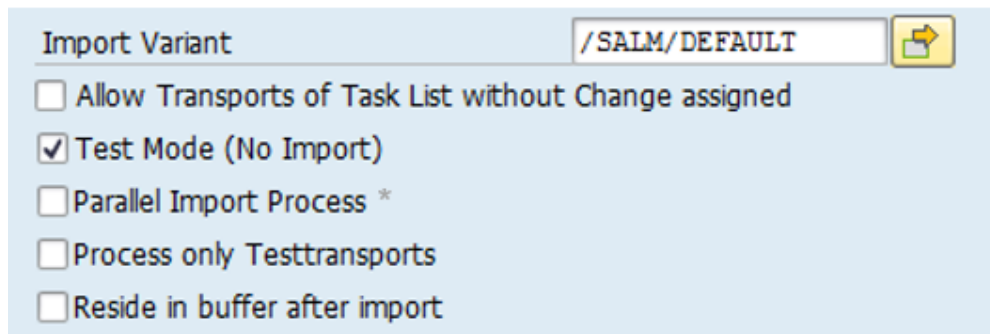
- **Release to Import**

Choose the Cycle Type which should be imported based on the entered Import Variant.

You can also enter multiple releases, or use Wildcard.

- **Import into Production Systems**

Here it can be decided, if the Import would be performed into a Production System or not



- **Import Variant**

The Import variants is defined via the customizing for Release Batch Import, Defines, which systems should be considered for import, Provides restrictions which have to be fulfilled (e.g. system roles or CRM User Status of Change Documents).

- **Allows Transports of Task List without Change assigned**

Also transports, which are not assigned to a change document, will be imported.

- **Test Mode**

All checks will be performed, but no import is triggered.

- **Parallel import Process\***

This Option allows a parallelized import into multiple defined target systems.

- **Process only Test transports**

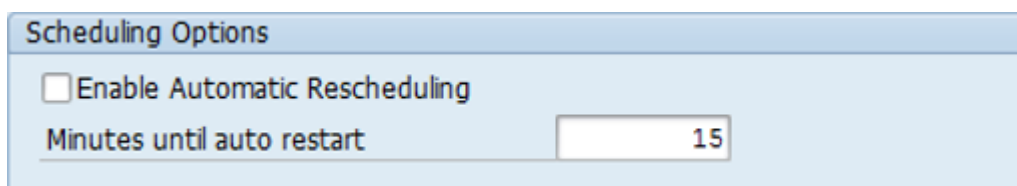
Only Transports of Copies (TOC) will be imported,

During the transport selection all non TOCs will be removed from the selection.

- **Reside in buffer after import**

After import into the defined systems the transports will be left on the import buffer.

## Program /SALM/BATCH\_IMPORT\_TRIGGER - Scheduling Options



- **Enable Automatic Rescheduling**

After program is finished it will schedule itself again to run again as a job.

- **Minutes until auto restart**

If Automatic Rescheduling is enabled, this defines the number of minutes after which the program will run again,

Enabled Active Automatic Rescheduling will be active permanently, so the Job has to be removed manually to stop the rescheduling.



## Program /SALM/BATCH\_IMPORT\_TRIGGER - Check Options for Downgrade Protection

The screenshot shows a 'Check Options' dialog box. It contains two main sections: 'Downgrade Protection' and 'Relational Checks'. Under 'Downgrade Protection', there are two checked options: 'Downgrade Protection on' and 'Skip downgrade Transports'. Under 'Relational Checks', there are five options: 'Enable Relation Checks' (unchecked), 'Check Change Doc Predecessors' (disabled), 'Check for complete WP Import' (disabled), 'Check predecessors of Work Packages' (disabled), and 'Check complete Master WP' (disabled).

- **Downgrade Protection on**

Performs check on possible downgrades,  
Found downgrades will be logged.

- **Skip downgrade Transports**

If this option is disabled and if transports from the selection are affected from a downgrade, no import will be triggered,

If this option is enabled transports which are affected from downgrades will be removed from the selection before the import is triggered,

**On productive systems: If a downgrade has been found in the transport selection skipping is not allowed. Thus, no import will be triggered.**

### Program /SALM/BATCH\_IMPORT\_TRIGGER - Relational Checks

The Check Options for Relational Checks are only valid, when a customer has implemented Focused Build 'Requirement-to Deploy'.

They are not applicable, when utilizing the Focused Build Standalone Enhancement 'Release Batch Import'!

### Release Batch Import Log

For each run of the Program /SALM/BATCH\_IMPORT\_TRIGGER an Application Log is being created.

Please access the Application Log via transaction [SIG1](#) with

Object: [/SALM/](#), and

Subobject: [/SALM/BATCH\\_DEPLOY](#)

Ty...	Message Text
✖	Import Strategy check for change 8000012162 failed. Reason:
✖	No customizing for change process type S1TM status E0012
✖	Import Strategy check for change 8000012329 failed. Reason:
✖	No customizing for change process type S1TM status E0012
✖	Transport L71K900979 has no change relation. Import not allowed in customizing.
✖	Transport L71K900988 has no change relation. Import not allowed in customizing.
✖	Transport L71K900992 has no change relation. Import not allowed in customizing.
✖	Transport L71K900997 has no change relation. Import not allowed in customizing.
✖	Transport L71K901001 has no change relation. Import not allowed in customizing.
✖	Transport L71K901017 has no change relation. Import not allowed in customizing.
✖	Transport L71K901048 has no change relation. Import not allowed in customizing.
✖	Transport L71K901056 has no change relation. Import not allowed in customizing.
✖	Transport L71K901060 has no change relation. Import not allowed in customizing.
✖	Transport L71K901062 has no change relation. Import not allowed in customizing.
✖	Transport L71K901068 has no change relation. Import not allowed in customizing.
✖	Transport L71K901072 has no change relation. Import not allowed in customizing.
✖	Transport L71K901076 has no change relation. Import not allowed in customizing.
✖	Transport L71K901081 has no change relation. Import not allowed in customizing.
✖	Transport L71K901160 has no change relation. Import not allowed in customizing.
✖	Transport L71K901162 has no change relation. Import not allowed in customizing.
✖	Transport L71K901164 has no change relation. Import not allowed in customizing.
✖	Transport L71K901171 has no change relation. Import not allowed in customizing.
✖	No transports left for variant /SALM/UNIT_TEST after status filtered for SID L71
✔	No transports left for variant /SALM/UNIT_TEST after project filtered for SID L71
✔	Import information collected for variant /SALM/UNIT_TEST; starting import...
✔	Import took 0 minutes and 1 seconds for all customized systems.

## 4.12 Configuration of Template Protection

### 4.12.1 Verifying Basic Configuration for SAP Solution Manager

Before starting with the Basic Configuration of your SAP Solution Manager system you should read the documentation and initial descriptions available in the Implementation Guide (transaction **SPRO**).

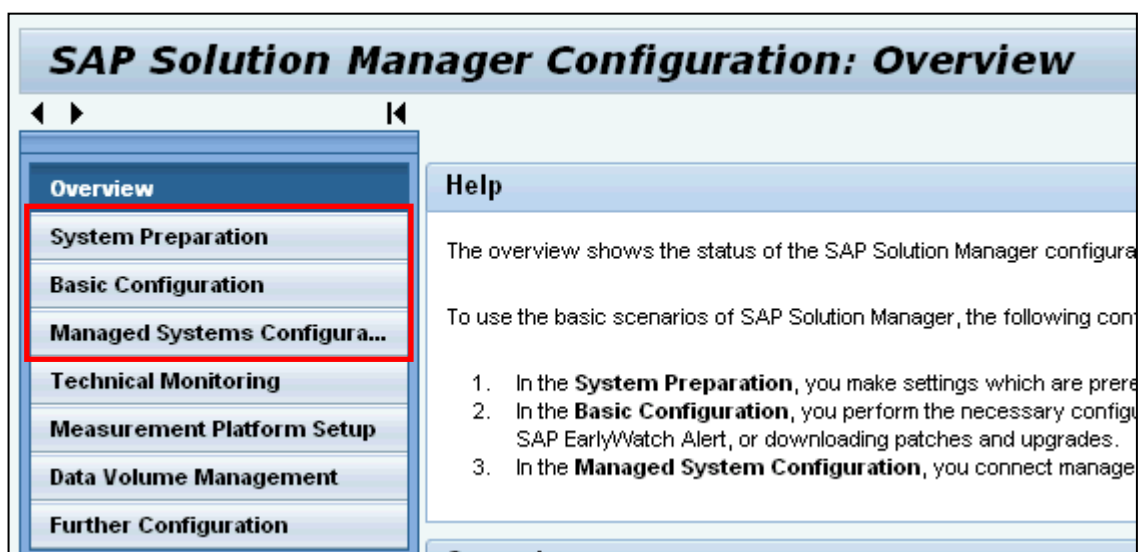
Therefore, navigate to [SAP Solution Manager Implementation Guide](#) → [SAP Solution Manager](#) → [Basic Configuration](#) → [Basic Configuration: Guided Procedure](#).

Via the transaction **SOLMAN\_SETUP**, you start the initial configuration of the SAP Solution Manager system. In the navigation area on the left, you can access the following guided procedures which contain configuration steps relevant for the Change Request Management scenario:

**System Preparation:** In this guided procedure, you make settings preliminary for the Solution Manager Configuration, such as creation of dialog users with the required authorizations, implementation of the central Correction Note and Web Service configuration.

**Basic Configuration:** This guided procedure leads you through all configuration steps, which you have to perform to enable basic scenarios in SAP Solution Manager. As part of the Basic Configuration, you set up the connection to SAP, schedule relevant background jobs and activate piece lists which contain important settings, such as standard customizing.

**Managed System Configuration:** In the Managed System Configuration, you connect Managed Systems to the Solution Manager via RFC. This is important, since SAP Change Request Management requires a READ, TMW and TRUSTED RFC Connection to every Managed System/Client. In order to ensure that SAP Change Request Management works perfectly with Managed Systems a minimum SP Level is required. Please check SAP Note 907768 for further details.



Please, confirm that you have successfully performed those three configuration steps according to the guided procedure documentations!

In addition to the Basic Configuration for SAP Solution Manager you must perform the Basic Configuration for SAP Change Request Management.

## 4.12.2 Piece List Activation

The Standard Customizing of SAP Change Request Management and all other IT Service Management relevant areas is delivered via a customizing piece list. This piece list needs to be activated as part of transaction [SOLMAN\\_SETUP](#) and will copy the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again will overwrite all existing standard customizing with the content of the piece list – therefore it is strictly recommended to copy all transaction types into the customer namespace, before starting to use SAP Change Request Management.

Technical System

SM2~ABAP~001

User Name

CHARM\_ADMIN

1

Specify Solution

2

Specify User & Connectivity ...

3

Specify Landscape D...

4

Configure Manually

5

Configure Automatically

Edit

Previous

Next

Save

Reset

Help

In this step, you configure the SAP Web Services communication between the ABAP and Java stacks of SAP Solution Manager, automatically.

- To start the automatic configuration, choose *Execute All*.  
**Note:** This can take a few minutes.  
 After the configuration, messages and other detailed information for a selected automatic activity are displayed in the *Log* screen area.  
 To display the log of failed batch job executions, start the Job Management (transaction SM37) and enter the job name.
- To postpone and exclude an activity from execution, select *Postponed* in the *Execution Status* column.  
 The system only automatically configures entries with the execution status *Execute*.
- To perform configuration activities manually, do the following:
  - In the *Documentation* column, choose the *Display* link.

Automatic Activities

Show All Logs

Execute All

Execute Selected

Refresh

	Status	Updates Needed	Description	Navigation	Ex
		<input type="checkbox"/>	Activate BW Source System	Open URL	Ex
		<input type="checkbox"/>	Activate Piece Lists	Start Transaction	Ex
		<input type="checkbox"/>	Create External Aliases	Start Transaction	Ex
		<input type="checkbox"/>	Activate Services	Start Transaction	Ex

Template Protection is delivered with predefined customizing which must be activated via piece list **/SALM/TEMPLATEPROTEC** (refer to chapter Error! Reference source not found. Error! Reference source not found.). This predefined configuration allows direct usage of Simple IT Request without any further adjustments.

## 4.12.3 SAP Change Request Management Setup as a Prerequisite for Template Protection

Before you start to configure SAP Change Request Management, implement the according Master Note for SAP Change Request Management in the latest version, which fits to your SP Level.

The configuration of SAP Change Request Management is a prerequisite for the utilization of Template Protection.

## 4.12.4 Activation of Template Protection Checks

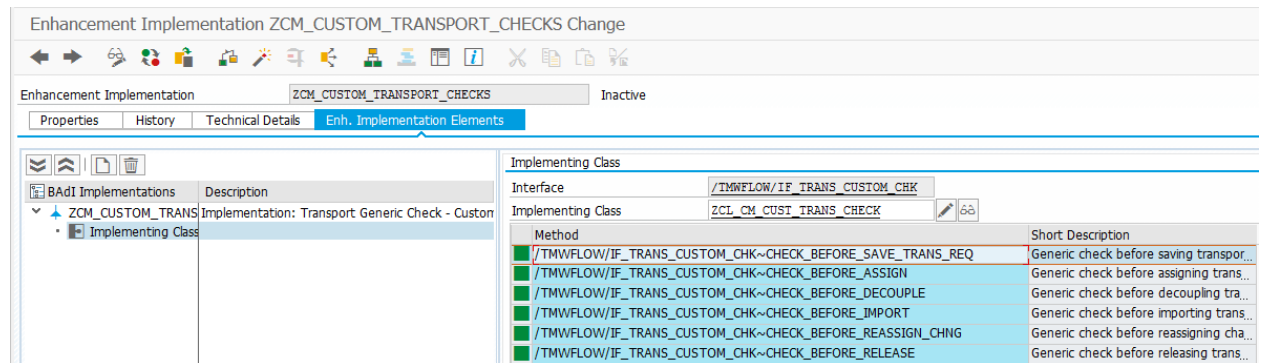
In order to activate the Template Protection in your system, a BAdI Implementation for the Transport Generic Check Framework (`/TMWFLOW/TRANS_DEFINED_CHECK`) has to be created. Within this implementation, the Template Protection Checks will be activated at the different actions of a Transport Request. You can include your own checks as well.



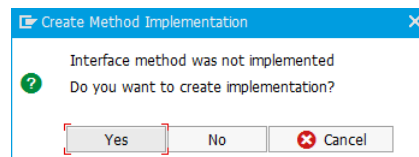
## 4.12.5 Check at Save of Objects

The following implementation will activate the check at the time of saving objects. So when you maintain objects and save the changes to the transport request, the Template Protection checks will be executed in parallel to the Cross System Object Locks checks.

To activate the Checks you need to create a BAdI Implementation and implement the method /TMWFLOW/IF\_TRANS\_CUSTOM\_CHK~CHECK\_BEFORE\_SAVE\_TRANS\_REQ via double click.



Confirm the popup.



Implement the following code in addition to your own code.

```
METHOD /tmwflow/if_trans_custom_chk~check_before_save_trans_req.
```

\*Template Protection Checks

```
/salm/cl_tpp_generic_chk=>check_before_save_trans_req(
  EXPORTING
    iv_transport_request      = iv_transport_request
    iv_src_sys_tms_sid        = iv_src_sys_tms_sid
    iv_src_sys_client         = iv_src_sys_client
    iv_src_sys_tms_domain     = iv_src_sys_tms_domain
    it_locks_4_object         = it_locks_4_object
    it_locks_4_table_key      = it_locks_4_table_key
  IMPORTING
    et_check_result           = et_check_result
    et_error_message          = et_error_message ).
```

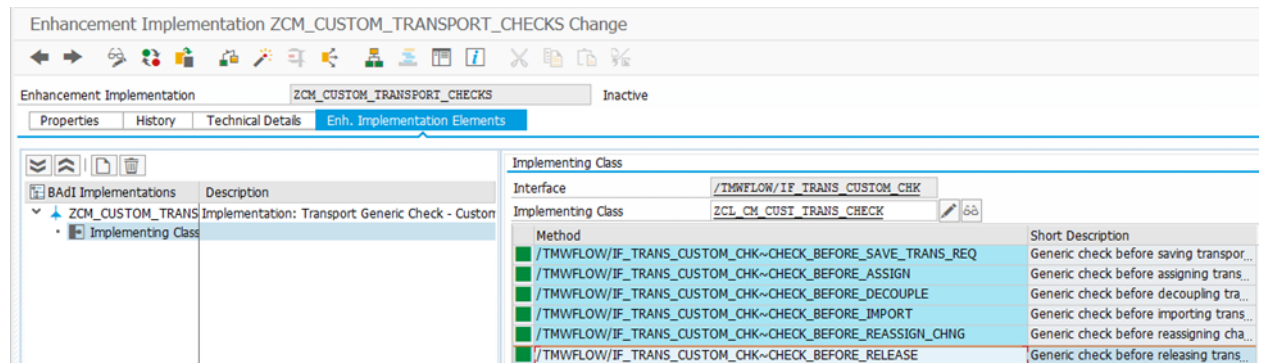
```
ENDMETHOD.
```

Save and Activate the Method.

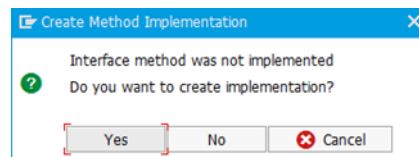
## 4.12.6 Check at Release of Transport Requests

The following implementation will activate the check at the time of releasing transport requests. So when a Transport Request is being released within Change Request Management, Quality Gate Management or directly via the Task List, the Template Protection checks will be executed in addition to Downgrade Protection Checks.

To activate the checks you need to create a BAdI Implementation and implement the method /TMWFLOW/IF\_TRANS\_CUSTOM\_CHK~CHECK\_BEFORE\_RELEASE via double click.



Confirm the popup.



Implement the following code in addition to your own code.

```
METHOD /tmwflow/if_trans_custom_chk~check_before_release.
```

```

/salm/cl_tpp_generic_chk=>check_before_release(
EXPORTING
    it_transport_request      = it_transport_request
    iv_tasklist_id           = iv_tasklist_id
    iv_cycle_guid            = iv_cycle_guid
    iv_change_guid           = iv_change_guid
    iv_immediate             = iv_immediate
    iv_check_4_creating_toc  = iv_check_4_creating_toc
IMPORTING
    et_check_result          = et_check_result
    et_error_message         = et_error_message ).

```

```
ENDMETHOD.
```

Save and activate the Method.



## 4.12.7 Central Customizing for Template Protection

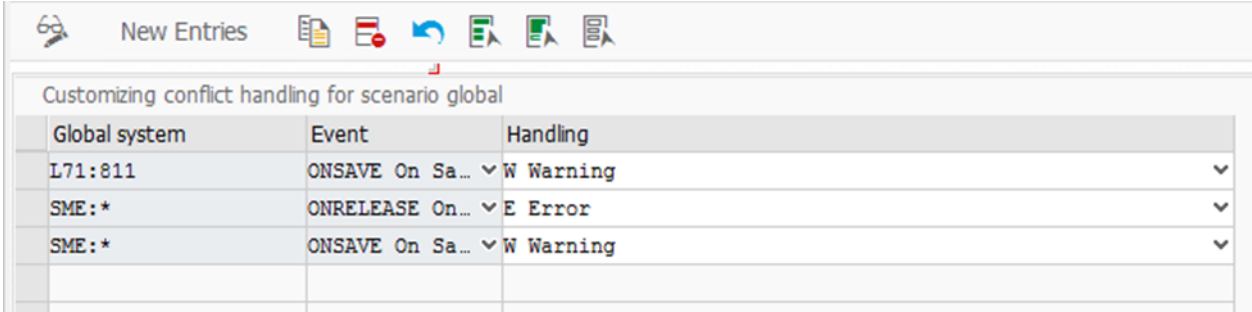
### Customizing Parameters

Within transaction **SM30** you can open the Maintenance View /SALM/TPP\_CUST. This will give you access to central customizing parameters. The following list shows you all parameters available.

Parameter	Description	Values
DISABLED	Disable the Template Protection Globally	<input checked="" type="checkbox"/> Activated <input type="checkbox"/> Deactivated

### Conflict Handling

Within transaction **SM30**, you can open the Maintenance View /SALM/TPP\_SG\_CHD. This will give you access to the conflict handling for the Global-Local Scenario.



Customizing conflict handling for scenario global		
Global system	Event	Handling
L71:811	ONSAVE On Sa...	W Warning
SME:*	ONRELEASE On...	E Error
SME:*	ONSAVE On Sa...	W Warning

In the Field *Global System*, you will need to define the system, for which the locks have been maintained. The desired setting will be inherited to all assigned local systems. To define a System you can define the System ID and Client separated by `:`. You can also use wildcards, both for System ID and for Client.

In the Field *Event* you need to define the related Template Protection Check. **ONSAVE** means the time when saving objects to a transport request, whereas **ONRELEASE** means the time when releasing Transport Requests.

In the Field *Handling* you can define, whether a Warning message (W) or Error message (E) should be shown. Depending on the Type of Message, the process may be cancelled, so that the object cannot be saved or the transport request cannot be released.

## 4.12.8 Maintenance of Locks in Template Protection

You can reach the Maintenance of the Template Protection via the Transaction /SALM/TEMPLATE\_PROTECTION. Please make sure to add /n at the beginning of the Transaction.

The Template Protection consists out of the following parts:

*Menu Bar*



Menu System Help

Template Protection

Refresh tree

Scenario: Global/Local

- Global system L71:811
  - Global system L71:\*
  - Local system L71:\*
  - Global system \*:
  - Global system XXX:999

PgID	Obj.	Object Name	Table Name	Table Key	Inactive	Ignore lo.	Created On	Created By	Changed On	Changed by	Source	Source	High key
R3TR	TABU	...	...	...			13.06.2017 08:39:3	CS205015	13.06.2017 08:39:3	...	M	L71K902130	...
R3TR	TABU	...	...	...			13.06.2017 13:24:0	CS162016	13.06.2017 13:24:0	...	TR	L71K902130	...
R3TR	TABU	...	...	...			13.06.2017 14:03:0	CS205015	13.06.2017 14:03:0	...	M	L71K902130	...
LMU	REPS	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
LMU	FUGT	...	...	...			06.06.2017 15:56:4	CS162016	06.06.2017 15:56:4	...	TR	L71K902130	...
R3TR	TABU	...	...	...			12.06.2017 14:57:3	CS162016	12.06.2017 14:57:3	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	VDAT	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	DEVG	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	TABU	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...

## Treeview

Menu System Help

Template Protection

Refresh tree

Scenario: Global/Local

- Global system L71:811
  - Global system L71:\*
  - Local system L71:\*
  - Global system \*:
  - Global system XXX:999

PgID	Obj.	Object Name	Table Name	Table Key	Inactive	Ignore lo.	Created On	Created By	Changed On	Changed by	Source	Source	High key
R3TR	TABU	...	...	...			13.06.2017 08:39:3	CS205015	13.06.2017 08:39:3	...	M	L71K902130	...
R3TR	TABU	...	...	...			13.06.2017 13:24:0	CS162016	13.06.2017 13:24:0	...	TR	L71K902130	...
R3TR	TABU	...	...	...			13.06.2017 14:03:0	CS205015	13.06.2017 14:03:0	...	M	L71K902130	...
LMU	REPS	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
LMU	FUGT	...	...	...			06.06.2017 15:56:4	CS162016	06.06.2017 15:56:4	...	TR	L71K902130	...
R3TR	TABU	...	...	...			12.06.2017 14:57:3	CS162016	12.06.2017 14:57:3	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	VDAT	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	DEVG	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	TABU	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...

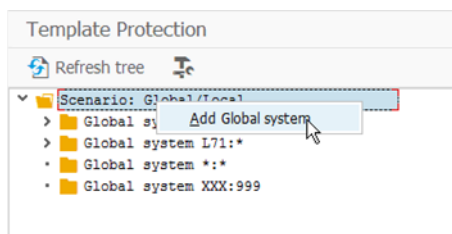
## Details of the selected treeview item

PgID	Obj.	Object Name	Table Name	Table Key	Inactive	Ignore lo.	Created On	Created By	Changed On	Changed by	Source	Source	High key
R3TR	TABU	...	...	...			13.06.2017 08:39:3	CS205015	13.06.2017 08:39:3	...	M	...	...
R3TR	TABU	...	...	...			13.06.2017 13:24:0	CS162016	13.06.2017 13:24:0	...	TR	L71K902130	...
R3TR	TABU	...	...	...			13.06.2017 14:03:0	CS205015	13.06.2017 14:03:0	...	M	...	...
LMU	REPS	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
LMU	FUNC	...	...	...			14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
R3TR	VDAT	...	...	...			15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140	...
LMU	FUGT	...	...	...			06.06.2017 15:56:4	CS162016	06.06.2017 15:56:4	...	TR	L71K902130	...
R3TR	TABU	...	...	...			12.06.2017 14:57:3	CS162016	12.06.2017 14:57:3	...	TR	L71K902130	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132	...
R3TR	VDAT	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	DEVIC	...	...	...			16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140	...
R3TR	DEVIC	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	FUGR	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...
R3TR	TABU	...	...	...			16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984	...

## Maintain System Hierarchies

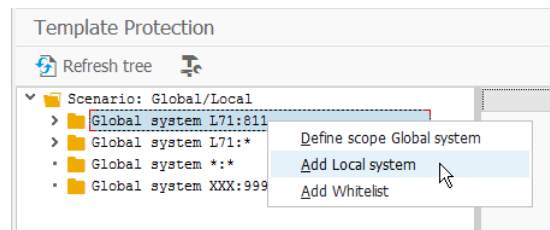
On Global System level you define all Objects, which should be locked on that system. On Local System level you define, the systems, on which checks should be performed in order to secure the global objects.

At the first step you need to create a global system. To do so, you need to click with the right mouse button the folder *Scenario: Global/Local* and select *Add Global system*.

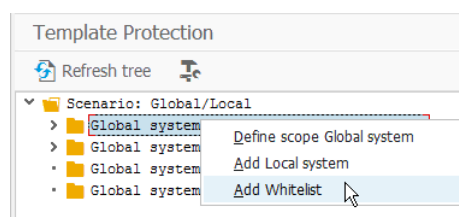


Define a System ID and a Client. You can use wildcards for both fields.

To assign a local system, click with right mouse button on the global system and define the system in the same way.



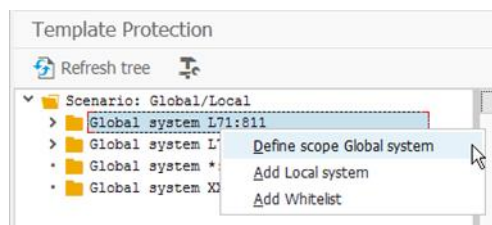
You can also add a Whitelist. All Objects maintained for the Whitelist will be ignored as part of the Template Protection Checks



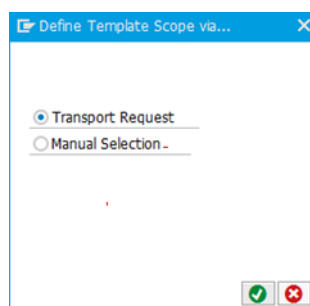
## Define Scope - Transport Request based Scoping

On the level of global systems and on the whitelist you can perform a transport request based scoping. With that scoping, you have the possibility, to select a transport request, managed by charm, and assign all objects to the global system or whitelist.

To do so, start the scope definition via the right mouse button:

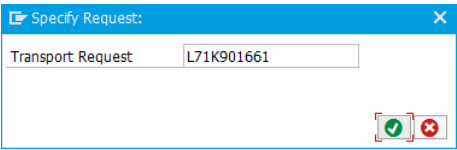


In the following popup, select *Transport Request*.



Now you can define a transport request, which should be added to the Template Protection. The F4 Help will show you all transport requests, which are created on a system matching the pattern of the Global System. So if you,

for example, use L71:\* as a global system, you will see all transport requests which are created on any client of L71 and managed by ChaRM.

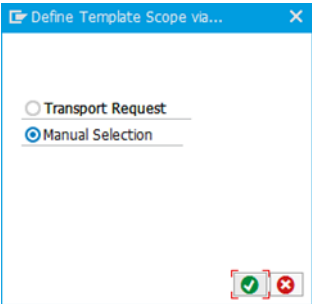


**Define Scope - Manual Scoping**

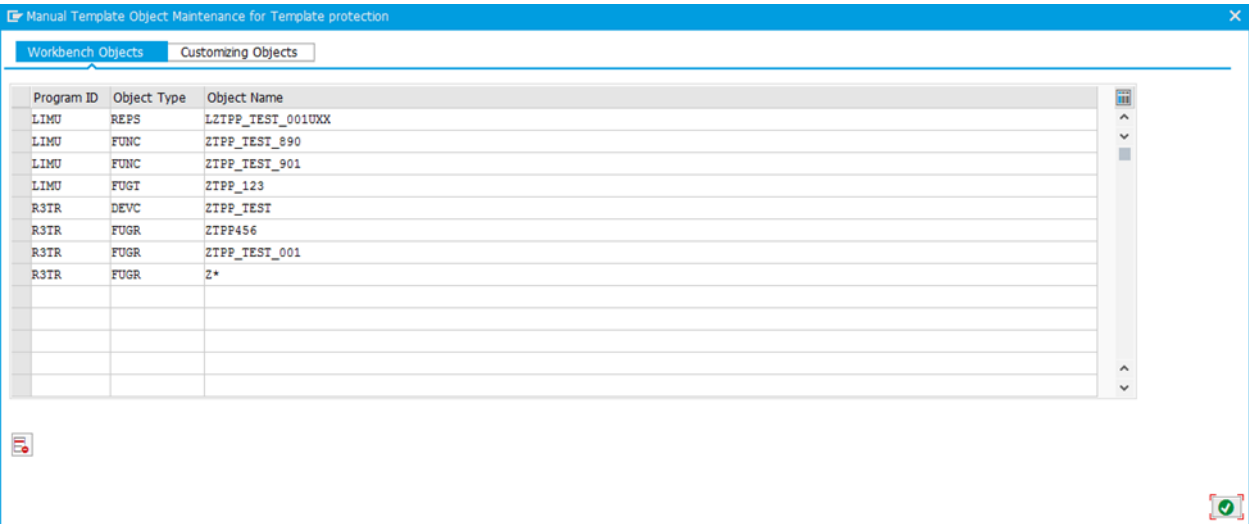
You can manually define objects for global systems and whitelists via manually entering the objects using the manual scoping

To do so, start the scoping as shown in the transport request based scoping.

In the following popup select *Manual Selection*.

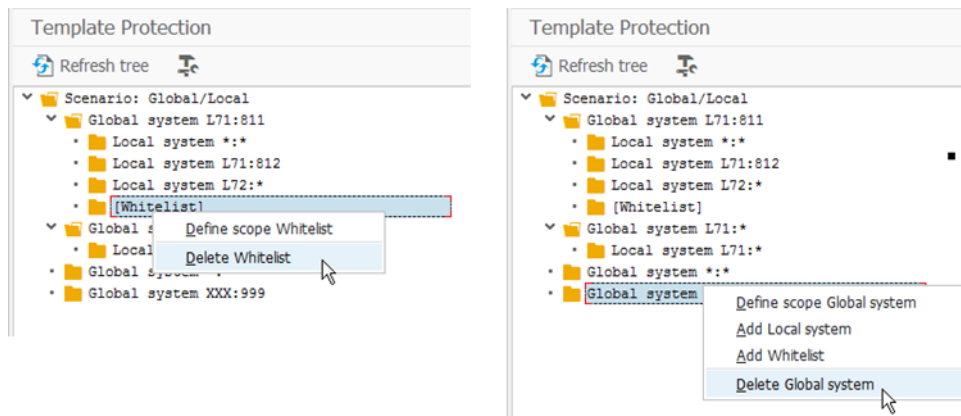


Now you have the possibility to maintain Workbench Objects via the Tab *Workbench Objects*. Wildcards are supported at the end of the Object Name.



You can maintain Customizing Objects via the Tab *Customizing Objects*. Wildcards are supported at the end of the Table Key. If you want to maintain cross client customizing, you need to do this in a separate run and make sure to deactivate the checkbox *Client specific customizing*.





## 4.13 Configuring Cross Landscape Distribution

### Use Cases

The cross landscape distribution is used to distribute transports from one landscape to another landscape. There can be several use cases where this function might be helpful.

### Cross Landscape Functional Developments

In this case you develop a custom development Package in one landscape and want to distribute the same functionality to other landscapes. E.g. Functions for User Maintenance or Basis Reports that should be available in all Landscapes.

### Global Functional Development

In this case you have different Landscapes that depend on each other but don't have a direct transport connections as the also differ in some major parts. You still want to distribute changes from one global development Landscape to other local landscape.

The XLD Function therefore support 2 different major modes.

### Strict Mode

In 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 what objects are allowed to be.

### Non-Strict Mode

In Non-Strict mode the XLD will allow you to distribute any change to any landscape that is configured on Solution Manager. This mode provides a lot of flexibility to distribute changes across different landscapes. This mode also provides a high risk that users distribute changes across landscapes that should not be distributed. It is your



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responsibility to ensure that only user with the knowledge what should be distributed are allowed to execute the XLD Wizard.

### Note

The XLD Function does not do any checks if the distributed objects are changed in the target system or not. It will always import the version from the source dev system into the target dev system.

When you setup XLD it is your or user responsibility to only allow a distribution when there are now conflicts between the 2 Landscapes. The general rule should be that objects that are changeable in a source system should never be changeable in any of the target systems.

Technically the XLD Functions follows the 4 Steps automatically.

1. Create a ToC from the Source Transport
2. Release ToC from the Source System and add it to the Queue of the Target System
3. Import the ToC in the Target System
4. Merge Object List from ToC with the Transport of the Target Change

## 4.13.1 Roles and Authorization

XLD Function uses the RFC Infrastructure of the SAP Solution Manager. In particular it requires TMW RFCs to each Development system that you want to distribute to.

In each of those System the TMW RFC User requires these additional Authorization:

Authorization Object:

**S\_RFC**

ACTVT = 16

RFC\_NAME = **TMW\_GET\_OPEN\_TRANSPORTS**, **/SALM/CM\_XLD\_MERGE\_REQUESTS**,  
**/SALM/CM\_XLD\_TRANSMIT\_QUEUE**

RFC\_TYPE = **FUNC**

**These authorizations are not added via solman\_setup or Imdb when you create the RFCs.**

In the SAP Solution Manager there is a specific authorization required to execute the XLD Function.

For this we have create a Role **SAP\_OST\_CM\_TRANSPORT\_M** that you need to assign to each user that is allow to execute the Cross Landscape Distribution.

## 4.13.2 Package Distribution for Managed System

For the XLD to function correctly you need to export the development package **/SALM/CHARM\_XLD\_MS** to each development System that you want to distribute to.

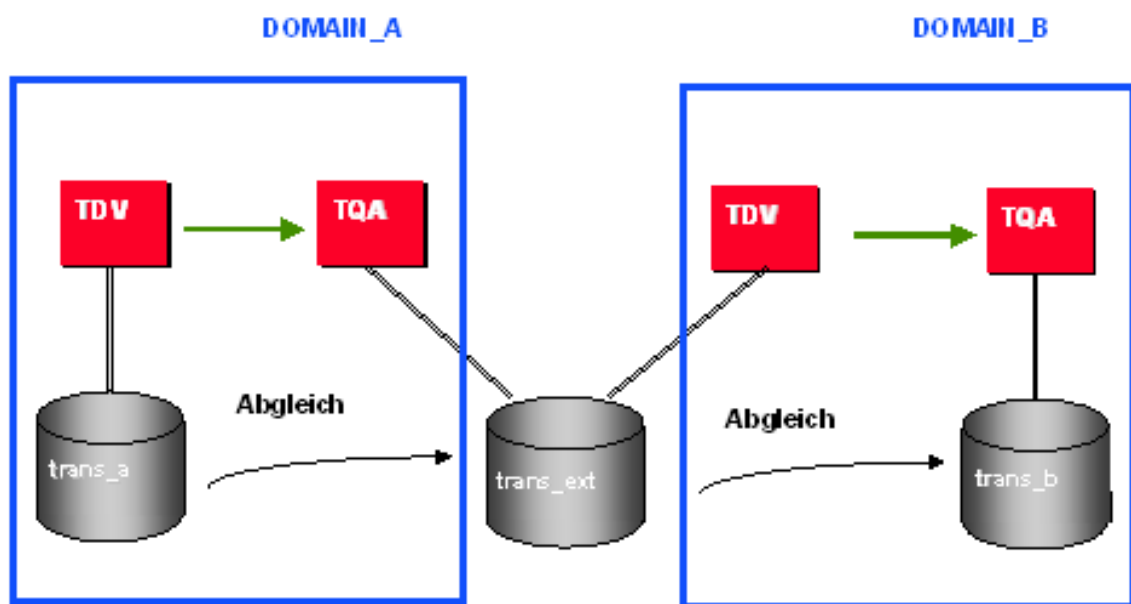
For this you need to do a “manual” Cross Landscape distribution.

5. Export the Package `/SALM/CHARM_XLD_MS` and all its Content from SAP Solution Manager into a Transport or ToC
6. Import the Transport into all Development Systems between you want to allow distribution.

### 4.13.3 Prerequisite for TMS RFC Free Setup

To be able to distribute with XLD transports between any 2 development systems by default these development systems need to have a domain link between each other.

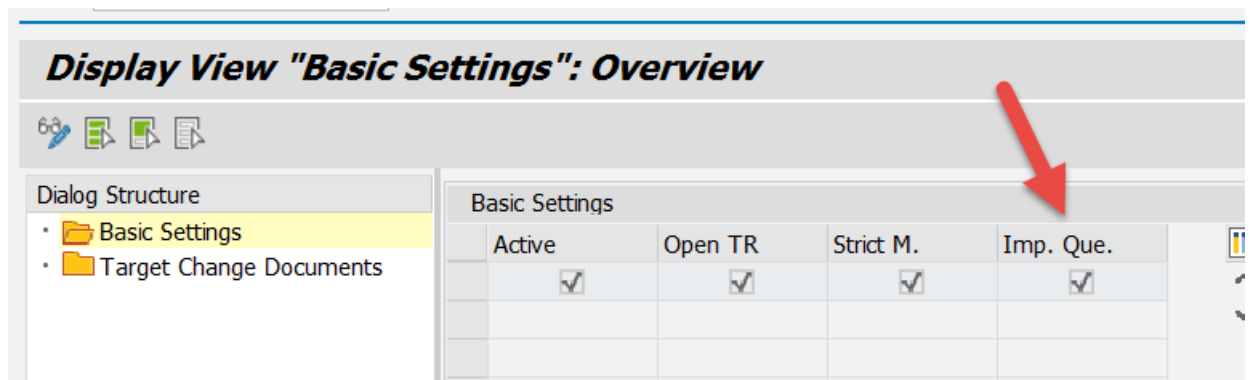
Just in case you don't want to create domain links between every development system (due to a very huge landscape) there is also an option to do this without domain links.



Let's assume you have 2 Development systems TDV and TQA. You want to setup a distribution from TDV to TQA. Therefore you need to create on the domain controller for TDV an external System Instance with the system id TQA (can be done Tx:STMS → system overview) and on the domain controller for TQA you need to create an external systems instance with system id TDV. Both external systems need to share the same transport directory.

Finally activate in the Basic Settings of view cluster `/SALM/CM_XLDCFG` the Imp. Que. synchronization.





## 4.13.4 Customizing Cross Landscape Distribution

For the Customizing there are 2 view cluster configured that can be access via [SPRO](#) or [SM34](#).

1. View Cluster for Customizing [/SALM/CM\\_XLDCFG](#)
2. View Cluster for Master data [/SALM/CM\\_XLDOBJ](#)

Changes in in the Customizing Cluster have to be recorded into a transport whereas all changes in the Master data Cluster can be done directly in the Productive Solution Manager.

### 4.13.4.1 View Cluster for Customizing [/SALM/CM\\_XLDCFG](#) – Basic Settings

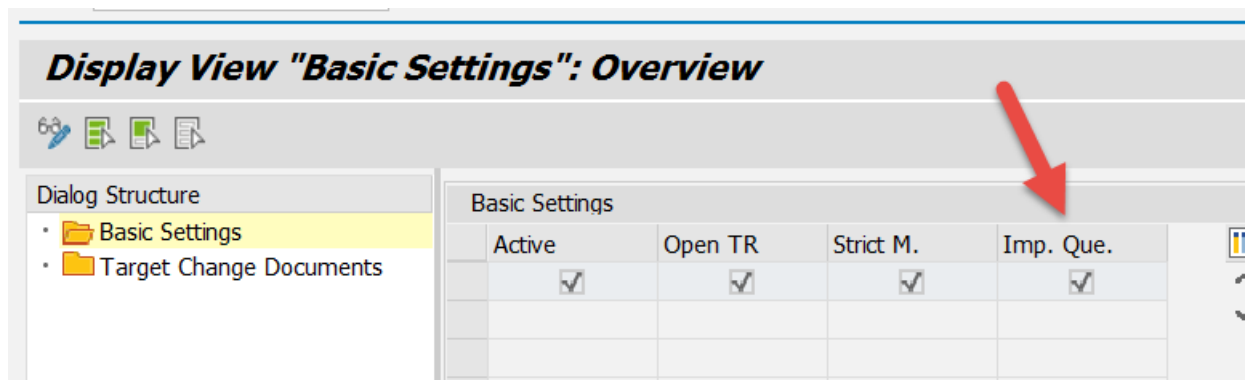
Here you can set some basic customizing flags.

[Active](#) = Activate XLD

[Open TR](#) = Allow distribution of open transports (default is that only released transports can be distributed)

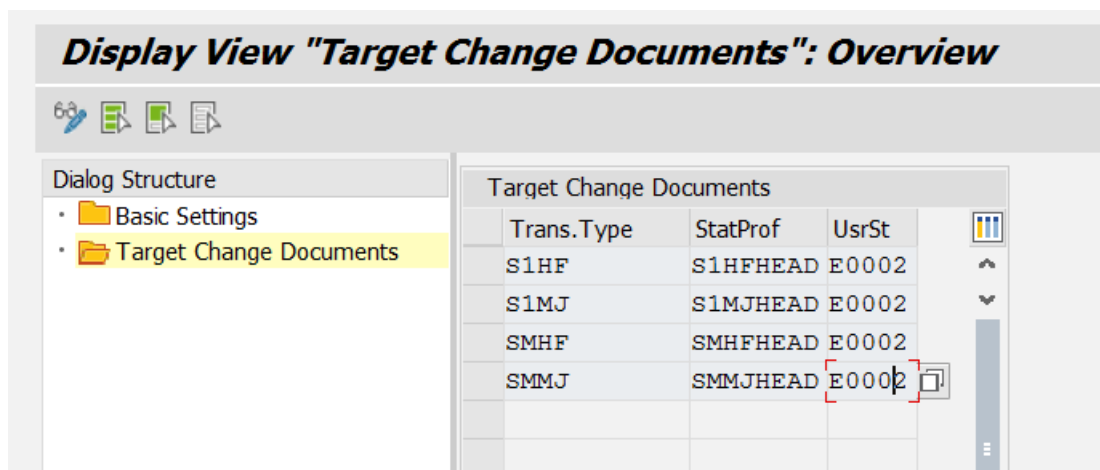
[Strict M.](#) = Activate the Strict Mode for XLD. In Strict Mode only objects that are defined in the Master Data Settings can be distributed. It also allows to configure a consistency change that validates of all of those objects are correctly distributed.

[Imp. Que.](#) = This is required to synchronies import queues when the target and source system use different transport directories.



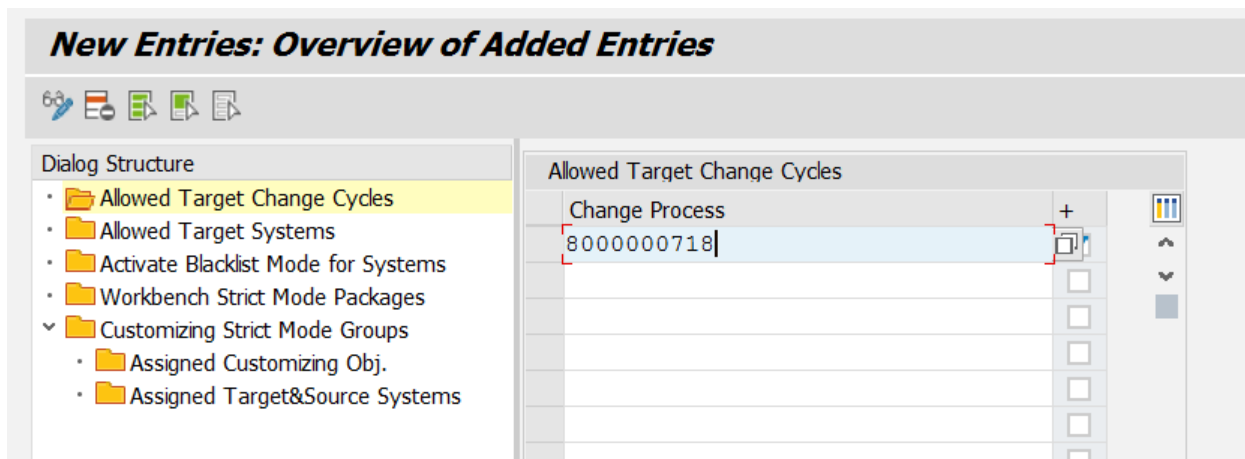
#### 4.13.4.2 View Cluster for Customizing /SALM/CM\_XLDCFG – Target Change Documents

When you run the XLD with selection for change documents. You can customize with this table what type of change documents are allowed and in what status they have to be.



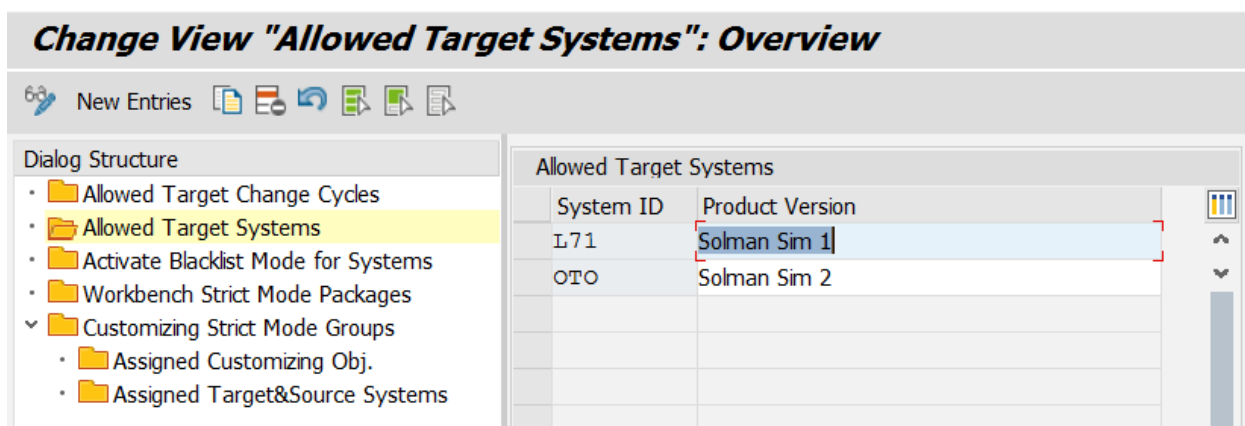
#### 4.13.4.3 View Cluster for Customizing /SALM/CM\_XLDOBJ – Allowed Target Change Cycle

When you run the XLD with selection for change documents you need to select a change cycle. This customizing folder allows you to filter the displayed change cycles. If this table is empty all active change cycles are displayed.



#### 4.13.4.4 View Cluster for Customizing /SALM/CM\_XLDOBJ – Allowed Target Systems

When you run the XLD with selection for transports you need to select a target system. This customizing folder allows you to filter the displayed target systems. If this table is empty all target systems are displayed that have been marked as development system in any of the logical component groups.



#### 4.13.4.5 View Cluster for Customizing /SALM/CM\_XLDOBJ – Activate Blacklist Mode for Systems

When you use the XLD with strict mode you can define here in which mode you want to define the object lists.

1. Whitelist (Flag is not set), you need to define all objects that should be allowed to be distributed.
2. Blacklist (Flag is set), you need to define the objects that are not allowed to be distributed. All objects that are not defined in the Blacklist can then be distributed.

### Change View "Activate Blacklist Mode for Systems": Overview

New Entries

Dialog Structure

- Allowed Target Change Cycles
- Allowed Target Systems
- Activate Blacklist Mode for Systems
- Workbench Strict Mode Packages
- Customizing Strict Mode Groups
  - Assigned Customizing Obj.
  - Assigned Target&Source Systems

Activate Blacklist Mode for Systems

System	Blacklist
L71	<input checked="" type="checkbox"/>

#### 4.13.4.6 View Cluster for Customizing /SALM/CM\_XLDOBJ – Workbench Strict Mode Packages

Workbench Objects can only be specified via Development Package. The setting here will then be valid for all objects in this Package. You can specify for each Package a Source (First Column) and Target System (3rd Column). If you need to distribute objects from one package to multiple systems you need to add multiple lines for the same package with different target systems.

The last column you can temporally deactivate a package setting.

### Change View "Workbench Strict Mode Packages": Overview

New Entries

Dialog Structure

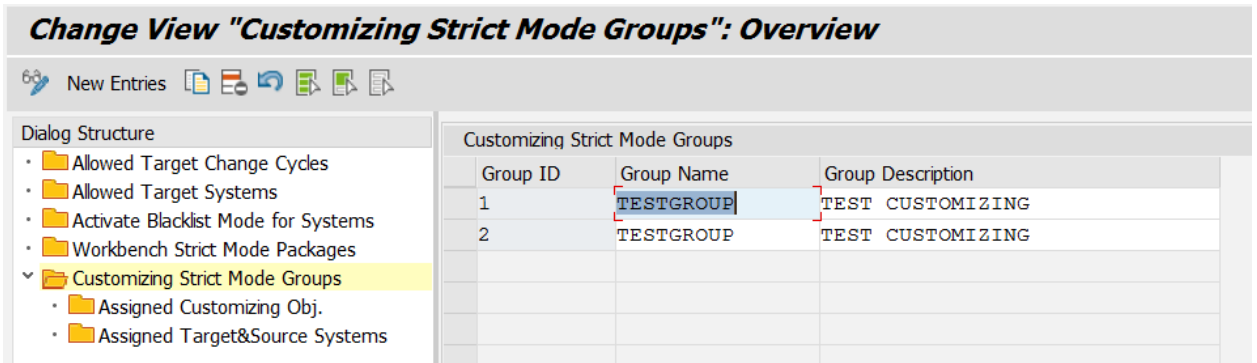
- Allowed Target Change Cycles
- Allowed Target Systems
- Activate Blacklist Mode for Systems
- Workbench Strict Mode Packages
- Customizing Strict Mode Groups
  - Assigned Customizing Obj.
  - Assigned Target&Source Systems

Workbench Strict Mode Packages

System	Package	Target	Active
L71	ZCHARM_TEST	*	<input checked="" type="checkbox"/>
L71	ZTEST_PACKAGE	L71	<input checked="" type="checkbox"/>
L71	ZTEST_PACKAGE	OTO	<input checked="" type="checkbox"/>
L71	Z_CLD_TEST1	L71	<input checked="" type="checkbox"/>
L71	Z_CLD_TEST2	71	<input type="checkbox"/>

#### 4.13.4.7 View Cluster for Customizing /SALM/CM\_XLDOBJ – Customizing Strict Mode Groups

Customizing Objects (Tables, Views etc.) have to be defined in Customizing Groups. For this purpose you can create a new Group with a Group ID, Group Name and Group Description. IN the Subfolders you can then assign the customizing objects and target or source systems.



#### 4.13.4.8 View Cluster for Customizing /SALM/CM\_XLDOBJ – Assigned Customizing Obj.

Is a subfolder for customizing groups and here you can define the customizing objects.

A Customizing transport object is classified uniquely by its master type and master name. There are four master types, which also contain subobjects:

View cluster master type CDAT - A view cluster can contain multiple views as subobjects.

View master type VDAT - A view can contain multiple tables as subobjects. Table content master type TDAT

The master type TDAT - can contain multiple tables as subobjects.

Table content master type TABU - The master type TABU references exactly one table.

##### Examples:

Master type object R3TR CDAT:

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	SCMGATTRPROFA
Table Name	SCMGATTRPROFA
Master Name	SCMGVC_ATTRPROF
Master Type	CDAT
Viewname	SCMGV_ATTRPROFA

This definition of a transport object references the view **SCMGV\_ATTRPROFA** as a subobject of the view cluster **SCMGVC\_ATTRPROF**. The table is part of the view **SCMGV\_ATTRPROFA**.

Master type object R3TR VDAT:

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	BAOPHASE
Table Name	BAOPHASE
Master Name	V_BAOPHASE
Master Type	VDAT
Viewname	V_BAOPHASE

This definition of a transport object references the view **V\_BAOPHASE**. This object describes only those entries in table BAOPHASE. The table is part of the view **V\_BAOPHASE**. If you want to include all tables of a view you can also use a \* entry as Table Name.

Master type object R3TR TDAT:

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	BAOPHASE
Table Name	TBDBE
Master Name	BDBG
Master Type	TDAT
Viewname	*

This definition of a transport object references the TDAT object BDBG. The table is part of the master type object BDBG.

Master type object R3TR TABU:

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	UST04
Table Name	UST04
Master Name	UST04

Column Name	Value
Master Type	TABU
Viewname	*

This definition of a transport object references the TABU object **UST04**. The table is the entire content of the master type object **UST04**.

For examples of client-specific transport objects and their subobjects, see table E071K (transaction **SE16**).

**Change View "Assigned Customizing Obj.": Overview**

New Entries

Dialog Structure

- Allowed Target Change Cycles
- Allowed Target Systems
- Activate Blacklist Mode for Systems
- Workbench Strict Mode Packages
- Customizing Strict Mode Groups
  - Assigned Customizing Obj.
  - Assigned Target&Source Systems

Group ID: 2

Assigned Customizing Obj.

Object ID	PgID	Obj. Type	Object Name
1	R3TR	TABU	TCURC
2	R3TR	TABU	TCURT

#### 4.13.4.9 View Cluster for Customizing /SALM/CM\_XLDOBJ – Target & Source Systems

In this customizing setting you can assign the target and source system for the selected customizing group. It is possible to add multiple target systems if required.

Table View Edit Goto Selection Utilities System Help

Change View "Assigned Target&Source Systems": Overview

New Entries

Dialog Structure

- Allowed Target Change Cycles
- Allowed Target Systems
- Activate Blacklist Mode for Systems
- Workbench Strict Mode Packages
- Customizing Strict Mode Groups
  - Assigned Customizing Obj.
  - Assigned Target&Source Systems

Group ID: 2

Assigned Target&Source Systems

System ID	Client	Sys.Role
L71	811	T Target System
L71	901	S Source System

## 4.14 Configuring Electronic Signature for Change Request Management

The purpose of this document is to describe the Electronic Signature for CHARM functionality and configuration. This functionality might be used especially in controlled systems where a legally binding electronic signature is required for specific approvals and process steps.

There for the Signature fulfills the requirements for Electronic Records and Electronic Signatures provided in Code of Federal Regulations Title 21

(<http://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfcfr/CFRSearch.cfm?CFRPart=11&showFR=1>)

### Official paragraphs that are applicable:

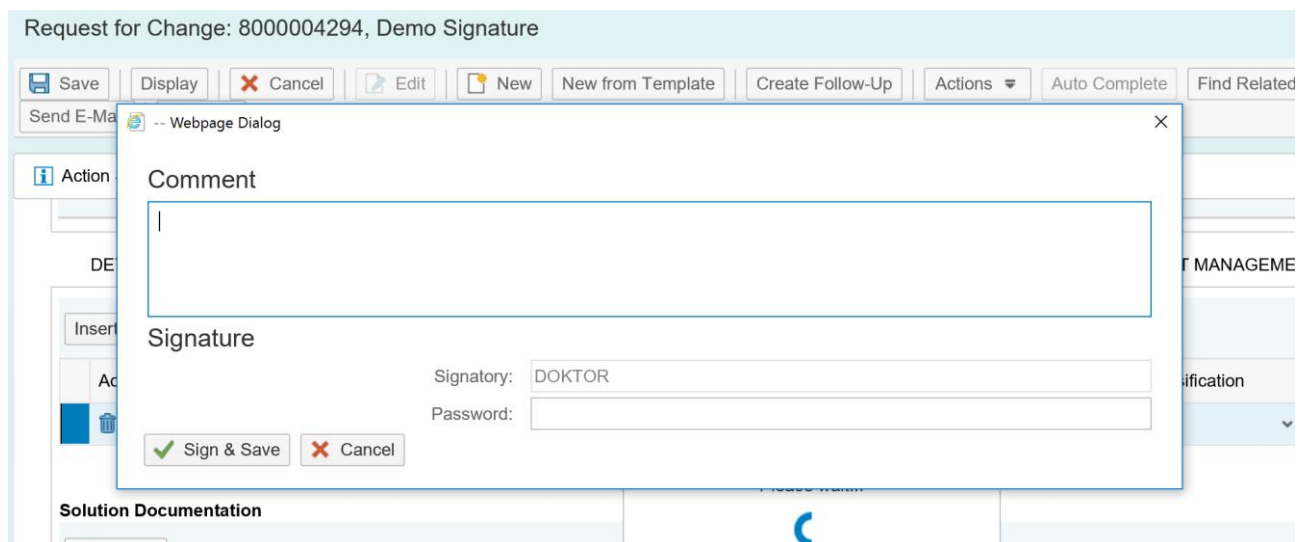
**21 CFR §11.10(e) System must assure that record changes (create, modify, delete) do not obscure previously recorded information by implementing secure, computer-generated, time-stamped audit trails. These audit trails must be retained for as long as the subject electronic records and be available for review and copying.**

**21 CFR §11.100(a) & §11.300(a) System must ensure that each electronic signature be unique to one individual and not reused by, or reassigned to, anyone else.**

**21 CFR Part §11.200(a, 1) System must assure that any electronic signature not based on biometrics must employ at least two distinct components (e.g., ID code and password)**

**21 CFR §11.200(a, 1, ii) System must enforce workflows such that an individual executing one or more signings not performed during a single, continuous period of controlled system access, will execute each signing using all of the electronic signature components.**

**21 CFR Part §11.300(e) Any devices that bear or generate identification code or password information must be tested to ensure that they function properly and have not been altered in an unauthorized manner.**



The Electronic Signature supports to Signature Scenarios in Change Request Management.

1. During an Approval Step, that uses the Approval Procedure.
2. During any Status switch within a change request or change document executed via actions.



## 4.14.1 Activating the Piece List

Call transaction **SCC1** in your working client and activate the piece list [/SALM/CHARM\\_EXT](#), which will supply your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

## 4.14.2 Roles and Authorization

Special Authorization to Execute Electronic Signature

To execute a digital signature there is an additional authorization C\_SIGN object required

The Authorization Object requires the following Attributes:

Object	Attribute	Value
C_SIGN	Activity	73
	Application of the Digital Sig	/SALM/CR
	Digital Signature Object	/SALM/CR

The authorization is not included in a Role and need to be manually added when activating the electronic signature.

## 4.14.3 Creating and Validating the Signature Object

1. Go to **SM30** open View SIGNAPPL\_V

Register "Application" Grouping Element for Dig. Signature	
Appl.	Desc.
/SALM/CR	Signature for Change Management
AUDIT	Audit Management
DS_EXAMP	Signature Tool: Sample Application
SMD	
SMT	
TWB	

Validate that the Application Object [/SALM/CR](#) is available

2. Go to transaction **ELSIG03N**

Digital Signature: Signature Object					
Object	Sign.Meth.	Comment	Remark	Document	Verif.
/SALM/CR	R System Signature with Authorization by SAP User ID/Password	Possib...	Possib...	Possib...	<input type="checkbox"/>
S User Signature with Ext. Security Product with Verification					
User Signature with Ext. Security Product W/O Verification					

Validate that Signature Object /SALM/CR is available and is set to System Signature with Authorization by SAP User ID/Password.

- Go to **SM30** open View **SIGNOBJECT\_V**

Register Signature Objects for Digital Signature			
Appl.	Object	Meta Table	LogStruct.
/SALM/CR	/SALM/CR	/SALM/DS_CR	/SALM/DS_LOG
AUDIT	ACTION	PLM_AUDIT_DS	PLM_AUDIT_DS_LOG
AUDIT	AUDIT	PLM_AUDIT_DS	PLM_AUDIT_DS_LOG
DS_EXAMP	DS_OBJ	DSIG_META_EX	DSIG_EXAMPLE_SIGN_LOG
SMD	SMD_DOC	SMD_DS	SMD_DS_LOG
SMT	TPLN	SMT_D_TPL_DSMETA	SMT_S_TPLN_DIG_SIG_LOG
SOLAR	BO	SABODS	SABODSLOG
SOLAR	DOC	SADS	SADSLOG
SOLAR	TWB2	AGSTWB_DS	AGSTWB_DSLOG

Validate that Appl. /SALM/CR with Object /SALM/CR is available and contains the following entries:

Column Name	Value
Mata Table	/SALM/DS_CR
LogStruct.	/SALM/DS_LOG
Comment	Possible
Remark	Possible
Document	Possible
Description	Signature for Change Management

## 4.14.4 Activating Electronic Signature for the Approval Assignment Block

To activate the Electronic Signature for an Approval Assignment Block you need to add a customizing entry to the table **/salm/c\_itr**.

You can define up to 10 different transaction types where you want to activate digital signature with attribute names **DSIGTYP0** to **DSIGTYP9**.

Provide your CHARM Transaction Types such as **SMCR** or **ZMCR**. All transaction types for CHARM are possible.

IT Requirement Customizing	
Attributes	Value
DEAEFFGC Deactivate Resource Request in	✓ X
DEAEFFHF Deactivate Resource Request in	✓ X
DEAEFFMJ Deactivate Resource Request in	✓ X
DEF_SIZE Default MAX Results for Fiori a	✓ 100
<b>DSIGTYP0 CHARM Electronic Signature Tran</b>	<b>✓ SMCR</b>
EFF_UNIT Preferred Effort Unit	✓ PDA
MODE_WP Mode for creating the Work Packa	✓ A

## 4.14.5 Activating Electronic Signature for an Action from the Action Profile

You can assign the electronic signature with this customizing to any action from a change request or change document only. For this purpose, you need to call maintenance view AICV\_UI\_POPUP via SM34 or SPRO

Maintenance View for AIC_UI_POPUP					
Transaction Type	Action Profile	Action Definition	Sequence	Bsp	
SMCG	SMCG_ACTIONS	SMCG_CREATE_PPM_TASK	10	AI	
SMCR	SMCR_ACTIONS	SMCR_CREATE_PPM_TASK	10	AI	
SMCR	SMCR_ACTIONS	SMCR_EXAMPLE_UI_ENHANCEMENT	10	AIC	
<b>SMCR</b>	<b>SMCR_ACTIONS</b>	<b>SMCR_QUALIFY_CHANGE</b>	<b>10</b>	<b>/SA</b>	
SMHF	SMHF_ACTIONS	SMHF_ASSIGN_TRANSPORT_REQUEST	10	AIC	
SMHF	SMHF_ACTIONS	SMHF_CREATE_PPM_TASK	10	AI	
SMHF	SMHF_ACTIONS	SMHF_DISTRIBUTE	10	AIC	

Add an entry for each action you want to add the electronic signature.

Column Name	Value	Example
Transaction Type	Transaction Type of your transaction you like to add	SMCR
Action Profile	Action Profile name from your transaction	SMCR_ACTIONS
Action Definition	This is the actual technical name of the action you like to add the signature to	SMCR_QUALIFY_CHANGE
Sequence	Sequence of the action in the action profile	10
BSP UI Component	This is the signature	/SALM/DS_SIGN

Column Name	Value	Example
BSP Interface	This is the signature interface	/SALM/DS_SIGN/MainWindow
BSP UI Usage	This is the usage linked in /SALM/CMCR_H and /SALM/CMCD_H. You need to use these 2 components to use any Change Request Management enhancement	CUSALMDIGITALSIGNATURE
PPF Container Element	Not used	
PPF Data Container Class	Not used	
Dialog Window title (OTR Alias)	OTR Alias for the popup title	/SALM/CHARM_DS/POPUP_TITLE
Before PPF Call	Signature must be executed before the action. If the signature fails, action will not be executed	Checked
After PPF Call	Do not use	Not checked
Activate	Activate the customizing settings	checked

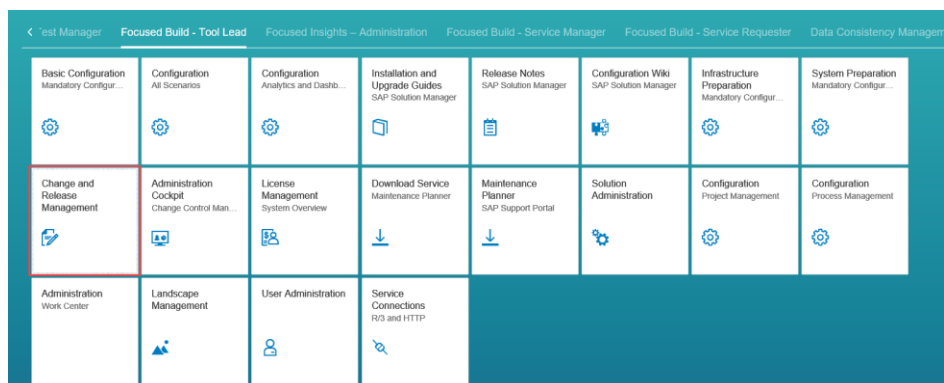
## 5 Appendix

### 5.1 Useful SAP Notes

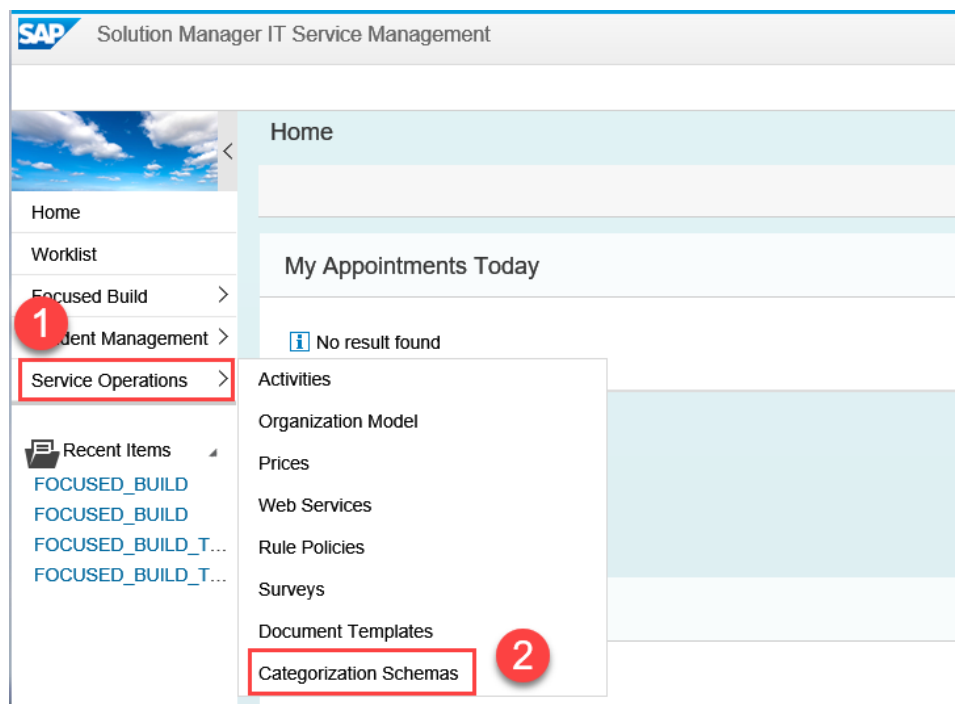
SAP Note No.	Description
<a href="#">1384598</a>	Information about the new remote infrastructure
<a href="#">1803899</a>	Report /RPM/CUST_TABLES_COPY deletes customizing entries
<a href="#">907768</a>	Change Request Management: Information about the required support package levels of managed systems
<a href="#">2257213</a>	Information about authorizations for SAP Solution Manager RFC users
<a href="#">1483276</a>	Use of Customizing Parameters in DNO_CUST04, AGS_WORK_CUSTOM and ICT_CUSTOM
<a href="#">1604651</a>	Bad Performance when loading runtime repositories
<a href="#">1586185</a>	Project selection fails for some transaction types
2427162	Focused Build - Application not responding in Chrome browser
2447548	Report for Replacing Ibase component in documents
2456627	Document Type Administration Dump Object Types with Namespace

### 5.2 Adjust Category Schema

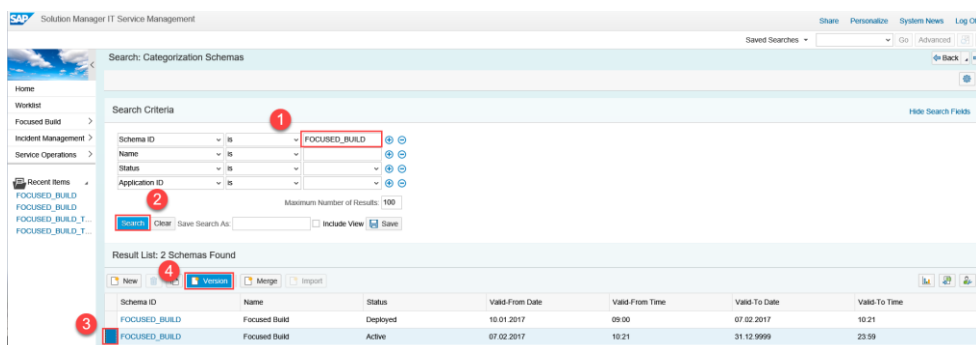
1. Launch Change and Release Management



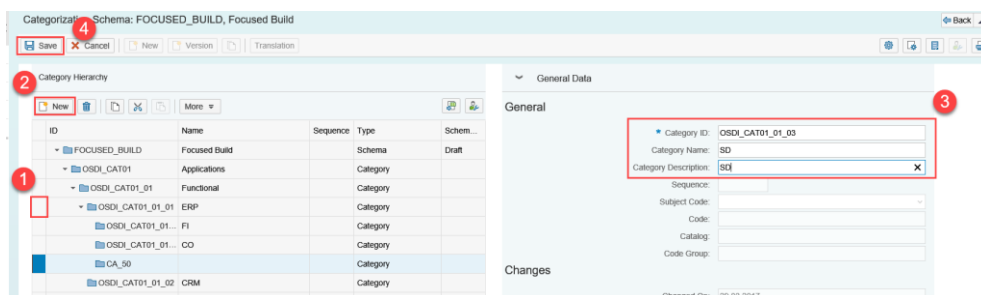
2. Select Service Operations → Categorization Schemas



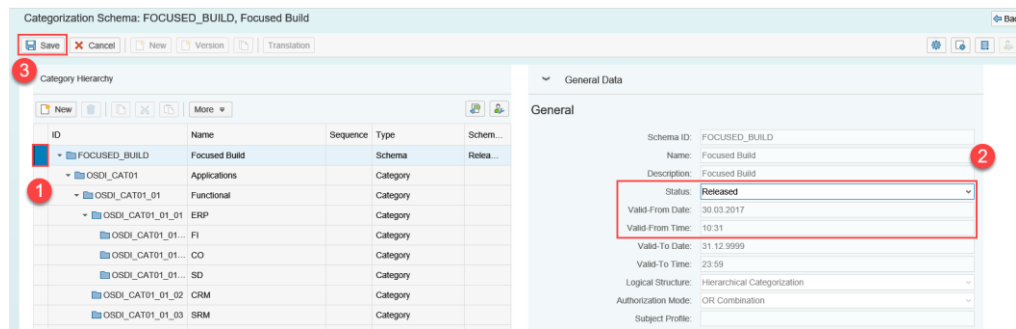
3. Search for Schema ID: 'FOCUSED\_BUILD', select the active one and then Create Version button



4. Select parent category you would like to create a new category for, then 'New'. Adjust new Category ID following existing naming convention and enter Name and Description.



5. To activate new version select the root ID of the Schema, enter Valid-From Date and Time and set Status to released.

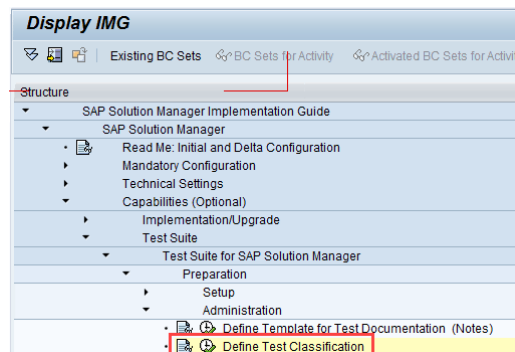


The Schema will be available for new documents starting from specified Valid-From Date and Time.

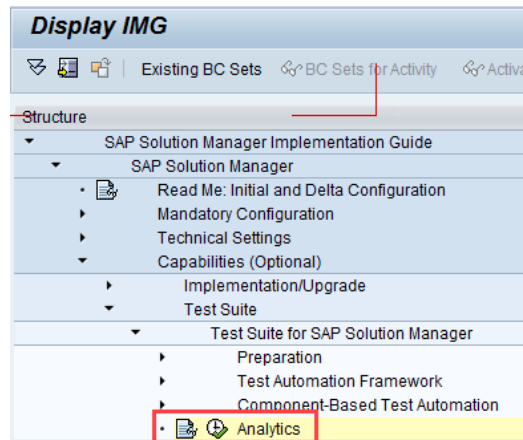
## 5.3 Mandatory Standard Configuration for Test Suite

In order to use Test Suite as part of the Requirement-to-deploy scenario in Focused Build ensure that at least following standard configuration tasks have been completed successfully.

### 5.3.1 Test Classification



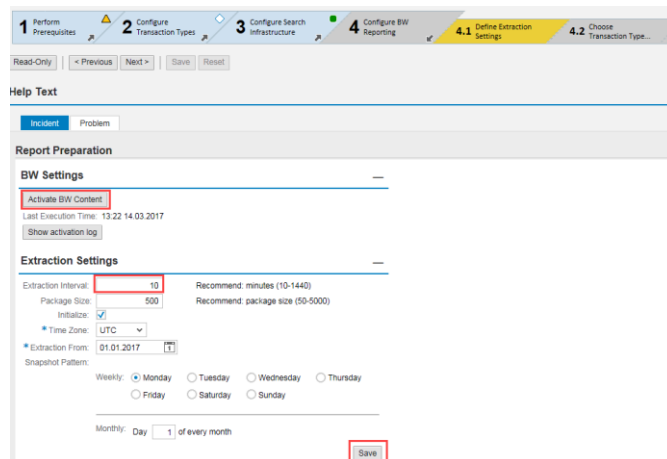
## 5.3.2 Analytics for Test Suite



## 5.3.3 Analytics for ITSM

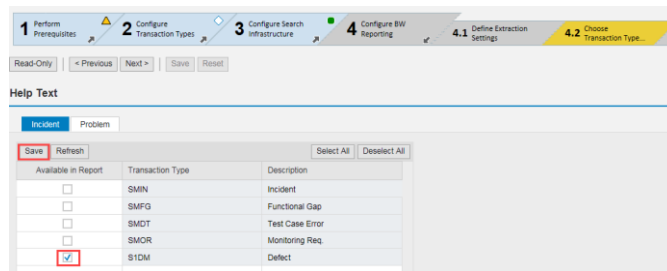
This is required to get the data for Defect Management into BW.

1. Call transaction: **SOLMAN\_SETUP**
2. Select Scenario IT Service Management
3. Step 4.1



4. Step 4.2

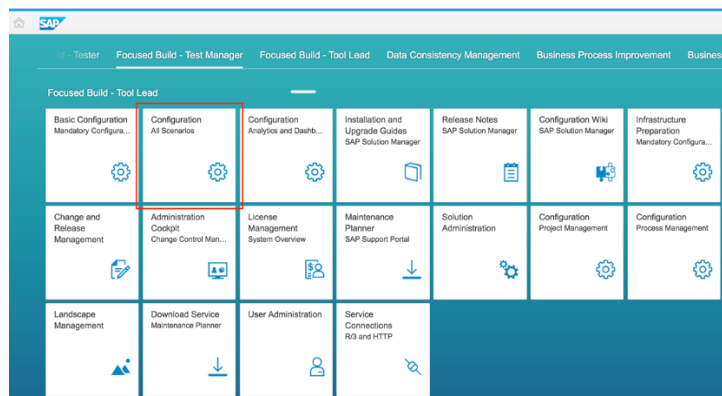




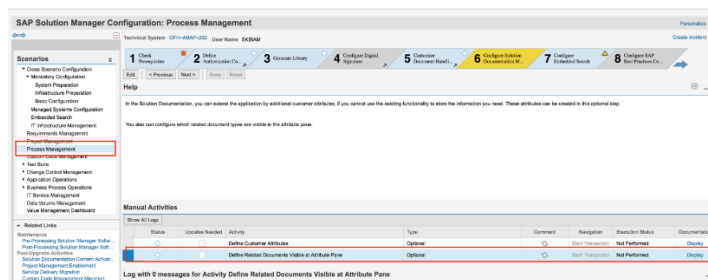
## 5.4 Activating BAdI for Related Transaction in Solution Documentation Attributes Panel

To change the visibility of related transactions in the attribute pane of structure elements such as for instance business process or business process step, follow the steps described below.

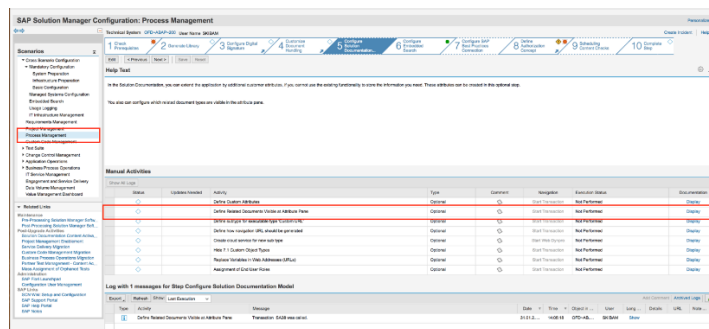
Run transaction **SM\_WORKCENTER** and select *Configuration All Scenarios*.



Select *Process Management* and navigate to the chapter 6 *Configure Solution Documentation Management*.



Select *Process Management* and navigate to the chapter 6 *Configure Solution Documentation Management* (ST < SP03) or 5 *Configure Solution Documentation Management* for systems on > SP03



**BAdI Implementations**

Implementations for BAdI Definition BADI\_SMUDE\_LCO\_INTEGRATION

Active(MG)	Active(Impl.)	Enhancement Implementation	BAdI Implementation	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	/SALM/SMUDE_LCO_EXT_BR	/SALM/SMUDE_LCO_EXT_BR	BAdI implementation for ST-OST (Piori int
<input type="checkbox"/>	<input type="checkbox"/>	AGS_CRM_API_LCO_ICC_GAPS	AGS_CRM_API_LCO_ICC_GAPS	ICC Functional Gap integration in Soluti
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AGS_CRM_API_LCO_INCIDENTS	AGS_CRM_API_SMUDE_LCO_INCIDENTS	Incident integration in Solution Document
<input type="checkbox"/>	<input type="checkbox"/>	AGS_CRM_API_LCO_ISSUES	AGS_CRM_API_LCO_ISSUES	Issue integration in Solution Document
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AGS_CRM_API_LCO_RFC	AGS_CRM_API_LCO_RFC	Request for Change integration in Soluti
<input type="checkbox"/>	<input type="checkbox"/>	AGS_CRM_API_LCO_RM	AGS_CRM_API_LCO_RM	Business Requirement integration in Soluti
<input type="checkbox"/>	<input type="checkbox"/>	AGS_CRM_API_LCO_RM_IR	AGS_CRM_API_LCO_RM_IR	IT Requirement integration in Solution D
<input type="checkbox"/>	<input type="checkbox"/>	/SALM/SMUDE_LCO_BR	/SALM/SMUDE_LCO_INTEGRATION_BR	BAdI implementation for requirements of :

De-select all potentially active implementations and activate `/SALM/SMUDE_LCO_BR` BAdI implementation for requirements of ST-OST.

## 5.5 Package and Namespace Selection in bc-Set Activation

If you are uploading and/or activating a bc-set in the scope of Focused Build you will be asked to select an appropriate package.

Mostly you can use `/SALM/CORE`.

## 5.6 Language Settings

Ensure that the default language for your browser is English:

Sprache hinzufügen	Entfernen	Nach oben	Nach unten
English (United States)	Windows-Anzeigesprache: Wird bei nächster Anmeldung aktiviert Tastaturlayout: Deutsch Datums-, Zeit- und Zahlenformat		Optionen
Deutsch (Deutschland)	Windows-Anzeigesprache: Aktiviert Tastaturlayout: Deutsch		Optionen

## 5.7 Hints and Pitfalls Regarding Virus Scan Profiles

- Please refer to [http://help.sap.com/saphelp\\_smp304svr/helpdata/en/7c/2d509370061014a2af8bb629919d56/content.htm?frameset=/en/6e/0e4c04ebf445e79fb57230a2fb4fa3/frameset.htm&current\\_toc=/en/7c/1feb92700610148db1c136782f31f/plain.htm&node\\_id=262&show\\_children=false](http://help.sap.com/saphelp_smp304svr/helpdata/en/7c/2d509370061014a2af8bb629919d56/content.htm?frameset=/en/6e/0e4c04ebf445e79fb57230a2fb4fa3/frameset.htm&current_toc=/en/7c/1feb92700610148db1c136782f31f/plain.htm&node_id=262&show_children=false)
- Check if a virus scanner is defined in transaction **VSCAN**
- Check virus scan profile in transaction **VSCANPROFILE**

## 5.8 Delete of obsolete projects

After initially creating the project templates, the used projects can be deleted that they don't appear in the Solution Readiness Dashboard.

A prerequisite for deletion of projects is that the project is still in status **CREATED**.

Just enter the project in **Read only** modus, select the top node of the project tree and press **Delete**.

**Project: Template FB Build SP1**

Save Read Only Print Fact Sheet Export Project... Create Version User Settings...

No Messages - Display Message Log

---

**FB\_BUILD\_SP1** Level of Severity No Value Set. Manually Set Status Created Responsible

**Structure** Resources Status Reports Project Versions Search

Detail Table Graphic

Template FB Build SP1

Create Phase Create Task Create Include **Delete** Schedule Aggregate Add to Favorites Copy to Forecasted Reset All Constraints Language: English

Project Element Se...

1 Template FB Build SP1

Discover & Prepare

Explore

Realize

Deploy

Run

**General**

Name: Template FB Build SP1 Number: FB\_BUILD\_SP1

Project Type: Focused Build - Build Project Reason:

Responsible Role: Project Manager Responsible Resource:

Responsible:

Substitute:

Description:

Show Substitute Details

## 5.9 Adapting Project Reasons

In project management, you can select various project reasons:

The screenshot shows the 'General' tab of a project in SAP. The 'Name' field contains 'MANGO TEST 072015 Master Project' and the 'Number' field contains 'MANGO\_MASTER\_TST\_2'. The 'Project Type' is 'SAP MANGO Master Project'. The 'Reason' dropdown is open, showing options: 'Project Reason 1', 'Project Reason 2', 'System of Differentiation', 'System of Innovation', and 'System of Record'. The 'Responsible Role' is 'Program Manager' and the 'Responsible Resource' is 'Tim Steuer'. The 'Forecast Release' section includes 'Release Class', 'Release Number', 'Release Type', and 'Go-Live Date'.

You can configure the project reasons in Customizing. To adapt project reasons, do the following:

5. In the Customizing for SAP Solution Manager, choose [SAP Customizing Implementation Guide](#) → [SAP Portfolio and Project Management](#) → [Project Management](#) → [Structure](#) → [Define Project Reason](#).
6. Change the reasons for projects.

## 5.10 User Roles, Authorizations and Business Partners

### 5.10.1 Authorization Roles and Users in SAP Solution Manager System

Each employee who is involved in the Requirement-to-Deploy process needs an own user in the SAP Solution Manager system to be able to access the system.

It must be clarified with the customer who (customer himself or partner or you as delivery team) will create and configure the needed authorization roles and users.

Further information about the definition of users and authorization roles for Focused Build can be found in the [Focused Build for SAP Solution Manager Security Guide](#).

#### Authorization Roles

With Focused Build the following composite roles get delivered for the Requirement-to-Deploy process:

SAP\_OST\_FB\_ARCHITECT\_COMP  
SAP\_OST\_FB\_ANALYST\_COMP  
SAP\_OST\_FB\_DEV\_COMP  
SAP\_OST\_FB\_PROJ\_M\_COMP  
SAP\_OST\_FB\_REL\_M\_COMP  
SAP\_OST\_FB\_TESTER\_COMP  
SAP\_OST\_FB\_TEST\_M\_COMP  
SAP\_OST\_FB\_TOOLLEAD\_COMP

Beside below exceptions all these composite roles, including the single roles have to be copied into the customer (Z\*) namespace.

Exceptions: From the included single roles the following ones are 'only' used as navigation roles and should not be copied but to be used as they are:

SAP\_BPR\_PPM  
 SAP\_OST\_SM\_CRM\_UIU\_ARCHITECT  
 SAP\_OST\_SM\_CRM\_UIU\_DEV  
 SAP\_OST\_SM\_CRM\_UIU\_PROJ\_M  
 SAP\_OST\_SM\_CRM\_UIU\_REL\_M  
 SAP\_OST\_SM\_CRM\_UIU\_SM\_PRO  
 SAP\_OST\_SM\_CRM\_UIU\_TEST\_M  
 SAP\_OST\_SM\_CRM\_UIU\_TESTER  
 SAP\_OST\_SM\_CRM\_UIU\_TOOLLEAD

Use transaction **PFCG** to

- copy the roles
- generate the profiles (leave configuration as is).

## Template Users

Use transaction **SU01** to create the following template users for Focused Build and to assign the needed roles:

User	Last name	First Name	Composite Role
ARCHITECT1	Template User	Solution Architect 1	ZSAP_OST_FB_ARCHITECT_COMP
ARCHITECT2	Template User	Solution Architect 2	ZSAP_OST_FB_ARCHITECT_COMP
ANALYST1	Template User	Analyst 1	ZSAP_OST_FB_COMP_ANALYST_COMP
ANALYST 2	Template User	Analyst 2	ZSAP_OST_FB_COMP_ANALYST_COMP
DEVELOPER1	Template User	Developer 1	ZSAP_OST_FB_DEV_COMP
DEVELOPER2	Template User	Developer 2	ZSAP_OST_FB_DEV_COMP
PROJMAN1	Template User	Project Manager 1	ZSAP_OST_FB_PROJ_MANAGER_COMP
PROJMAN2	Template User	Project Manager 2	ZSAP_OST_FB_PROJ_MANAGER_COMP
RELMAN1	Template User	Release Manager 1	ZSAP_OST_FB_REL_MANAGER_COMP
RELMAN2	Template User	Release Manager 2	ZSAP_OST_FB_REL_MANAGER_COMP
TESTER1	Template User	Tester 1	ZSAP_OST_FB_TESTER_COMP
TESTER2	Template User	Tester 2	ZSAP_OST_FB_TESTER_COMP
TESTCOORD1	Template User	Test Coordinator 1	ZSAP_OST_FB_TEST_COORD_COMP
TESTCOORD2	Template User	Test Coordinator 2	ZSAP_OST_FB_TEST_COORD_COMP

User	Last name	First Name	Composite Role
TOOLLEAD1	Template User	Tool Lead 1	ZSAP_OST_FB_TOOLLEAD_COMP
TOOLLEAD2	Template User	Tool Lead 2	ZSAP_OST_FB_TOOLLEAD_COMP

## Users

Transaction **BP\_USER\_GEN** can be used to create further users if they already exist in another system. Within this transaction, the users created in chapter 0 can be used as template user to create further users.

**Create Users or Business Partners Automatically**

Select Users from Managed System

RFC Destination: NONE

Users: ARCHITECT to

General User Attributes

Users valid on

Include locked users ☒

Users

Identify Users and Business Partners by

☐ E-Mail Address

☒ User Name

☒ Create Business Partners (BP)

☒ Update Business Partners (BP)

☒ Update BP Master Data as well

Program

☒ Display Details

☐ Hide Skipped Entries

☒ Test Mode

## 5.10.2 Authorization Roles and Users in Systems Belonging to the Project

Dependent on his role, each employee who is involved in the Requirement-to-Deploy process might need an own user in the different systems involved in the project. Which authorizations / roles the different users need depends on the project, role and application.

User	Dev	Test	Maint	QA	PreProd	Prod
Architect	X	X	X	X	X	X
Analyst	X	X	X	X	X	X
Developer	X	X	X	X	X	
Project Manager	X	X	X	X	X	x
Release Manager	X	X	X	X	X	X

User	Dev	Test	Maint	QA	PreProd	Prod
Tester		X		X		
Test Coordinator	X	X	X	X	X	
Tool Lead	X	X	X	X	X	X

Which authorizations the users get in which of the respective systems has to be verified with the project team.

### 5.10.3 Defining Business Partners

For each party that is involved in the CRM based transactions of the Requirement-to-Deploy process a business partner is needed. For the employees, the business partners can be created using transaction **BP\_GEN** (a variant of transaction **BP\_USER\_GEN**).

Create business partners to the template users created in chapter Authorization Roles and Users in SAP Solution Manager System → *Template Users*:

1. Run transaction **BP\_GEN**
2. Choose *RFC Destination* **NONE**
3. Using multiple selection, select the template users
4. Choose *Execute* to create the business partners

5. If the protocol of the test run indicates no errors, go back to the selection screen, remove the check mark to Test Mode, and execute it again
6. Repeat the same for each relevant RFC destination (pointing to the systems involved with the project – see also chapter *Authorization Roles and Users in SAP Solution Manager System → Template Users*) with the same users

The business partners can be checked and manually adapted in transaction **BP**. For Requirement-to-Deploy it is important that the business partner exists with the BP roles Business Partner (Gen.), Contact Person and Employee:

**Display Person : 12183**

Business Partner ID: 12183 ✓ Key User Template User / 68789 St. Leon-Rot

Display in BP role: 000000 Business Partner (G...)

Address: AddFS0000 Financial Services BP

In BP role Business Partner (Gen.) on tab *Identification*, entries to all systems in which the user should be able to create requirements, test defects, etc. are shown. Entries have to be maintained according to the following specifications:

IDType CRM001

Identification Number <SysID><blank><installation number><blank><client><blank><user>

**Display Person : 12183**

Business Partner ID: 12183 ✓ Key User Template User / 68789 St. Leon-Rot

Display in BP role: 000000 Business Partner (G...)

Address Address Overview **Identification** Control Payment Transactions

Personal Data

Sex: ☒ Unknown ☐ Female ☐ Male

Marital status: ☐

Nationality:

Identification Numbers

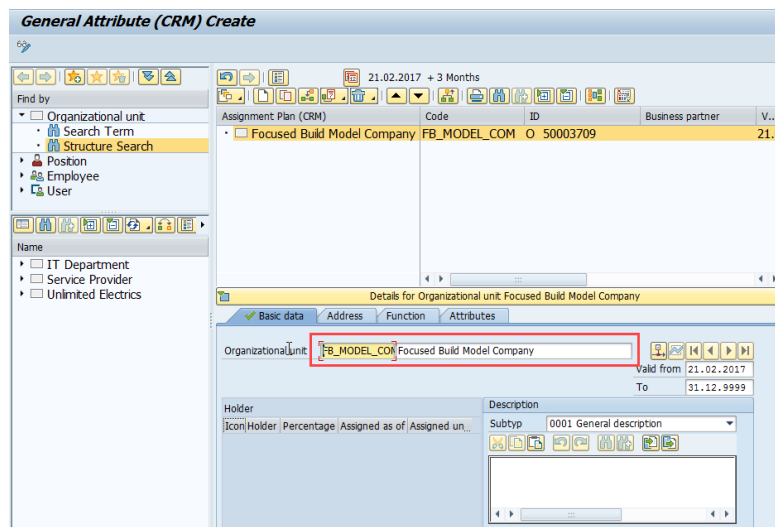
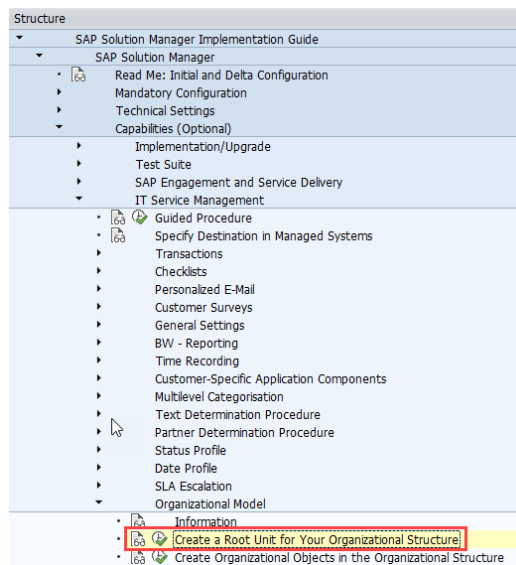
External BP number: E2E 100 TP\_IM\_KEY

IDType	Description	Identification Number	Response
CRM001	External System Identifier	E2E 0020305144 100 TP_IM_KEY	
CRM001	External System Identifier	OTO 0020226859 800 TP_IM_KEY	

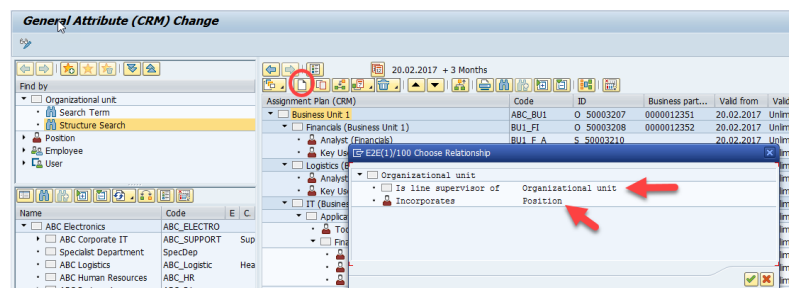
## 5.11 Organizational Model (optional)

Create an organization model in the SAP Solution Manager that represents an extract of the customer's organization covering the Requirement-to-Deploy process. If you want to create a new Root Unit, call transaction **SPRO** and create a new Root Unit via IMG activity highlighted below:



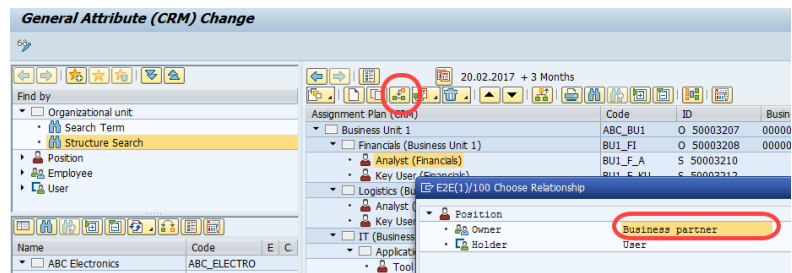


If you would like to enhance an existing organization model you can directly use transaction **PPOMA\_CRM** to do so. To create new organizational units and positions always select the upper organizational unit, click on **Create** and then choose either **Organizational Unit** or **Position**:



Name the new unit respectively.

To assign business partners to the positions select the respective positions, click on *Assign* upper organizational unit, click on *Create* and then choose *Business partner*:



Assign the respective business partner.

Create the bellow organizational units and assign the respective positions and users/BPs:

<Company>

Business Unit A

Financials

Position: Analyst

BP Analyst 1

Position: Key User

BP Tester 1

Logistics

Position: Analyst

BP Analyst 2

Position: Key User

BP Tester 2

IT

Application Management

Position: Tool Lead

Financial

Position: Architect

BP Architect 1

Position: Developer

BP Developer 1

Position: Test Coordinator

BP Test Coordinator 1

Logistics

Position: Architect

BP Architect 2

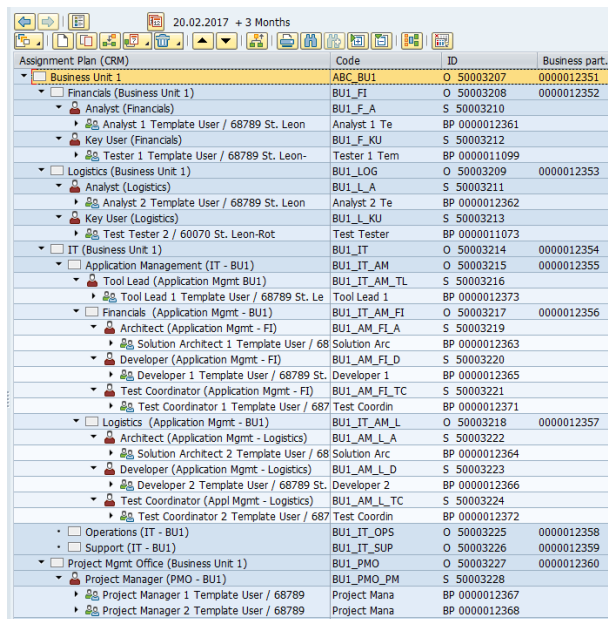
Position: Developer

BP Developer 2

Position: Test Coordinator

BP Test Coordinator 2

Operations  
 Support  
 PMO  
 Position: Project Manager  
 BP Project Manager 1  
 BP Project Manager 2



Assignment Plan (CRM)	Code	ID	Business part...
Business Unit 1	ABC_BU1	O 50003207	0000012351
Financials (Business Unit 1)	BU1_FI	O 50003208	0000012352
Analyst (Financials)	BU1_F_A	S 50003210	
Analyst 1 Template User / 68789 St. Leon	Analyst 1 Te	BP 0000012361	
Key User (Financials)	BU1_F_KU	S 50003212	
Tester 1 Template User / 68789 St. Leon	Tester 1 Tem	BP 0000011099	
Logistics (Business Unit 1)	BU1_LOG	O 50003209	0000012353
Analyst (Logistics)	BU1_L_A	S 50003211	
Analyst 2 Template User / 68789 St. Leon	Analyst 2 Te	BP 0000012362	
Key User (Logistics)	BU1_L_KU	S 50003213	
Test Tester 2 / 60070 St. Leon-Rot	Test Tester	BP 0000011073	
IT (Business Unit 1)	BU1_IT	O 50003214	0000012354
Application Management (IT - BU1)	BU1_IT_AM	O 50003215	0000012355
Tool Lead (Application Mgmt BU1)	BU1_IT_AM_TL	S 50003216	
Tool Lead 1 Template User / 68789 St. Le	Tool Lead 1	BP 0000012373	
Financials (Application Mgmt - BU1)	BU1_IT_AM_FI	O 50003217	0000012356
Architect (Application Mgmt - FI)	BU1_AM_FI_A	S 50003219	
Solution Architect 1 Template User / 68	Solution Arc	BP 0000012363	
Developer (Application Mgmt - FI)	BU1_AM_FI_D	S 50003220	
Developer 1 Template User / 68789 St.	Developer 1	BP 0000012365	
Test Coordinator (Application Mgmt - FI)	BU1_AM_FI_TC	S 50003221	
Test Coordinator 1 Template User / 687	Test Coordin	BP 0000012371	
Logistics (Application Mgmt - BU1)	BU1_IT_AM_L	O 50003218	0000012357
Architect (Application Mgmt - Logistics)	BU1_AM_L_A	S 50003222	
Solution Architect 2 Template User / 68	Solution Arc	BP 0000012364	
Developer (Application Mgmt - Logistics)	BU1_AM_L_D	S 50003223	
Developer 2 Template User / 68789 St.	Developer 2	BP 0000012366	
Test Coordinator (Appl Mgmt - Logistics)	BU1_AM_L_TC	S 50003224	
Test Coordinator 2 Template User / 687	Test Coordin	BP 0000012372	
Operations (IT - BU1)	BU1_IT_OPS	O 50003225	0000012358
Support (IT - BU1)	BU1_IT_SUP	O 50003226	0000012359
Project Mgmt Office (Business Unit 1)	BU1_PMO	O 50003227	0000012360
Project Manager (PMO - BU1)	BU1_PMO_PM	S 50003228	
Project Manager 1 Template User / 68789	Project Mana	BP 0000012367	
Project Manager 2 Template User / 68789	Project Mana	BP 0000012368	

## 5.12 Multitenancy Enhancement

### 5.12.1 Report /SALM/ITSM\_MT\_BP\_AUTH\_GRP

This report can be used to automatically assign authorization groups to business partners according to their position in the organizational structure. It is covered in the chapter titled, Assign Authorization Groups to Business Partners.

#### Start report

Open report via **SPRO** (*SAP Solution Manager* → *Focused Build* → *Change Control Extensions* → *Multi Tenancy Extensions* → *Update Business Partner Authorization Groups*) or transaction **SE38** (Report Name /SALM/ITSM\_MT\_BP\_AUTH\_GRP)

Assign Authorization Groups to Business Partners			
Processing Mode			
Testmode	<input checked="" type="checkbox"/>		
Assign authorization groups	<input type="radio"/>		
Delete authorization group assignments	<input type="radio"/>		
Business Partner			
Only assigned Business Partners	<input type="checkbox"/>		
Root Organizations	<input type="text" value="2467"/>	to	<input type="text"/>
Business Partner	<input type="text" value="*"/>	to	<input type="text"/>

## Processing Modes

### Testmode

As long as test mode is activated (checked) to changes will be written to database tables.

You can use this mode to check, which business partners would be changed. You will also get a list of business partner which are assigned to more than one root organization. Within the same organization a business partner can be assigned several times.

### Assign authorization groups

Authorization group will be updated by analyzing the current organizational assignment of existing business partners

### Delete authorization group assignments

The value for business partner authorization group will be deleted for all business partners which are considered. This means that afterwards they do not have an authorization group.

## Business Partner

### Only assigned business partners

With this open checked only business partner who are assigned to an organization are taken in to account. Unassigned business partners will be ignored.

If you uncheck this option all unassigned business partners will get the configured default authorization group (refer to Customize Default Authorization Group).

### Root organizations

The root organizations will be prefilled with your customized root organizations (see chapter *Assign Authorization Groups to Root Organizations*). In general there's no need to change it.

Please note, that added organizations need to be defined as root. Otherwise, they will be ignored.

### Business partner

This search option for business partners is prefilled with \*, which means that all business partners will be checked. Only business partner who match this criteria, will be taken into consideration. All others are ignored.

If you want to perform the update for one or some specific business partners only, add a list here.

## Necessary Authorizations

The user who executes the report will probably need additional authorizations. Therefore, you need to create an authorization role in transaction **PFCCG**.

Authorization Object	Authorization Values		Comment
S_TCODE	Transaction Code	/SALM/MT_BP_AUTHGRP	enter the report via transaction
PLOG	Infotype	*	Read Business Partner data for processing
	Planning Status	*	
	Object Type	*	
	Plan Version	01	
	Function Code	DISP	
	Subtype	*	
B_BUPA_GRP	Activity	02, 03	Change authoriatzion group of business partner in database
	Authorization Group	*	
B_BUPA_RLT	Activity	02, 03	Change authoriatzion group of business partner in database
	BP Role	*	

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