

Focused Build for SAP Solution Manager 7.2

ST-OST 200 SP 3



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.
Example	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.
Example	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

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Contents

Typographic Conventions.....	2
Document History.....	3
1 Introduction.....	9
1.1 Target Group.....	9
1.2 Overview of Focused Build for SAP Solution Manager.....	9
1.3 General	9
1.4 Usage Rights	10
2 Configuration of Focused Build Requirement-to-Deploy	11
2.1 Basic Configuration of SAP Solution Manager	11
2.1.1 Implementing Mandatory SAP Notes.....	11
2.1.2 Maintaining Number Ranges.....	11
2.1.3 Related Documentation.....	12
2.1.4 Activating the Piece List(s)	12
2.1.5 Important SAP Notes.....	12
2.1.6 Transaction Types	13
2.1.7 Setup Steps	14
2.1.8 Activation of Virus Scan Profiles.....	24
2.1.9 Multilevel Categorization.....	25
2.2 Configuration and Customizing.....	28
2.2.1 Maintaining AGS_WORK_CUSTOM.....	28
2.2.2 Customizing Requirements Management.....	28
2.2.3 [Optional] E-Mail Notification for Work Packages and Items	29
2.2.4 [Optional] Enabling Richtext	29
2.2.5 Activation of Required Badls.....	33
2.2.6 Release Management	33
2.2.7 Defining System Aliases for oData Services.....	35
2.2.8 Configure exceptions for naming of automatically created KPI documents.....	36
2.2.9 Configuring Test Suite Extensions	38
2.2.10 Configuring Project Management.....	41
2.3 Important Links.....	43
3 Project Preparation.....	44
3.1 Target Group.....	44
3.2 Prerequisites.....	44
3.2.1 Technical prerequisites	44
3.2.2 Content related prerequisites.....	45
3.3 Create Solution with Branches, System Landscape and Document-Type assignment	46
3.3.1 Create Solution.....	46
3.3.2 Setup up branches.....	48
3.3.3 Setup system landscape	50
3.3.4 Related Documentation.....	53

3.3.5	Considerations, if process management is already in use	54
3.3.6	Create and assign Document Types to Solution	55
3.3.7	Adjust Customizing for Document KPI Framework	57
3.3.8	Configure E-Mail Notifications on Document Status Change	60
3.3.9	Import Best Practice Content into Import Branch	62
3.3.10	Release Scope-relevant Processes into Design-Branch.....	63
3.3.11	Create Change Control Landscape.....	65
3.3.12	Transaction Type for Change Control Landscape.....	66
3.3.13	Define Branch Mapping (SPRO).....	66
3.4	Setup Release Management	68
3.4.1	Release Planning	68
3.4.2	Prepare Release Component for Batch Import	73
3.4.3	Define Release Profile Mapping	73
3.5	Project Setup.....	74
3.5.1	Create Projects.....	74
3.5.2	Assign Release to Projects	76
3.5.3	Assign sub projects to master project.....	78
3.5.4	Maintain project data (optional)	79
3.5.5	Define Wave Relationships between Master and Build Projects.....	80
3.5.6	Link Q-Gates of Master and Build Projects	82
3.5.7	Maintain Project Milestones	84
3.5.8	Release Q-Gate(s)	86
3.5.9	Assign dedicated Release Numbers to Waves (optional).....	86
3.5.10	Prepare first Wave and Sprint	88
3.5.11	Release Project Header	89
4	Upgrade Focused Build from SP02 to SP03	90
4.1	Implementing Mandatory SAP Notes	90
4.2	Activating the Piece List(s)	90
4.3	[Optional] Enabling Richtext.....	90
4.4	Updating Authorization Roles.....	94
5	Configuration of Standalone Extensions.....	95
5.1	Activities Valid for all Standalone Extensions	95
5.1.1	Activating the Piece List.....	95
5.2	Configuration of Test System Refresh.....	95
5.2.1	Prerequisites for Refresh Test Systems	95
5.2.2	Simulation Landscape for Refresh Test System	96
5.2.3	Activating the Piece List.....	96
5.2.4	Adjusting Task List	96
5.2.5	Creating Change Cycle and Assign Task List Variant for New Customer to Task List.....	102
5.2.6	Executing the Refresh Test System Scenario	106
5.2.7	Available BADI Definition: /SALM/RTS_FILTER_DELTA_BAdI	109
5.3	Configuration of Retrofit Automation	110
5.3.1	Required Activities	110
5.3.2	Roles and Authorization.....	111
5.3.3	Basic Configuration for SAP Solution Manager.....	112
5.3.4	Piece List Activation	113
5.3.5	Checking for Correct Retrofit Setup: NO_CSOL Parameter Must be Active	114
5.3.6	Activating Retrofit Automation Scenarios	114

5.3.7	Specifying Retrofit Target Task List for Retrofit Automation	116
5.3.8	Specifying Mapping Rules for Target Change Document.....	117
5.3.9	Defining Target Systems for Importing Retrofit Transport of Copies.....	118
5.3.10	Defining Retrofit Automation E-Mail Settings	119
5.3.11	Activating Relevant Business Add-In Implementations	121
5.3.12	Optional: Enabling Navigation to Change Document.....	122
5.3.13	Calling Report /SALM/RETRO_AUTOMATION	124
5.3.14	Creating a Regular Job for Retrofit Automation.....	125
5.4	Configuration of Retrofit for BW.....	125
5.4.1	Enhanced Retrofit Without Implemented Focused Build 'Retrofit for BW'	125
5.4.2	Setup of a Simulation Landscape for Focused Build Retrofit for BW.....	126
5.4.3	Configuration Steps for Focused Build Retrofit for BW.....	127
5.4.4	Retrofit with Implemented Focused Build Retrofit for BW.....	134
5.5	Configuration of Repack for Change Request Management	134
5.5.1	Overview	134
5.5.2	Roles and Authorization	135
5.5.3	Package Distribution for Managed System	136
5.5.4	Repack Options	136
5.5.5	Activating the Piece List	138
5.5.6	Configuration.....	138
5.6	Configuration of Simple IT Request.....	142
5.6.1	Overview	142
5.6.2	Roles and Authorizations	144
5.6.3	Activating Piece List.....	146
5.6.4	SAP Notes.....	146
5.6.5	Configuration.....	147
5.6.6	Customizing Options	150
5.6.7	My Inbox Integration (Optional).....	152
5.6.8	Rich Text for Simple IT Request (Optional)	152
5.6.9	Multilingual Services for Simple IT Request (optional)	157
5.7	Configuration of dropDoc	158
5.7.1	Prerequisites	159
5.7.2	Overview of dropDoc Variants	159
5.7.3	Activation of oData Services.....	160
5.7.4	Activation of ICF Services.....	160
5.7.5	Document Types of Attachments.....	161
5.7.6	Current Status Handling - KPI Overview	163
5.7.7	Current Status Handling - KPI Customization for Work Package and Work Item.....	164
5.7.8	Overview of Digital Signature.....	166
5.8	Configuration of Multi Tenancy Enhancement	171
5.8.1	Use Case	171
5.8.2	Activating the Piece List	172
5.8.3	Roles and Authorizations	172
5.8.4	Status Check for Transaction Types.....	172
5.8.5	Business Partner Dependent Checks.....	174
5.8.6	Configuration Item Dependent Checks.....	184
5.8.7	Restricting Access to Solutions and Documentation	186
5.8.8	Activation.....	189
5.9	Configure Status Dependent Check Framework.....	192
5.9.1	Use Cases	192

5.9.2	Roles and Authorization.....	192
5.9.3	Activating the Piece List.....	193
5.9.4	Consistency Checks for Change Transaction Types	193
5.9.5	Additional Field Checks.....	194
5.9.6	Check of Business Partner Function	197
5.9.7	Check of Text Fields	199
5.10	Configuration of Change Request Management - Scorecard.....	203
5.10.1	Use Case.....	203
5.10.2	Roles and Authorization.....	203
5.10.3	Activating the Piece List.....	203
5.10.4	Customizing Scorecard	204
5.10.5	Generating Scorecard data	209
5.11	Configuring Release Batch Import	209
5.11.1	Piece List Activation.....	209
5.11.2	Required SAP Note Implementations.....	210
5.11.3	Status-dependent Import Control as technical Prerequisite	211
5.11.4	Starting Import based on Import Variant	234
5.12	Configuration of Template Protection	238
5.12.1	Verifying Basic Configuration for SAP Solution Manager.....	238
5.12.2	Piece List Activation.....	239
5.12.3	Prerequisite for Template Protection.....	240
5.12.4	Activation of Template Protection Checks	240
5.12.5	Check at Save of Objects.....	242
5.12.6	Check at Release of Transport Requests.....	243
5.12.7	Central Customizing for Template Protection.....	244
5.12.8	Maintenance of Locks in Template Protection.....	244
5.13	Configuring Cross Landscape Distribution	250
5.13.1	Roles and Authorization.....	251
5.13.2	Package Distribution for Managed System	252
5.13.3	Prerequisite for TMS RFC Free Setup	252
5.13.4	Prerequisites for Automated Cross Landscape Distribution	253
5.13.5	Customizing Cross Landscape Distribution	253
5.14	Configuration of Cutover Checks and Post Cutover Activities.....	266
5.14.1	Activating the Piece List.....	268
5.14.2	Roles and Authorization.....	268
5.14.3	Customize Cutover Checks.....	269
5.14.4	Customize Post Cutover Activities	272
5.14.5	WebUI Configuration.....	275
5.14.6	Activation of Webservice cm_cutovr.....	275
5.14.7	Condition Check /SALM/COC_SUCCESS.....	275
5.14.8	Ignored Tracks.....	276
5.15	Configuring Electronic Signature for Change Request Management.....	277
5.15.1	Activating the Piece List.....	278
5.15.2	Roles and Authorization.....	278
5.15.3	Creating and Validating the Signature Object	279
5.15.4	Activating Electronic Signature for the Approval Assignment Block	280
5.15.5	Activating Electronic Signature for an Action from the Action Profile	281
5.16	Configuring Test Steps.....	283
5.16.1	Overview.....	283
5.16.2	Prerequisites.....	284

5.16.3	Activating Piece List.....	286
5.16.4	SAP Notes.....	287
5.16.5	Service Maintenance	288
5.16.6	Test Suite Dashboard	291
5.16.7	Checking Test Suite Configurations and User Authorizations	292
5.16.8	CUSTOMIZING OPTIONS.....	293
5.16.9	Setup of Machine Translation API	299
5.16.10	Users and Authorization Roles	300
6	Appendix.....	302
6.1	Useful SAP Notes.....	302
6.2	Adjust Category Schema	302
6.3	Mandatory Standard Configuration for Test Suite.....	304
6.3.1	Test Classification.....	304
6.3.2	Analytics for Test Suite.....	305
6.3.3	Analytics for ITSM.....	305
6.3.4	Context menu for Test Steps missing in Solution Documentation	306
6.3.5	Error message when starting app “My test executions”	306
6.3.6	Upload of Attachments to Steps or Test Cases does not work	307
6.4	Activating BAdI for Related Transaction in Solution Documentation Attributes Panel.....	308
6.5	Package and Namespace Selection in bc-Set Activation	309
6.6	Language Settings.....	309
6.7	Hints and Pitfalls Regarding Virus Scan Profiles	310
6.8	Delete of obsolete projects.....	310
6.9	Adapting Project Reasons	310
6.10	User Roles, Authorizations and Business Partners.....	311
6.10.1	Authorization Roles and Users in SAP Solution Manager System	311
6.10.2	Authorization Roles and Users in Systems Belonging to the Project.....	313
6.10.3	Defining Business Partners.....	314
6.11	Organizational Model (optional).....	315
6.12	Multitenancy Enhancement.....	318
6.12.1	Report /SALM/ITSM_MT_BP_AUTH_GRP	318
6.13	Clickjacking protection framework in SAP NetWeaver AS ABAP an AS JAVA	320

1 Introduction

This document helps you to configure the Focused Build Requirement-to-Deploy scenario for SAP Solution Manager with SAP Solution Manager 7.2. SPS 8 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 from the SAP Help Portal at <https://help.sap.com/viewer/p/FBUILD>.

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

1.4 Usage Rights

There are two different to obtain usage rights for Focused Build for the various functions provided with Focused Build:

- Premium engagement customers (MaxAttention or SAP ActiveEmbedded)
Obtain your Focused Build licenses through a dedicated service.
- Non-premium engagement customers
Order your Focused Build licenses from SAP Store.

Further information is provided at <https://support.sap.com/en/solution-manager/focused-solutions/focused-build.html>

2 Configuration of Focused Build Requirement-to-Deploy

2.1 Basic Configuration of SAP Solution Manager

2.1.1 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	
1818804	Change Request Management: Enable client restriction for import subsets		X
1731806	Change Request Management: Support of multi-client import		X
2468171	ChaRM: Dump DBIF_RSQLE_TABLE_UNKNOWN for table /SDF/TMW_ADM on shadow systems		X
2335056	ChaRM: runtime error PERFORM_PARAMETER_MISSING during creation of ToCs		X

2.1.2 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.

2.1.3 Related Documentation

For more information about Change Request Management, go to SAP Help Portal at https://help.sap.com/viewer/p/SAP_Solution_Manager, select version 7.2 SPS 8. 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.

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.

2.1.4 Activating the Piece List(s)

Call transaction [scc1](#) in your working client and activate the following piece list

1. [/SALM/FB_CUST](#)

which will supply your system with the predefined customizing. Copy the customizing by putting the piece list into the [Transport Request](#) field. The result of this activation can be verified in transaction [scc3](#).



Note

If you are upgrading Focused Build from SP02 to SP03 you should refer to chapter Upgrade Focused Build from SP02 to SP03.

2.1.5 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
2713624	Focused Build: Central Note for Focused Build 2.0 SP03 for SAP Solution Manager 7.2 = SP08



Note

Manual activities of SAP Note 2713624 must be implemented after the piece list activation (refer to chapter 2.1.4 Activating the Piece List). In detail it means to read the content of this SAP note carefully.

2.1.6 Transaction Types

Focused Build is intended to use solely the following transaction types:

Transaction Type	Description	Usage
S1BR	Requirement	Business Requirements
S1MT	Master Work Package	
S1IT	Work Package	Project Management without Portfolio Management
S2IT	Work Package	Project Management with Portfolio Management (SAP Portfolio and Project Management)
S3IT	Work Package	Without Project Management
S1CG	Work Item	Work Item without transport requests
S1CR	Request for Change	
S1HF	Urgent Change with TMS (Project Management)	
S1SG	Standard Change	
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	
S4AT	Service Request Approver Template (SITR)	Simple IT Request
S4CT	Request for Change Template for Simple Service Request	Simple IT Request
S4IT	Incident Template for Simple Service Request	Simple IT Request
S4PT	Problem Template for Simple Service Request	Simple IT Request
S4RQ	Service Request with Approval (SITR)	Simple IT Request

Transaction Type	Description	Usage
S4ST	Service Request for Simple Service Request	Simple IT Request

2.1.7 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	FBBR

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

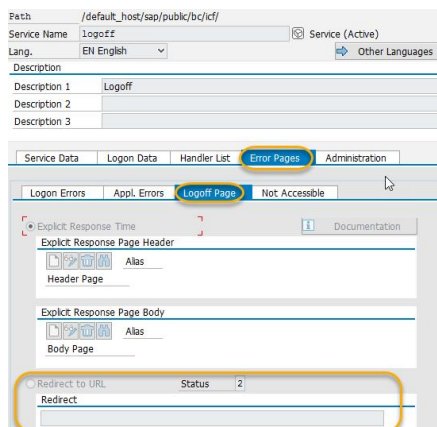
Activate all services for IT Service Management, Change Request Management, and Product and Portfolio Management.

1. Call transaction **SICF_INST** and activate the following services:

- o SM_CHARM
- o SM_CRM_UI
- o SALM_FB

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

2. 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?frameset=/en/b7/383953fcabff4fe10000000a44176d/frameset.htm¤t_toc=/en/fc/4a4c52eea9c871e10000000a44176d/plain.htm&node_id=8
3. 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:

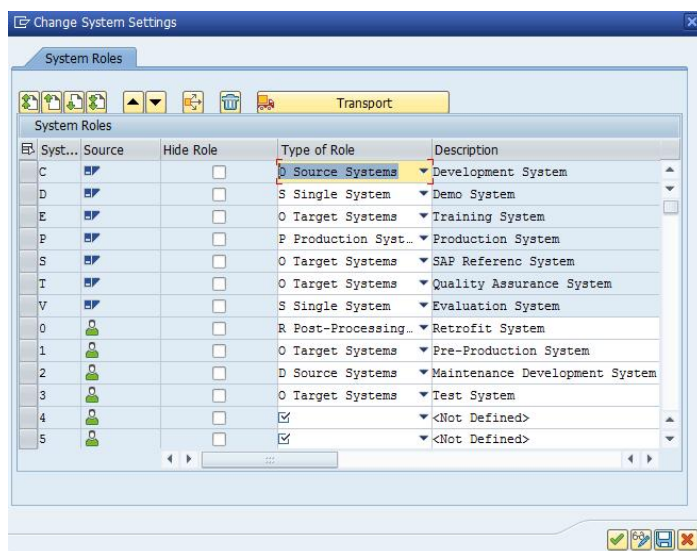
System Role	Source	Type of Role	Description
C	SAP	D - Source System	Development System
D	SAP	O - Target System	Demo System
T	SAP	O - Target System	Quality Assurance System
E	SAP	O - Target System	Training System
P	SAP	P - Production System	Production System
S	SAP	O - Target System	SAP Reference System

System Role	Source	Type of Role	Description
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 **SM5Y_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 `/*`.

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_PRE`
For imports into PRE-PRD of everything included into 1 release.
- `/SALM/RELEASE`
For imports into PRE-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 Configuration* 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 Configuration* 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 2.1.7 Setup Steps.

Change View "Import Configuration": Overview

New Entries BC Set: Change Field Values

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration**
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
- Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant: /SALM/RELEASE

Import Configuration		
Import Config	Phase Chk	Continue
IMPORT_PRODUCTION	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Select *Maintain Landscape Data* and maintain your system landscape per *Import Config* which has been defined previously. As *Solution ID* you maintain a dedicated solution. The *Release Component* can be maintained with '*'.
Usually there are more than 1 system per *Import Config*. Which means that you must create 1 entry per system. Just in case you have the same system with different clients in different *Import Config(s)*, you must create each entry with a different *ID*. 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 Configuration**
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
- Maintain Landscape Data**
 - Maintain System Clients
 - Maintain LMDB only Clients

Maintain Landscape Data						
ID	Solution ID	Release Component	Cycle Type	System	Non-ABAP	Import Config
1	{XO{5U6w7kYV...{XO{5U6w7jYVs1TrS...	All Types ...	OT0		<input type="checkbox"/>	IMPORT_INTEGRATION_TEST
2	{XO{5U6w7kYV...{XO{5U6w7jYVs1TrS...	All Types ...	OT0		<input type="checkbox"/>	IMPORT_QAS
3	{XO{5U6w7kYV...{XO{5U6w7jYVs1TrS...	All Types ...	OT0		<input type="checkbox"/>	IMPORT_INTEGRATION_TEST
4	{XO{5U6w7kYV...{XO{5U6w7jYVs1TrS...	All Types ...	OT0		<input type="checkbox"/>	IMPORT_PRODUCTION
5	{XO{5U6w7kYV...{XO{5U6w7jYVs1TrS...	All Types ...	OT0		<input type="checkbox"/>	IMPORT_STD_CHANGE

Note

Please keep in mind that *Maintain Landscape Data* is considered as master data which needs to be maintained on each SAP Solution Manager individually. In addition, if you create additional releases those must be maintained here, or you must maintain the *Release Component* with '*'.

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 Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
- Maintain Import Sequence of Systems
- Maintain Landscape Data
 - Maintain System Clients**
 - Maintain LMDb only Clients

Numerical ID: 1
 Solution ID: {XO}{5U6w7kYVluFRXf0jgm}
 Release Component: {XO}{5U6w7jYVs1TrSr70d0}
 Cycle Type: ☐
 System Name: OT0

Client	SysRole ID	RFC Type	Comm.Cl
812	1	Trusted RFC	812

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.

- For special use cases where imports must be performed sequentially system after system (e.g. ERP and BW) the node *Maintain Import Sequence of Systems* can be utilized. You have to maintain *System*, *Client* and *Imp. Seq.* (Import Sequence). If such a use case is not given the node can be left empty.

Change View "Maintain Import Sequence of Systems": Overview

New Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
- Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
- Maintain Import Sequence of Systems**
- Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDb only Clients



System	Client	Imp. Seq.

➔ 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.

- If you like to execute `/SALM/BATCH_IMPORT_TRIGGER` regularly, check the automatic rescheduling flag and define the frequency. Go to transaction **SE38** or **SA38**, execute `/SALM/BATCH_IMPORT_TRIGGER`. Afterwards select relevant *Release to Import*.


Start/Schedule Import based on Variant

General Options

Release(s) to Import 

☐ Import into Production Systems

Import Variant 

☐ Allow Transports of Task List without Change assigned

☒ Test Mode (No Import)

☐ Process only Testtransports

Scheduling Options

☐ Enable Automatic Rescheduling

Minutes until auto restart

Name of Job

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

Note

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

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

Start/Schedule Import based on Variant

General Options

Release(s) to Import

☐ Import into Production Systems

Import Variant

☐ Allow Transports of Task List without Change assigned
☐ Test Mode (No Import)
☐ Process only Testtransports

Scheduling Options

☒ Enable Automatic Rescheduling
Minutes until auto restart
Name of Job

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

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

➔ Recommendation

For the recommended setting for import please refer to

For housekeeping purposes, you should schedule report /SALM/BATCH_IMPORT_CLEAN_LOGS daily to keep your database performant.

Clean BI Run Log Tables

Delete runs later X days

☐ Test mode

A selective deletion of log entries can be achieved via report /SALM/BATCH_IMPORT_LOG_DELETE.

Batch Import Log Delete

Date of Run to

Run GUID

User

☒ Test run

Please refer to [SAP note 2774831 - Focused Build - Release/Batch Import: cleanup of logs](#).

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.

This job can be created within transaction [SM36](#) with the name [FB_SRD_DATA_EXTRACTION](#).

Recommendation

To schedule this job with an appropriate batch user e.g. [SM_FB_BTC_DE](#) which has got the copy of the delivered role [SAP_OST_FB_BTC_DE](#).

As a 2nd step in this background job you should add /SALM/FILL_SRD_CACHE because /SALM/DATA_EXTRACTION_PPMITSM invalidates the caches after each run.

There are several data options which can be selected for extraction and refill of the caches.

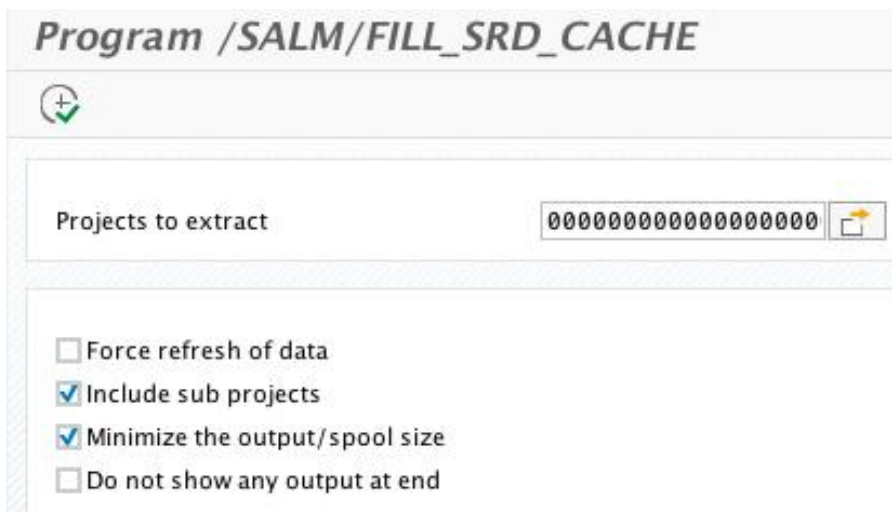
- Force refresh of data: Even if data is stored in the cache for the selected project, data will still be refreshed.
- Include sub projects: This option is for Master projects, If this parameter is checked, we will also refresh the data of the build projects related to the selected projects.
- Minimize output/spool size: If this is not checked, we will show the execution time tile of every tile for the selected projects. This is not recommended for hourly executions as it is a waste of storage space. If you check this option, only projects execution time will be shown/stored.
- Do not show any output at end: If checked, there will be no output at the end of this report. This option is mainly for developers (if they want to use this report in other programs).

Generally, these Focused Build project types are extracted:

- /SALM/COMPLETE
- /SALM/MAINT
- /SALM/SINGLE

Focused Build - Build project (type: /SALM /BUILD) cannot be extracted separately. Build projects will be extracted together with the associated master project. In case you are interested in just one or several dedicated projects and you the project GUID you can maintain them in the field [Projects to extract](#).

The selection can be saved as variant.



You can use the following variants:

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
Foc_insights [ATTENTION: DO NOT USE if you are operating Focused Build R2D]	Variant for usage of DP_BUILD from Focused Insights

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

Extraction Job run modes

- Normal mode (Use simple process mode disabled, Use Multi process mode disabled). This is the standard execution mode (sequential execution).
- Simple process mode (Use simple process mode enabled, use multi process mode disabled). The extraction job is separated into two “blocks”.
 - PPM extraction: Projects related data extraction. (Is executed in a dialog process if there is one dialog process available else it will execute in normal mode)
 - CRM extraction: CRM object data extraction. (Is always executed in normal mode)
- Multiple process mode (Use simple process mode: Any, use multi process mode enabled).
 - The extraction job is separated into two “blocks”.
 - PPM extraction: Projects related data extraction. (Is executed in a dialog process if there is one dialog process available else it will execute in normal mode)

We fragment the data depending on: PPM length of data fragment (Parameter), Maximum PPM threads allowed (Parameter), Available dialog process number (Variable), Total data length (Variable) and we execute the data fragment in a dialog process. If there is no dialog process available, we switch to normal mode.

 - CRM extraction: CRM object data extraction. (Is always executed in normal mode)

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.

- /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.



Recommendation

Run program /SALM/DATA_BUFFER_DELETE after each customization change of KPI values (maintenance view: /salm/vc_kpi) or CRM status schema.

Data Extraction for Test Management Dashboard

Schedule /SALM/TSD_DATA_EXTRACTION daily by utilizing transaction **SM36** Job Wizard.

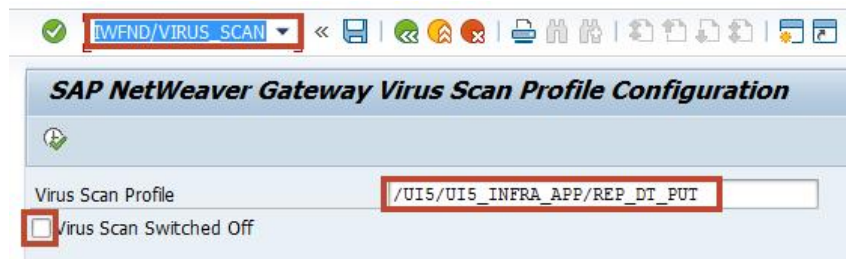
ABAP program name:	/SALM/TSD_DATA_EXTRACTION
Date/time:	<end of day> (recommended after the W extractor)
Period:	daily

Transferring Recorded Times

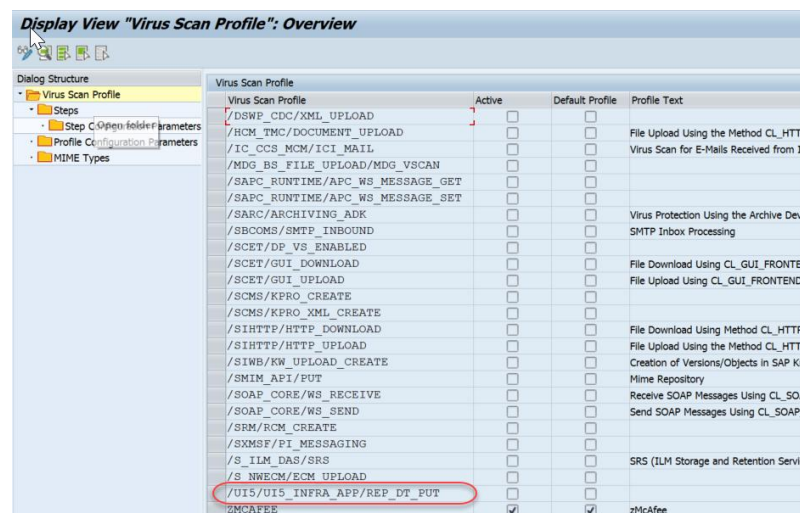
Schedule DPR_CATS_CPR_TRANSF to run daily (overnight) to transfer recorded times back into the project.

2.1.8 Activation of Virus Scan Profiles

To activate the virus protection in your development system, go to transaction **/n/IWFND/VIRUS_SCAN**, search and activate the virus scan profile **/UI5/UI5_INFRA_APP/REP_DT_PUT**.



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



Note

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



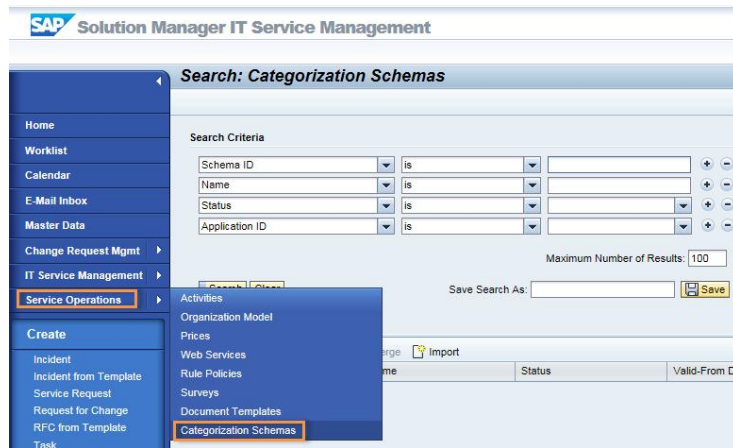
2.1.9 Multilevel Categorization

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 2713624.

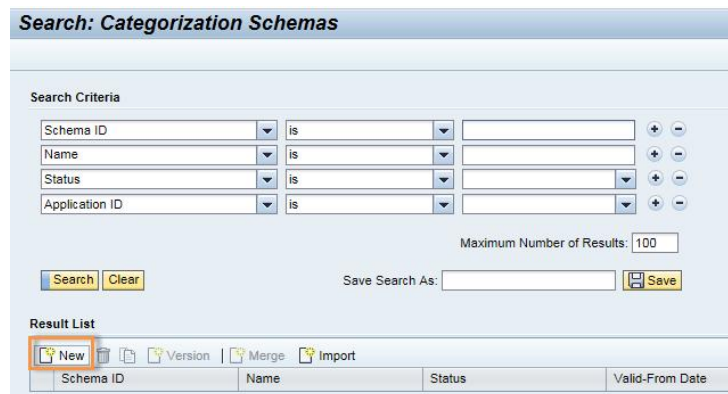
For more information, see the [Multilevel Categorization](http://wiki.scn.sap.com/wiki) guide on the SAP Community Network at <http://wiki.scn.sap.com/wiki>.

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

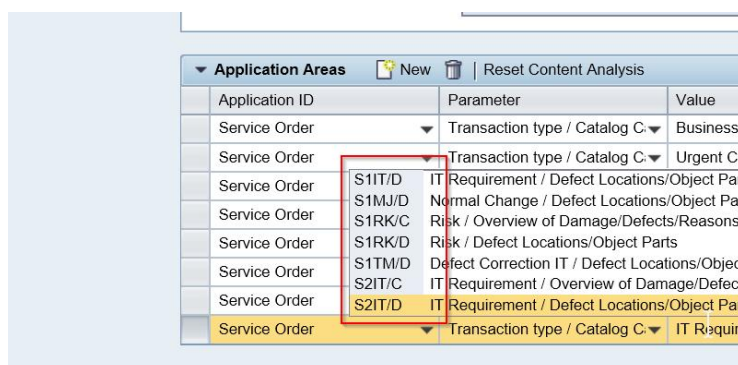
1. Call transaction **SM_CRM**
2. Choose *Service Operations* and then *Categorization Schemas*.



3. Create a new categorization schema and call it **FOCUSED_BUILD**.



4. Assign the application areas as follows:



- 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: EN to

Import

Filename: I:\FB_General.txt

- 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:

- 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
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	

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 [Optional] E-Mail Notification for Work Packages and Items

This functionality is available as of ST-OST SP03 and can be enabled analogous to the standard customizing in Change Request Management:

<https://help.sap.com/viewer/8b923a2175be4939816f0981b73856c7/7.2.08/en-US/3d5b0a5b99714ffca72941337c97be58.html>

2.2.4 [Optional] Enabling Richtext

To enable rich text editing we need to follow these steps:

1. The relevant business type of the transaction type must be maintained in view **CRMV_ITSM_SWITCH**. (For incidents/Defect this would be an entry with **CRM_ITSM_COM** = **BUS2000223**, for WP/BR/WI/RISK... **CRM_ITSM_COM** = **BUS2000116**)

Display View "Assign Business Object Types to Switches": Overview

Switch	Trans.Cat.
CRM_ITSM_COM	S2000116
CRM_ITSM_COM	BUS2000223

Content of this view is transportable within custom request.

- The individual text types must also be maintained in transaction [CRM_C TEXT](#).

Change View "CRM Text Format Customizing Maintenance View": Overview

Text Object	Text Object Description	ID	Text ID Description	Formatted	HTML-Text	Converter Class
CRM_ORDERH	Transaction Header	S105	Comment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	S115	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	SU01	Reply	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	SU99	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION

In this table we add the fields that we want to activate rich text on them.

- To display the rich text component in CRM we need to follow these steps: Click on "[Configure page](#)"

Work Package: 8000000283, OST200: WP_HF_01

Save | Display | Cancel | Edit | Create Follow-Up | Attach Overview PDF | Actions | Auto Complete | Find Related Problems | Open in UI5 App

STATUS OVERVIEW | RELATED TRANSACTIONS

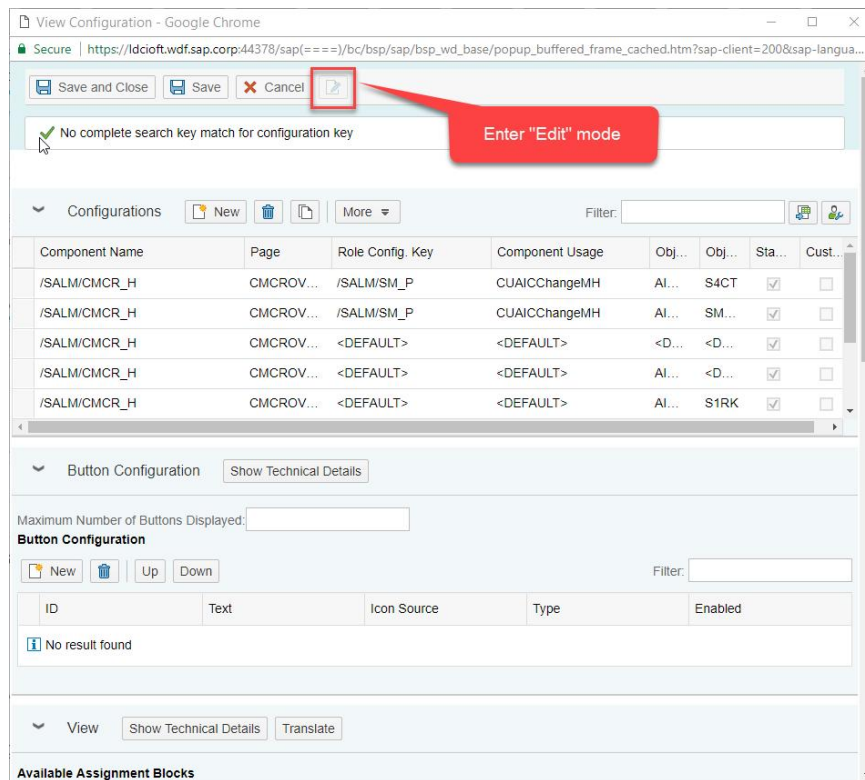
1 Created | 2 Scope Analysis | 3 Scope Completed | 4 **Scope Extension** | 5 Rejected | 6 Postponed | 7 To Be Developed | 8 In Development | 9 In Repair | 10 To Be Tested | 11 Tested | 12 Hand Over to Release | 13 Production

DETAILS | TEXT | SCOPE | SOLUTION DOCUMENTATION | CHECKLIST | TEST MANAGEMENT | CHANGE HISTORY | ATTACHMENTS

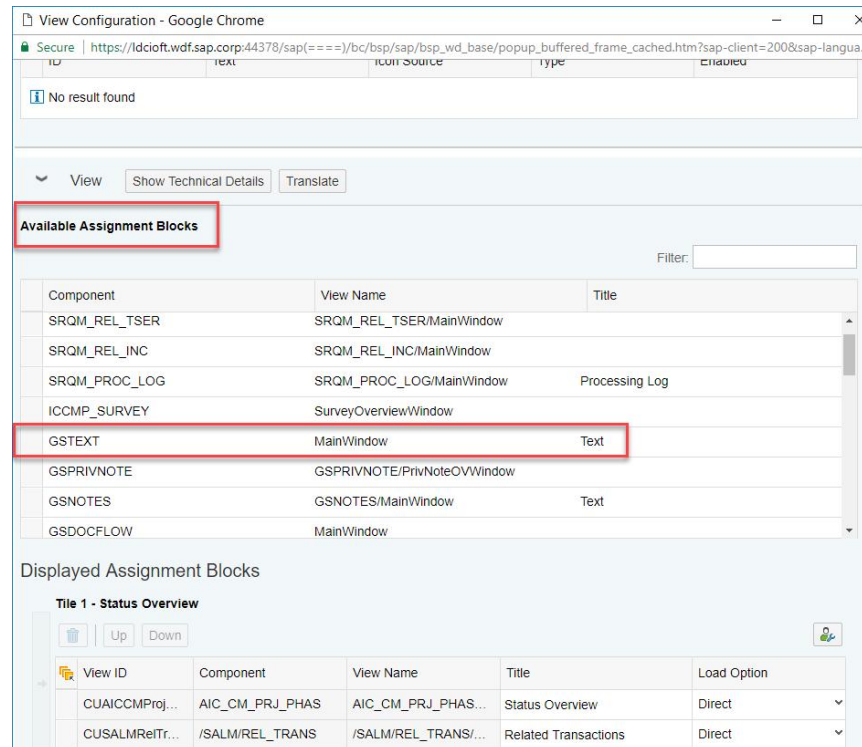
Edit | General Data | Category

Select "Configure page"

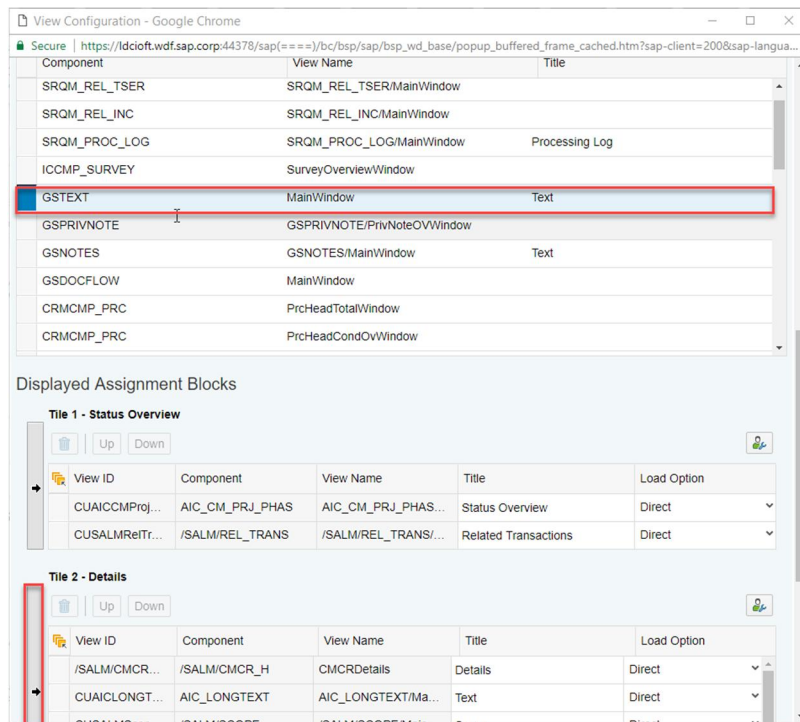
- Enter "Edit" mode



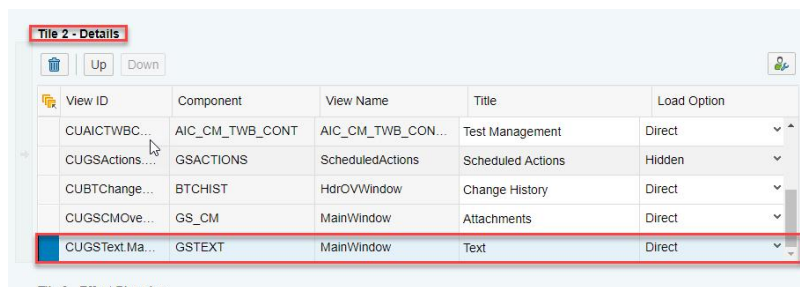
5. Search for "Available Assignment Blocks"



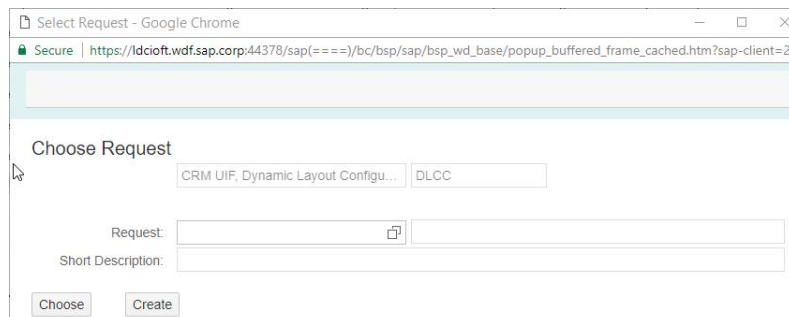
6. Select "GSTEXT"



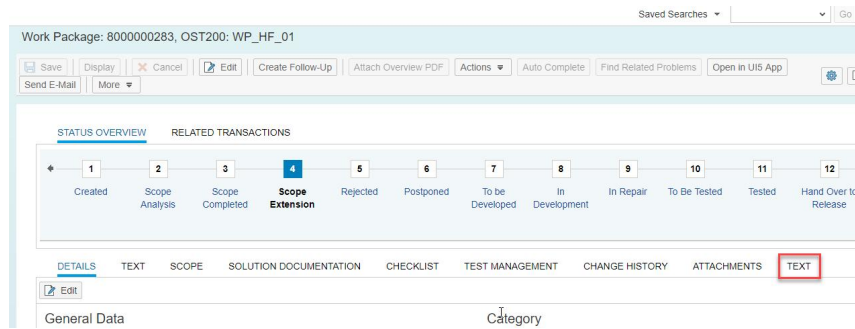
7. Add it to the Details Tile:



8. Create a request

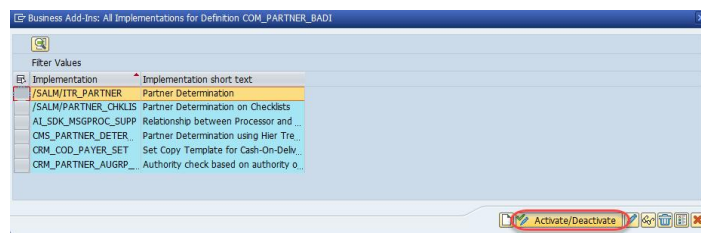


9. Now tab should be added:

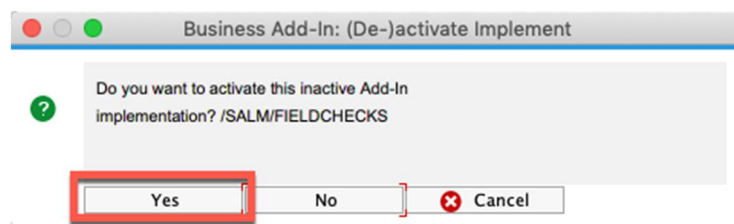


2.2.5 Activation of Required BadIs

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



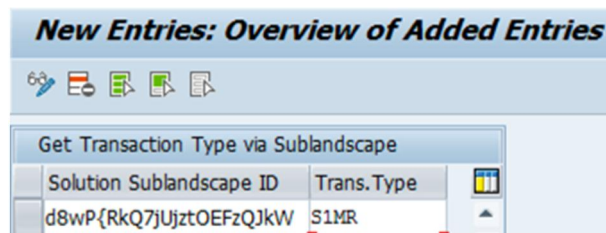
and activate the implementation */SALM/ITR_PARTNER*. In addition, you need to activate the implementation */SALM/FIELDCHECKS* which you find In the customizing of SAP Solution Manager as well *SAP Solution Manager* → *Focused Build* → *Work Package Configuration* → *Activation of required BadIs* → *Activation of CRM_ORDER_FIELDCHECK_NEW*



2.2.6 Release Management

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

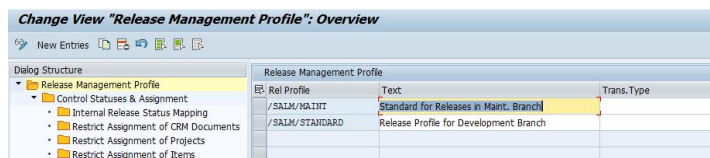
In the customizing of SAP Solution Manager, choose *SAP Solution Manager* → *Capabilities* → *Change Control Management* → *Change Request Management Framework* → *Change Cycles* → *Configure Transaction Type for Sublandscapes* and maintain your *Solution Sublandscape ID* with the relevant cycle transaction type; e.g. S1MR



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.



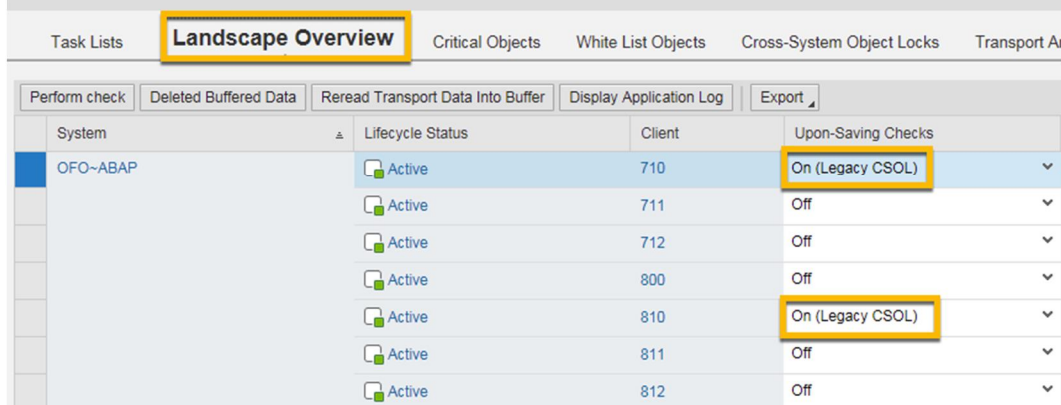
3. Check if all entries are available (if no entries are available check chapter *Activating the Piece List*)

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



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

2.2.7 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
<code>/SALM/RELEASE_DASHBOARD_SRV</code>	Release Dashboard	
<code>/SALM/SOL_READINESS_ODATA_SERVICE</code>	Solution Readiness Dashboard	
<code>/SALM/TEST_SUITE_DASHBOARD_SRV</code>	Test Management Dashboard	
<code>/SALM/TM_TWL_SRV</code>	Tester Worklist	
<code>/SALM/TM_TS_DESIGNER_SRV</code>	Test Step Designer	
<code>/SALM/BUSINESS_REQUIREMENTS_SRV</code>	Requirements Management	
<code>/SALM/MC_SRV</code>	Mass Change App	
<code>/SALM/MANGOCRMUI</code>	Work Package Management and Work Item Management	
<code>/SALM/DROP_DOC_SRV</code>	Integrated dropDoc	
<code>/SALM/MY_DOCS_SRV</code>	My Documents	
<code>/SALM/PARA_CACHE_SRV</code>	Focused Build - Parameter Cache	
<code>/SALM/CRMGENERICAPPCONFIG</code>	My Requirements App	
<code>/SALM/CRM_GENEREIC_SRV</code>	My Requirements App	
<code>/SALM/IT_PPM_UI5_APP_SERVICE_SRV</code>	Project Management	

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/TEST_SUITE_DASHBOARD_SRV_0001](#)
 - o [/SALM/TM_TWL_SRV_0001](#)

- [/SALM/TM_TS_DESIGNER_SRV_0001](#)
 - [/SALM/BUSINESS_REQUIREMENTS_SRV_0001](#)
 - [/SALM/MC_SRV_0001](#)
 - [/SALM/MANGOCRMUI_0001](#)
 - [/SALM/DROP_DOC_SRV_0001](#)
 - [/SALM/MY_DOCS_SRV_0001](#)
 - [/SALM/PARA_CACHE_SRV_0001](#)
 - [/SALM/CRMGERICAPPCONFIG_0001](#)
 - [/SALM/CRM_GENERIC_SRV_0001](#)
 - [/SALM/IT_PPM_UI5_APP_SERVICE_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.

2.2.8 Configure exceptions for naming of automatically created KPI documents

This functionality is delivered active. The default option for document title generation for automatically created documents is:

< Document Type technical ID >_< Name of structure node where document is created >.< File Extension >

Within this configuration you can define exceptions of this naming rule as well as deactivate the automated document creation.

1. Start the customizing for “Exceptions for naming of automatically created KPI documents” using the transaction `spro`. Click on [SAP Reference IMG](#) button and follow the path: [SAP Solution Manager – Focus Build - Documentation - Exceptions for naming of automatically created KPI documents](#), then select the appropriate checkmark.

2.2.9 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](#):

- [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
- [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](#)
 - Define general settings for the Test Steps application such as execution mode, available languages, status-based execution lock and others
 - Define status settings for status of steps such as label, default status, or evidence required
 - Define custom fields which can be used as result attributes during design of test steps documents
 - Define folders to group and organize test steps documents in the designer application
 - Define status aggregation rules which will aggregate step status to test case status during test execution
 - 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:
 - Activations for ICF services
 - Customizing for the Test Suite
 - Activations for the SAP Business Warehouse
 - 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.

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 (S1IT) 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 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.

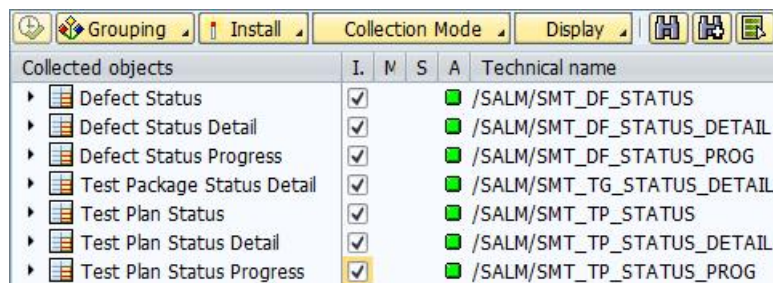
Activation of BEx-Queries

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*) (F7).
 3. Select the following entries:

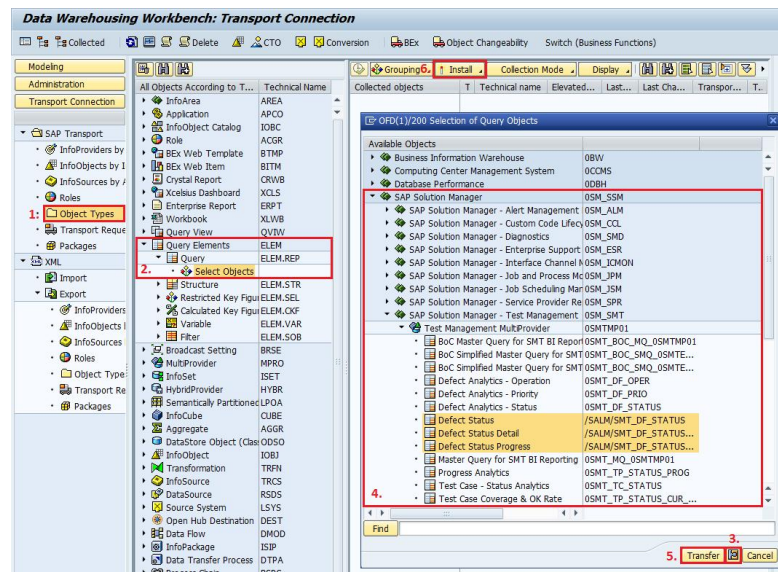
Entry	Technical Name
Defect Status	/SALM/SMT_DF_STATUS
Defect Status Detail	/SALM/SMT_DF_STATUS_DETAIL
Defect Status Progress	/SALM/SMT_DF_STATUS_PROGRESS
Test Package Status Detail	/SALM/SMT_TG_STATUS_DETAIL
Test Plan Status	/SALM/SMT_TP_STATUS
Test Plan Status Detail	/SALM/SMT_TP_STATUS_DETAIL
Test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

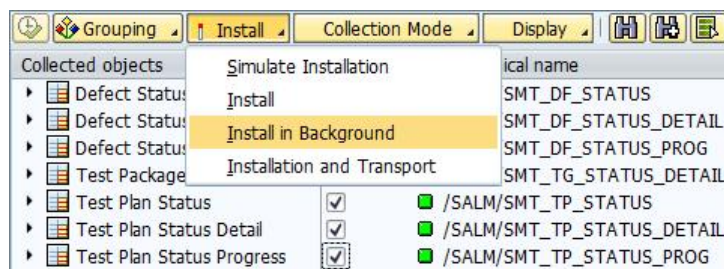


6. When all queries are selected for installation, choose *Install* and then *Install in Background*.



➔ Recommendation

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



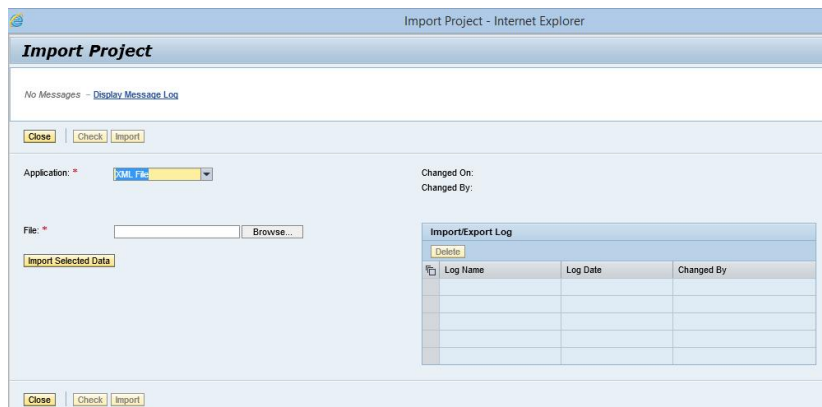
2.2.10 Configuring Project Management

Creating Projects Templates

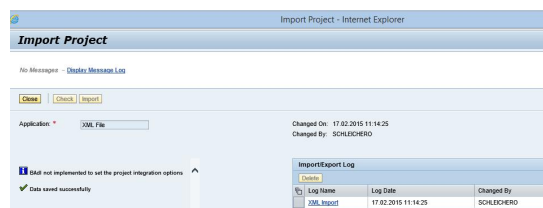
1. Download the project template XML files from SAP Note

SAP Note	Description
2713624	Focused Build: Central Note for Focused Build 2.0 SP03 for SAP Solution Manager 7.2 = SP08

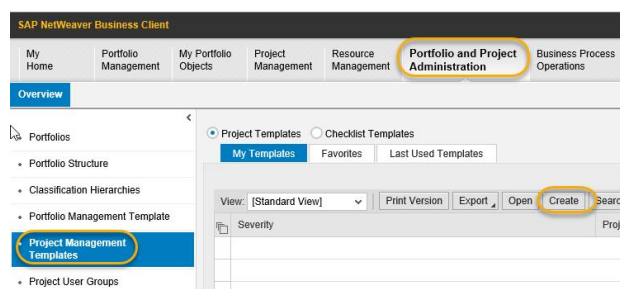
2. To start Project Management, on the SAP Solution Manager Launchpad, choose *My Projects*.
3. Choose *Projects* and then choose *Import Project*.
4. In the *Application* field, select *XML File*.



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

Field	Value
Template	One of the projects provided, for example, <i><Template: Focused Build_Build_Project></i>
New Checklist Templates	<i>None</i>
Original Language	<i>English</i>

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 6.8 Delete of obsolete projects.

2.3 Important Links

Batch job scheduling:

https://help.sap.com/saphelp_nw70/helpdata/EN/c4/3a7f87505211d189550000e829fbbd/frameset.htm

Learning Map including How to's:

https://service.sap.com/sap/bc/bsp/spn/esa_redirect/index.htm?gotocourse=X&courseid=70324959

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)	Log Comp Grp.	System Role	SID	Client
	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.

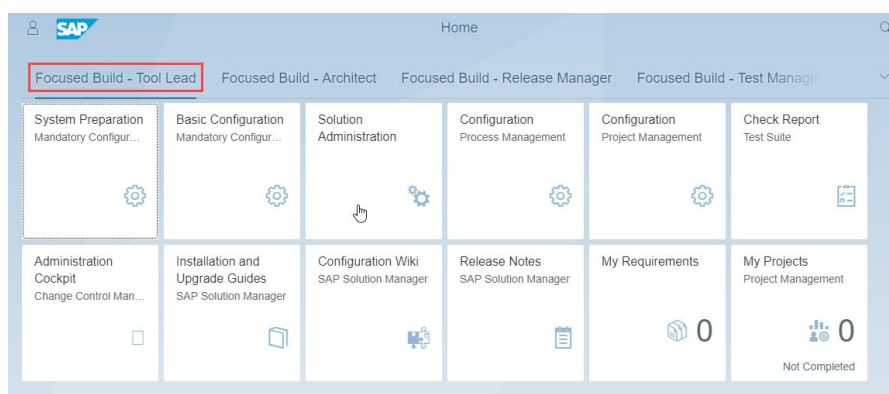
The general recommendation is to use only one solution to reflect the entire system landscape and its documentation also for large and interconnected companies.

Assumption:

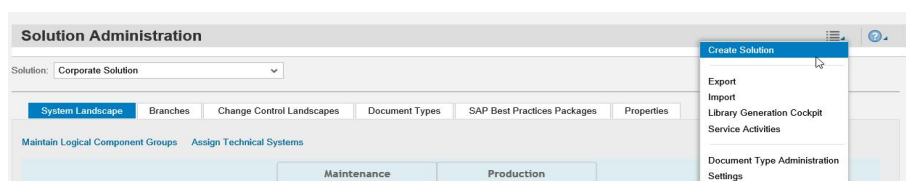
The customer is not using any Solution yet in their SAP Solution Manager system. At the end of this section, we describe how to deal with customers, who are already using Solution(s) in their system.

How to create a Solution:

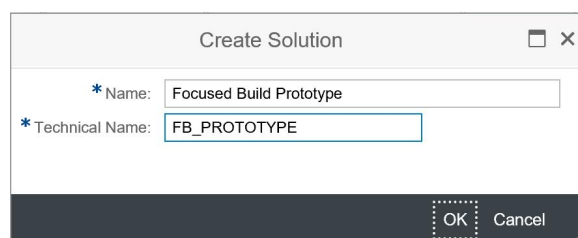
1. Enter "Solution Administration" either via transaction code SOLMADM or via the SAP Solution Manager Launchpad (Section "Project and Process Management" => Solution Documentations). See screenshot below.



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



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



4. 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.

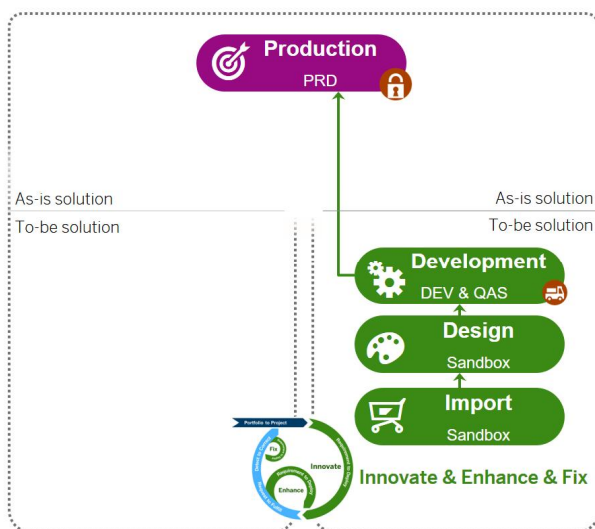
Typically, a solution contains a production branch, a maintenance branch and a development branch.

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.





■ Production branch

- Production branch represents the productive 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

 = Locked

 = Change controlled



Caution

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

Production branch

Production branch represents the productive solution

Innovation branches

Import branch to import new best-practice processes

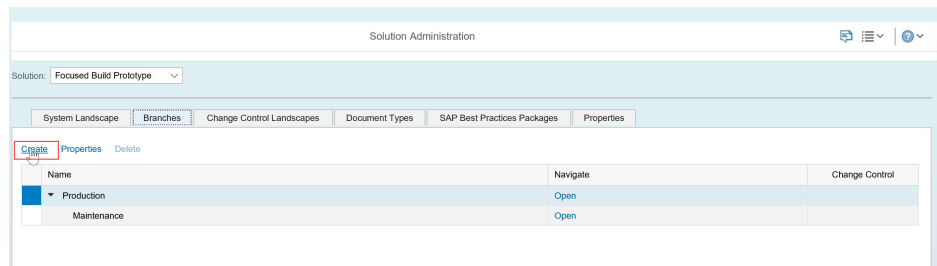
Design branch to design customer target operating model

Development branch to build the actual operating model

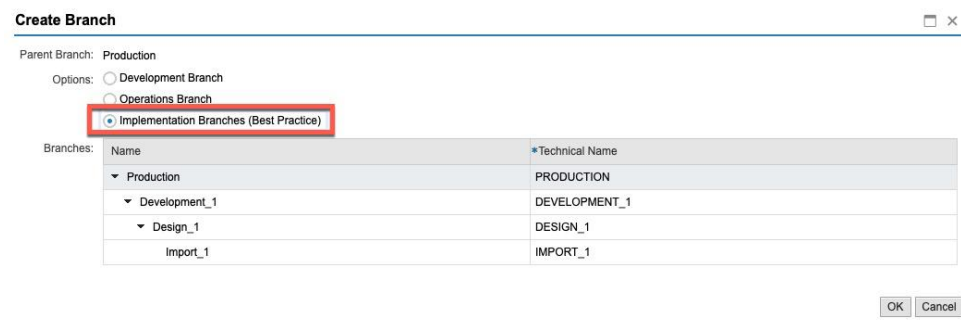
The design is the branch to be used during Build Design Support.

How to create the best practice branch structure?

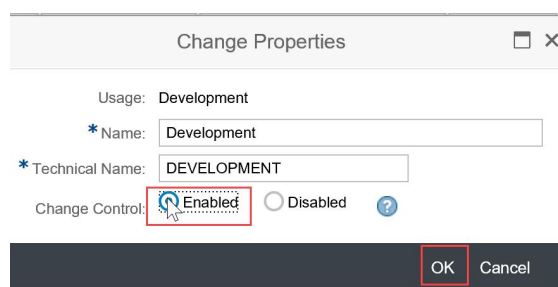
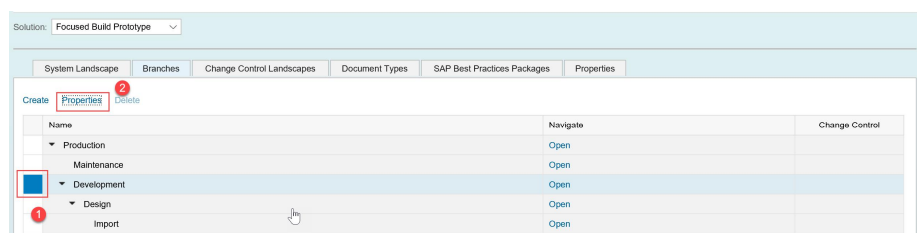
1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "Branches". The below screen will appear showing the production and maintenance branch.



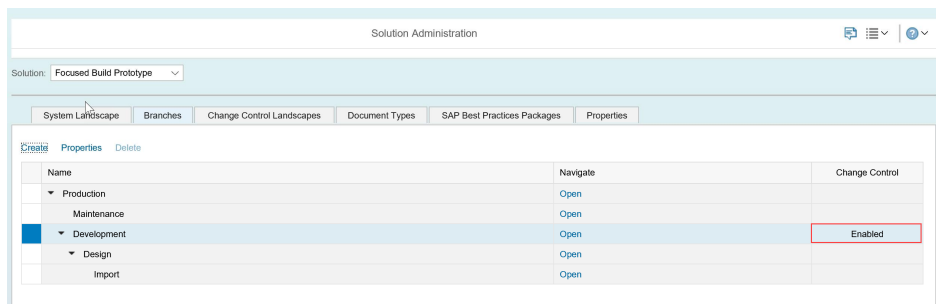
3. Mark the Production Branch and select on "Create"
The below screen will appear, confirming the parent branch (in this case Production branch). Select *Implementation Branches (Best Practice)*.



4. Enable Change Control for Development branch



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



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 SAP Solution Manager 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.

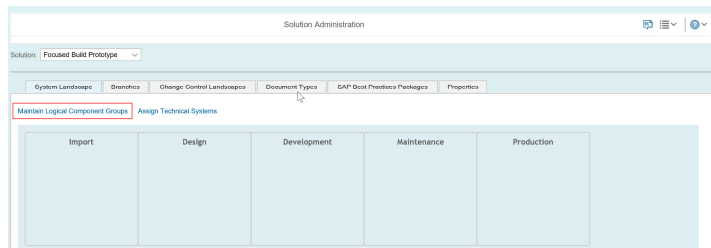
The technical systems assigned to logical components are classified according to their system role e.g. development system, quality assurance system.

Assumption:

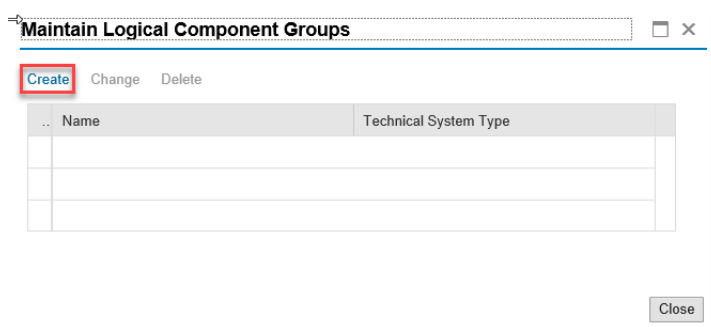
For the prototype we use a Demo landscape which is a simulation of transport landscape using different clients in the same system. Creating of Demo Landscape is described in the appendix.

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

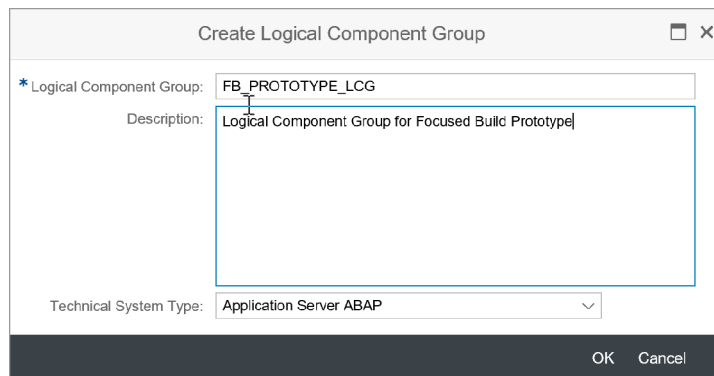
1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "System Landscape". The branches created will be displayed (see below).
3. Click on "Maintain Logical Component Groups"



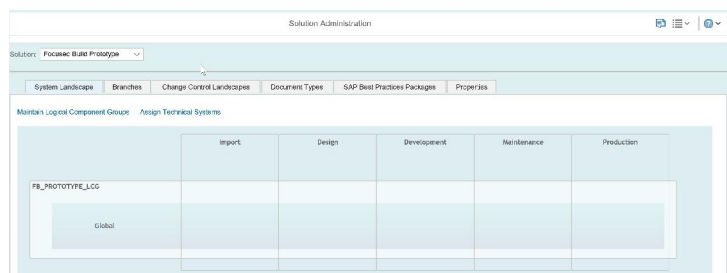
4. A screen appears showing all LCGs, which are available for this Solution. Click on “Create” to create a new LCG for the S/4HANA landscape.



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.



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



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

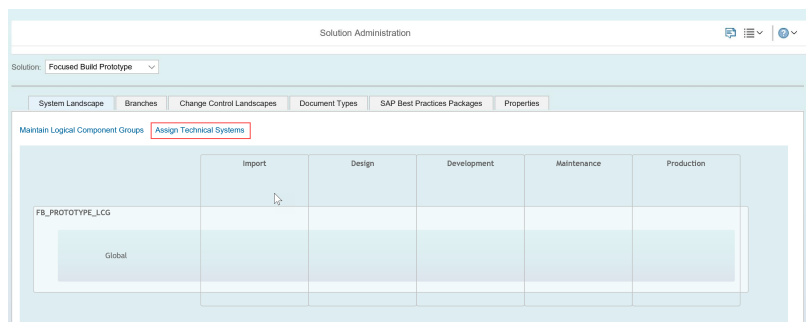
How to assign a system?

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.

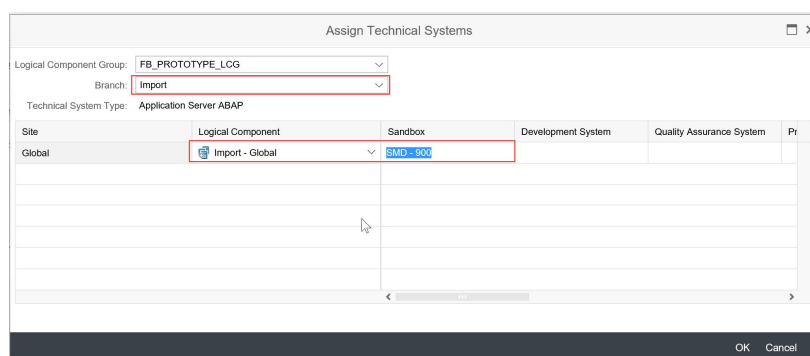
In this example, we assume that a system S4H / client 100 acts as S/4HANA sandbox. To assign the system, it must be known to SAP Solution Manager. That means the system must exist in LMDB and an RFC exists (preferable the managed system setup was executed).

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

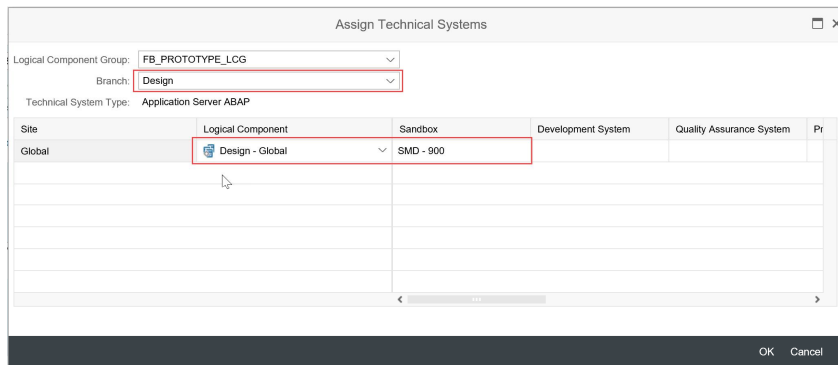
1. Ensure that you are in the correct Solution in transaction SOLADM.
2. Click on tab "System Landscape". The branches and the logical component group created will be displayed (see below).
3. Click on "Assign Technical Systems"



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. .



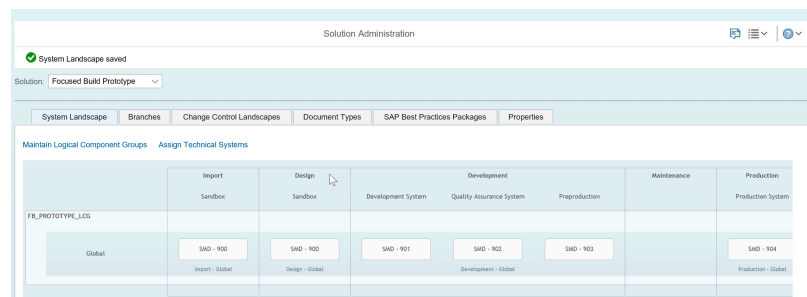
5. Click OK and then again 'Assign Technical Systems'
6. For the Design branch we assign the same system/client like for sandbox.



7. On the previous window select "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:



3.3.4 Related Documentation

For more information about Change Request Management, go to SAP Help Portal at https://help.sap.com/viewer/p/SAP_Solution_Manager, select version 7.2 SPS 8. 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.

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

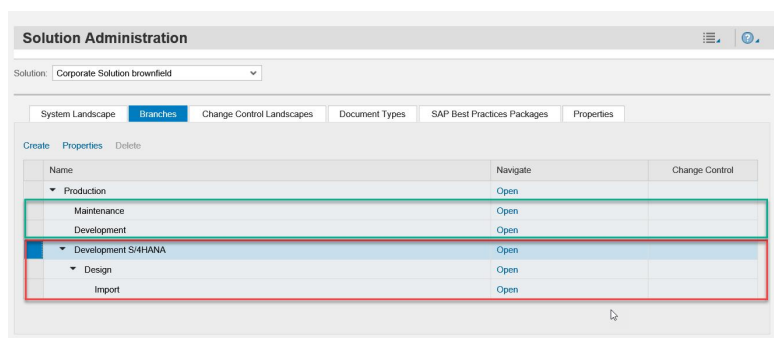
Basically, we recommend separating the S/4HANA implementation from other implementation project or the maintenance of the current Solution. That means that we recommend a branch structure "Development" => "Design" => "Import" (as described in xxx) as a child of the production branch. That can co-exist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



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

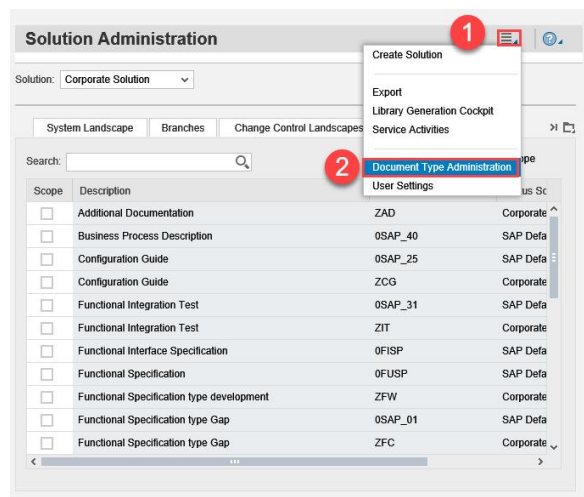
To ensure a smooth transition to Build Execution, all results documents should be available (and uploaded to Solution Manager) at the end of the FitGap / Delta Design. The management of these documents obviously becomes easier if...

- 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'

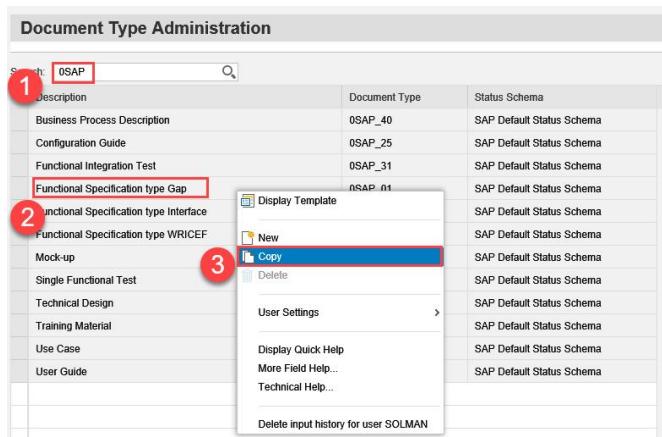
Description	Document Type	Status Schema
Functional Specification type Gap	OSAP_01	SAP Default Status Schema
Functional Specification type WRICEF	OSAP_02	SAP Default Status Schema
Functional Specification type Interface	OSAP_03	SAP Default Status Schema
Use Case	OSAP_11	SAP Default Status Schema
Technical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

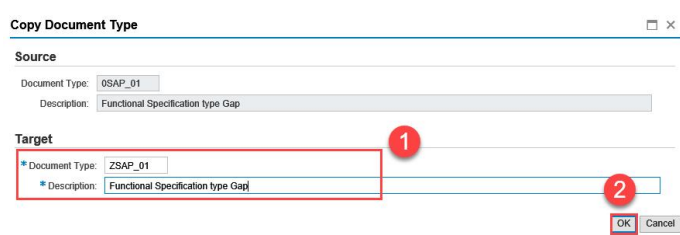
Go to Solution Administration à 'Global Functions' à Document Type Administration:



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

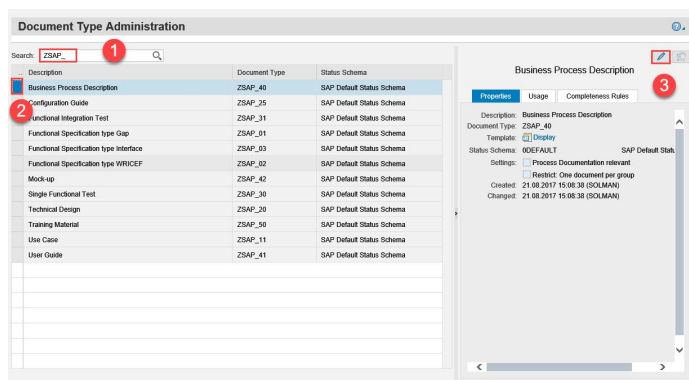


In the dialog box enter target document type (e.g. ZSAP_XX) and related description and confirm with OK:

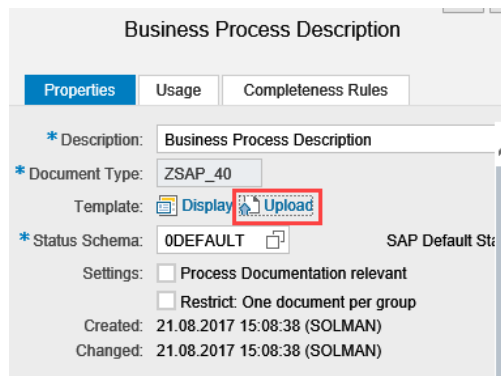


Repeat this for all standard Document Types (OSAP_XX)

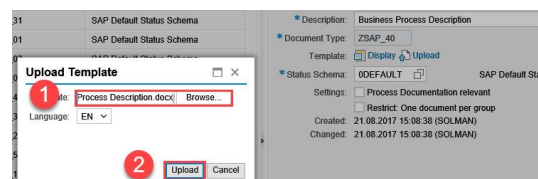
Enter search term that reflects you naming convention (e.g. ZSAP), press Enter, select one of the listed entries and choose 'edit' button



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



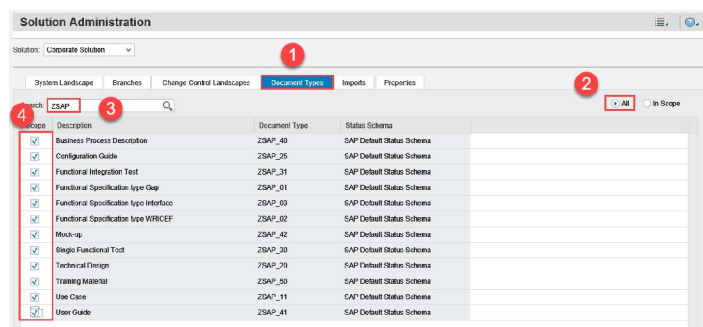
Use dialog box to browse for the document template and select 'Upload'



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

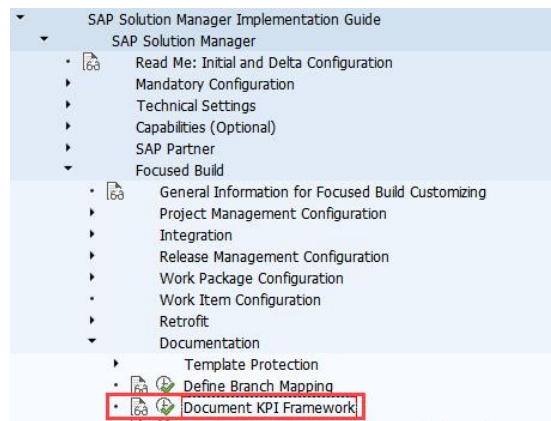
Repeat the upload for all customer Document Types (ZSAP_XX)

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:



3.3.7 Adjust Customizing for Document KPI Framework

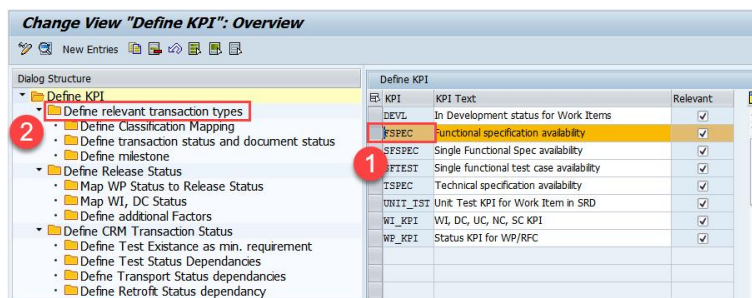
To be able to use the KPI reporting for the created document types you need to adjust the related customizing. To do so start SPRO and open the IMG note for Document KPI Framework:



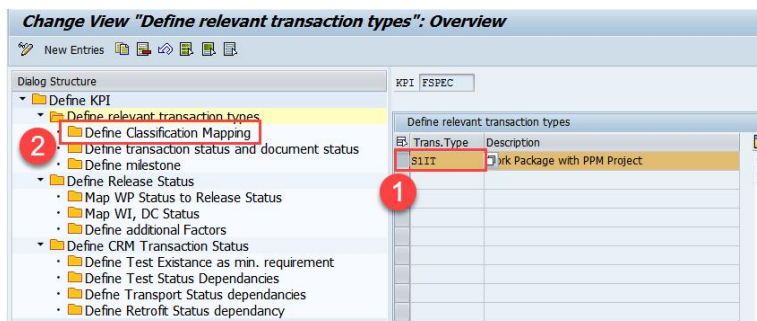
For following KPIs the Document Types need to be changed from OSAP_XX to the new types created in the previous chapter:

KPI
FSPEC
SFTEST
TSPEC

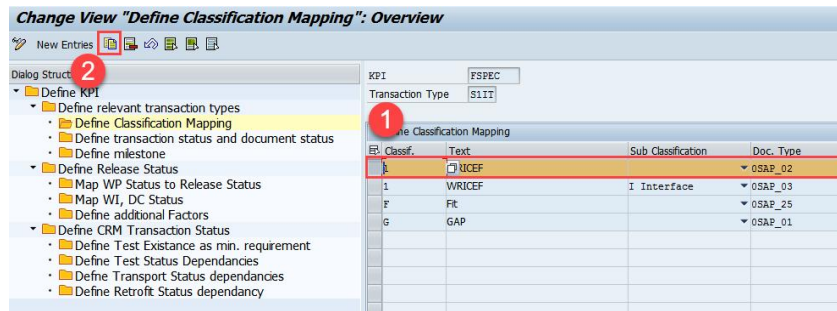
1. Select entry of KPI and then double-select on 'Define relevant transaction types'



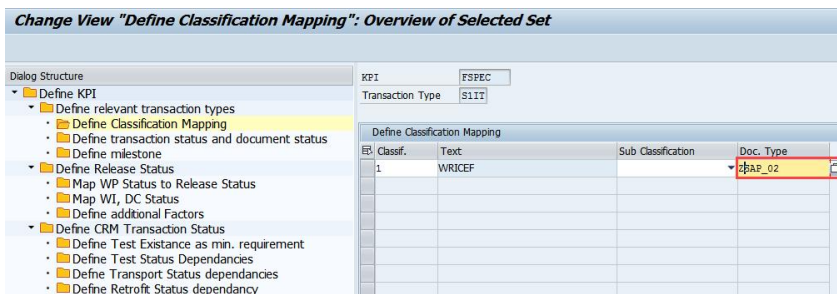
2. Select transaction type and then double-select on 'Define Classification Mapping'



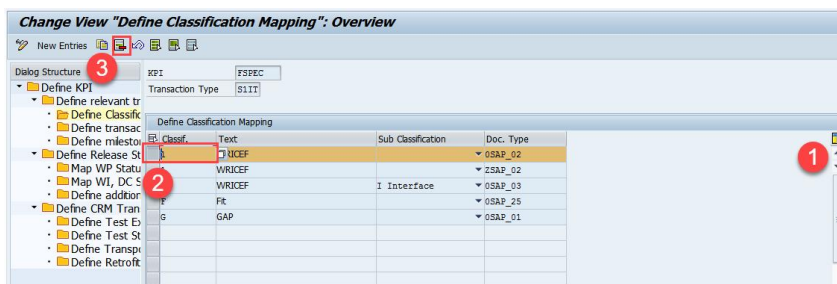
3. Select the first entry and choose 'Copy' button



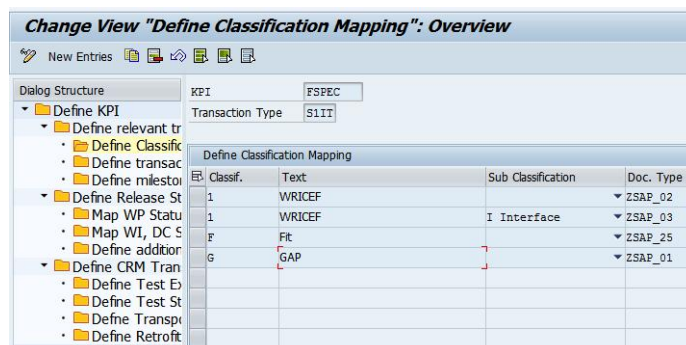
4. Adjust Doc. Type entry and press 'Enter'



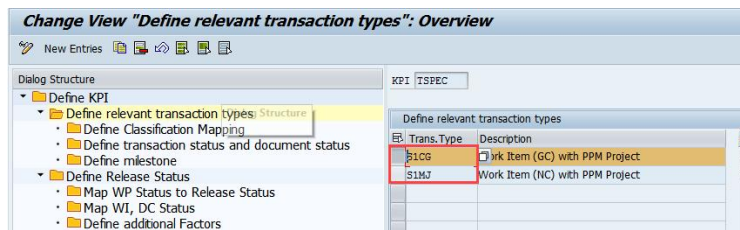
5. Scroll up the table and delete the original entry with 'OSAP_XX' Doc. Type



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



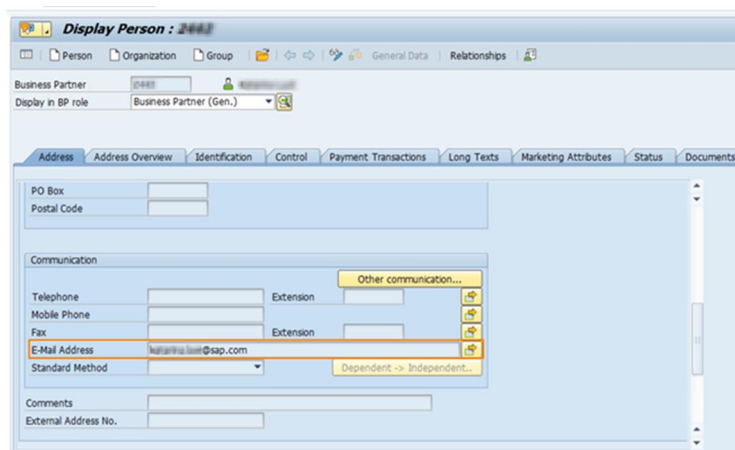
7. Repeat steps 1 - 6 for KPI 'SFTEST'
8. Repeat steps 1 - 6 for KPI 'TSPEC' for each transaction type S1CG and S1NC



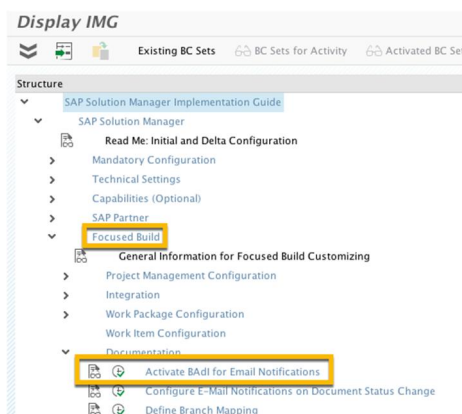
3.3.8 Configure E-Mail Notifications on Document Status Change

i Note

The E-Mail notification will be sent to the E-Mail address which is being maintained in business partner. Use the transaction **bp** for Business partner in your system. Search for the user and check the E-Mail in "Communication" part of Business partner form.



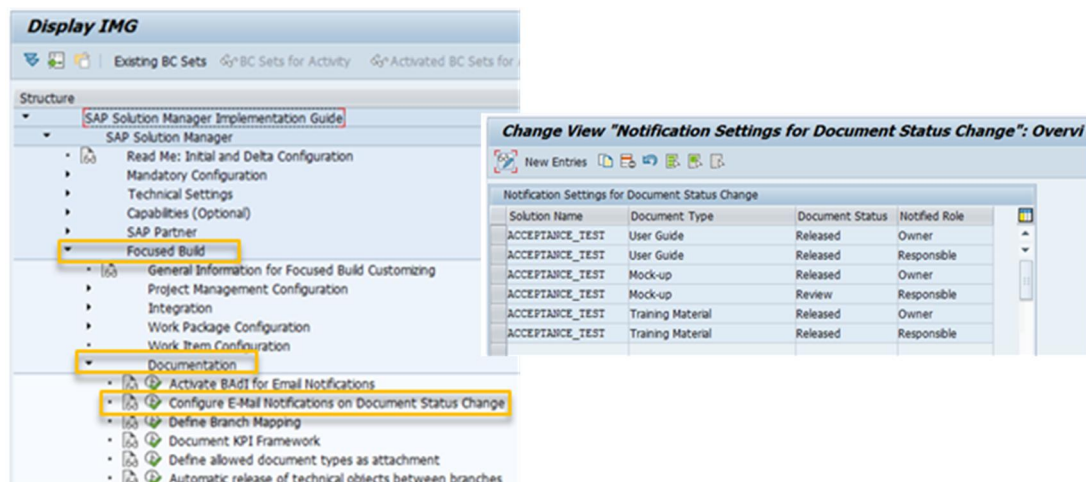
1. Start the customizing of E-Mail notification by using the transaction **spro**. Click on [SAP Reference IMG](#) button and follow the path: [SAP Solution Manager – Focus Build - Documentation - Activate BAdI for Email Notification](#), then select the first checkmark.



2. Select the next option *Configure E-Mail Notifications on Document Status Change*.

In the table you see the document type, the document status and who should be notified – the owner or the responsible. Therefore, the customizing table “Configure E-Mail Notification on Document Status Change” contains the parameter:

- o Solution Name
- o Document Type
- o Document Status
- o Notified Role



3. Here you can create and save the new customizing parameter, by selecting New Entries button. The F4-Help/Contextual Help is implemented for all input fields.

1 Note

- o The creator of the documents is always the owner of the new created document.
- o The E-mail notification will be sent successfully, triggered by status change of the document. It may take some time.
- o The E-mail notification contains the document name and link to the document in MyDocuments app.

Dear [Name],

The document titled "(UG) User Guide 1" has been set to status Review.
You can view the document in SAP Solution Manager following the link:

https://LDCIOFD.MQ.SAP.CORP.44390/sap/bc/ui5_ui5/salm/my_docs/index.html#/OwnedByMe/051Mjh1T7kQ1sfXYchZHDm%2F051Mjh1T7k2F00505686805D1EE88CED5ECA27D75CC3

Best Regards,
Your SAP Solution Manager

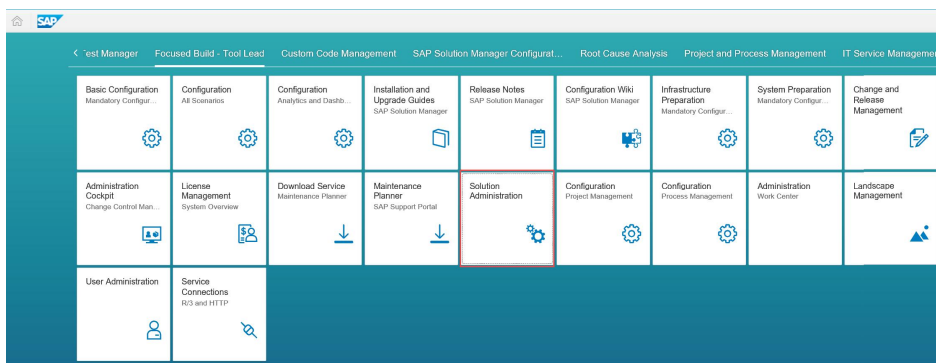
3.3.9 Import Best Practice Content into Import Branch

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.

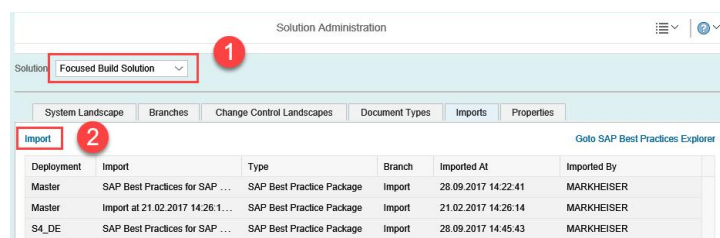
Furthermore, it is mandatory that SAP note 2194123 is implemented.

How a to create import best practice content?

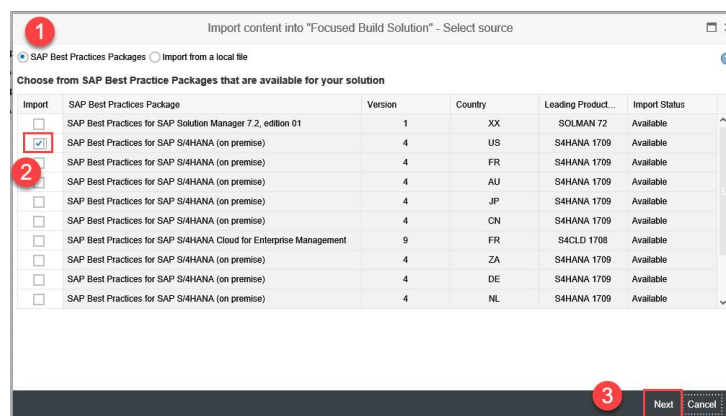
1. Ensure that you are in the correct Solution in transaction SOLADM or go via Launchpad group Focused Build - Tool Lead à Solution Administration



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



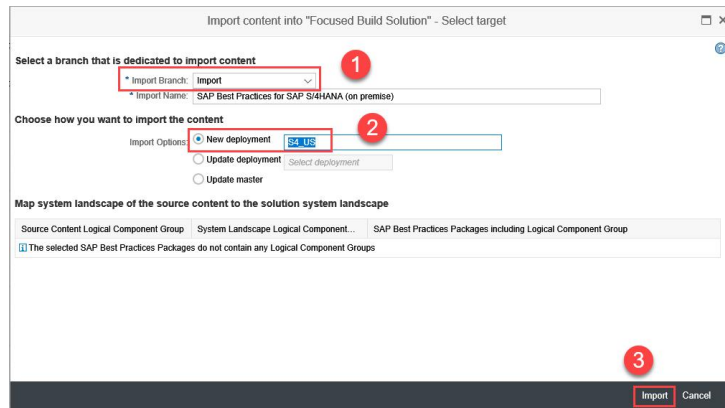
3. In the next screen, select the appropriate best practice package and select "Next".



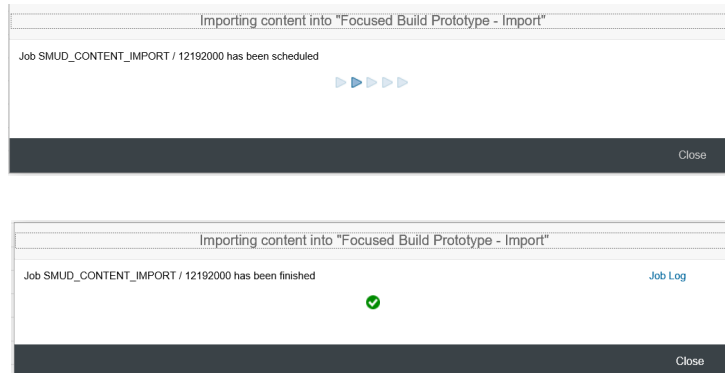
Note

If nothing is display, please revisit SAP note 2194123 Setup HTTP connections to import SAP Best Practices Packages into solutions.

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.



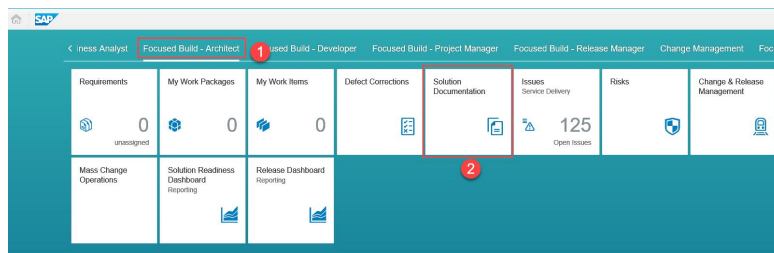
5. Click in "Import". A background job will be triggered to perform the actual import.



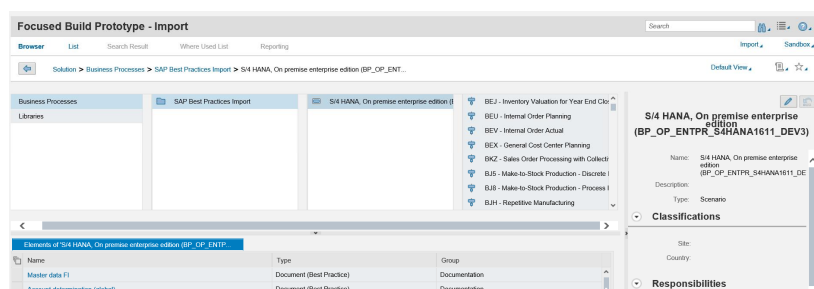
6. A success message indicates that the import was successfully done.

3.3.10 Release Scope-relevant Processes into Design-Branch

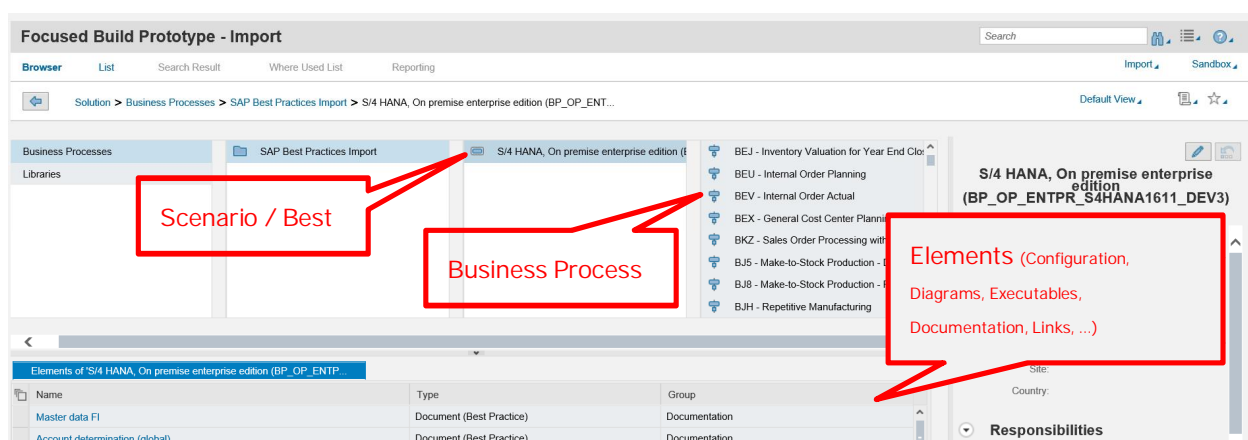
1. First, let's look at what we just imported. From the SAP Solution Manager Launchpad ("Focused Build - Architect") select the "Solution Documentation" Tile.



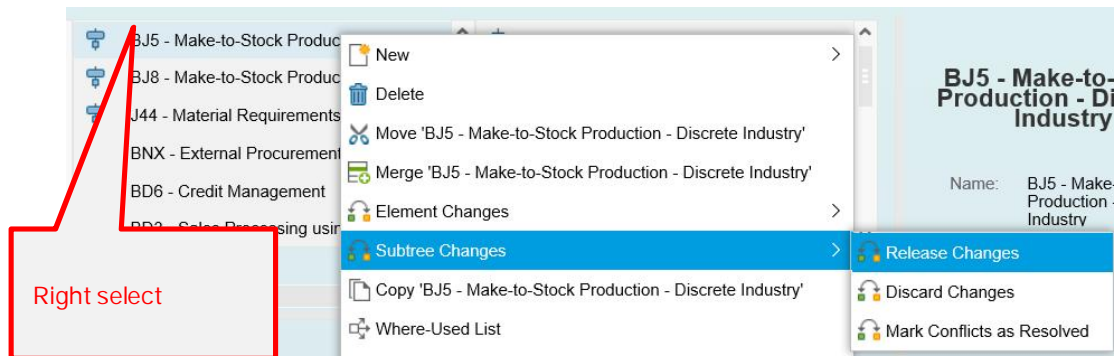
- The top of the screens indicates which solution/branch is selected. Make sure you are looking at the Import branch of the newly created solution. To switch to another solution, select 'Global Functions' à Solution. To switch to a different branch in the selected solution, use the branch dropdown field.



- 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 – if 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.
- Expanding the Import branch's content (Business Processes à Best Practices Import à <Best Practice Package> à <Best Practice Process> à 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.



- 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).

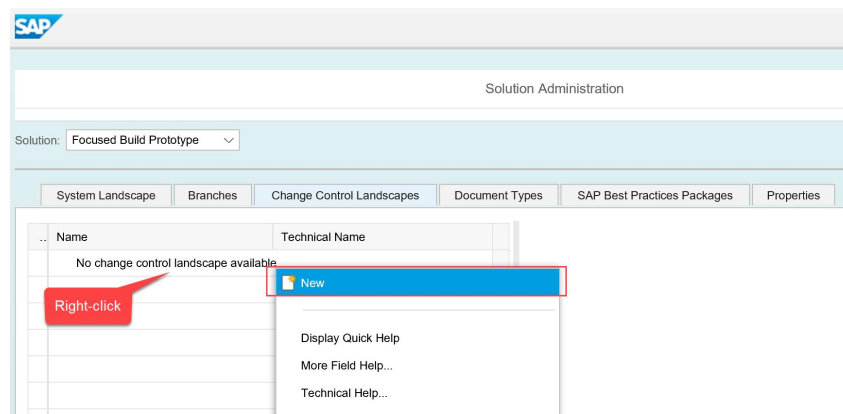


- To do so, right select on a relevant best practice process, then chose "Subtree Changes" à "Release Changes" and confirm the dialog box. The selected process has now been released to the DESIGN branch, where gaps will be documented, and best practice process can be adjusted.

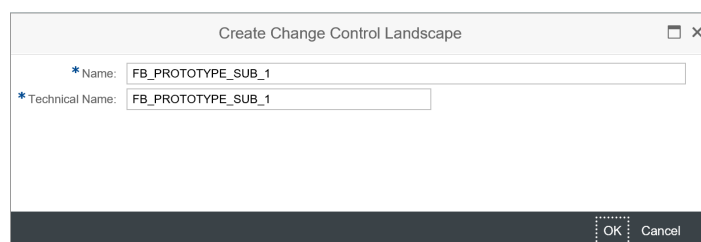
3.3.11 Create Change Control Landscape

Create Change Control Landscape in SOLADM:

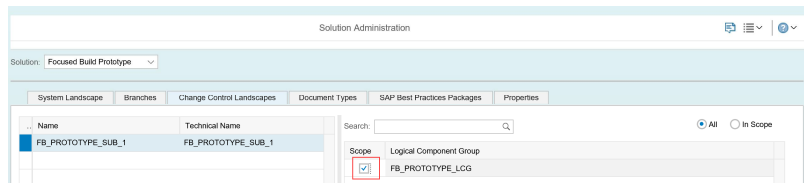
- Select right solution and the tab Change Control Landscape
- Right-select on empty area in the table and select new in the dropdown menu



- Enter name and technical name



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



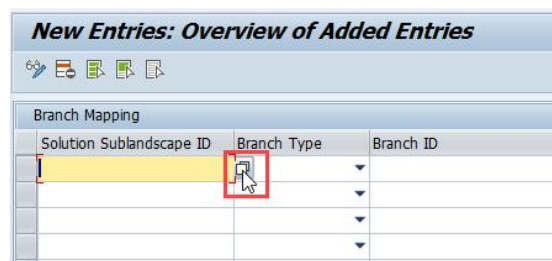
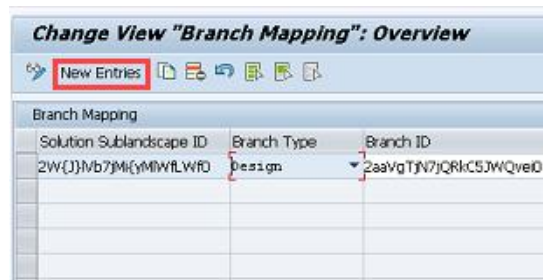
3.3.12 Transaction Type for Change Control Landscape

Perform the steps described in chapter **Error! Reference source not found.** to assign the required Transaction type for your new Change Control Landscape.

3.3.13 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:

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



Sublandscape GUID (1) 23 Entries found

Restrictions

Solution Description	Branch Description
Focused Build Prototype Design	
Focused Build Prototype Development	
Focused Build Prototype Import	
Focused Build Prototype Maintenance	
Focused Build Prototype Production	

Branch Mapping

Solution Sublandscape ID	Branch Type	Branch ID
051MXMAK7jQxm4UXqps{S...	DESIGN Design	051MXMAK7kQxmTlweN{2...
	DEV Development	

New Entries: Overview of Added Entries

Branch Mapping

Solution Sublandscape ID	Branch Type	Branch ID
051MXMAK7jQxm4UXqps{S...	DESIGN Design	051MXMAK7kQxmTlweN{2...

Sublandscape GUID (1) 23 Entries found

Restrictions

Solution Description	Branch Description
Focused Build Prototype Design	
Focused Build Prototype Development	
Focused Build Prototype Import	
Focused Build Prototype Maintenance	
Focused Build Prototype Production	

New Entries: Overview of Added Entries

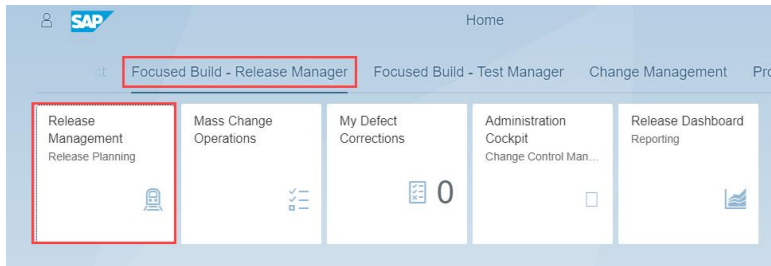
Branch Mapping

Solution Sublandscape ID	Branch Type	Branch ID
051Me1R}7JU1}4rx2Np0}G	DESIGN Design	051Me1R}7JU1}6KPSnMW}G
051Me1R}7JU1}4rx2Np0}G	DEV Development	051Me1R}7JU1}5(3R)UW}G
	DESIGN Design	
	DEV Development	

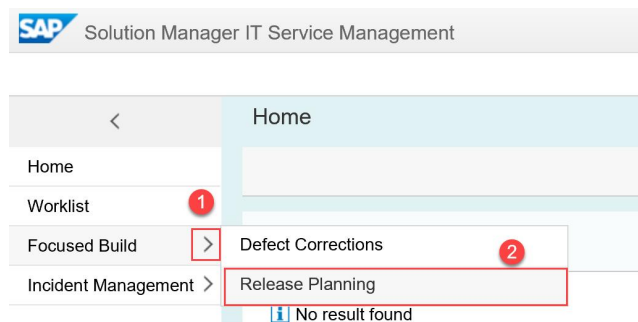
3.4 Setup Release Management

3.4.1 Release Planning

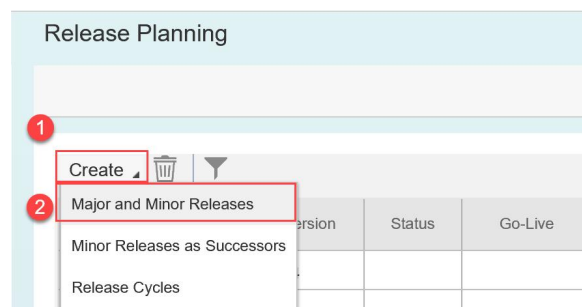
1. Select Release Management tile in the Launchpad



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



3. Select Create à Major and Minor Releases



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: FB_PROTOTYPE_SUB_1

Major Release

*Number of Major Releases: 3

*Duration (Days): 360

*Branch: Development

*Go-Live Day: Sunday

*Go-Live Date of First Major Release: Dec 31, 2017

Minor Release

*Number of Minor Releases: 0

*Duration (Days): 0

*Branch: Maintenance

*Go-Live Day: Sunday

Create Cancel

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

Create

	Landscape / Release Version	Status	Go-Live	Branch	Semester1 2017	Semester2 2017	Semester1 2018	Semester2 2018
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

- Select Create → Release Cycles

1 Create

2

	Landscape / 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

- Confirm creation of Release Cycle

Create Release Cycle

Do you want to create Release Cycle for selected release?

Yes No

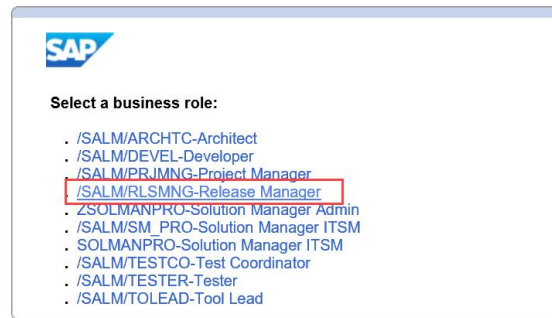
- Navigate to Release Cycle while selecting on the related entry in the release table

Release Planning

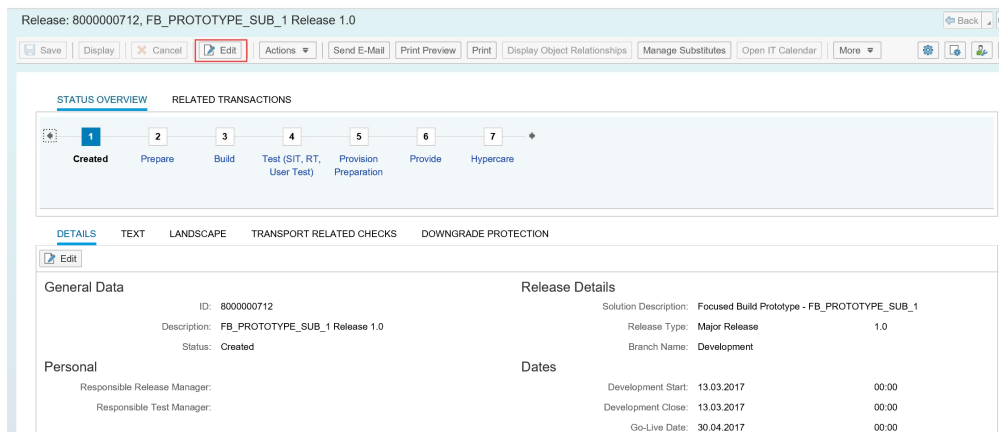
Create

	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_SUB_1
3	Major Release 2.0	Created	03.09.2017	Development	FB_PROTOTYPE_SUB_1
4	Major Release 3.0	Created	07.01.2018	Development	FB_PROTOTYPE_SUB_1

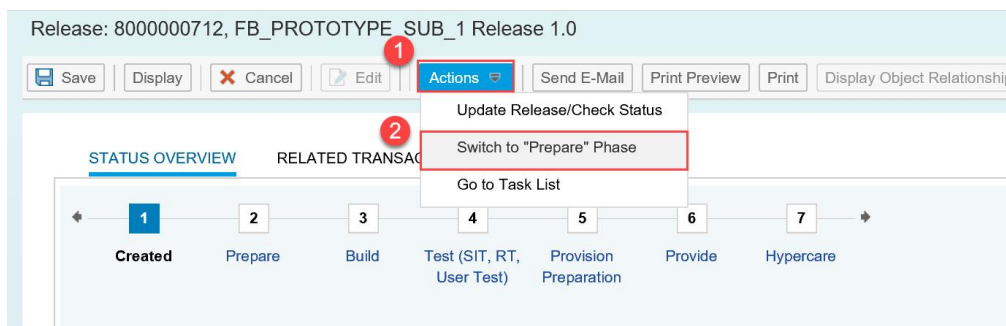
9. Select Business Role of Release Manager



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



11. Select Actions à Switch to "Prepare Phase"

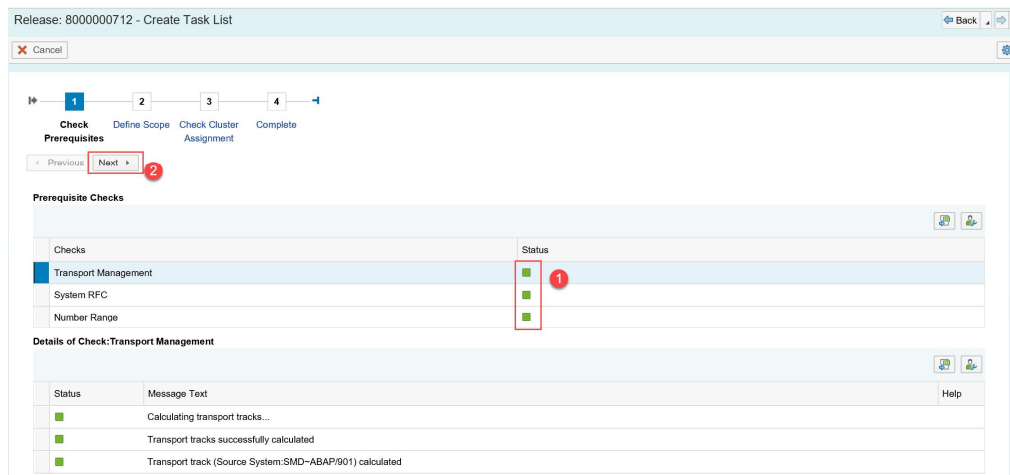


12. Confirm to create the task list

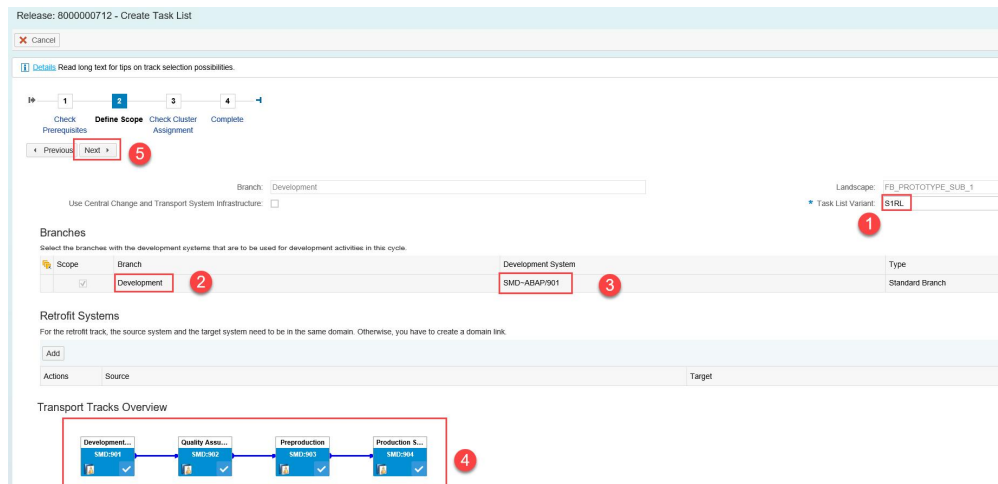
There is no active task list assigned to the cycle. Do you want to create or assign the task list now?

Yes No

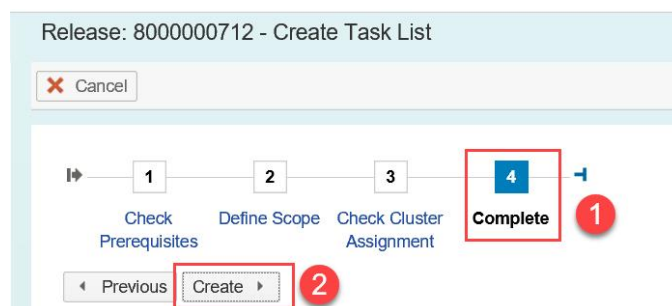
13. Click next and check status of prerequisites



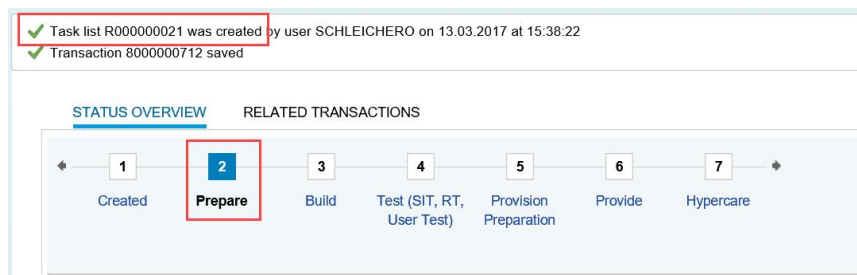
14. Check that task list variant is 'S1RL', branch is Development, assign development system, transport landscape and continue with Next



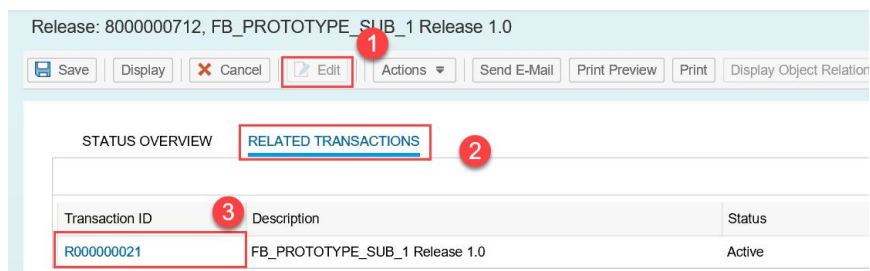
15. To complete Task List creation select 'Create'



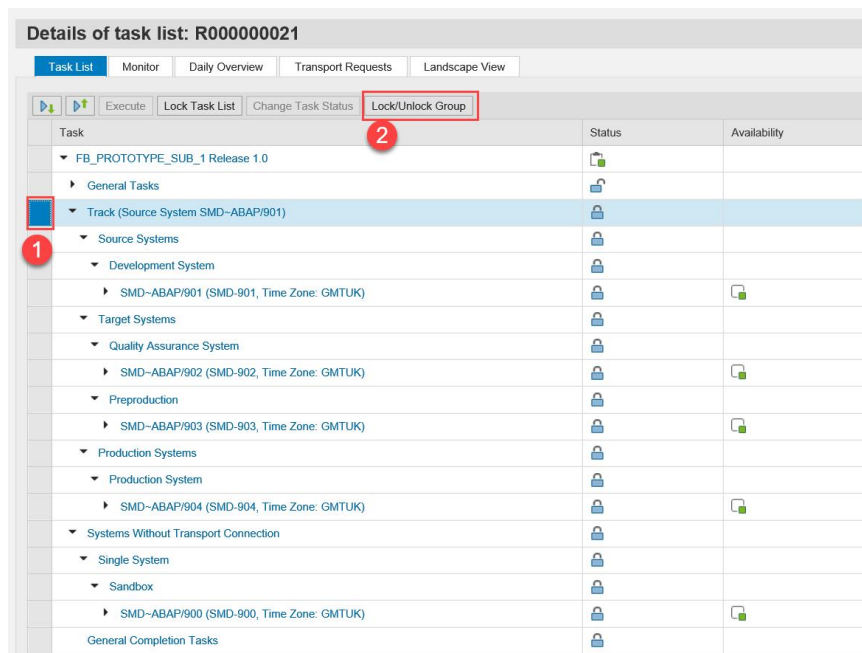
16. Check message that Task List has been created and Release has been switched to "Prepare" Phase.



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



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



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

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	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			

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 Object

✓ Transaction 8000001110 saved

STATUS OVERVIEW RELATED TRANSACTIONS

3.4.2 Prepare Release Component for Batch Import

Please refer to 2.2.6 Release Management ® (3) Maintain Landscape Data.

3.4.3 Define Release Profile Mapping

If you are creating a new release component or change control landscape which shall be utilized in Focused Build, 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 by clicking *New Entries*.

Change View "Release Component and Mapping Profile": Overview

New Entries

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, design or import 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

3.5 Project Setup

For the prototype example, we create:

- 1 master project
- 2 build projects

3.5.1 Create Projects

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

☒ Project Templates
 ☐ Checklist Templates

My Templates
 Favorites
 Last Used Templates

View: * [Standard View]
 Print Version
 Export
 Open
 Create
 Search
 Remove from Dashboard
 SAP BusinessObj

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

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

Developer	Focused Build - Project Manager	Focused Build - Release Manager	Change Management	Focused Build - Tester	Focused Build - Tool Lead	Focused Build - Test Manager		
<div>Project Management</div> <div>Focused Build Projects</div> <div><div><div></div><div>217</div></div><div>Not Completed</div></div>	<div>Requirements Management</div> <div><div><div></div><div>675</div></div></div>	<div>My Requirements</div> <div><div><div></div><div>3</div></div></div>	<div>My Work Packages</div> <div><div><div></div><div>41</div></div></div>	<div>My Risks</div> <div><div><div></div><div>0</div></div></div>	<div>Issues Service Delivery</div> <div><div><div></div><div>9</div></div><div>Open Issues</div></div>	<div>My Tasks Project Management</div> <div><div><div></div><div>0</div></div><div>Not Completed</div></div>	<div>Solution Readiness Dashboard Reporting</div> <div></div>	<div>My Defects</div> <div><div><div></div><div>1</div></div></div>

- In the Project Management app select *Create Project*

https://ldci0ft.wdf.sap.corp:44390/sap/bc/v_

Focused Build Project

Hide Filter Bar Filters Go

Project ID: Project Name: Start Date: End Date: Project Status:

Project Type: Project Language: Responsible Person:

Projects (215)

Severity	Project ID	Project Name	Start Date	End Date	Project Status	Project Type	Project Language	Responsible Person
□	001_MASTER_F...	Master Project fo...	26.12.2017	30.12.2018	Created	Focused Build ...	English	Test Team BRAEMERH
◆	002_BUILD_FB...	002 Build Project...	31.12.2017	30.12.2018	Created	Focused Build ...	English	Not Set
◆	003_SOLED_20...	003 Build Project...	01.11.2017	31.12.2018	Released	Focused Build ...	English	Not Set
◆	004_MASTER_T...	004 Another Mas...	31.10.2017	21.06.2018	Created	Focused Build ...	English	Not Set
▲	140000000000...	ST_OST Testing...	01.09.2016	02.09.2016	Created	Focused Build ...	English	Not Set
□	140000000000...	GF Focused Build	13.02.2017	19.04.2017	Released	Focused Build ...	English	Not Set
◆	140000000000...	Test Master Proj...	04.04.2017	03.01.2018	Created	Focused Build ...	English	Not Set
◆	140000000000...	Master AT - Do...	03.05.2017	26.06.2017	Created	Focused Build ...	English	Not Set
◆	140000000000...	VJ SCM Proj	31.12.2012	31.12.2012	Created	Focused Build ...	English	Not Set
◆	140000000000...	Template FB Bul...	30.08.2017	22.03.2018	Created	Focused Build ...	English	Not Set

Last Refresh: Mon May 07 2018 14:55:45 GMT+0200 (W. Europe Daylight Time)
 Create Project
 Assign Master

Maintain *Project ID*, *Project Name* and select *Project Type* and *Template*, as well as the *Start Date*. In addition, you could select the *End Date* and the *Project Language*. Also, a *Project Description* could be maintained. At the end select *Create*.

Create Project

Details

*Project ID: FREIGHT MANAGEMENT SP3

*Project Name: FREIGHT MANAGEMENT SP3

*Project Type: Focused Build - Build Project

*Template: TPL_FB_BUILD_SP3

*Start Date: 01.12.2018

End Date: dd.MM.yyyy

Project Description:

Create Cancel

- Repeat step 2 for all projects required for the prototype

3.5.2 Assign Release to Projects

- Assign Actual Release to Build Projects and Master Project. In *Project Management* app select on *Detail* while the root node is selected.

Focused Build Project									
Level of Severity: Not Set	Status: Created	Responsible: Not Assigned	Actual Release: Not Assigned	Solution Documentation	Work Package 0	Work Item 0	Detail		
May 2018, Week 19									
Name	Save	Sev	Sat 05	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11
▼ ▲ Focused Build - Build Project 1	◇	<							
> Wave 1	◇	<							
> Wave 2	◇	<							
> Wave 3	◇	<							
> Wave 4	◇	<							

Afterwards the *Detail(s)* area opens on the left-hand side. Here you should maintain the *Actual Release* by selecting the edit pencil on the lower right corner.

Detail

Basic Information

ID: FB_BUILD_1_PROTO_1

Name: Focused Build - Build Project 1

Description:

Responsible: Project Manager

Responsible: Not Assigned

Severity:

Status: Created

Advanced

Planned Release

Component:

Number:

Type:

Go-Live:

Status:

Advanced

Actual Release

Component:

Number:

Type:

Go-Live:

Status:

Advanced

2. In this area you maintain the *Component* (Change Control Landscape) and the (release) *Number*.

Actual Release

Component: AT_SUB_SP02

Number: 2.0.0

Type: Major Release

Go-Live: 06.05.2018

Status: BUILD

Advanced

If you like to assign consecutive releases to consecutive waves of a project, you can proceed nearly analogous.

1. Assign Actual Release to waves in projects. In *Project Management* app select on *Detail* while a wave node is selected.

The screenshot shows the SAP S/4HANA Project Management interface. On the left, a Gantt chart displays a project timeline from Wednesday, July 4th to Wednesday, July 11th. The project is named 'SP02 FB Build Project 1'. On the right, the 'Basic Information' tab is active, showing details for 'Wave 2'. A red rectangle highlights the 'Release' section, which contains the following fields:

Field	Value
Component	FB_Release_OTD
Number	3.0.0
Type	Major Release
Go-Live	23.06.2019
Status	PLANNED

In this (marked) area you maintain the *Component* (Change Control Landscape) and the (release) *Number for the dedicated wave*.

3.5.3 Assign sub projects to master project

In the *Project Management* app select 1 or several build projects which you like to assign to a certain master project by selecting *Assign Master*.

The screenshot shows the SAP Focused Build Project app interface. At the top, there are search filters for Project ID, Project Name, Start Date, End Date, and Project Status. Below the filters, a table lists 216 projects. The table has columns for Severity, Project ID, Project Name, Start Date, End Date, Project Status, Project Type, Project Language, and Responsible Person. One project, 'FB_BUILD_1_P...', is highlighted with a red rectangle. At the bottom right of the interface, the 'Assign Master' button is highlighted with a red rectangle.

In the following dialog box, you see the available master projects. Select one and select *Assign*.

- Maintain the mandatory fields * and select create. The newly created wave will be inserted after the previously selected wave (copy template).

Create New Wave

Details

*Wave Name:

Wave 4

Wave Responsible:

*Start Date:

dd.MM.yyyy

*End Date:

dd.MM.yyyy

Wave Description:

Create Cancel

If you need to change the wave sequence, it can be realized via adjustment of the [Sort Number](#).

Name	Save	Severity	Start Date	End Date	Sort Number
▼ ▲ FB_BUILD_VL_01	◇	◇	17.04.2018	21.04.2018	
> ● Wave 1	◇	◇	19.04.2018	19.04.2018	00010
> ● Wave 2	◇	◇	19.04.2018	19.04.2018	00020
> ● Wave 3	◇	◇	19.04.2018	19.04.2018	00030
> ● Wave 4	◇	◇	19.04.2018	19.04.2018	00040
> ● Wave 5	◇	◇	23.05.2018	29.06.2018	00041

- Repeat step 1-2 until you have got the desired wave number per build project.

3.5.5 Define Wave Relationships between Master and Build Projects

- In master project select the root project node in structure and select on [Wave Relationship](#) in the top right corner. → Wave in Header area and then add Waves from Sub Projects to the related wave in Master Project

Focused Build Project

Level of Severity: OK

Status: Released

Responsible: Nicolas Alech

Actual Release: AT_SUB_SP02 / Major Release / 1.0.0 / undefined

Solution Documentation

Wave Relationship

MASTER AT SP02

Name	Save	Severity	Start Date	End Date		
<div></div> <div> Master AT SP02</div>			01.01.2018	17.07.2018		
<div> Build 3 AT SP02</div>			01.04.2018	05.04.2018		
<div> Build 1 AT SP02</div>			31.12.2017	31.07.2018		
<div> Build 2 AT SP02</div>			31.12.2017	31.07.2018		
<div> Wave 1</div>			01.02.2018	01.04.2018		
<div> Wave 2</div>			02.04.2018	06.05.2018		

- In the following *Wave Relationship* dialog box, you can see in the *Header* area the available waves in the current master project. If you like to add wave relationships, select in the 'add-sign' on the right-hand side of the *Details* area.

Wave Relationship

Header

Wave Name	Last Changed On	Last Changed By
Wave 1	07.05.2018	SCHLEICHERO
Wave 2	07.02.2018	MARKHEISER
Wave 3	07.02.2018	MARKHEISER
Wave 4	07.02.2018	MARKHEISER
Wave 5		

Details

<input type="checkbox"/> Project Number	Project Name	Wave Name
No data		

Save Close

- In the next dialog box *Assign Project Waves to Current Wave* select on *Search*. If you would expect a long search result you can also restrict the search. Within the Search Result check all waves in scope. For instance, if you are in the course of creating a relationship for wave 1 select all wave(s) 1 of all build projects assigned to the master project and select *OK*.

Assign Project Waves to Current Wave

Filter

Reset Search

Project Number: ▾

Project Name:

Wave Name:

Search Results

<input type="checkbox"/> Project Number	Project Name	Wave Name
<input checked="" type="checkbox"/> BUILD 3 AT SP02	Build 3 AT SP02	Wave 1
<input type="checkbox"/> BUILD 3 AT SP02	Build 3 AT SP02	Wave 2
<input type="checkbox"/> BUILD 3 AT SP02	Build 3 AT SP02	Wave 3
<input type="checkbox"/> BUILD 3 AT SP02	Build 3 AT SP02	Wave 4
<input checked="" type="checkbox"/> BUILD 1 AT SP02	Build 1 AT SP02	Wave 1
<input type="checkbox"/> BUILD 1 AT SP02	Build 1 AT SP02	Wave 2
<input type="checkbox"/> BUILD 1 AT SP02	Build 1 AT SP02	Wave 3
<input type="checkbox"/> BUILD 1 AT SP02	Build 1 AT SP02	Wave 4
<input checked="" type="checkbox"/> BUILD 2 AT SP02	Build 2 AT SP02	Wave 1
<input type="checkbox"/> BUILD 2 AT SP02	Build 2 AT SP02	Wave 2

OK Cancel

- Once you are finished with the creation of the relationships you can *Save* it.

Wave Relationship		
Header		
Wave Name	Last Changed On	Last Changed By
Wave 1	07.05.2018	SCHLEICHERO
Wave 2	07.02.2018	MARKHEISER
Wave 3	07.02.2018	MARKHEISER
Wave 4	07.02.2018	MARKHEISER
Wave 5		
Details		
Project Number	Project Name	Wave Name
<input type="checkbox"/> BUILD 3 AT SP02	Build 3 AT SP02	Wave 1
<input type="checkbox"/> BUILD 1 AT SP02	Build 1 AT SP02	Wave 1
<input type="checkbox"/> BUILD 2 AT SP02	Build 2 AT SP02	Wave 1

- 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

- [Optional] Check Start / End dates and duration of related waves between master and sub projects and adjust if needed

Project: Focused Build - Master Project

Save
Read Only
Print Fact Sheet
Export Project...
Create Version...
User Settings...

No Messages
Display Message Log

FB_MASTER
Level of Severity
No Value Set
Status
Created
Responsible

Structure
Resources
Status Reports
Project Versions
Search

Detail
Table
Graphic

Focused Build - Master Project > Build > Wave 1

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

Basic Data
Dates and Work
Additional Data
Notes

Calendar: Use from Project

Dates

Earliest Start/Finish: 20.03.2017 / 23.06.2017
Copy to C

Latest Start/Finish: 20.03.2017 / 23.06.2017
Copy to C

Forecasted Start/Finish:
T / T

Start Constraint: No constraint
T

Finish Constraint: No constraint
T

Duration: 96 Days

Work: 0 Days

Confirmation

Project: Focused Build - Build Project 1

Save
Read Only
Print Fact Sheet
Export Project...
Create Version...
User Settings...

No Messages
Display Message Log

FB_BUILD_1
Level of Severity
No Value Set
Status
Created
Responsible

Structure
Resources
Status Reports
Project Versions
Search

Detail
Table
Graphic

Focused Build - Build Project 1 > Build > Wave 1

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

Basic Data
Dates and Work
Work Package
Test Request

Calendar: Use from Project

Dates

Earliest Start/Finish: 20.03.2017 / 23.06.2017
Copy to Constraint

Latest Start/Finish: 20.03.2017 / 23.06.2017
Copy to Constraint

Forecasted Start/Finish:
T / T

Start Constraint: No constraint
T

Finish Constraint: No constraint
T

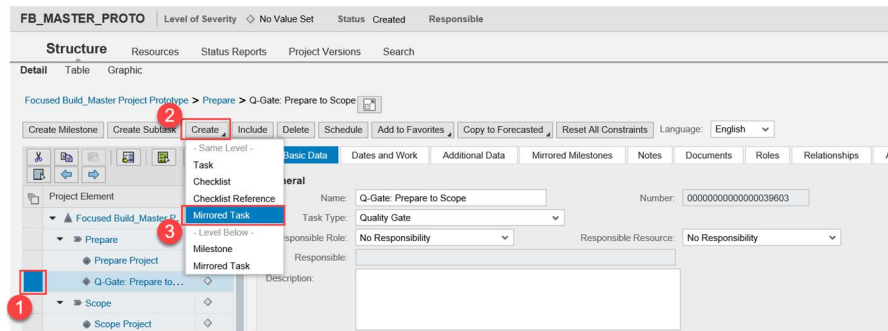
Duration: 96 Days

Work: 0 Days

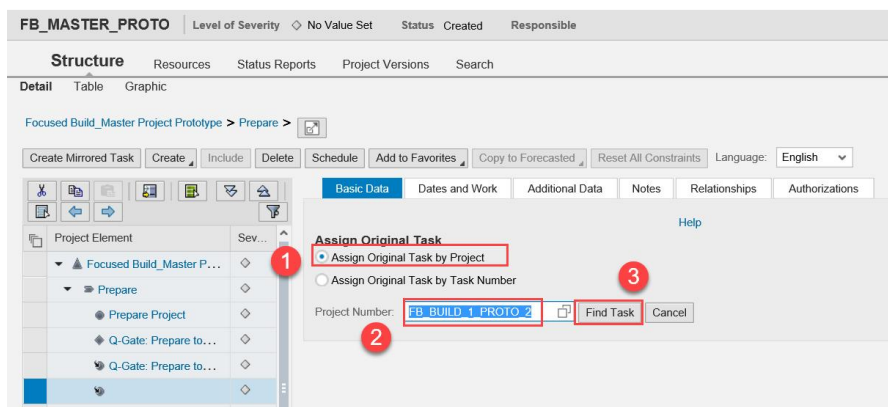
Confirmation

3.5.6 Link Q-Gates of Master and Build Projects

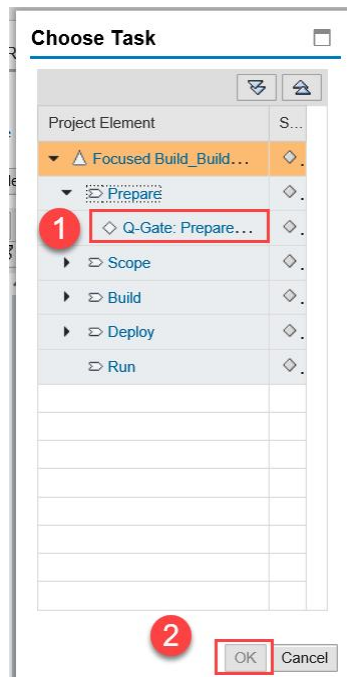
- To Link Q-Gates from Build Projects to Master Project select the relevant Milestone **Task** in Master Project à Create à - Same Level – Mirrored Task



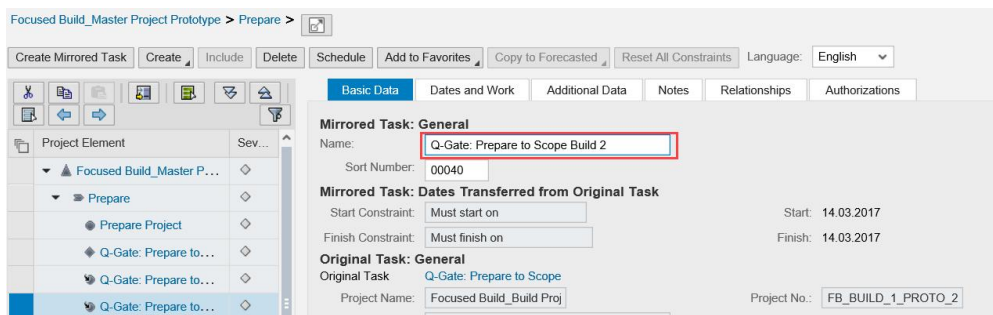
2. Select 'Assign Original Task by Project', enter Project ID and then select 'Find Task'



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



4. Adjust Name of Mirrored Task and Save



- 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.

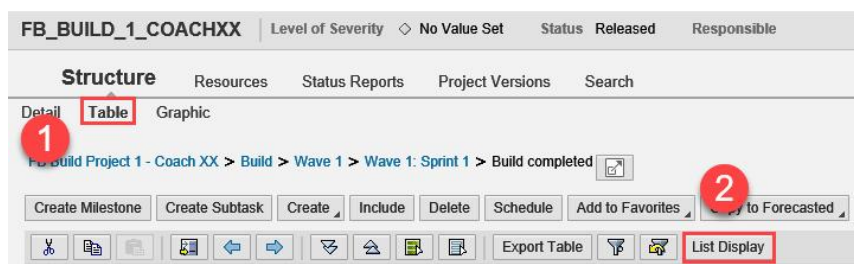
Single update of milestone

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

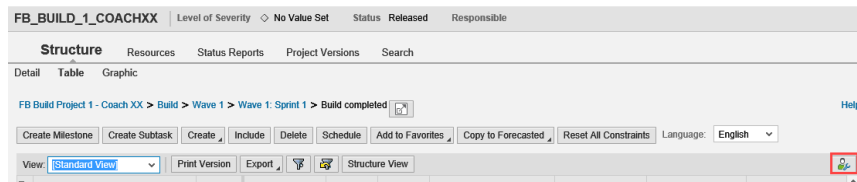
Name	Save	Severity	Start Date	End Date	Sort Number	
Build 1 AT SP02			31.12.2017	31.07.2018		
Wave 1			01.02.2018	01.04.2018	00010	
Wave 1: Scope & Build			02.01.2018	31.03.2018	00010	
Requirement reviewed				08.01.2018	00020	
Functional Specification				10.01.2018	00030	
Scope defined				14.01.2018	00040	

Mass update of milestones

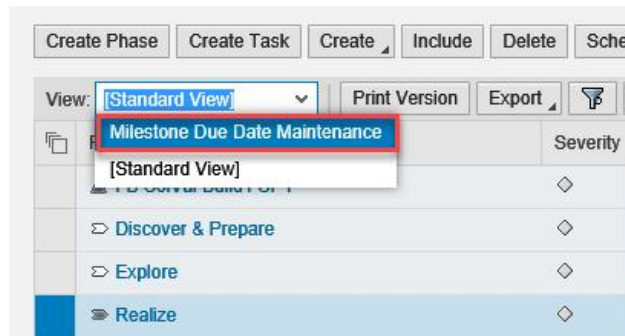
- To update multiple milestones in a table view, select view 'Table' and then the 'List Display' button in the 'old' PPM UI.



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



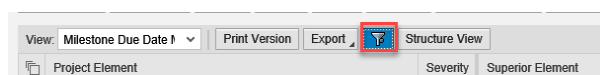
3. Select view 'Milestone Due Date Maintenance'



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
● Define 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	

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



Set Filter

Filter Conditions

Filter: 1

General 2

☒ Projects ☒ Phases ☒ Tasks ☒ Checklists ☒ Checklist Items

Focused Build Milestone Filter

View: Milestone Due Date ▾ Print Version Export Structure View						
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	

3.5.8 Release Q-Gate(s)

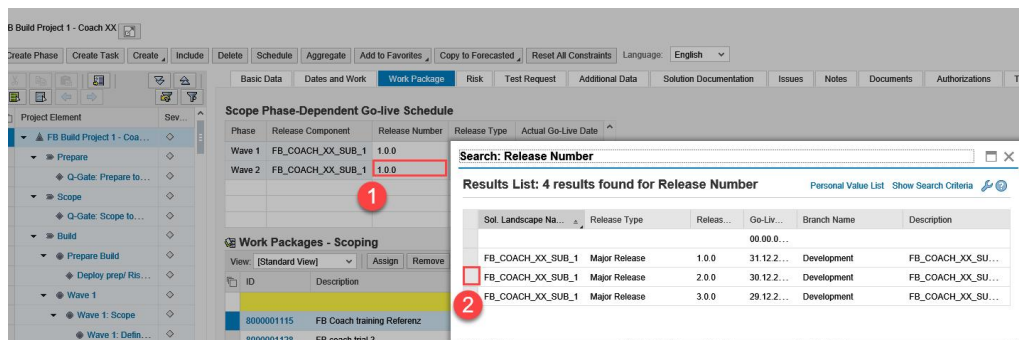
To get the date for the next Q-Gate visible in the Solution Readiness Dashboard you need to change the status of that Q-Gate to 'Released'.

The screenshot shows the SAP Focused Build Project interface. On the left, a Gantt chart displays project phases: Discover & Prepare, Explore, Realize, Wave 1, Wave 2, Deploy, and Run. A red box highlights the 'Q-Gate: Prepare to Explore' phase. In the center, a 'Detail' panel is open for the 'Q-Gate: Realize to Deploy' phase. The 'Status' dropdown in the 'Detail' panel is set to 'Released', which is also highlighted with a red box. The 'Severity' is set to 'Medium' and the 'Created' date is '12/19/2018, 10:32:05 AM'.

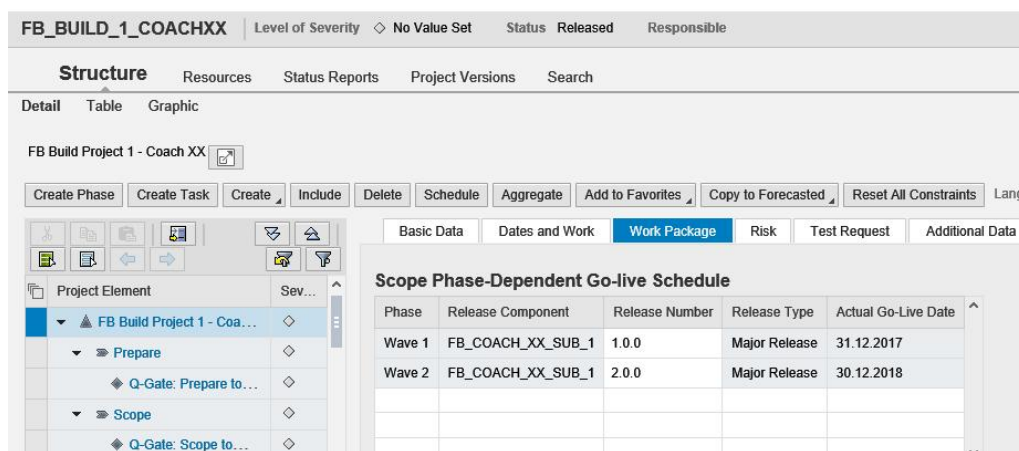
3.5.9 Assign dedicated Release Numbers to Waves (optional)

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



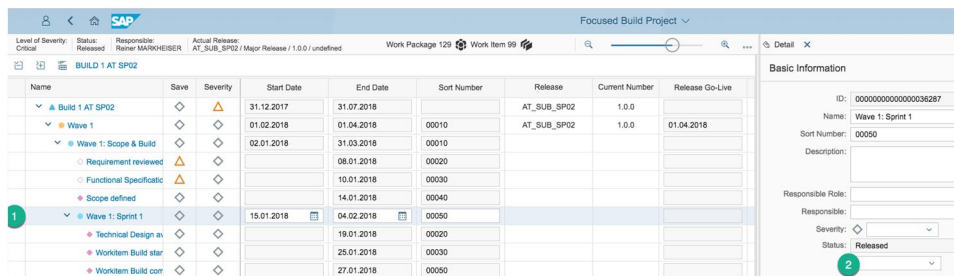
3. New assignment of Release to Wave



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



2. Open the *Details* view and select **Release** in the dropdown list
3. Wave / Sprint is now released so Work Packages / Work Items can be handed over to development.

3.5.11 Release Project Header

To be able to create Test Plans for a Project the Status on Project header must be set to 'Released'.

4 Upgrade Focused Build from SP02 to SP03

4.1 Implementing Mandatory 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
2713624	Focused Build: Central Note for Focused Build 2.0 SP03 for SAP Solution Manager 7.2 = SP08

Note

SAP Note [2713624](#) must be implemented after the piece list activation (refer to chapter 2.1.4 Activating the Piece List). *in detail it means to read the content of this SAP note carefully and implement all mention mandatory notes and attached bc-sets.*

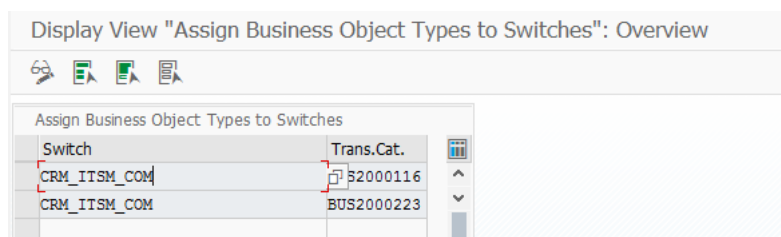
4.2 Activating the Piece List(s)

Call transaction `SCC1` in your working client and activate the following piece list `/SALM/FB_CUST`, which will supply your system with the predefined customizing. Copy the customizing by putting the piece list into the *Transport Request* field. The result of this activation can be verified in transaction `SCC3`.

4.3 [Optional] Enabling Richtext

To enable rich text editing we need to follow these steps:

1. The relevant business type of the transaction type must be maintained in view `CRMV_ITSM_SWITCH`. (For incidents/Defect this would be an entry with `CRM_ITSM_COM = BUS2000223`, for WP/BR/WI/RISK... `CRM_ITSM_COM = BUS2000116`)



Display View "Assign Business Object Types to Switches": Overview	
Assign Business Object Types to Switches	
Switch	Trans.Cat.
CRM_ITSM_COM	BUS2000116
CRM_ITSM_COM	BUS2000223

Content of this view is transportable within custom request.

- The individual text types must also be maintained in transaction *CRM_CTEXT*.

Change View "CRM Text Format Customizing Maintenance View": Overview

Text Object	Text Object Description	ID	Text ID Description	Formatted	HTML-Text	Converter Class
CRM_ORDERH	Transaction Header	S105	Comment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	S115	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	S001	Reply	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION
CRM_ORDERH	Transaction Header	S099	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CL_CRM_TEXT_FORMAT_CONVERSION

In this table we add the fields that we want to activate rich text on them.

- To display the rich text component in CRM we need to follow these steps: Click on *"Configure page"*

Work Package: 8000000283, OST200: WP_HF_01

Select "Configure page"

- Enter "Edit" mode

View Configuration - Google Chrome

Enter "Edit" mode

Component Name	Page	Role Config. Key	Component Usage	Obj...	Obj...	Sta...	Cust...
/SALM/CMCR_H	CMCROV...	/SALM/SM_P	CUAICChangeMH	AI...	S4CT	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/SALM/CMCR_H	CMCROV...	/SALM/SM_P	CUAICChangeMH	AI...	SM...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/SALM/CMCR_H	CMCROV...	<DEFAULT>	<DEFAULT>	<D...	<D...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/SALM/CMCR_H	CMCROV...	<DEFAULT>	<DEFAULT>	AI...	<D...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/SALM/CMCR_H	CMCROV...	<DEFAULT>	<DEFAULT>	AI...	S1RK	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Button Configuration

Maximum Number of Buttons Displayed:

Button Configuration

New Up Down Filter:

ID	Text	Icon Source	Type	Enabled
No result found				

View Show Technical Details Translate

Available Assignment Blocks

5. Search for "Available Assignment Blocks"

View Configuration - Google Chrome

Secure | [https://ldcioft.wdf.sap.corp:44378/sap\(===\)/bc/bsp/sap/bsp_wd_base/popup_buffered_frame_cached.htm?sap-client=200&sap-langua...](https://ldcioft.wdf.sap.corp:44378/sap(===)/bc/bsp/sap/bsp_wd_base/popup_buffered_frame_cached.htm?sap-client=200&sap-langua...)

No result found

View Show Technical Details Translate

Available Assignment Blocks

Filter:

Component	View Name	Title
SRQM_REL_TSER	SRQM_REL_TSER/MainWindow	
SRQM_REL_INC	SRQM_REL_INC/MainWindow	
SRQM_PROC_LOG	SRQM_PROC_LOG/MainWindow	Processing Log
ICOMP_SURVEY	SurveyOverviewWindow	
GSTEXT	MainWindow	Text
GSPRIVNOTE	GSPRIVNOTE/PrivNoteOVWindow	
GSNOTES	GSNOTES/MainWindow	Text
GSDOCFLOW	MainWindow	

Displayed Assignment Blocks

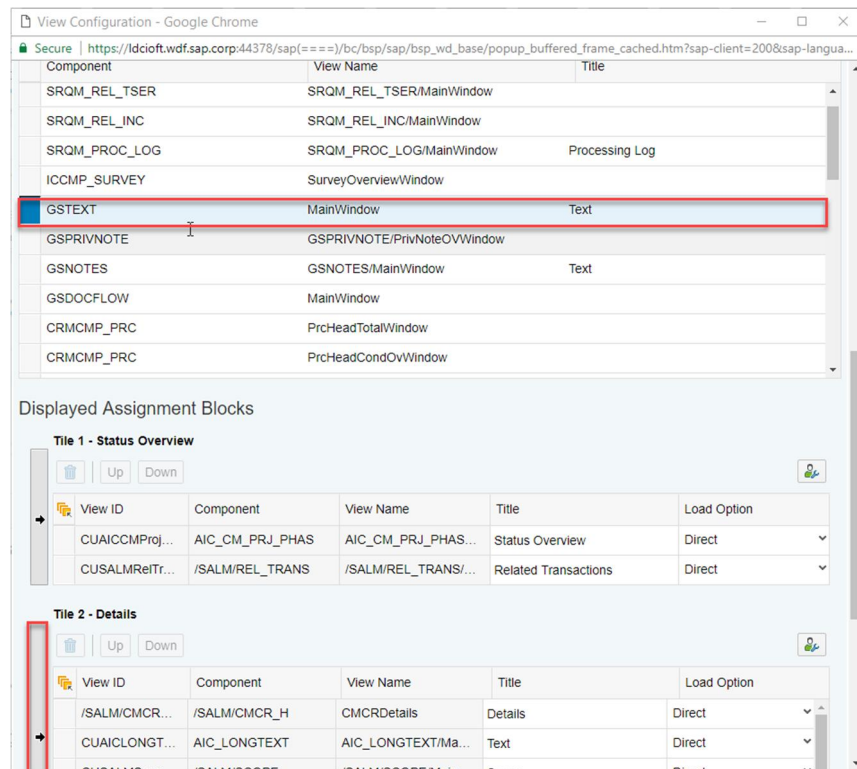
Tile 1 - Status Overview

Up Down

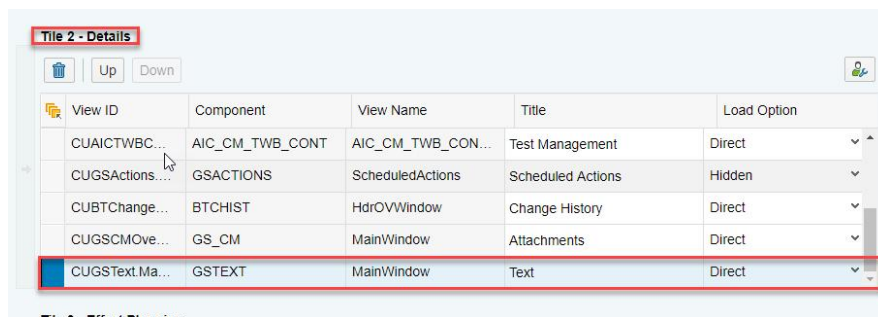
View ID	Component	View Name	Title	Load Option
CUAICCMProj...	AIC_CM_PRJ_PHAS	AIC_CM_PRJ_PHAS...	Status Overview	Direct
CUSALMReITr...	/SALM/REL_TRANS	/SALM/REL_TRANS/...	Related Transactions	Direct

Tile 2 - Details

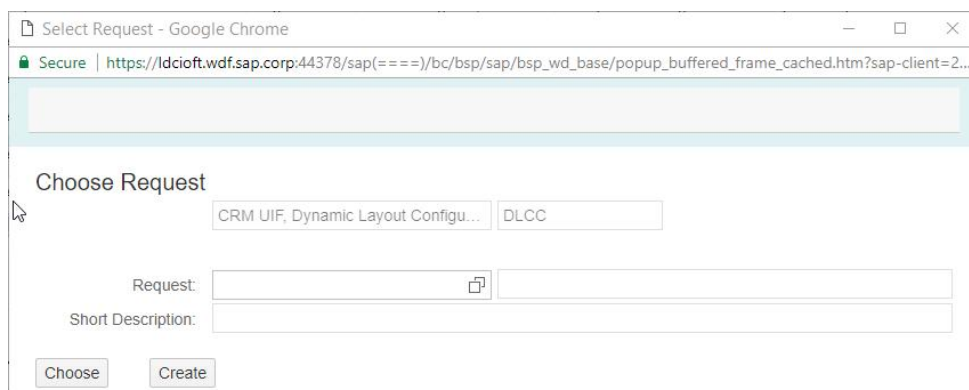
6. Select "GSTEXT"



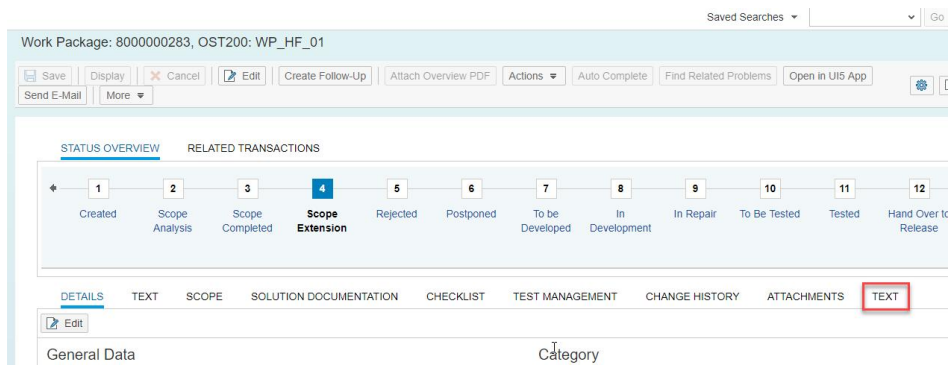
7. Add it to the Details Tile:



8. Create a request



9. Now tab should be added:



4.4 Updating Authorization Roles

Changes in the user roles delivered by SAP, have to be considered. The respective role copies in the customer name space have to be adapted accordingly.

Changes of ST-OST specific roles are documented in the ST-OST specific security guides and in the roles descriptions in the system.

5 Configuration of Standalone Extensions

5.1 Activities Valid for all Standalone Extensions

5.1.1 Activating the Piece List

Call transaction `SCC1` in your working client and activate the piece list `/SALM/CHARM_EXT`, which then supplies your system with the predefined customizing. The result of this activation can be verified in transaction `SCC3`.

5.2 Configuration of Test System Refresh

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` (for phase or release cycle) or `SAP1` (for continual cycle) 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. 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*.

5.2.1 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.

Copy Variant SAP1 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 *SAP1* 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...
SAP0	Maint.	D	2000	Create Transport Request	/TOWFLOW/SCMA_TROORDER_CREATE				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	2100	Create Transport Request Task	/TOWFLOW/SCMA_TRTASKS_CREATE				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3000	Perform Correction					Note	Non-M.	Satel.	
SAP0	Maint.	D	3100	Implement SAP Note	/TOWFLOW/SCMA_SNOTE_APPLY				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3200	Import Support Package	/TOWFLOW/SCMA_SFAP_CALL				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3900	Create Transport of Copies	/TOWFLOW/SCMA_TROORDER_FRETRANS				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3925	Decouple Transport Request	/TOWFLOW/SCMA_TROORDER_DECOUPLE				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3935	Assign Transport Request	/TOWFLOW/SCMA_TROORDER_ASSIGN				Transactio...	Non-M.	Satel.	
SAP0	Maint.	D	3950	Delete Empty Transport Requests	/TOWFLOW/SCMA_TROORDER_CLEAR	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	D	4000	Release Transport Request	/TOWFLOW/SCMA_TROORDER_RELEASE	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	D	4100	Release Transport Request for Cluster	/TOWFLOW/SCMA_CLUSTER_RELEASE	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	O	1000	System Logon	/TOWFLOW/SCMA_RSRLGGIN				Transactio...	Non-M.	Satel.	
SAP0	Maint.	O	1940	Import Transport Request for Cluster	/TOWFLOW/SCMA_CLUSTER_IMPORT	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	O	1950	Preliminary Import	/TOWFLOW/SCMA_PRELIMINARY_IMPORT	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	O	2010	Schedule Import Job for Transport Reque	/TOWFLOW/SCMA_TROORDER_IMPORT	DDMMY			Job	Non-M.	Satel.	
SAP0	Maint.	O	2020	Import into Sandbox	/TOWFLOW/SCMA_TROORDER_IMPORT_#				Transactio...	Non-M.	Satel.	
SAP0	Maint.	O	2100	Display TMS Alert Monitor	/TOWFLOW/SCMA_TMS_ALERT_MONI				Transactio...	Non-M.	Satel.	
SAP0	Maint.	O	2200	Display TMS Import Monitor	/TOWFLOW/SCMA_TMS_IMPORT_MONI				Transactio...	Non-M.	Satel.	
SAP0	Maint.	O	2300	Display TMS Import History	/TOWFLOW/SCMA_TMS_IMPORT_HIST				Transactio...	Non-M.	Satel.	

Then choose *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: /TOWFLOW/SCMA_RSRLGGIN

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 task list variant *SAP1* with project type *Continual Cycle* and replace it with the new task list variant *GPN1*.

As a result, all tasks of task list variant *SAP1* are copied to the new task list *GPN1*, as shown below:

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

 New Entries    

Tasks for Types of System Roles												
Variant	Proj. Ty...	Role T...	Number	Description	Program Name	Variant	Flow Defn...	Trans...	Task Type	Mandat...	Exec. L...	Irrel...
GNP1	Maint...	D	1000	System Logon	/ZMWFLW/SCHA_SSRLOGIN				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	2000	Create Transport Request	/ZMWFLW/SCHA_TROORDER_CREATE				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	2100	Create Transport Request Task	/ZMWFLW/SCHA_TRIASKS_CREATE				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3000	Perform Correction					Note	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3100	Implement SAP Note	/ZMWFLW/SCHA_SNOTE_APPLY				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3200	Import Support Package	/ZMWFLW/SCHA_SFPM_CALL				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3900	Create Transport of Copies	/ZMWFLW/SCHA_TROORDER_PRETRANS				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3925	Decouple Transport Request	/ZMWFLW/SCHA_TROORDER_DECOUPLE				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3935	Assign Transport Request	/ZMWFLW/SCHA_TROORDER_ASSIGN				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	3950	Delete Empty Transport Requests	/ZMWFLW/SCHA_TROORDER_CLEAR	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	4000	Release Transport Request	/ZMWFLW/SCHA_TROORDER_RELEASE	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	D	4100	Release Transport Request for Cluster	/ZMWFLW/SCHA_CLUSTER_RELEASE	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	1000	System Logon	/ZMWFLW/SCHA_SSRLOGIN				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	1940	Import Transport Request for Cluster	/ZMWFLW/SCHA_CLUSTER_IMPORT	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	1950	Preliminary Import	/ZMWFLW/SCHA_PRELIMINARY_IMPORT	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	2010	Schedule Import Job for Transport Reque...	/ZMWFLW/SCHA_TROORDER_IMPORT	DUMMY			Job	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	2020	Import into Sandbox	/ZMWFLW/SCHA_TROORDER_IMPORT_H				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	2100	Display TMS Alert Monitor	/ZMWFLW/SCHA_TMS_ALERT_MONI				Transaction	▼ Mon-M...	▼ Sate...	▼
GNP1	Maint...	O	2200	Display TMS Import Monitor	/ZMWFLW/SCHA_TMS_IMPORT_MONI				Transaction	▼ Mon-M...	▼ Sate...	▼

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](#).

Choose the IMG node [Define Additional Tasks for Task Lists](#) and mark all entries with task list variant [SAPO](#) and project type [Urgent Change](#).

Choose [Copy](#).

Perform this step for each selected task of task list variant [SAPO](#), project type [Urgent Change](#) and replace it with the new task list variant [GPN1](#).

As a result, all [Urgent Change](#) 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](#).

Select the IMG node [Define Additional Tasks for Task Lists](#) and mark all entries with task list variant [SAPO](#) and project type [Phase Cycle](#).

Choose [Copy](#).

Perform this step for each selected task of task list variant [SAPO](#) with project type [Phase Cycle](#), and replace it with the new task list variant [GPN1](#).

As a result, all [Phase Cycle](#) 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](#).

Select the IMG node [Define Additional Tasks for Task Lists](#) and mark all entries with task list variant [SAPO](#) and project type [Release Cycle](#).

Choose [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 a 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: *SAP Solution Manager* → *Capabilities (Optional)* → *Change Control Management* → *Schedule Manager* → *Create Customer-Specific Header and Footer Tasks*.

Mark all entries with task list variant *SAP1* 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	/TMWFLOW/SCMA_TROORDER_MULT_SYS
SAP0	Phase Cycle	Task Plan He.	5000	Process Critical Objects	/TMWFLOW/SCMA_CRIT_OBJ_APPR
SAP0	Phase Cycle	Task Plan He.	6000	Reassign Change	/TMWFLOW/SCMA_REASSIGN_CHANGE
SAP0	Phase Cycle	Task Plan He.	6500	Ignore Downgrade Protection Conflict	/TMWFLOW/SCMA_IGNORE_DGP_CONF
SAP0	Continual C.	Task Plan He.	1100	Open Test Plan Management	/TMWFLOW/SCMA_STWB_2
SAP0	Continual C.	Task Plan He.	1200	Open Cycle Transaction	/TMWFLOW/SCMA_SOCH_CRM_GO_TO_I
SAP0	Continual C.	Task Plan He.	2050	Correct Import (Repair Flag)	/TMWFLOW/SCMA_SET_REPAIR_FLAG
SAP0	Continual C.	Task Plan He.	2800	Lock/Release Transport Tracks incl. Role Types	/TMWFLOW/SCMA_UNLOCK_TRACK
SAP0	Continual C.	Task Plan He.	3000	Log On to System	/TMWFLOW/SCMA_RSLOGIN_HEADER
SAP0	Continual C.	Task Plan He.	4000	Display TMS Alert Monitor	/TMWFLOW/SCMA_TMS_ALERT_MONI_H
SAP0	Continual C.	Task Plan He.	4100	Display TMS Import Monitor	/TMWFLOW/SCMA_TMS_IMP_MONI_H
SAP0	Continual C.	Task Plan He.	4200	Display TMS Import History	/TMWFLOW/SCMA_TMS_IMP_HIST_H
SAP0	Continual C.	Task Plan He.	4300	Perform Transport Tasks in Several Systems	/TMWFLOW/SCMA_TROORDER_MULT_SYS
SAP0	Continual C.	Task Plan He.	5000	Process Critical Objects	/TMWFLOW/SCMA_CRIT_OBJ_APPR
SAP0	Continual C.	Task Plan He.	6000	Reassign Change	/TMWFLOW/SCMA_REASSIGN_CHANGE
SAP0	Continual C.	Task Plan He.	6500	Ignore Downgrade Protection Conflict	/TMWFLOW/SCMA_IGNORE_DGP_CONF

Choose *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: /TMWFLOW/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 task list variant *SAP1* 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 *SAP1* are copied to the new task list *GPN1*:

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

New Entries

Variant	Proj. T...	Hdr/Footer	Description	Program Name	Variant	Flow Definition	Transac...	Task Type	Mande
GPN1	Main..	Task Plan Fo	Overview of All Change Procedures in ...	/TMWFLOW/SCMB_COMPLETE_CYCLE				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan Fo	Check for Completion of Maintenance	/TMWFLOW/SCMB_MAINTCYCLE_CHECK_DUMMY				Job	Mon-N
GPN1	Main..	Task Plan Fo	Complete CTS Projects	/TMWFLOW/SCMB_CTS_RELEASE				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Project Administration in Solution Mana...	/TMWFLOW/SCMB_SOLAR_PROJECT_AD				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Configuration in Solution Manager	/TMWFLOW/SCMB_SOLAR02				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Test Plan Management in Solution Man...	/TMWFLOW/SCMB_STWB_2				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Change Transaction in Service Desk	/TMWFLOW/SCMB_SDCM_CRM_GO_TO_I				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Correct Import (Repair Flag)	/TMWFLOW/SCMB_SET_REPAIR_FLAG				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Assign a Project Project to the Mainte...	/TMWFLOW/SCMB_CPROJECTS_ASSIGN				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Access cProject Project for the Mainte...	/TMWFLOW/SCMB_CPROJECTS_CALL				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Remove cProject Project from Mainte...	/TMWFLOW/SCMB_CPROJECTS_SUSPND				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Lock/Release Transport Tracks incl. Rol...	/TMWFLOW/SCMB_UNLOCK_TRACK				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	System Logon	/TMWFLOW/SCMB_RSRLOGIN_HEADER				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Import Support Packages	/TMWFLOW/SCMB_QUEUE_IMPORT				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Display TMS Alert Monitor	/TMWFLOW/SCMB_TMS_ALERT_MONI_H				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Display TMS Import Monitor	/TMWFLOW/SCMB_TMS_IMP_MONI_H				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Display TMS Import History	/TMWFLOW/SCMB_TMS_IMP_HIST_H				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Perform Transport Tasks in Several Sys...	/TMWFLOW/SCMB_TTBORDER_MULT_SYS				Transaction/Online Program	Mon-N
GPN1	Main..	Task Plan He	Register transport requests in task list	/TMWFLOW/SCMB_TTBORDER_ASSIGN				Transaction/Online Program	Mon-N

Copy Variant SAPO 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 *SAPO* must be copied the new task list *GPN1*.

Select the IMG node *Create Customer-Specific Header and Footer Tasks* and mark all entries with task list variant *SAPO* and project type *Urgent Change*.

Choose *Copy*.

Perform this step for each selected header and footer task of task list variant *SAPO* with project type *Urgent Change* and replace it with the task list variant *GPN1*.

As a result, all *Urgent Change* header and footer tasks of task list variant *SAPO* are copied to the task list *GPN1*.

Copy Variant SAPO 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 *SAPO* must be copied the new task list *GPN1*.

Select the IMG node *Create Customer-Specific Header and Footer Tasks*, and mark all entries with task list variant *SAPO* and project type *Phase Cycle*.

Choose *Copy*.

Perform this step for each selected header and footer task of task list variant *SAPO* with project type *Phase Cycle* and replace it with the task list variant *GPN1*.

As a result, all *Phase Cycle* header and footer tasks of task list variant *SAPO* are copied to the task list *GPN1*.

Copy Variant SAPO 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 *SAPO* must be copied the new task list *GPN1* as well.

Select the IMG node *Create Customer-Specific Header and Footer Tasks*, and mark all entries with task list variant *SAPO* and project type *Release Cycle*.

Choose *Copy*.

Perform this step for each selected header and footer task of task list variant *SAPO* with project type *Release Cycle* and replace it with the task list variant *GPN1*.

As a result, all *Release Cycle* header and footer tasks of task list variant *SAPO* are copied to the task list *GPN1*.

Registering the New Task Refresh Test System

Launch transaction SM30 .

Enter table **SCMAPROGRAMS** and choose *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 a next step, add the new task list activity *Refresh Test System* to the customer task list variant **ZSRE1**. In customizing 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, SP02 has been successfully implemented in your SAP Solution Manager System.

Choose *New Entries* and create the new entry with the following:

- Project Type = **Continual Cycle**,
- Type of Role = **O**,
- 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 *O*:

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	Continu...	O	2500	Synchronize Urgent Changes from Other Test Systems	/ZINWELON/SCM_TRIMP_SYNC_TEST				Job	Non-Mandat...	Satellite
ZSRE1	Continu...	O	2600	Import Support Package	/ZINWELON/SCM_SFPM_CALL				Transaction...	Non-Mandat...	Satellite
ZSRE1	Continu...	O	4000	Refresh Test System	/SALM/RTS_REFRESH_SYSTEM				Transaction...	Non-Mandat...	Satellite
ZSRE1	Continu...	P	1000	Log On to System	/ZINWELON/SCM_SRLG10R				Transaction...	Non-Mandat...	Satellite

Repeat this activity for each project type in scope.

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

Next, one or several change cycles 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 select the tile *Change and Release Management*.

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

Choose *Create* à *Change Cycle* in the left navigation frame.

Two types of change cycles available with SAP Solution Manager Release 7.2 are 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.

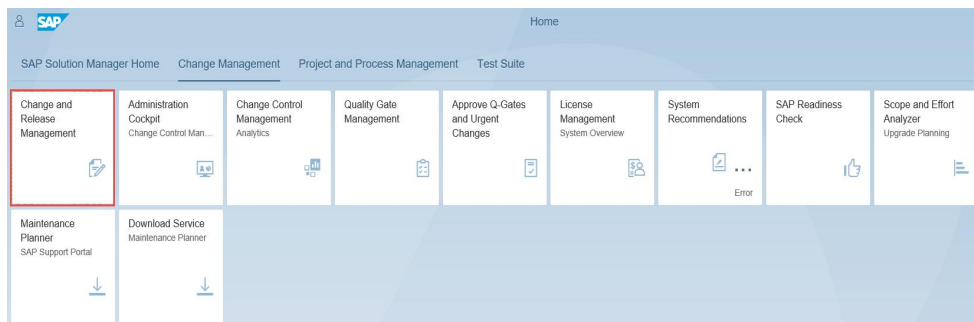
Urgent changes, preliminary imports and status-dependent imports can be processed in parallel. The import is executed as *Import Subset*. The assigned transport requests stay in buffer for re-import and are examined by the consolidated import again.

By contrast, use the continual cycle (transaction SMAI) if a (daily, regularly-defined weekdays, or on demand) deployment of transports is required.

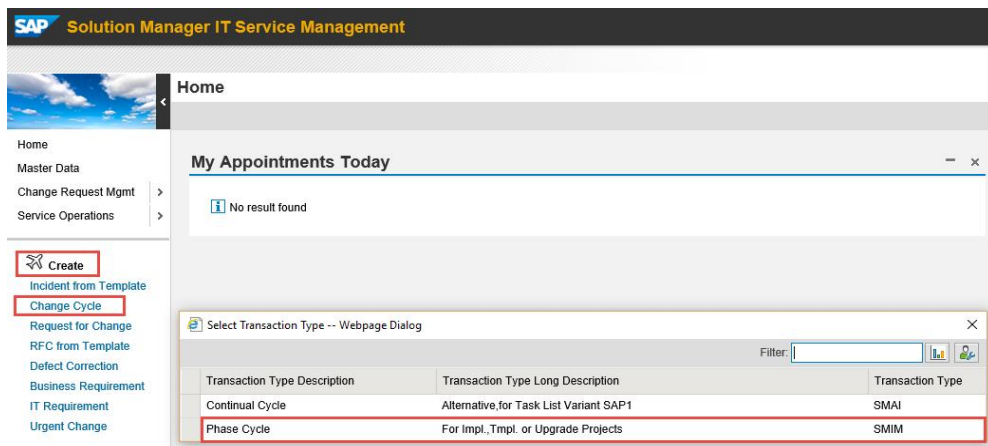
Transports are imported only once and do not stay in buffer.

Create a Change Cycle

Launch the SAP Fiori Launchpad via transaction SM_WORKCENTER, go to *Change Management*, and select the tile *Change and Release Management*:



Select *SOLMANPRO* as business role to open the CRM WebUI. Select *Create* à *Change Cycle* from the left navigation frame, and then choose *Phase Cycle* from the dialog box that appears:



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, choose *Actions* and select *Set Phase to Scope*:

Clear the dialog box by selecting *Yes*:

A guided procedure opens. As a 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

Next, define the scope. For the mandatory field *Task List Variant*, select your task list variant *GPN1* via the F4 help:

SAP Solution Manager IT Service Management

Welcome Administrator SS (CHARM_ACM_S5) 00:29 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

Branch: Maintenance

Use Central Change and Transport System Infrastructure: ☐

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	Source	Target	Filter

Transport Tracks Overview

Development... Quality Assa... Production S...

MW1-100 MW1-200 MW1-300

Proceed with guided procedure instructions up to Step 4, *Complete*, as shown below.

Lastly, select *Create*:

SAP Solution Manager IT Service Management

Welcome Administrator SS (CHARM_ACM_S5) 00:29 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**

Branch: Maintenance

Task List Variant: Default Variant for Task List

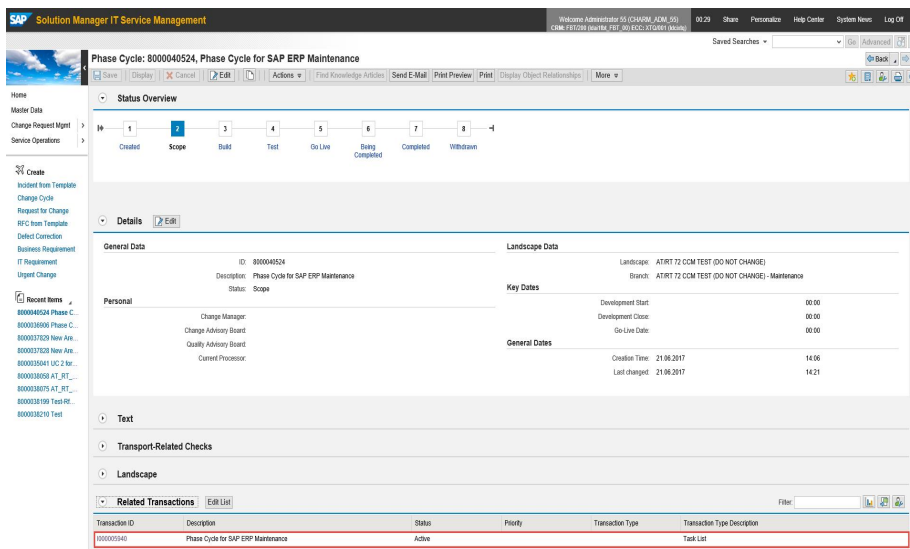
Landscape: ATIR7 T2 COM TEST (DO NOT CHANGE)

Transport Tracks Overview

Development... Quality Assa... Production S...

MW1-100 MW1-200 MW1-300

Since the scope of your new phase cycle is fully-defined, the system automatically generates the referring task list:



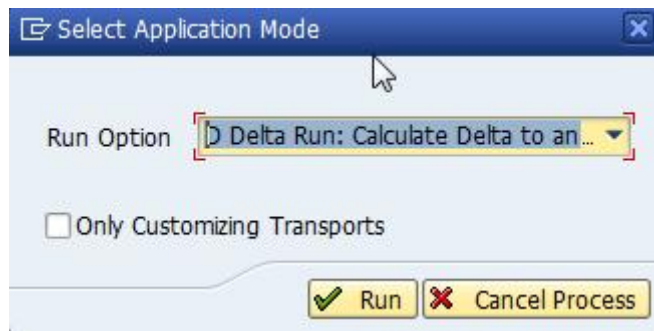
5.2.6 Executing the Refresh Test System Scenario

Execute Delta Run: Calculate the Delta to another System

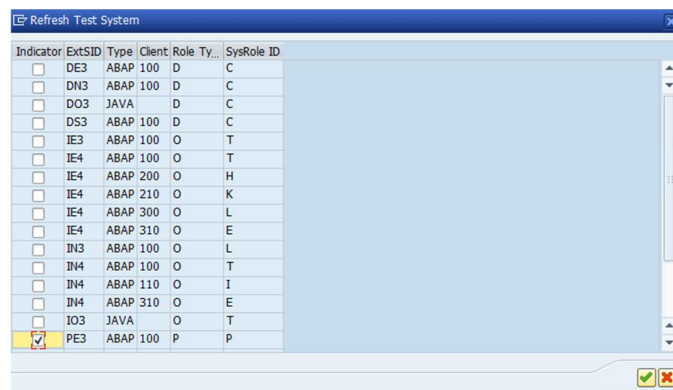
First, execute the new task *Refresh Test System* which is available for the target system TRG:

Task List						
Task						
Task	Status	Availability	Mandatory	Executable	Program	
▼ Test System Refresh						
▶ General Tasks						
▼ Track (Source System DE3-ABAP/100)						
▶ Source Systems						
▼ Target Systems						
▶ Training System						
▶ Integration System (client 300)						
▶ Migration Client (client 210)						
▶ CT Restricted Client (client 200)						
▼ Quality Assurance System						
▼ IE3-ABAP/100 (IE3-100, Time Zone: CET)						
Log on to System					/TMWFLOW/SCMA_RSRLGIN	
Perform Preliminary Import					/TMWFLOW/SCMA_PRELIMNRY_IMPORT	
Schedule Import Job for Transport Requests					/TMWFLOW/SCMA_TRORDER_IMPORT	
Import to Sandbox System					/TMWFLOW/SCMA_TRORDER_IMPORT_H	
Display TMS Alert Monitor					/TMWFLOW/SCMA_TMS_ALERT_MONI	
Display TMS Import Monitor					/TMWFLOW/SCMA_TMS_IMPORT_MONI	
Display TMS Import History					/TMWFLOW/SCMA_TMS_IMPORT_HIST	
Synchronize Urgent Changes from Other Test System					/TMWFLOW/SCMA_TRIMP_SYNC_TEST	
Import Support Package					/TMWFLOW/SCMA_SPAM_CALL	
Refresh Test System					/SALWRTS_REFRESH_SYSTEM	

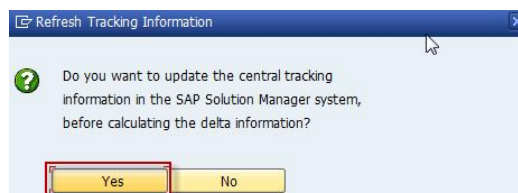
Choose *D: Delta Run: Calculate Delta to another System* from the dropdown list in the dialog box and choose *Run*:



On the next dialog box, select the source system (production system SRD, client 001) from the list and choose *Select*:



Here we recommended you let the system update the central transport tracking information, based on the delta calculation. 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](#)

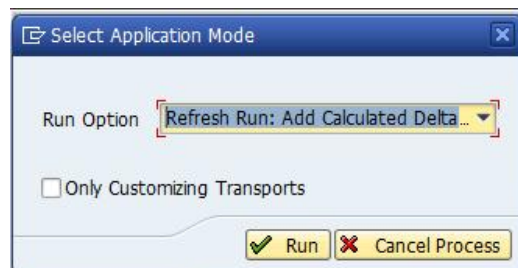
Perform the System Copy

As a next step, perform the system copy.

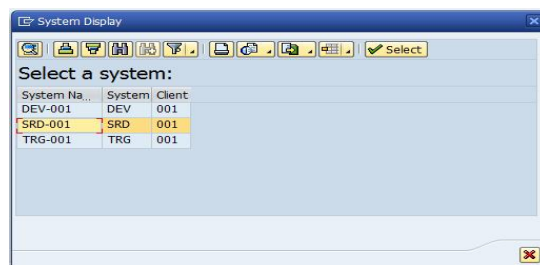
Execute Refresh Run: Add Calculated Delta to Another System

Execute the task *Refresh Test System* again.

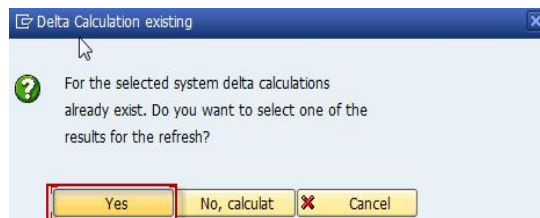
Select the option *Refresh Run: Add Calculated Delta to another System* from the dropdown list in the dialog box and choose *Run*:



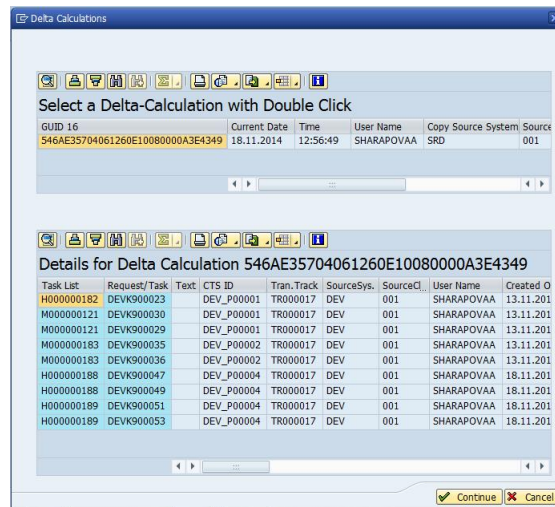
As a next step, select the source system (production system SRD, client 001) from the list and choose *Select*:



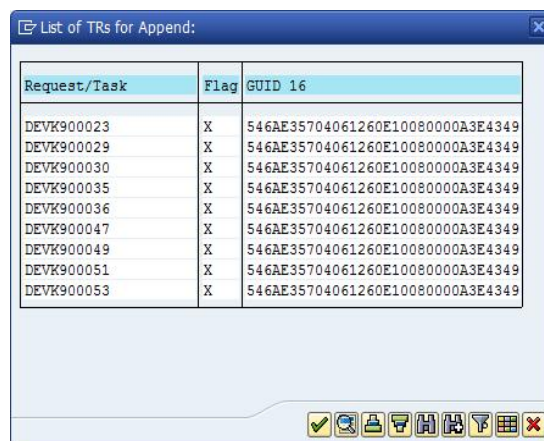
You can now choose the existing delta calculations:



Select one of the available delta calculations. If more than one exists, select the most current one and choose *Continue*:



Continue and then confirm by selecting the green checkmark shown below. The list of transports add to the import buffer of the refreshed test system TRG:



Perform the Import via Change Request Management (Import Project All)

As last step, trigger the import to system TRG via the task list.

5.2.7 Available BAdI Definition: /SALM/RTS_FILTER_DELTA_BAdI

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](#).

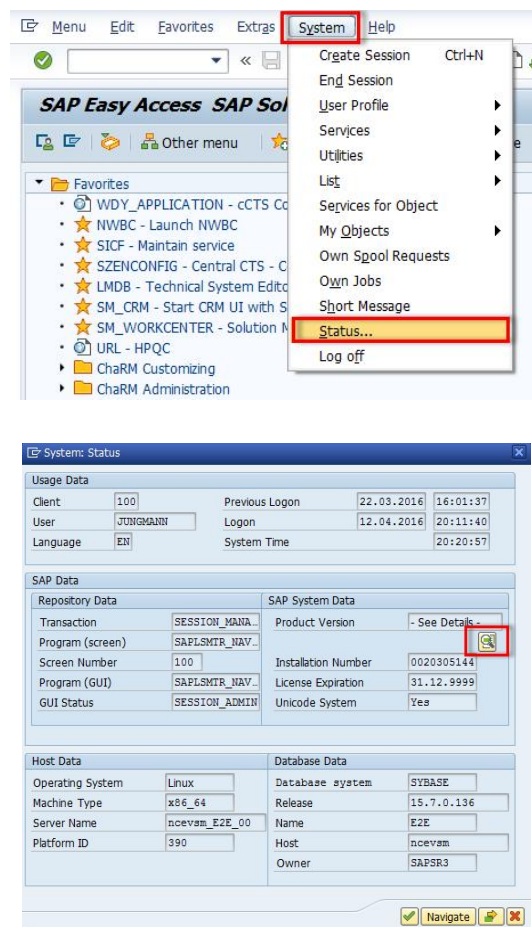
5.3 Configuration of Retrofit Automation

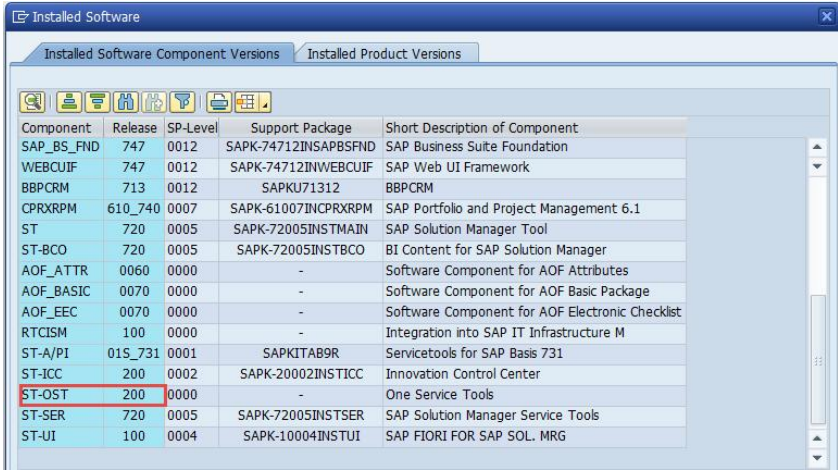
5.3.1 Required Activities

Implement or verify the correct implementation of the central SAP Solution Manager note, based on the SP level of your SAP Solution Manager system.

Before you start the configuration, please ensure that your Solution Manager 7.2 system has software component ST-OST 200, SP02 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

5.3.2 Roles and Authorization

There are no Focused Build-specific authorizations or roles defined for using the Retrofit Automation feature.

The retrofit report is either executed by a dialog user or by a system user (in case the report is scheduled in a background job).

Relevant are the authorizations and authorization roles available for SAP Solution Manager Change Request Management and Retrofit, delivered by ST. Especially the following has to be considered:

For scheduling the retrofit report:

- Authorization to schedule a report in the background (transaction [SM37](#))

For the user executing the retrofit report

In SAP Solution Manager system:

- Authorization for authorization object `SM_CM_RFIT` (activity „Display“) is needed.
- CRM authorizations for the creation of target change documents (only relevant for scenario 'Change Document as Retrofit Target')
- Authorization for transaction [SE38](#) or [SA38](#)

In both DEV systems (maintenance and development track):

- Authorization for authorization object `S_RFCACL` for the usage of the trusted RFC – connection from the SAP Solution Manager system to the DEV systems.
- Authorization role `SAP_CM_MANAGED_DEVELOPER_RETRO`.

In TEST System (development track):

- Import authorization to import retrofit transport of copies (ToCs) in the test system (only relevant for scenario 'ToC as Retrofit Target')

For the `TMW RFC` user the following authorizations are needed. They should already be maintained accordingly if the RFCs and RFC users have been generated using [SOLMAN_SETUP](#)

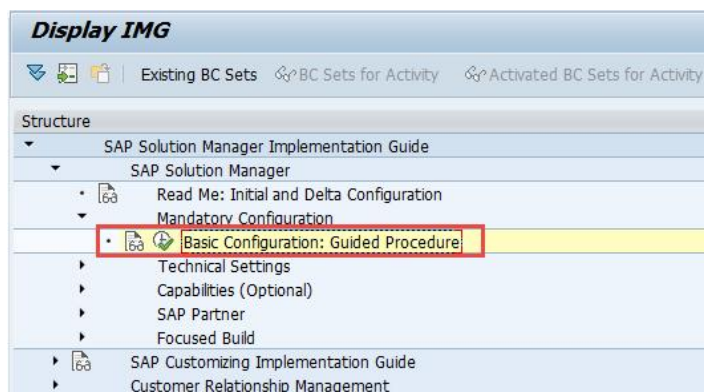
In DEV System (development track):

- Retrofit target transport request / ToC creation authorization
- For the „ToC as Retrofit Target“ scenario: Authorization to release ToC

5.3.3 Basic Configuration for SAP Solution Manager

Before starting with the basic configuration of your SAP Solution Manager system, consider reading the documentation and initial descriptions available in the implementation guide (transaction `SPRO`).

Navigate to [SAP Solution Manager Implementation Guide](#) à [SAP Solution Manager](#) à [Mandatory Configuration](#) à [Basic Configuration: Guided Procedure](#)



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

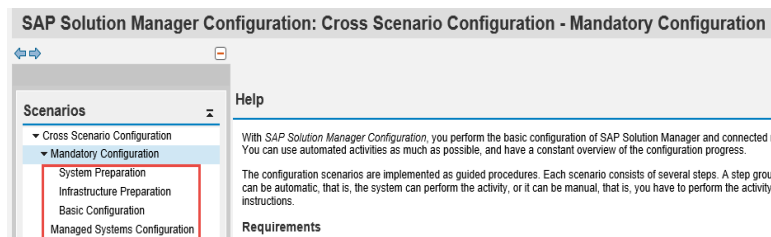
System Preparation: In this guided procedure, define preliminary settings for SAP Solution Manager configuration, such as creation of dialog users with the required authorizations, implementation of the central correction note, and web service configuration.

Infrastructure Preparation: With infrastructure preparation, set up the SLD connections, establish LMDB synchronization, and set up the Java connectivity. Also, 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 need 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 that contain important settings such as standard customizing.

Managed Systems Configuration: In managed system configuration, connect managed systems to SAP Solution Manager via RFC. This is important, since Change Request Management requires the following RFC connections to every Managed System/Client: READ, TMW, and TRUSTED. To ensure that 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, be sure to perform the basic configuration for Change Request Management.

5.3.4 Piece List Activation

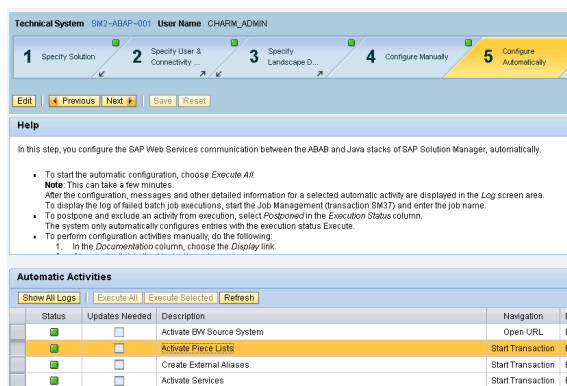
Change Request Management customizing, and all other IT service management-relevant areas are delivered via a customizing piece list. This piece list needs to be activated as part of transaction `SOLMAN_SETUP`. It copies the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again overwrites all existing standard customizing with the content of the piece list. We recommend copying all transaction types into the customer namespace before using Change Request Management.



Caution

The existing BC-sets of Change Request Management are not designed to be activated within a SAP Solution Manager 7.2 system since the customizing piece list replaces them.



As a requirement, activate a dedicated piece list for the standalone enhancement. To do so, call transaction `SCC1` in your working client and activate the piece list `/SALM/CHARM_EXT`. This supplies your system with the predefined customizing. The result of this activation can be verified in transaction `SCC3`.

5.3.5 Checking for Correct Retrofit Setup: NO_CSOL Parameter Must be Active

SAP® SAP Solution Manager Implementation Guide® SAP Solution Manager® Capabilities (Optional)® Change Control Management® Retrofit® Define Retrofit Parameters

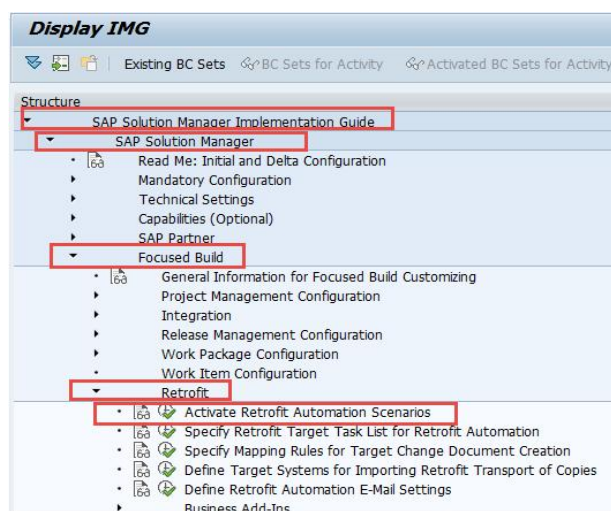
Change View "Configuration Table for Retrofit Extension": Overview

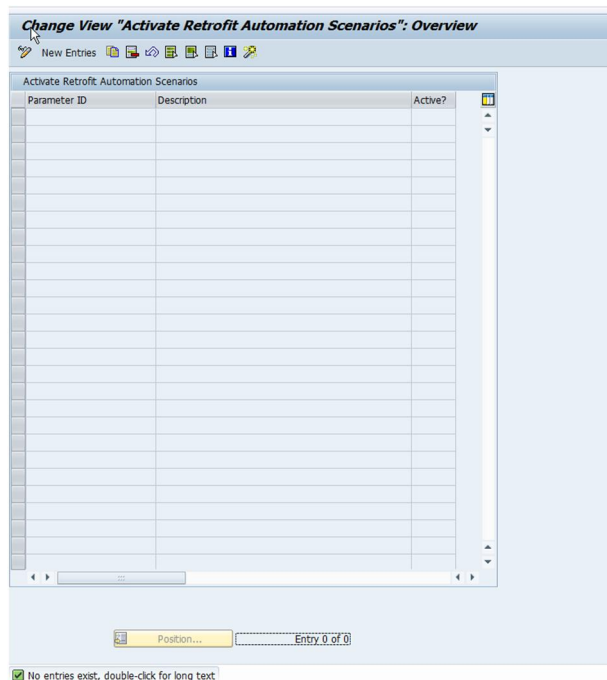
New Entries

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_CNI Number of Attempts...	Parameter Inactive	
MAN_BACK Switch Status back...	W Parameter Causes Warning	
NO_CSOL No Cross-System Obj...	X Parameter Active	
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_TOC Transport of Copie...	X Parameter Active	

Since writing a CSOL entry can trigger a CSOL dialog box that cancels the background job, be sure to set the parameter *No Cross-System Object Lock for import Objects*.

5.3.6 Activating Retrofit Automation Scenarios





Create new entries:

Parameter ID (1) 5 Entries found

Restrictions

Parameter ID	Description
AUTO_BW	BW Objects Handling
AUTO_FULL	Full Retrofit Automation Scope (all auto-import objects)
AUTO_STOP_AT_ERROR	Stop at failed Retrofit (Auto-Import)
AUTO_TOC	Use Transport of Copies as Retrofit target
AUTO_TR	Use Original Transport as Retrofit target

The following scenarios are available:

[AUTO_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). After an unsuccessful auto-import for a transport, the retrofit automation report cancels the processing of further transports.


[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.

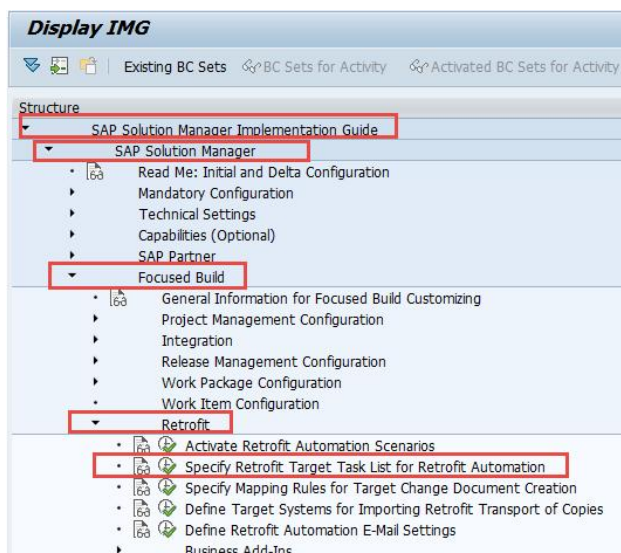
 IMG Activity: *Specify Retrofit Target Task List for Retrofit Automation* is needed for this Scenario (see chapter 3.5).

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).

5.3.7 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.

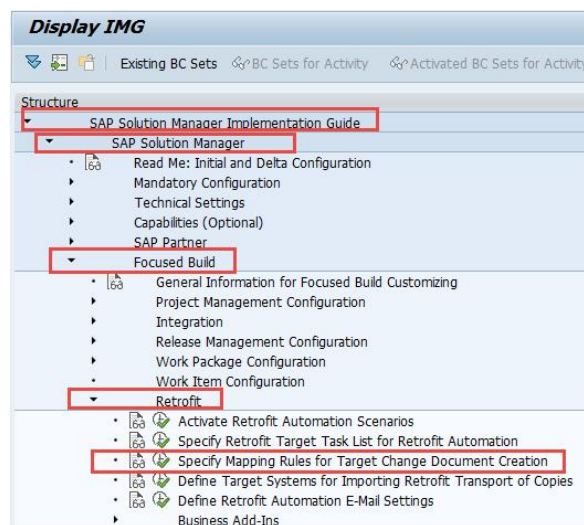
Create an entry for each source task list ID and the referring source and retrofit system combination including clients and enter the target task list ID from the implementation line that you want to use as receiving target.

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

5.3.8 Specifying Mapping Rules for Target Change Document Creation



These settings are relevant for the retrofit automation scenario *Change Document as Retrofit Target* (AUTO_CD) only.

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 additional data:

- Appointments
- Texts
- Partner functions

The data should be mapped on change document creation.

Change View "Transaction Type": Overview

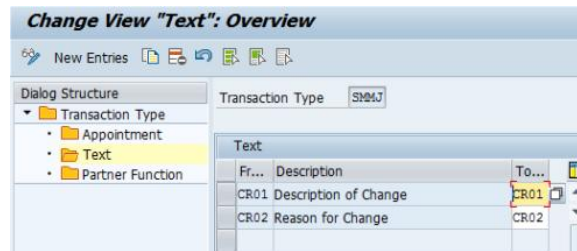
New Entries

Transaction Type		
From TType	Description	To TType
SM67	Normal Change with TMS	SM67

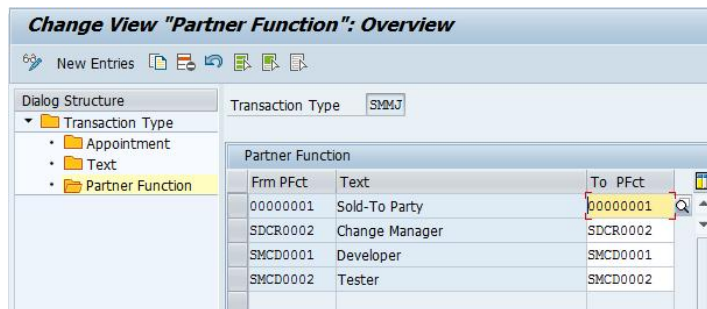
Dialog Structure

- Transaction Type
 - Appointment
 - Text
 - Partner Function

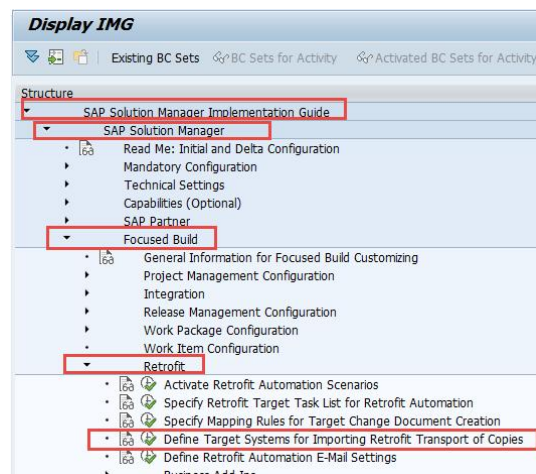
Example for mapping of texts between relevant source and target transaction type:



Example for mapping of partner functions between source and target transaction type:



5.3.9 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 systems 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.

Change View "Define Target Systems for Import of Retrofit ToCs"

New Entries

Define Target Systems for Import of Retrofit ToCs			
Source System ID	Source Client	Target System ID	Target Client
OTO	710	OTO	711

5.3.10 Defining Retrofit Automation E-Mail Settings

Configuring Standard Texts

The following standard texts are configured as a global definition:

TA-Code SE61.

Document Maintenance: Initial Screen

Worklist Authorizations

Settings

Document Class: General text

Language: English

Document

Name: /SALM/RETRO_MAIL_SUCCESS

Display Change 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,

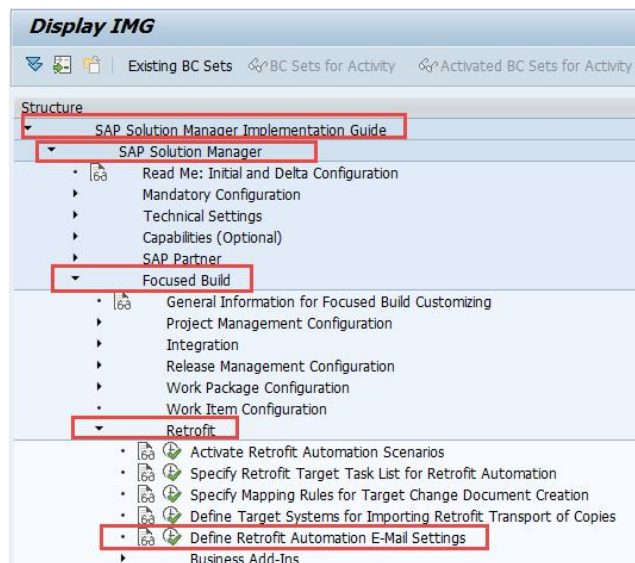
your retrofit activities could not be completed automatically. Please take manual action and complete the retrofit activities at the earliest possibility.
The relevant transports are:

(see below)

Best Regards,
Release and Change Management

Defining Retrofit Automation E-Mail Settings

With add-on 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:



Selecting the IMG node, calls the database table `/SALM/RETRO_MAIL`:

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 e-mail notifications (success and error mail), toggle the `Switch mail off` option.

To switch off a specific type of email notification (success or error mail), leave the corresponding `Mail Text Object` field empty.

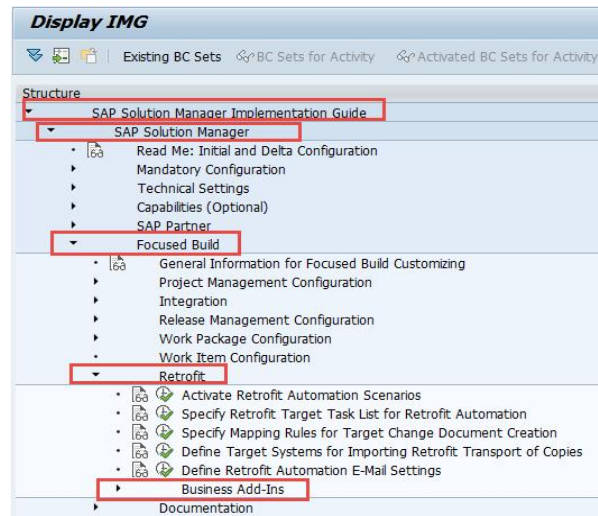
Further Prerequisites:

- For functioning e-mail notifications, the e-mail address must be maintained by the relevant business partner, and the business partner remains linked to the USER, who is the owner of the TR to be retrofitted,
- In addition, e-mail setup SCOT needs to be setup properly.



Use TA SOST to preview the notification before it is sent out.

5.3.11 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).

The BAdI implementation [/SALM/RETRO_RELEASE](#) must be activated if you want to navigate to the change documents for which a transport to be retrofitted or a retrofit target transport is assigned. (For more information, see chapter 3.10).

During Retrofit BAdI

You generally don't need a retrofit automation scenario.

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:

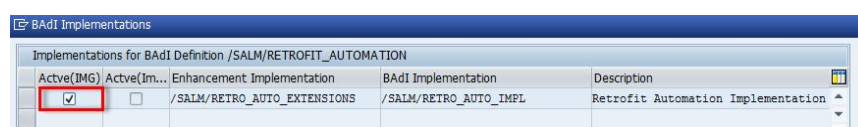
ToC

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)

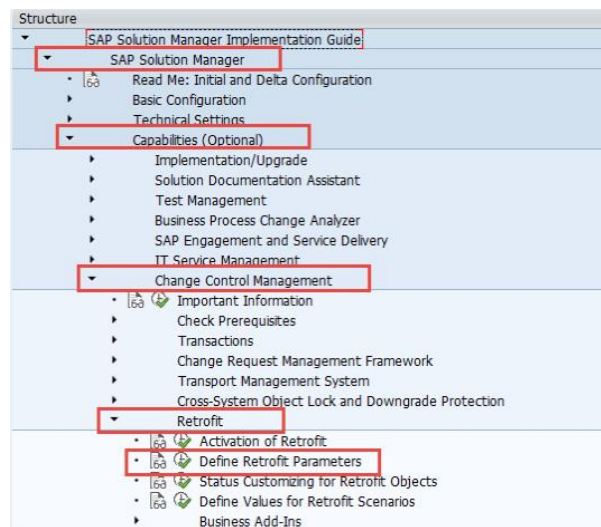


5.3.12 Optional: Enabling Navigation to Change Document

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	

As a result, find the column *Change_ID* displayed on the retrofit list.

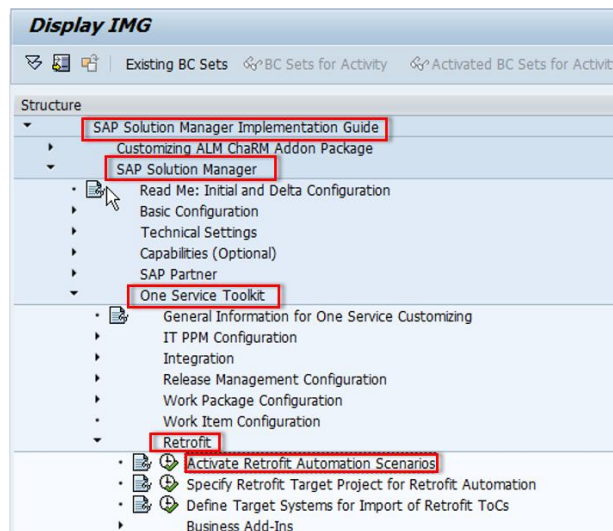
Adding Additional Function Display Change Document (Parameter DISP_CD) to the Menu of the Retrofit Tool

Go to database table /TMWFLOW/ADDFUNC and ensure that an entry for the code **DISP_CD** (additional function: *Display Change Document*) is available.

This adds the additional function to the retrofit list's menu, under *Additional Functions*.

Launch the database table /SALM/RFIT_PARAM and make a *New Entry* for Code **DISP_CD**.

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



Code **DISP_CD** now shows as retrofit automation parameter. Set this parameter to *Active*.

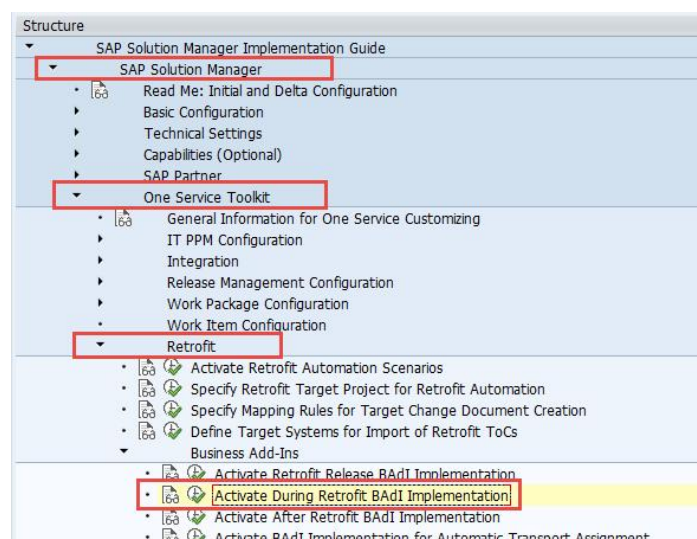
As a result, the navigation to the referring change document is now enabled. However, the full technical enablement of this additional function still requires the activation of the BAdI implementation */SALM/DURING_RETROFIT*, described in chapter 5.3.11.

In addition, the BAdI implementation */SALM/RETRO_RELEASE* must be set to *Active* to fill the field *Change ID* on the retrofit list. (For more information, see chapter 5.3.11).

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*:

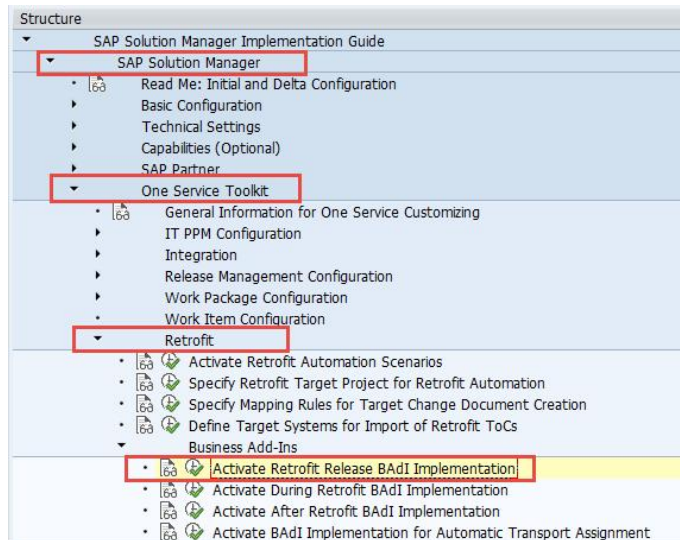


Result: The additional function *Display Change Document* is now technically fully enabled.

Activating the BAdI implementation */SALM/RETRO_RELEASE*

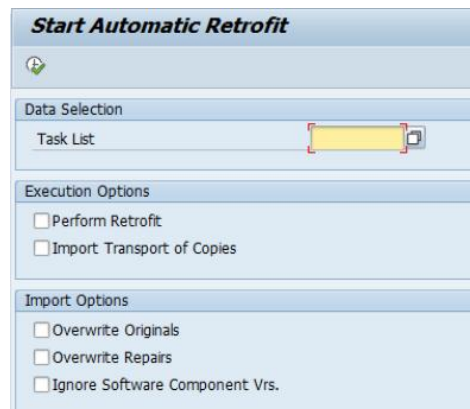
The activation of the BAdI implementation `/SALM/RETRO_RELEASE` is a prerequisite for the additional function `Display Change Document` as the field `Change ID` on the retrofit list is automatically filled with the referring change ID, when an original transport is released and put to the retrofit list.

(Relevant method: `/TMWFLOW/RELEASE_IF~EDIT_CHANGE_ID`).



5.3.13 Calling Report `/SALM/RETRO_AUTOMATION`

SE38: report `/SALM/RETRO_AUTOMATION` 



Field `Task List ID`: Enter the current task list ID for maintenance.

Start the retrofit automation via this report.

5.3.14 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

- Avoid creating multiple jobs.
- Create multiple steps in one job with the same program, but different variants which have been defined.
- Create different jobs only when there is a different scheduling requirement.

Scheduling interval and period

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

Monitor job logs

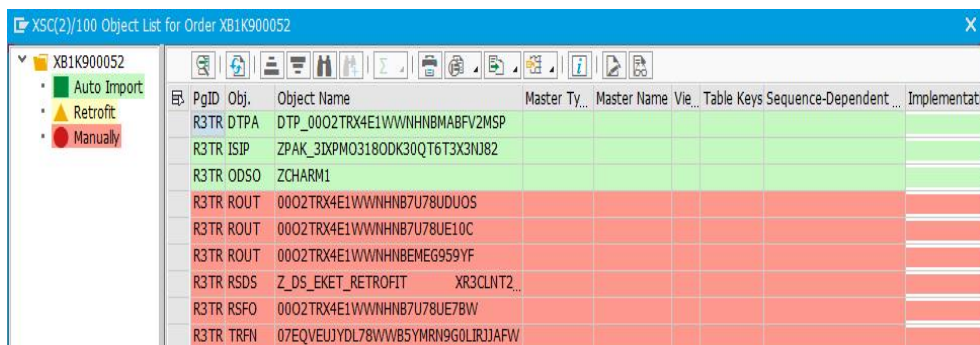
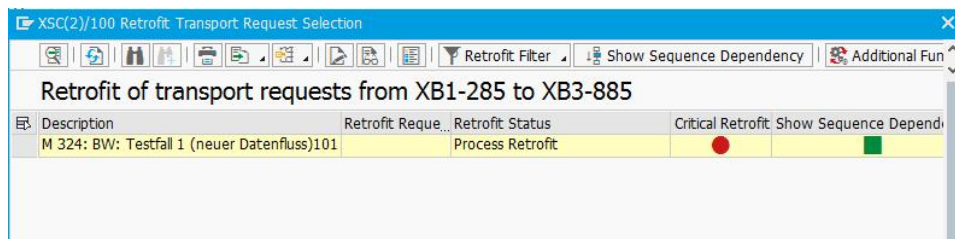
5.4 Configuration of Retrofit for BW

5.4.1 Enhanced Retrofit Without Implemented Focused Build 'Retrofit for BW'

Before implementing the Focused Build *Retrofit for BW*, SAP's standard scenario for enhanced retrofit classifies 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 if 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.



5.4.2 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*:

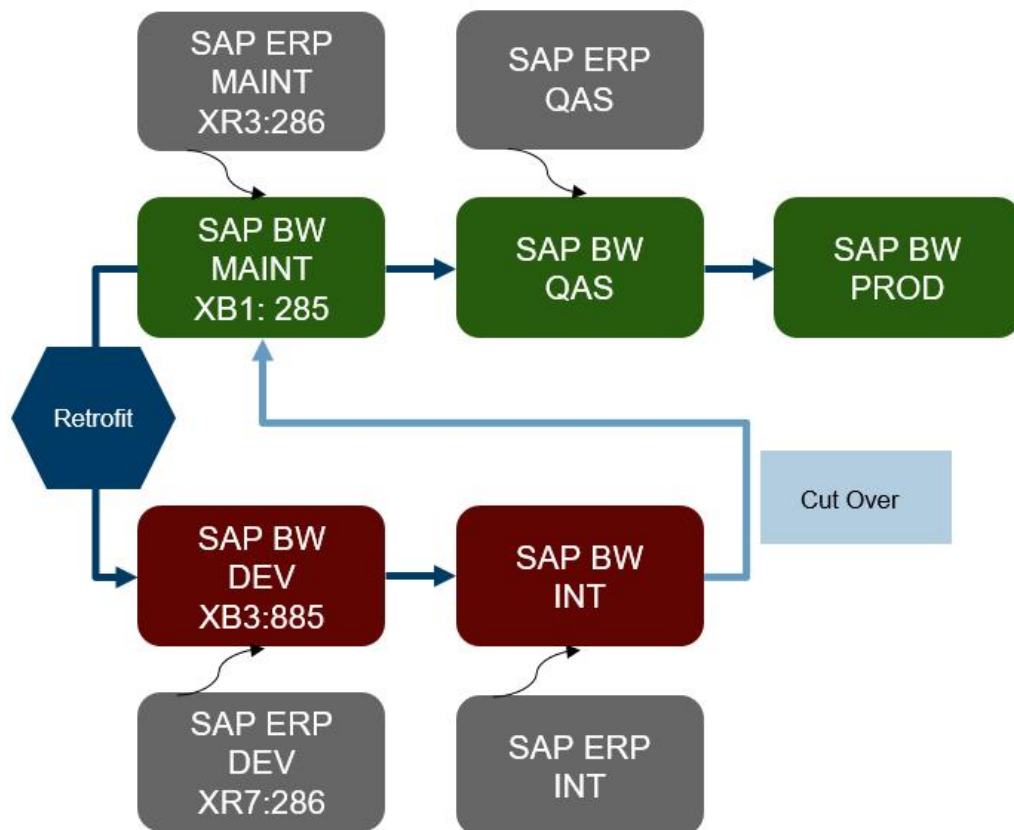
SAP Solution Manager System:	XSC, Client 100
Maintenance Development System for SAP BW:	XB1, Client 285
Retrofit Target System for SAP BW:	XB3, Client 885
Source System for SAP BW MAINT DEV System:	XR3, Client 286
Source System for SAP BW Retrofit Target System:	XR7, Client 286

Be aware, that for successful testing of Focused Build retrofit for BW, the simulation landscape must comprise the source systems (such as 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.

The above prerequisite applies to the retrofit as well. 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.

Example of a simulation landscape for Focused Build *Retrofit for BW*:



5.4.3 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 auto import 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

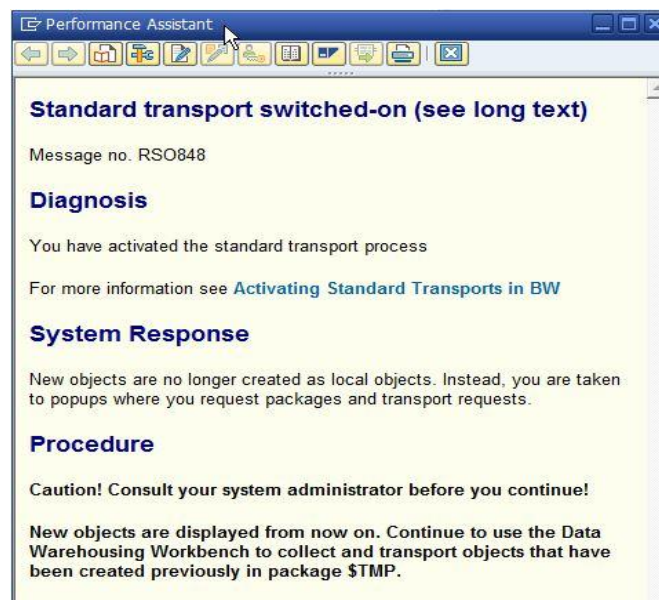
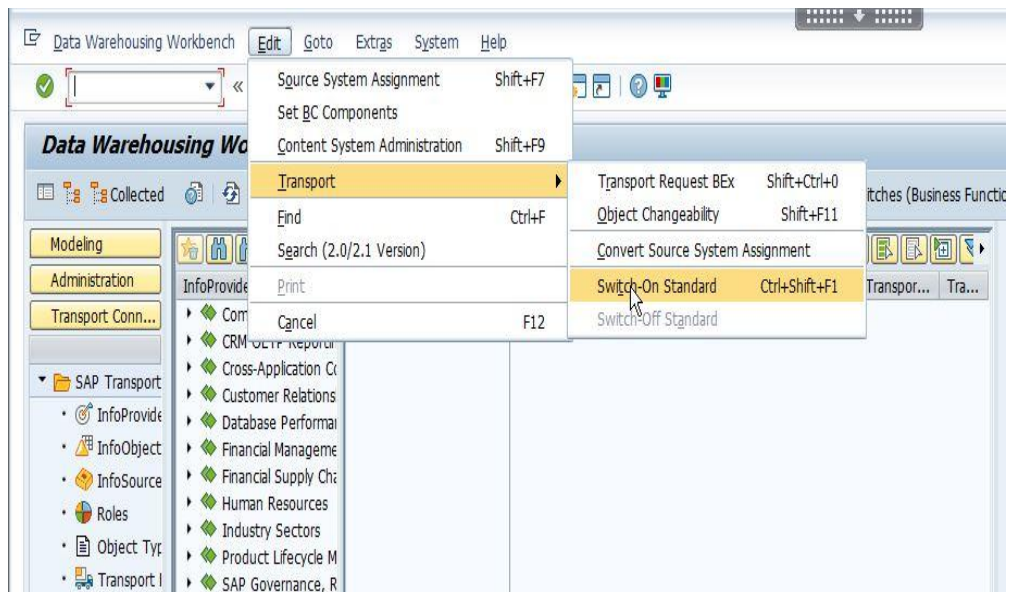
For the usage of Change Request Management (ChaRM) and Focused Build *Retrofit for BW* the BW transport connection tool cannot be used. In the tool, it is possible to store all changed objects locally before they are assigned to a transport request.

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 SAP's standard transport management connection (SAP TMS) for SAP BW. To do so, perform the following steps in transaction **RSA1**:

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

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



Switch to the standard transport management connection (SAP TMS) for both of the following:

- SAP BW maintenance development system
- 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

Bundled with the SAP Solution Manager System XSC, the transport retrofit for BW extension remote (remote API) needs to be imported in both the following:

- SAP BW project development system XB3 (retrofit target system)
- SAP BW maintenance development system XB1 (source system).

Proceed in the following way:

1. Go to the transport organizer (transaction **SE09**) in the customer's SAP Solution Manager. Choose *Request/Task* à *Create* from the menu, and create an empty ToCs (in our example: XSCK900055).
2. Next, save the development package for the retrofit for BW extension remote API's to your newly created ToCs:

Launch transaction **SE80**,

Enter **/SALM/*** as package and choose the input help, or arrow icon,

Select development package **/SALM/RETRO_BW_MS** on the following dialog box and press the button *ok*,

Mark development package **/SALM/RETRO_BW_MS** with the cursor. With a right mouse select, select *Write Transport Entry* from the menu,

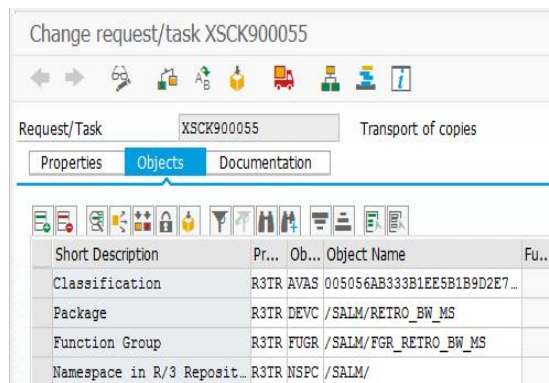
Choose *All Entries*. As a result, all objects of the development package are saved to the transport request on the following dialog box.

In the next dialog box, you have to enter the transport order number of your newly-created ToCs,

By saving development package **/SALM/RETRO_BW_MS** to the ToCs, you save the required function group **/SALM/ FGR_RETRO_BW_MS** (R3TR FUGR **/SALM/FGR_RETRO_BW_MS**) to the ToC as well.

3. Release the objects of your ToCs.

As the target for the ToCs, you can enter the QAS SAP Solution Manager System.



- Put the ToCs to the import queues of the source and retrofit target system

Launch transaction STMS on the QAS SAP Solution Manager System and select [Overview à Imports](#) from the menu.

Display the import queue of the SAP Solution Manager System,

Mark your ToCs (XSK900055) with the cursor and choose [Request à Forward à System](#) from the menu, and enter the source system (XB1).

Forward the ToCs to the import queue of the retrofit target system as well.

- Import the retrofit for BW extension remote APIs in the source system and the retrofit target system.

Launch transaction STMS in the source system XB1 and choose the menu options [Overview à 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 ToCs (XSK90055) with the cursor and choose the import request icon.

Launch transaction STMS in the retrofit target system XB3 and choose the menu option [Overview à 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

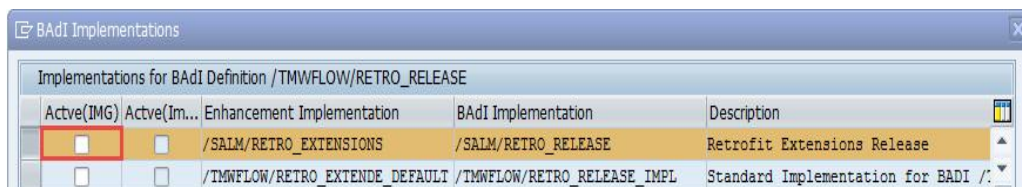
Request XSK900055

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

Mark the ToCs (XSCK90055) with the cursor and choose the import request icon.

Activate BAdI implementation /SALM/RETRO_RELEASE

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](#).



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

The BAdI implementation [/SALM/RETRO_RELEASE_BW](#) is required 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

To activate the BAdI implementation /SALM/AFTER_RETROFIT (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 After Retrofit BAdI implementation](#).



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 can 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 puts 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 [Icons] 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 [Icons]

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

Additional Authorizations for TMW RFC USER on Retrofit Target System required

For the authorization object S_RFC, 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:

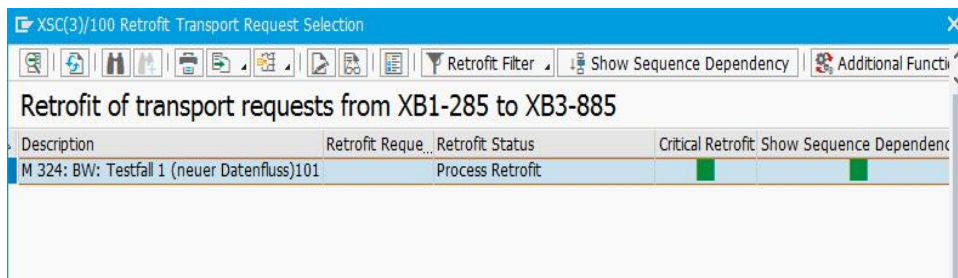
ZRETROFIT_BW_TMW_ADDITIONAL OO Additional Authorization for TMW User (Retrofit BW Scenario)

OO Manually	Cross-application Authorization Objects	AAAB
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 as	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 SAP Role SAP_SOLMAN_TMW_702.

5.4.4 Retrofit with Implemented Focused Build Retrofit for BW

After implementing the Focus Build *Retrofit for BW*, non-conflicting critical SAP BW objects show a green (auto-import) classification.



In a conflict case, a critical BW object shows a red classification (*Manual Retrofit*).

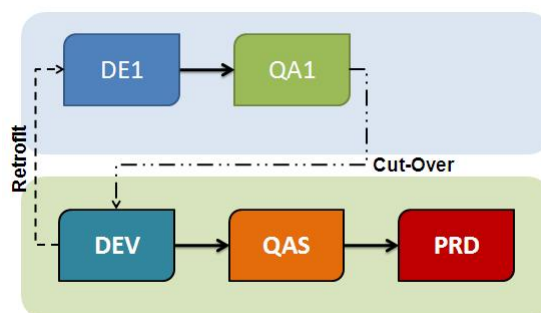
5.5 Configuration of Repack for Change Request Management

5.5.1 Overview

In this section, you can learn about 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 consists of many changes (most likely over 100) respective of 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 (respective of its transport) of the maintenance cycle.

5.5.2 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*
- **S_RFC**
 - Activity: *Execute*
 - Name of RFC to be protected: **TMW_TM_GET_HISTORY**
 - Type of RFC object to be protected: *Function Module*
- **S_RFC**
 - Activity: *Execute*
 - Name of RFC to be protected: **TR_OBJECTS_OF_REQ_AN_TASKS RFC**
 - Type of RFC object to be protected: *Function Module*

Change/Transport Manager

The repack is integrated in the business role **/SALM/SM_SM_PRO**. To use it, you need to have the following roles assigned:

- **SAP_OST_SM_CRM_UIU_SM_PRO**
- **SAP_OST_FB_CRM_UIU_CM**
- **SAP_OST_FB_CRM_UIU**

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**

This authorization is included in the role **SAP_OST_CM_TRANSPORT_M**.

Configuration User

To configure repack via transaction SPRO, the configuration user needs to have **SAP_OST_FB_CM_ITSM_CONFIG**.

5.5.3 Package Distribution for Managed System

The package `/SALM/CHARM_REPACK_MS` must be deployed to each managed development system, where the repack is to be performed.

5.5.4 Repack Options

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

Step 1: Scenario

- Repack by Transport

In the next step, you can select transport requests freely from the source system.

- Repack by Change Cycle

In the next step, you can select transport requests assigned to a given change cycle.



A dialog box titled "Scenario" with a label "* Repack Scenario:" followed by two radio buttons: "Repack by Transport" and "Repack by Change Cycle".

Step 2: Source (Repack by Transport)

- Source System

Select the relevant source system (if multiple systems 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 ToCs should be shown in the result list.



A dialog box titled "Source" with the following fields and controls:

- Source System:** A dropdown menu.
- Start Date:** A date field with a calendar icon and a time field set to "00:00".
- End Date:** A date field with a calendar icon and a time field set to "00:00".
- Show Open Transports:** A checkbox.
- Show ToC:** A checkbox.

Step 2: Source (Repack by Change Cycle)

- Source System

Select the relevant source system (if multiple systems 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 requests are available).

- Customizing Request

Select a target customizing request (if multiple requests 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 deletes these locks to add the locks for the repack target transport request.

- ToC into Customizing

Repack transports of copies into target customizing transport (otherwise, they are 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"/>

5.5.5 Activating the Piece List

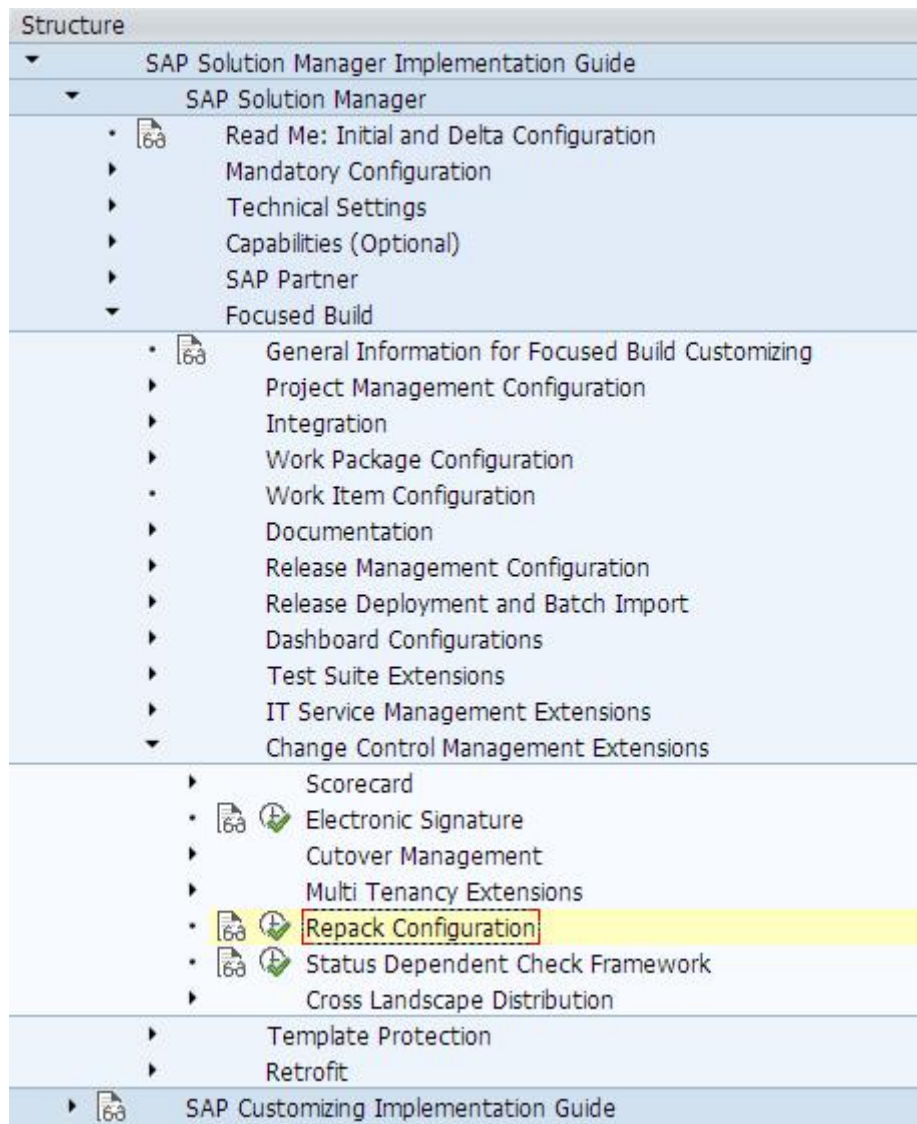
Call transaction SCC1 in your working client and activate the piece list [/SALM/CHARM_EXT](#), which supplies your system with the predefined customizing. The result of this activation can be verified in transaction SCC3.

5.5.6 Configuration

5.5.6.1 Repack Options

This section describes the customizing parameters in the table [/SALM/REPACK_CUS](#). These parameters allow you to set default values for the Repack Options.

In transaction SPRO call the SAP reference IMG and navigate to [SAP Solution Manager® Focused Build® Change Control Management Extensions® Repack Configuration](#).



The displayed 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.

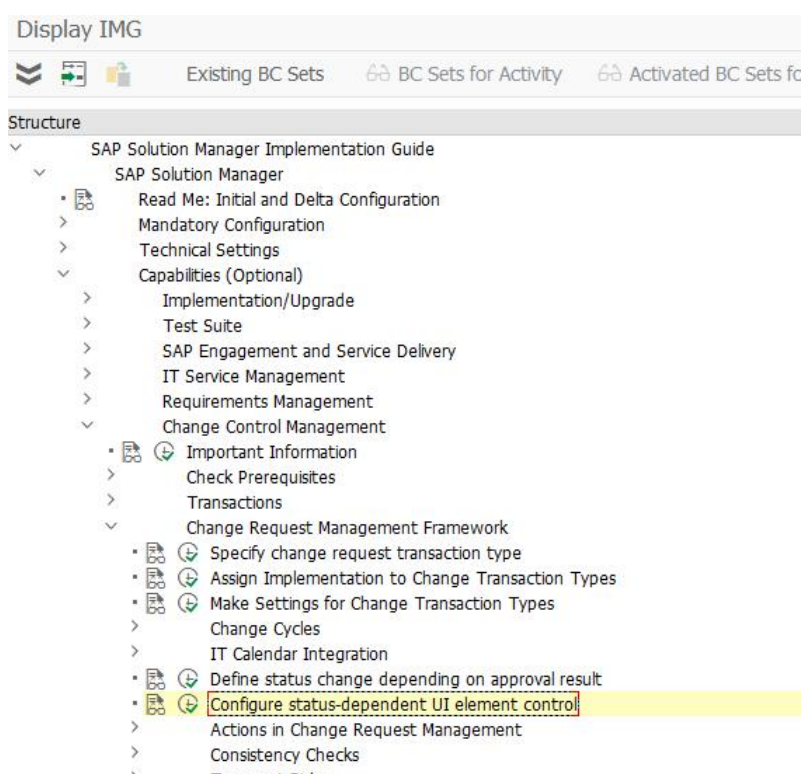
- SET_ORIGINALITY
- Defines the default value for [Change Originality](#) option. Set to **x** if this option should be checked by default.

- SHOW_OPEN

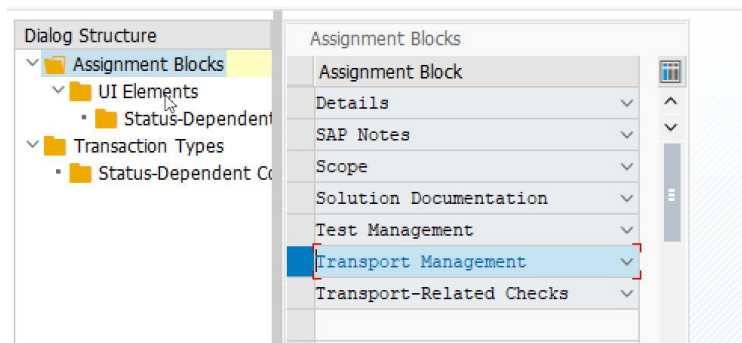
- Defines the default value for *Show Open Transports* option. Set to **x** if this option should be checked by default.
- SHOW_ToC
- Defines the default value for *Show ToC* option. Set to **x** if this option should be checked by default.
- SHOW_TODAY_MINUS_DAYS
- Defines the default value for *Start 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.

5.5.6.2 Configure status-dependent UI element control

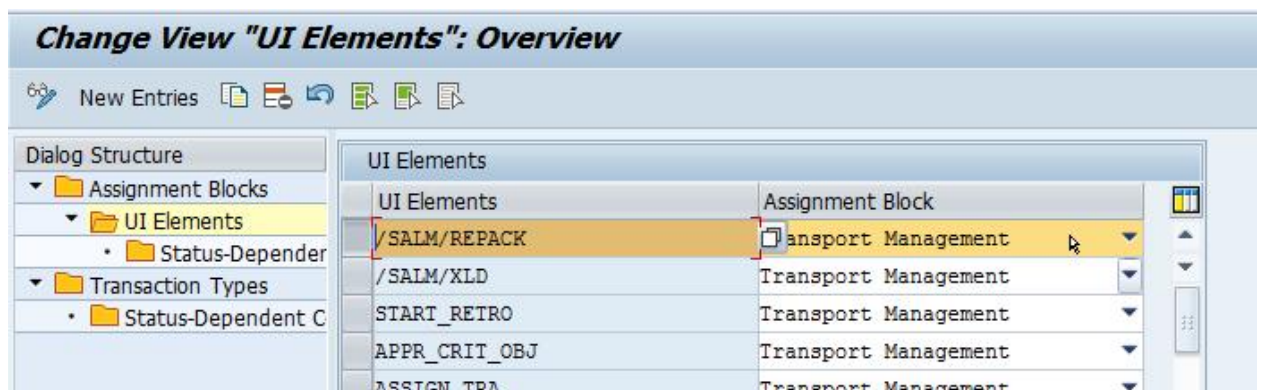
1. Without further customizing the button to call Repack in the WebUI will be disabled for all transactions types. You need to add the status, in which the Repack should be available, to the status dependent field customizing. In transaction SPRO select the entry *Configure status-dependent UI element control*.



2. There select the folder *Assignment Blocks*. Select the assignment block *Transport Management* on the right side and double-click on the sub-folder *UI Elements*.



3. Create the new entry /SALM/REPACK for the assignment block Transport Management.



4. Select your new entry and go to **Status-Dependent Control of UI Elements**.
5. Here you need to define your customizing for all transaction types.
 - o Add an entry for each status value of your transaction types.
 - o Select a value for *Editable/Executable* as required.
 - o Make sure that you activate all entries in the last column *Active*

The following screenshot displays an example for ZMHF and ZMMJ. Please note the other attributes (e.g. *Visible*) are ignored.

New Entries: Overview of Added Entries						
<div> </div>						
Dialog Structure <ul style="list-style-type: none"> Assignment Blocks <ul style="list-style-type: none"> UI Elements <ul style="list-style-type: none"> Status-Depender Transaction Types <ul style="list-style-type: none"> Status-Dependent C 		Status-Dependent Control of UI Elements				
	Transaction ...	UI Element	Status Profile	User Status	Editable/Executable	Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0001	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0002	Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0004	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0005	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0006	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0007	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0008	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0009	Not Editable/Executable	Not Visible
	ZMHF	/SALM/REPACK	ZMHFHEAD	E0010	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0001	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0002	Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0004	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0006	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0009	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0010	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0011	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0012	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0013	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0014	Not Editable/Executable	Not Visible
	ZMMJ	/SALM/REPACK	ZMMJHEAD	E0015	Not Editable/Executable	Not Visible

5.6 Configuration of Simple IT Request

5.6.1 Overview

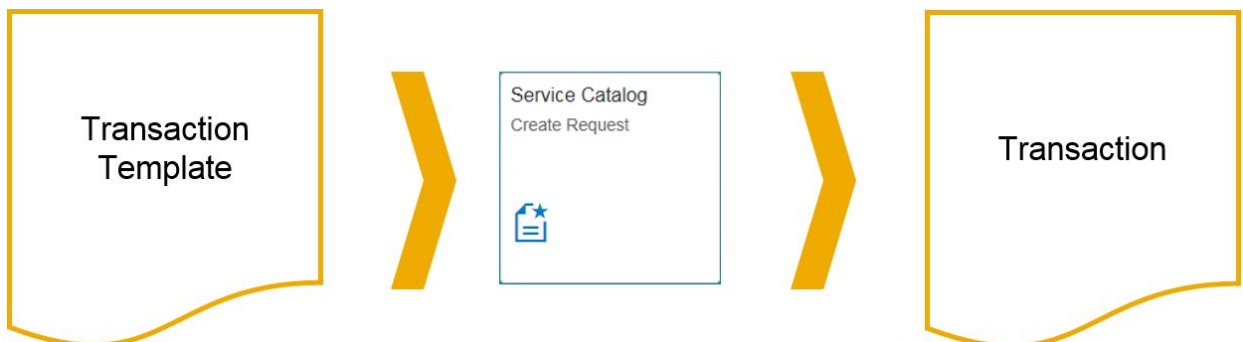
In this section, you can learn about the functionality of Simple IT Request and its configuration.

With Simple IT Request, business users can consume any SAP Solution Manager-based IT service via a single point of entry, a catalog Fiori application. This includes an intuitive user interface for postprocessing of consumed services (*My Requests* Fiori application).

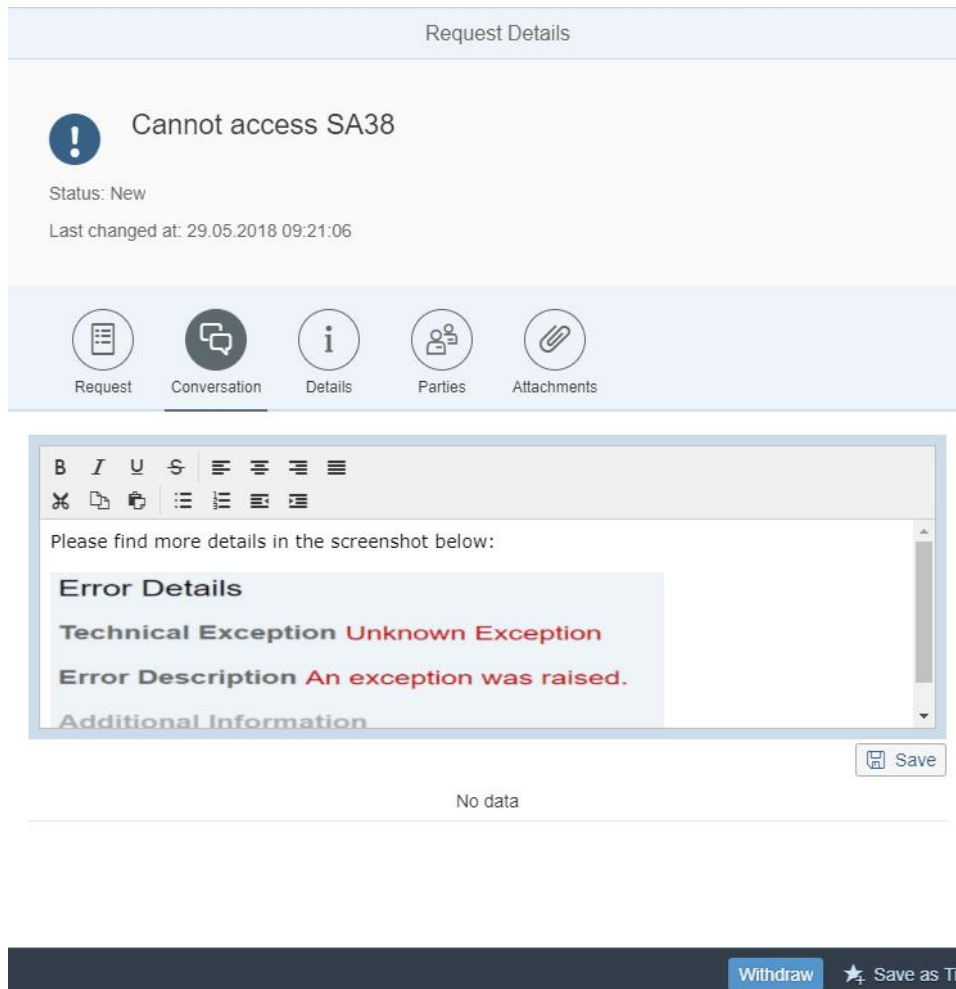
The screenshot shows the SAP Simple IT Request interface. The top navigation bar includes the SAP logo, a back arrow, a home icon, and the text 'Simple IT Request'. Below this, the left sidebar shows 'Access Services' with a search bar and a 'REFRESH' button. The main content area is titled 'Details' and features a blue warning icon and the heading 'Authorization Issues'. Below the heading are 'Clear Form' and 'Load Template' buttons. The 'IT Request Details' section contains a 'Description*' field with the value 'Authorization Issues', a rich text editor with various formatting icons, and a 'Description (long)*' field with the text: 'Please describe your authorization issue here. Please also add a screenshot of Transaction SU53 to this request.' Below these are 'Impact*' and 'Urgency' dropdown menus. The 'Attachments' section shows 'Attachments (0)' and a '+ ' button. At the bottom right, there is a 'Submit' button with a download icon.

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 authorization issues 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.



5.6.2 Roles and Authorizations

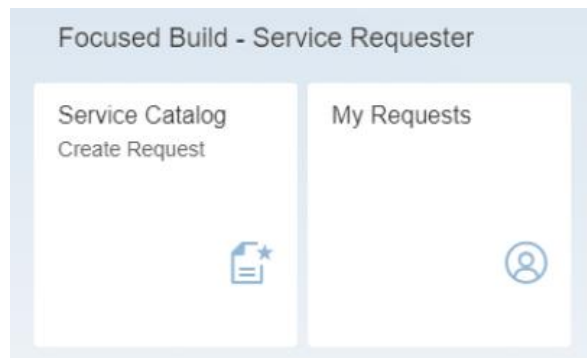
Depending on the role different user interfaces/applications are relevant for Simple IT Request:

Service Requester

The service requester can access the service catalog via a Fiori application. The requester can access their own services which were requested via the [My Requests](#) app. This includes the option to review the status of their request, answer to questions raised by the processor, edit/delete/create attachments and set user status via action buttons (withdraw, reject, confirm). The relevant Fiori applications are accessible via transaction SM_WORKCENTER.

For service requesters, the following composite role is available: [SAP_OST_SSR_REQUESTER_COMP](#)

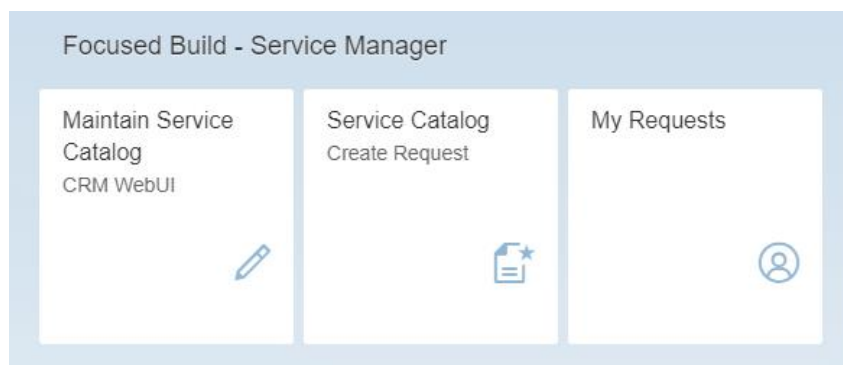
Note: If the approval-based workflow for service requests should be available for service requesters, the additional role SAP_OST_FB_ITSM_S4RQ_CREATE is required.



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, the service manager 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), the service manager also defines the layout of the service form in the catalog application. The service manager can maintain the categorization schema 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](#)



Request Approver

If an approval is required in the workflow of a request, the respective approver can find the request in the Fiori application [My Inbox](#) or in the CRM UI via transaction SM_WORKCENTER. The approver requires the additional role SAP_OST_FB_ITSM_S4RQ_APPROVE. To use the central [My Inbox](#) application for approvals with Simple IT Request, follow the specific configuration steps described below.

5.6.3 Activating Piece List

Simple IT request is delivered with predefined customizing, business roles and authorization roles which must be activated via piece list /SALM/SIMPLE_IT_REQ. This predefined configuration allows direct usage of Simple IT Request without any further adjustments.

Since SP02 the delta piece list /SALM/SITR_SP02 is available, whereas SP03 comes with /SALM/SITR_SP03. If you implemented the Simple IT Request with SP02, you only need to activate piece list /SALM/SITR_SP03. If you've upgraded from SP01, you'll need to activate piece list /SALM/SITR_SP02 and /SALM/SITR_SP03. Otherwise all 3 piece lists need to be implemented.



Caution

In case you have already configured Simple IT Request prior to ST-OST SP03 and you are now planning to utilize Focused Build R2D scenario

- either starting with ST-OST SP03
- or updating Focused Build R2D scenario to ST-OST SP03

you are going to overwrite the existing customizing in /SALM/ITSM_SSRTM due to a wrong entry in the piece list /SALM/FB_CUST. Thus, you have to redo the customizing /SALM/ITSM_SSRTM after the activation of this piece list.

As the piece list should be activated only once, please first verify if this already has been done in the working client of the SAP Solution Manager system. If piece lists already have been activated, you can find a respective entry in SCC3.

- Call transaction SCC3.
- Select transport requests.
- Search for /SALM/SIMPLE_IT_REQ, /SALM/SITR_SP02 and /SALM/SITR_SP03.

Please ensure the piece list is activated. To do so, copy it from client 000 to your working client:

- Call transaction SCC1.
- Enter piece list (transport request) /SALM/SIMPLE_IT_REQ (and afterwards same for /SALM/SITR_SP02 and /SALM/SITR_SP03).
- For a first test without database update, you can set the flag for *Test Run*.

Select an option to start the import immediately or as a background job.

5.6.4 SAP Notes

- [2713570](#) - Focused Build: Technical collective note for ST-OST 200 SP03
- [2713624](#) - Focused Build: Central Note for Focused Build 2.0 SP03 for SAP Solution Manager 7.2 SP08

5.6.5 Configuration

Simple IT Request is delivered with predefined customizing, business roles and authorization roles which must be activated via piece list(s) (please refer to chapter 5.6.3 Activating Piece List). 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 two 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, such as for 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 Solution Manager configuration interface. On the left, the 'Category Hierarchy' pane shows a tree structure under 'SAP_SM_TEMPLATE_V2'. The hierarchy includes categories like 'End User Workspace', 'Office Equipment', 'Mobile Devices', 'Software', 'Printing', 'Business Applications', 'SAP', 'Non-SAP', 'Corporate Intranet', 'User Management', 'IT Infrastructure', 'Networking', 'File Share', 'Active Directory', 'Print Servers', 'Internet Access', 'Mail', 'Virtualization', 'Physical Servers', and 'Databases'. A callout box labeled 'Standard Categorization Structure' points to the 'Business Applications' category. On the right, the 'General Data' pane shows details for the 'SAP_SM_TEMPLATE_V2' schema, including its name, description, status (Deployed), valid dates, logical structure (Hierarchical Categorization), and authorization mode (OR Combination). Below this, the 'Changes' section shows the last change on 19.09.2016. At the bottom, the 'Application Areas' table lists various application IDs and their corresponding parameters and values.

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 Loca...
Service Order	Transaction type / Catalog Cat...	Normal Change / Defect Loca...
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 customized business roles, consider the specific navigation bar profile `/SALM/S1SOLMANPRO`. This profile includes 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 configurations also need to be adjusted if other business roles are used. Include the assignment block *Simple IT Request Setup* referring to CRM UI component **/SALM/ITSMSSRFS** into the configuration of the corresponding business role.

Field Label	Type	Mandatory	Read only	Visibility of Field

Authority Groups

Remove Line

Authorization Group

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
- S4AT: Service Request Template (with Approval Workflow)

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
- S4AT triggers S4RQ (with Approval Workflow)

This mechanism follows the general approach of Simple IT Request as described above. To integrate custom-specific templates or transaction types, see the *Customizing Options* chapter below. All relevant tables that need to be maintained are highlighted. Adjustments to authorization roles, categorization schemas, and CRM business roles, including UI configurations, also might be necessary if you use new/other transaction types 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

Includes 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`

Includes 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`

We recommended copying these roles into customer namespace. Adjust them to customer specifics if necessary, 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.

5.6.6 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
Definition of Service Templates for Catalog Selection	/SALM/ITSM_SSRSR	Define the template transaction types that can be used to create catalog services.
Template Mapping to Simple IT Request Transaction Type	/SALM/ITSM_SSRTM	Define the mapping between template transaction type and transaction type which is created if a service is consumed.
Copy Control for Transaction Types	CRMV_PR_COPY_MA	Define standard copy control between template transaction types and transaction types.
Customizing of General Settings	/SALM/ITSM_SSRST	Define the categorization type which is used to build the catalog hierarchy referring to a selected reference transaction template.
Definition of Available Layout Fields for Simple IT Request Apps	/SALM/ITSM_SSRLF	<p>Define the transaction fields that can be selected within the layout component during maintenance of a service (e.g., Description, Priority, Urgency, Contact Person, ...).</p> <p>In case customer-specific layout fields which require a value-help are added, an additional BAdI-Implementation needs to be created. Please refer to the existing implementations</p>

Option	Table	Description
		(/SALM/ITSM_SSR_DEFAULT_VHI) of BAdI /SALM/ITSM_SSR_FLDVALHELP_BADI .
Define Activities for Simple IT Request	/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").
Definition of Partner Functions as Requestor by Trans. Type	/SALM/ITSM_SSRRO	Define the partner function "requester", used during consumption of a service to set the consumer as requester.
Customizing of Communication in My Requests App	/SALM/ITSM_SSRCO	Define text type and status (optional & conditional) which is set when end users communicate with the IT organization using the My Request App.
Conditional Status Change	/SALM/ITSM_SSRCS	Define a conditional status change based on the transaction's status. This option is integrated in option "Customizing of Communication in My Requests App".
Visible Tabs in My Requests App by Trans. Type	/SALM/ITSM_SSRRT	Define the tabs which are displayed in the My Request App (e.g., Request, Conversation, Attachments, ...).
Customizing of Authorization Groups	/SALM/ITSM_SSRAG	Define authorization groups that can be used to restrict access to services on transaction template level.
Customizing of My Inbox Integration	/SALM/ITSM_SSRCP	Define the transactions used for the optional My Inbox Integration. Entries must contain the transaction type (e.g. S4RQ), the corresponding status value (e.g. E0015 for Validated) and the partner function for the Approver (SMSO0001).
AGS: Work Center Customizing	AGS_WORK_CUSTOM	Optional: Maintain following entries in case Request for Changes are to be used with Simple IT Request: Parameter Key: UIC_PROC_TYPE_SPECIFIC_*, Parameter Value: /SALM/CMCR_H/CMCROverview_S4CT Parameter Key: UIC_PROC_TYPE_SPECIFIC_*, Parameter Value: /SALM/CMCR_H/CMCRHeaderEF_S4CT

Option	Table	Description
		See note 1483276 for additional information on the Parameter.

5.6.7 My Inbox Integration (Optional)

With Simple IT Request, approval-based workflows are supported. You can find transaction types S4AT (Template) and S4RQ (Request) in default customizing delivery which include such an approval workflow. The approval workflow for Change Request Management with transaction type SMCR is also supported. These workflows can be integrated into the Fiori app *My Inbox* running on a central Fiori Frontend Service (central-hub-deployment).

The configuration of this scenario follows the general procedure of the *My Inbox* integration for Change Request Management. You can find further details in [SAP Note 2590554 - SAP Solution Manager - Change Request Management: My Inbox SAP Fiori App Integration - General Information](#). Please follow the note's instructions to establish an integration of your gateway/frontend server with SAP Solution Manager.

Besides these activities, the configuration specific to Simple IT Request is delivered via piece lists for the Simple IT Request (see above).

5.6.8 Rich Text for Simple IT Request (Optional)

The configuration steps below show how to enhance Simple IT Request with the rich text formatting feature.

5.6.8.1 Disclaimer

Technical restrictions prohibit working with rich texts in combination with guided procedures. In addition, technical restrictions prohibit activating rich texts for Change Request Management transaction types.

Once you've activated rich text formatting for a specific IT service management transaction type (such as incidents or service requests), avoid creating transactions of these types using Guided Procedures (such as used in business role [SOLMANREQU](#) to create incidents or service requests).

5.6.8.2 Prerequisites

You need to have SP02 or higher of ST-OST Component installed on SAP Solution Manager 7.2 SP7 or higher.

The following business functions must be activated in transaction SFW5:

- [CRM_ITSM_COM - Content and Text Management](#)
- [CRM_TM_1 - Text Management Assignment Block](#)

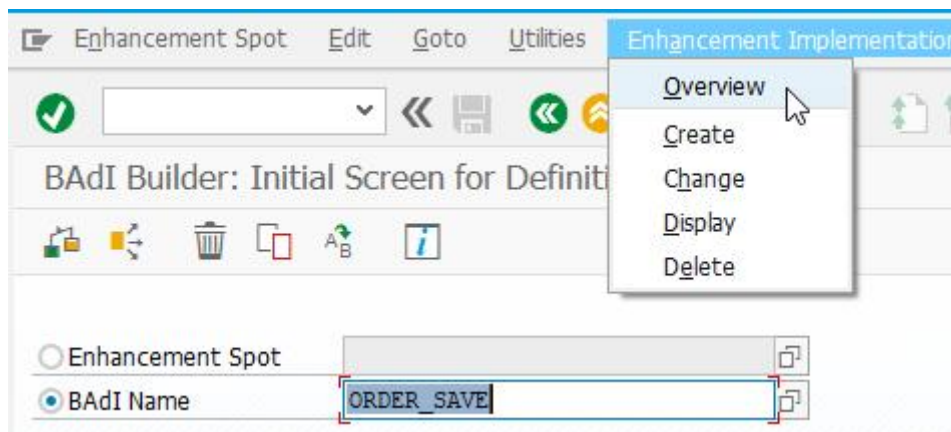
- **UI_FRW_RTE - Assignment is defined in business function**

- Please be aware, that the Business Functions CRM_TM_1 and UI_FRW_RTE are not reversible!

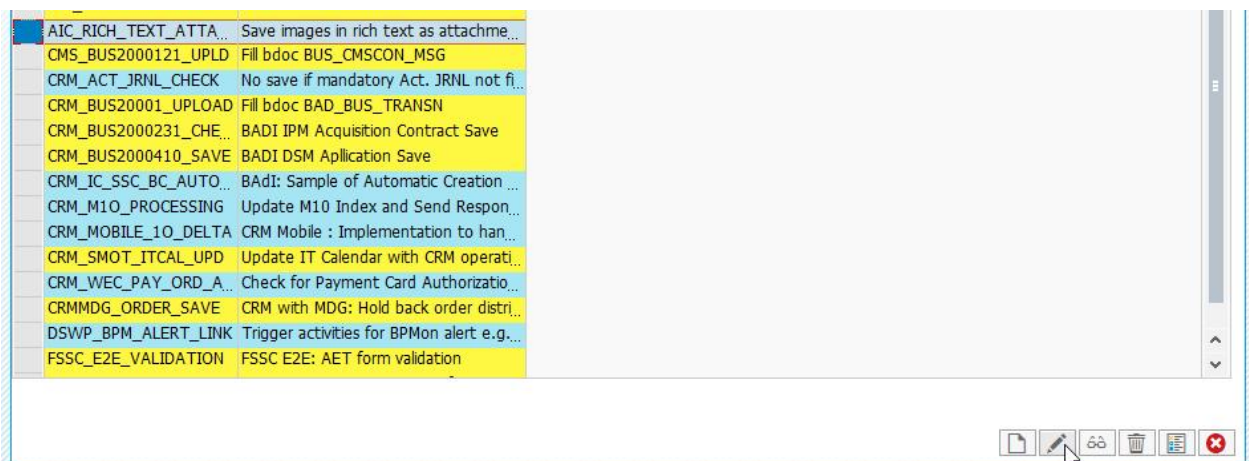
- The following Implementation of BAdI **ORDER_SAVE** must be implemented and called:

AIC_RICH_TEXT_ATTACH - Save images in rich text as attachments

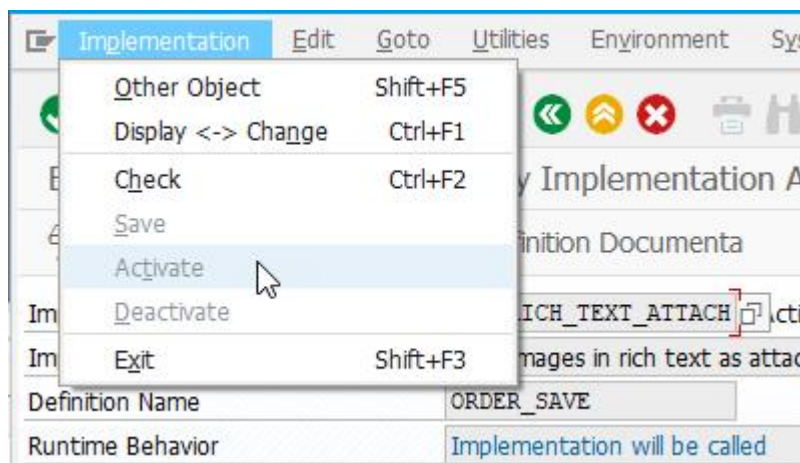
- For checking the BAdI implementation, open transaction SE18, enter **ORDER_SAVE** as BAdI Name. From the menu bar, choose *Enhancement Implementation -> Overview*:



- In the following screen, check if the implementation **AIC_RICH_TEXT_ATTACH** is highlighted with a yellow background color.
- Otherwise select the implementation and enter change mode by selecting on Change (F6):



- Activate the implementation by choosing *Implementation -> Activate*:



5.6.8.3 Configuration

Rich text formatting can be activated per text type individually. We recommend activating it for every used text type within the specific transaction type.

Please be sure to activate every text type which is defined in Simple IT Request's customizing (description, reply, proposed solution, and others).

5.6.8.4 CRM WebClient UI

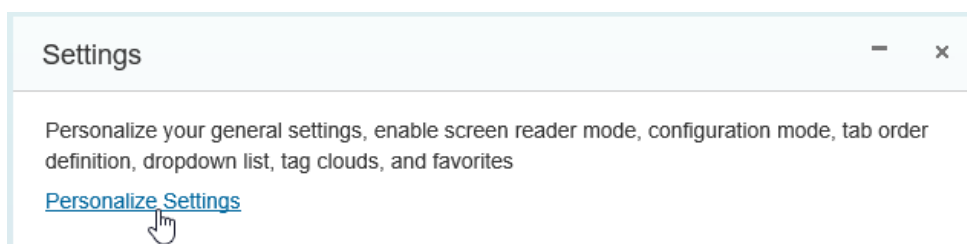
The CRM WebClient UI can only display and edit rich texts in the notes assignment block of each transaction's work area. Therefore, this block must be enabled in each relevant WebClient UI component.

For doing this, enter the CRM UI via the Fiori work center, or transaction SM_CRM. Choose business role [/SALM/SM_PRO](#) or your equivalent copied one and ensure that the configuration mode in the personal settings is enabled:

Click on the personalize function in the web UI home screen:



On the following screen, enter the personal settings:



Enable the configuration mode in the following dialog box and save your changes:

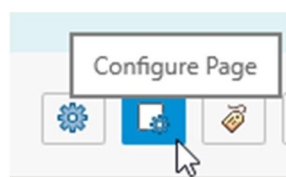
Configuration Mode

Enable the configuration of pages and views directly from the user interface

☒ Enable configuration mode

Now navigate to a transaction which should be activated for rich text formatting, and configure the page as follows:

Choose the configure page icon in the navigation bar:

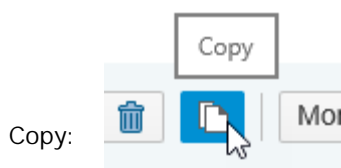


Configure Page:

In the following dialog box, copy the chosen configuration key, proceed with the predefined keys, or adapt the keys to your needs. Continue by selecting [Continue](#):

Select the configuration for copying into customer namespace:

Configurations					
<div>New More</div>					
Component Name	Page	Role Config. Key	Component Usage	Object Type	Object Subtype
AIC_INCIDENT_H	INCIDENTOV	<DEFAULT>	<DEFAULT>	AIC_OB_OPTASK	<DEFAULT>
AIC_INCIDENT_H	INCIDENTOV	<DEFAULT>	<DEFAULT>	AIC_OB_SRVREQ	<DEFAULT>



Copy:

Search configuration key suggested as default

Role Config. Key:

Component Usage:

Object Type:

Object Subtype:

[Continue](#)

Choose configuration key and select [Continue](#):

After doing this, change the load option of the assignment block **GSTEXT (Title: Notes)** from *Hidden* to your desired option. Choose **Direct** for displaying the expanded block, and **Lazy** for a collapsed display.

Select **GSTEXT** and change the load option:

Displayed Assignment Blocks

Up Filter:

	Component	View Name	Title	Load Option
	AIC_CM_PRJ_...	AIC_CM_PRJ_...	Projects	Hidden
	GSTEXT	MainWindow	Notes	Hidden
	SRQM_SLAPRO	SRQM_SLAPR...	Service Level A...	E Direct
	SRQM_REL_T...	SRQM_REL_T...	Related Transa...	C Lazy
	SRQM_PROC_...	SRQM_PROC_...	Processing Log	H Hidden

Save the changes and repeat these steps for each transaction type you want to use with rich text formatting.

Optional: Since the notes assignment block displays all used text types, you can change the text assignment block's load option to *Hidden*, or *Lazy* (Component: **AIC_LONGTEXT**).

5.6.8.5 Customizing Options

This section describes the customizing options of activating rich text formatting in Simple IT Request which can be defined in different customizing tables. Each table can be maintained in transaction SM30.

Option	Table	Description
CRM Formatted Text Customizing	CRMV_TEXT_FORMAT	Add a table entry for each text type you want to use. Choose the following options: Text-Object CRM_ORDERH Select Formatted Select HTML-Text Enter CL_CRM_TEXT_FORMAT_CONVERSION as the converter class
Assign Business Objects to Switches	CRMV_ITSM_SWITCH	Add a table entry for each business object type you want to use. Choose the following options: Switch: CRM_ITSM_COM Trans.Cat.: BUS2000223 (for Service Requests and Incidents), BUS20001116 (for Service Orders) and/or BUS2000224 (for Problems)
Customizing of General Settings for Simple IT Request	/SALM/ITSM_SSRST	Add a table entry for each transaction type you want to use. Choose the following options: +: RT_PROC Number: 1, 2, ..., n

Option	Table	Description
		Text: S4RQ , S4AT and/or any additional ITSM transaction type.
Service Desk Customizing (Attachment handling)	DNOC_USERCFG	<p>Add a table entry for each text type you want to use.</p> <p>Choose the following options:</p> <p>Field Name: IM_TEXT_SAVE_ATTACH_{TextType} (Change {TextType} with text type ID)</p> <p>Sequence Number: 1, 2, ..., n</p> <p>Field Value: x</p> <p>Description: Choose freely</p>

5.6.9 Multilingual Services for Simple IT Request (optional)

Multilingual Services enable Service Managers to maintain templates in the Service Catalog in each available language in SAP Solution Manager. The displayed language in both Applications (MyRequests & Catalog) is selected based on the logon language in the Fiori Launchpad.

There's no additional customizing necessary to activate this feature.

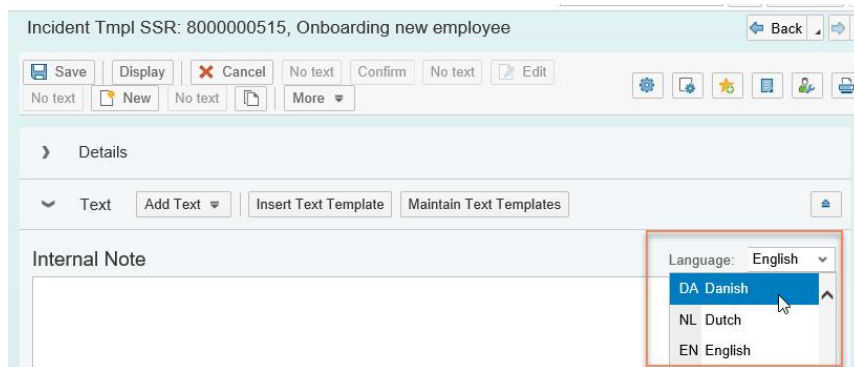
5.6.9.1 Configuration

In CRM WebClient UI a new translation area in the Simple IT Request assignment block was added. Herein the Service Manager can maintain the short-text translations in each available language.

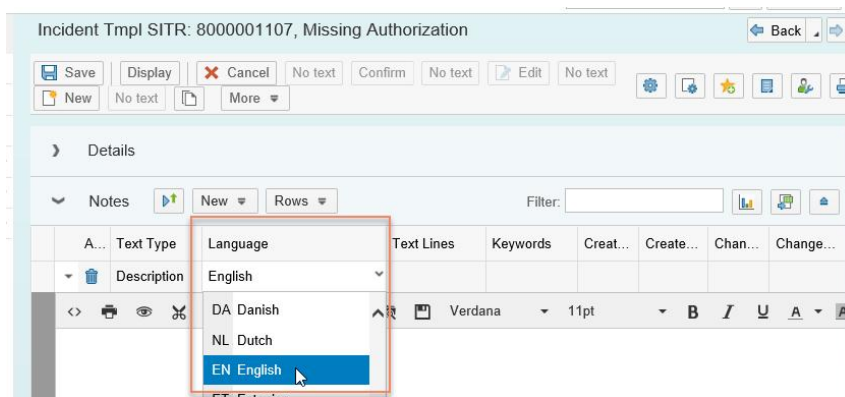
In case a translation is missing, a fallback scenario is implemented. The fallback language is selected based on the service's initial language.

Long-text translations (e.g. Description) can be maintained as follows:

Assignment block Text:



Assignment block Notes:



Any additional information (e.g. Multi-Level-Categorization) can be maintained using the standard translation feature in CRM WebClient UI.

5.7 Configuration of dropDoc

Use dropDoc to manage numerous file types, which simplifies the default usability of file management inside Solution Documentation. As such, 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 Solution Documentation.

Also, the new standalone app [MyDocuments](#) displays all documents the user has created in Solution Documentation and are assigned to the user as *Owner* or *Responsible*.

Features of dropDoc include:

- Insert files using drag and drop.
- Mass maintenance of documents and documents type.
- Change the document status.
- Change document owner or responsible party.
- Display and download of items such as process diagrams.
- Delete one or more documents at the same time.
- Optimize for different screen resolutions.

As a partial web application, the frontend functionality of dropDoc is based on a browser UI technology SAPUI5. We recommend that for best dropDoc functionality, you use the latest browser versions for Google Chrome, Firefox, Safari, or Internet Explorer.

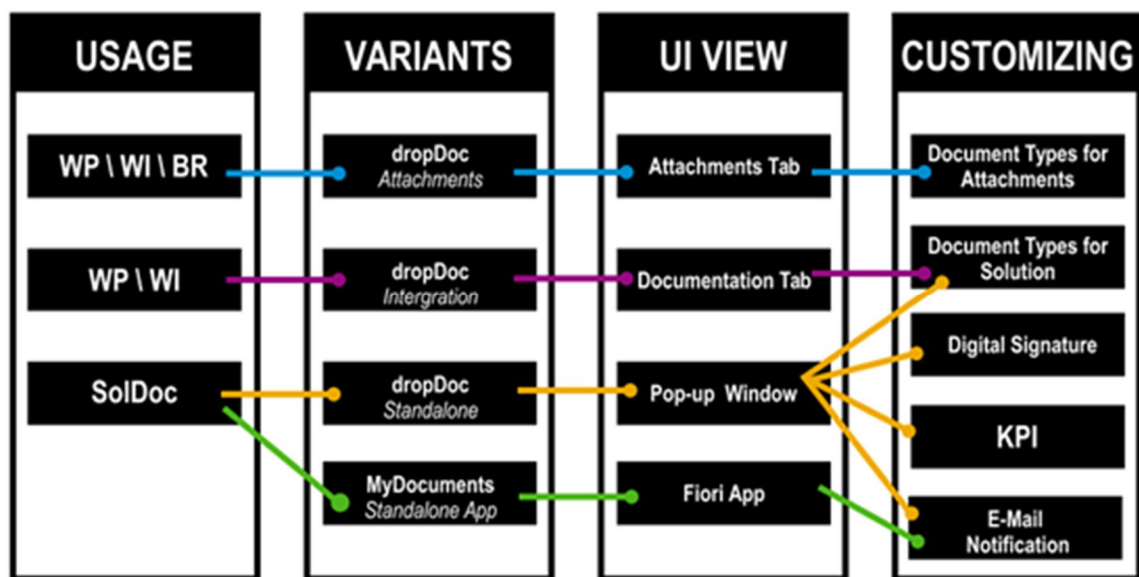
In addition, dropDoc allows for detailed configuration for your specific needs. Define the documentation store type and the expected document types in different surroundings.

5.7.1 Prerequisites

You have already created a solution and assigned document types.

5.7.2 Overview of dropDoc Variants

A well-rounded application, dropDoc 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. See the [Attachments Tab](#) as a part of WP or WI. For this dropDoc variant, the [Allowed document types for Attachments](#) table must be customized. (For more information, see chapter *Document Types of Attachments*.)
- Second, the integration variant is the main dropDoc application for Solution Documentation for the managing of documentation. See the [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 *Current Status Handling - KPI Overview*, *Overview of digital signature*, *Customizing of E-Mail Notification*)

- Third, the standalone variant is displayed in a dialog box window directly in Solution Documentation column browser. For this dropDoc variant, define the *Document types for solution* only.

i Note

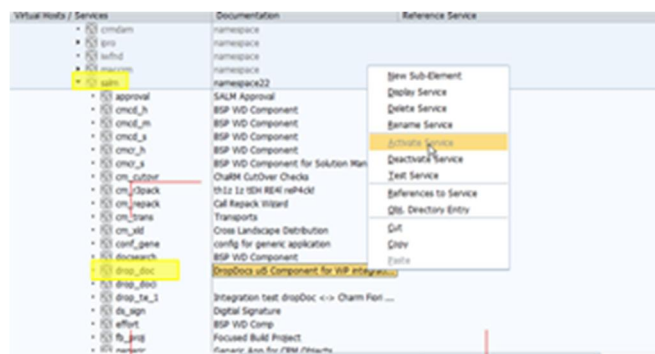
All dropDoc variants could be used for the same solution or separately.

The *MyDocuments* app presents documents from Solution Documents according to branches. You can change the status of documents directly from the *MyDocuments* app and trigger the e-mail notification. (see chapter *Customizing of E-Mail Notification*)

5.7.3 Activation of oData 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*.



5.7.4 Activation of ICF Services

BSP Services

Run transaction **SICF**, select the execute icon (or **F8**), and follow the path:

- For dropDoc **/sap/opu/odata/salm/drop_doc_srv** and activate service *DROP_DOC_SRV*.
- For MyDocuments **/sap/opu/odata/salm/my_docs_srv** and activate service *MY_DOCS_SRV*.

Virtual Hosts / Services	Documentation	Reference Service
▼ opu	OData for SAP Products	
▼ odata	Standard Mode	
▶ aigw	Namespace	
▶ iwfnfnd	Namespace	
▼ salm	Namespace	
• business_requirements_srv	BUSINESS_REQUIREMENTS_SRV	
• crmgenericappconfig		
• crm_generic_srv	CRM_GENERIC_SRV	
• drop_doc_srv	DROP_DOC_SRV	
• ext_integration_srv	EXT_INTEGRATION_SRV	
• itesm_ssr_catalog_srv	ITSM_SSR_CATALOG_SRV	
• itesm_ssr_myrequests_srv	ITSM_SSR_MYREQUESTS_SRV	
• it_ppm_ui5_app_service_srv		
• mangocrmui	MANGOCRUI	
• mc_srv	MC_SRV	
• my_docs_srv	MY_DOCS_SRV	
• oneservice_service	ONESERVICE_SERVICE	
• para_cache_srv	PARA_CACHE_SRV	
• release_dashboard_srv	RELEASE_DASHBOARD_SRV	
• servic_itsm_dashboard	SERVIC_ITSM_DASHBOARD	
• sol_readiness_odata_service	SOL_READINESS_ODATA_SERVICE	
• tm_service	TM_SERVICE	
• tm ts designer srv	TM TS DESIGNER SRV	

Definition of a system alias for oData service

Start transaction / IWFND/MAINT_SERVICE :

- For dropDoc OData service named **/SALM/DROP_DOC_SRV** and add one.

Activate and Maintain Services							
Service Catalog							
Type	Technical Service Name	Service Description	External Service Name	Namespace	OAuth	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/DL_SERVICE	1 OF Launchpad Service	DL_SERVICE	/STD/	<input type="checkbox"/>		
BEP	DEVXK_DASHBOARD	1 Dashboard service	DEVXK_DASHBOARD		<input type="checkbox"/>		
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	DSWP_CDC_ODATA_SRV	1 OData service for Cross-Database Comparison	DSWP_CDC_ODATA_SRV		<input type="checkbox"/>	Not Supported	
BEP	DSWP_CDC_SRV	1 OData service for Cross-Database Comparison	DSWP_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_HLS_UNUSED_IPS_SRV	1 DVM HLS and Potentially Unused IPs	DVM_HLS_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_ICIDB_OD	1 GW EZE ICIDB Service	EZE_ICIDB_OD		<input type="checkbox"/>		
BEP	EZE_ICIDB_ODATASERVICE	1 EZE KI Dashboard GW Service	EZE_ICIDB_ODATASERVICE		<input type="checkbox"/>		
BEP	EZERBCC_UI_SRV	1 GW project for new BPCC UI	EZERBCC_UI_SRV		<input type="checkbox"/>	Not Supported	
BEP	EZEEM_MF_TS	1 Technical Service for Message Flow Monitoring	EZEEM_MF_TS		<input type="checkbox"/>		

5.7.5 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"

New Entries

Trans.Type	Solution ID	Doc. Type
	051Mh1T7kQ1sYchZdOm	0F0SP
	051Mh1T7kQ1sYchZdOm	0SAP_11
S1IT	051Mh1T7kQ1sYchZdOm	01ZDG
S1IT	051Mh1T7kQ1sYchZdOm	0SAP_42
S1IT	051Mh1T7kQ1sYchZdOm	0ST
S1BR	051Mh1T7kQ1sYchZdOm	0SAP_41

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.

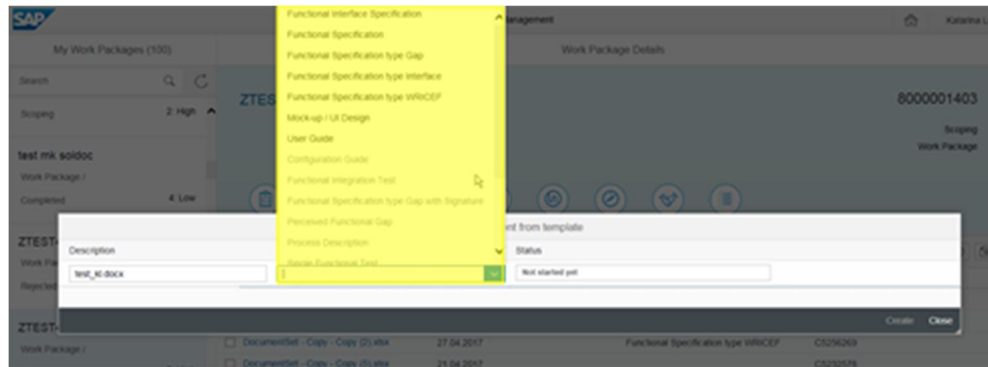
Note

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, use the wildcard (*) for all the three parameters (Solution ID, Transaction and Doc.Type).



Now the defined document types for attachments are available in the selected solution. You see the document types in the dialog box window in the dropdown menu of document type's field. The dialog box window is opening by creation of attachment.

5.7.6 Current Status Handling - KPI Overview

1 KPI Overall Rating

2 Overall KPI -applies the status of documents for complete WP/WI

3 KPI's Structure Level - applies the status of documents for each assigned structure

KPI overall	Documenttype	Filename	Availability	Current Status	Expected Status	Rating
Functional specification availability	Functional Specification type WRICEF	Functional_Specification_WRICEF.docx	● 1 First Overall KPI	Editing	In Progress	●
Single functional test case availability	Single Functional Test	--	▲ 2 Second Overall KPI	In Progress	In Progress	▲

KPI relevant structure	Documenttype	Filename	Availability	Current Status	Expected Status	Rating
Functional specification availability	Functional Specification type WRICEF	--	▲	--	In Progress	▲
Single functional test case availability	Single Functional Test	--	▲	--	In Progress	▲

Logic of dropDoc KPI

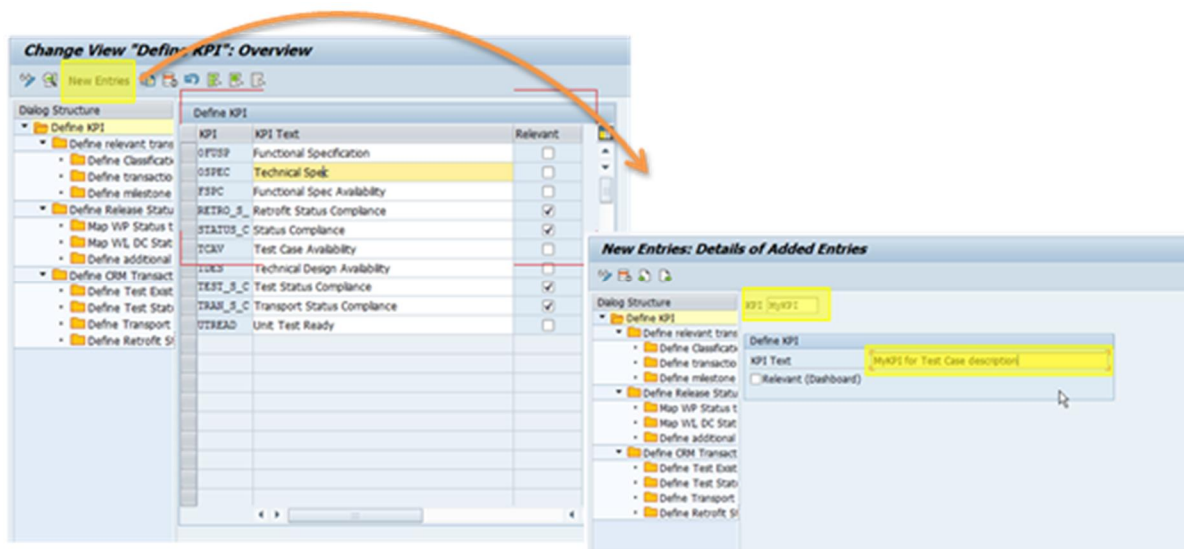
The KPI displaying the state of necessary documents of WP and their rating. If the rating of the document KPI is grey, this signifies that KPI for this document type exists but not necessary for WP/WI in its current status. The overall rating applies the worst rating, as shown below:

KPI 1	KPI 2	OVERALL RATING
green	green	green

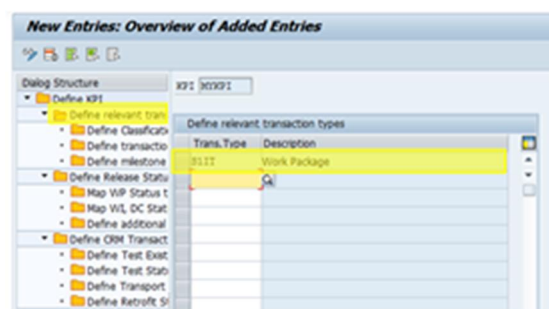
KPI 1	KPI 2	OVERALL RATING
green	red	red
red	green	red
red	grey	red
green	grey	green

5.7.7 Current Status Handling - 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.

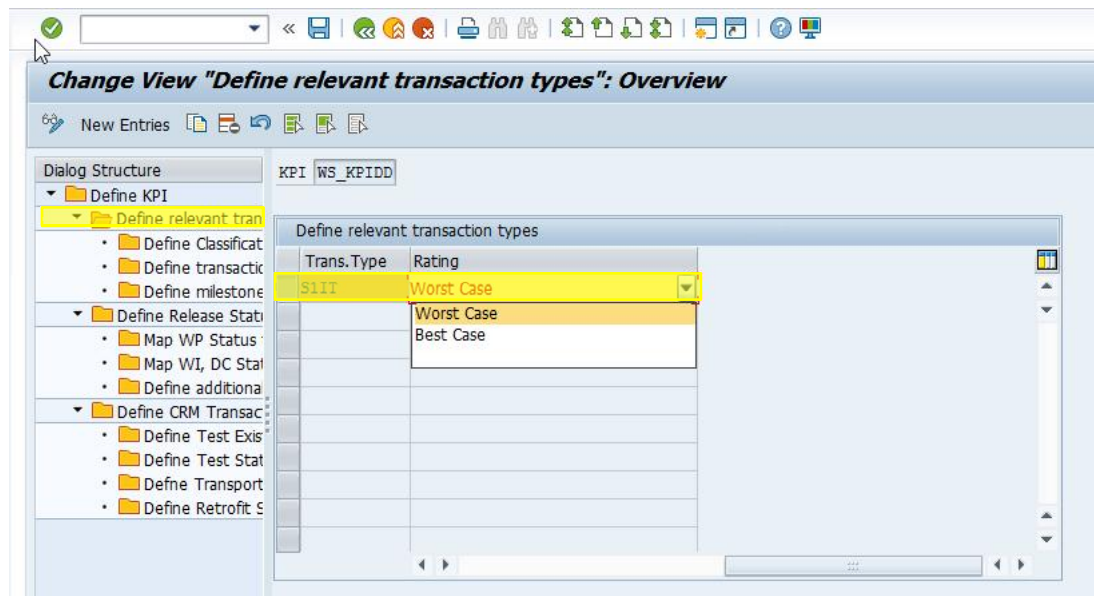


Note

Following two transaction options are available:

- o S1IT for WP
- o S1CG for WI

5. Then define *Worst- or Best-Case rating* of your KPI.



Note

KPI with Best Case:

Green, if the KPI is green rated in one of the WP/WI structures.

Red, if the KPI is for all structures red.

KPI with Worst Case:

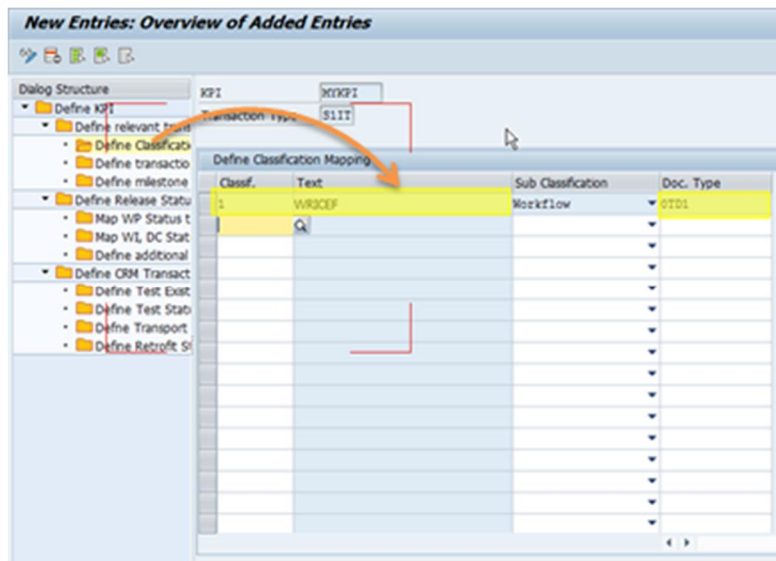
Green, if the KPI is green in all WP/WI structures.

Red, if at least one KPI in a structure is not green.

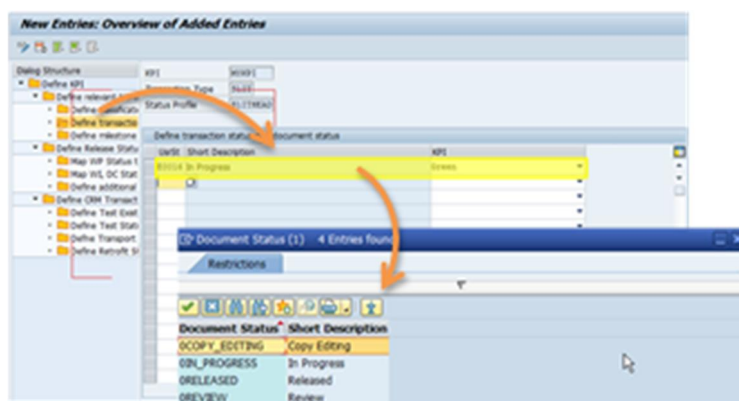
6. Select your KPI, choose *Define Classification Mapping*, and define the mapping. In first column, select the classification type of WP or WI, then *Sub Classification* in the third column.

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.



7. Select the mapping and navigate to *Define transaction status and document status*.



Define the status of WP/WI in first column *UsrSt*. Then select *Solution Manager Document Status*, which is the status of your document type that you defined type defined in a previous step. Specify the KPI behavior in relation to document status in the last column *KPI*. In the last column *KPI* select the option *Green*.

Now you can see your created KPI for your document type in the documentation tab in WP/WI application in the *Current Status area*.

➔ Recommendation

You can see these parameters in WP/WI applications on the first *Details* tab. Be sure to define the Sub classification of your WP/WI too. Open the WP and navigate to first tab *Details* select *Edit*,

5.7.8 Overview of Digital Signature

The digital signature can be defined for one or more specific document types. The digital signature includes a relationship of several parameters of a document. It controls 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 must 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:

- Defining a digital signature including *authorization groups*
- Defining a status schema
- 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:

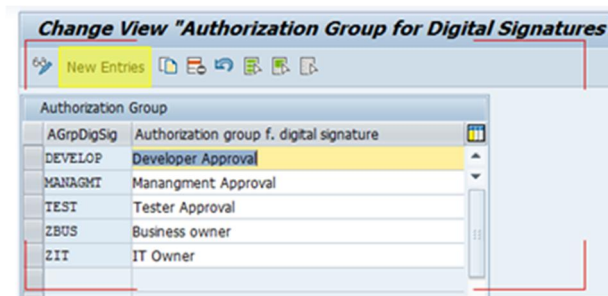
SAP Solution Manager -> Technical Settings -> Digital Signature -> Signature Strategy

- Define the digital signature:

The screenshot displays the SAP Solution Manager configuration interface. On the left, the 'Scenarios' list includes 'Process Management' and 'Custom Code Management'. The main area shows the 'Configure Digital Signature' step, which is highlighted in yellow. Below this, the 'Manual Activities' table is visible, listing three activities: 'Define Authorization Groups', 'Define Individual Signatures', and 'Define Signature Strategies'. The 'Define Authorization Groups' activity is highlighted in yellow. On the right, the 'Structure' pane shows the navigation path: 'SAP Solution Manager' > 'Technical Settings' > 'Digital Signature' > 'Signature Strategy'.

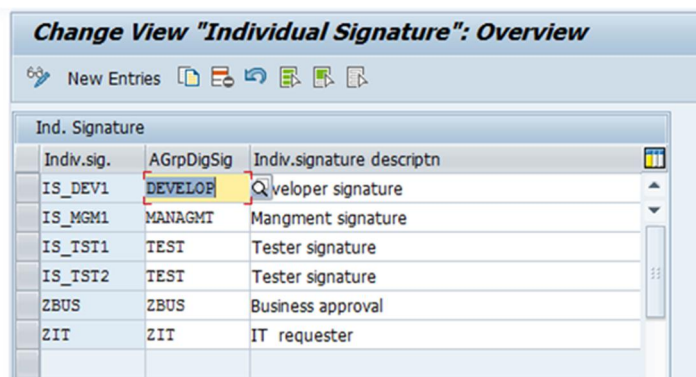
Status	Update Needed	Description	Status	Update Needed	Activity	Type	Comment	Navigation	Execution Status	Documentation
		Configure Basic Settings for Digital Signature			Define Authorization Groups	Optional		Start Transaction	Not Performed	Display
		Define Signatures and Authorization Groups			Define Individual Signatures	Optional		Start Transaction	Not Performed	Display
					Define Signature Strategies	Optional		Start Transaction	Not Performed	Display

- Define authorization groups:



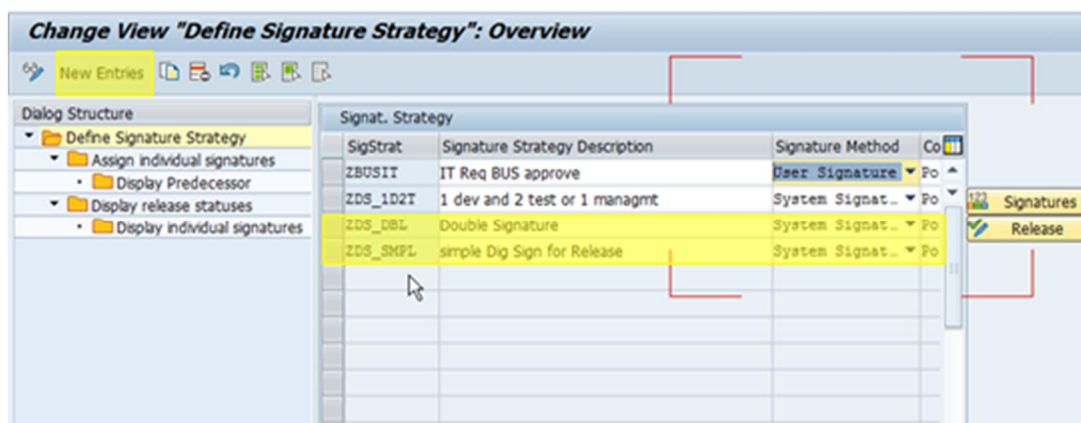
Enter the authorization groups you want to generate. Those groups represent different departments that need to sign a document to release it.

- Define individual signatures:



The individual signatures represent the roles you define in the authorization groups.

- Define signature strategies:



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 is based on the currently logged-in user, who has to enter their 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 according 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.

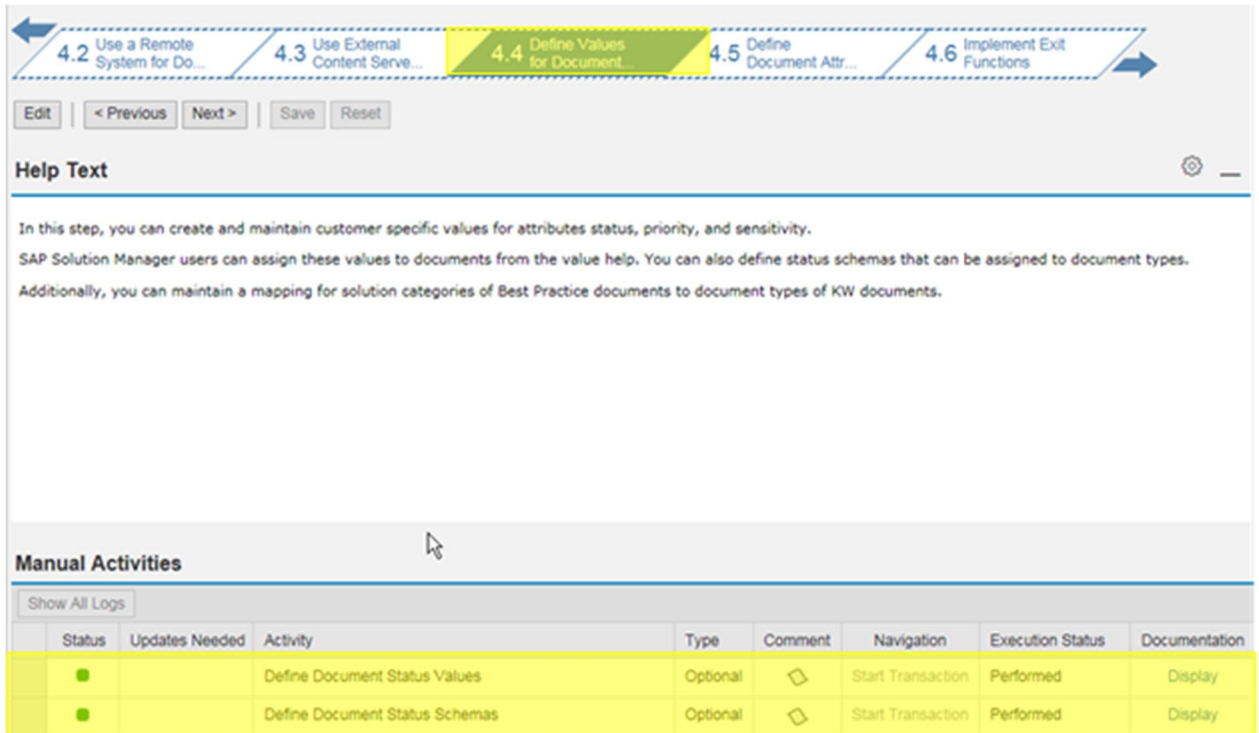
- Go back to the strategy overview and select your strategy. Choose [Release](#) on the right side of the table. Check the release states accordingly to your signing scenario. Save your definitions.

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.





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](#).

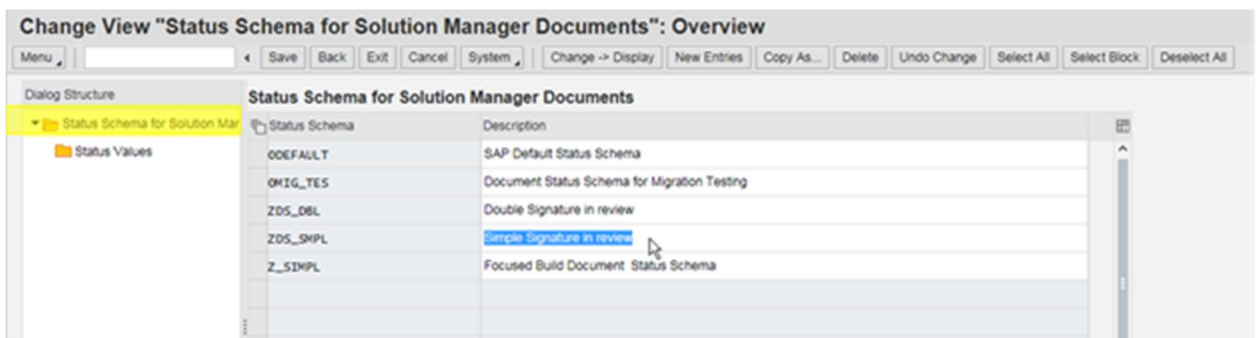


The screenshot shows the SAP Solution Manager interface for step 4.4 'Define Values for Document'. The top navigation bar includes steps 4.2, 4.3, 4.4 (highlighted), 4.5, and 4.6. Below the navigation bar are buttons for 'Edit', '< Previous', 'Next >', 'Save', and 'Reset'. The main area is titled 'Help Text' and contains the following 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.

Below the help text is a section titled 'Manual Activities' with a 'Show All Logs' button. It contains a table with the following data:

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



The screenshot shows the 'Change View "Status Schema for Solution Manager Documents": Overview' screen. It includes a 'Menu' bar with buttons: Save, Back, Exit, Cancel, System, Change -> Display, New Entries, Copy As..., Delete, Undo Change, Select All, Select Block, and Deselect All. The left sidebar shows the 'Dialog Structure' with 'Status Schema for Solution Manager' and 'Status Values'. The main area is titled 'Status Schema for Solution Manager Documents' and contains a table with the following data:

Status Schema	Description
0DEFAULT	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

- 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 Mar Status Values

Status Schema: ZDS_SHPPL

Status	Initial Status	Sequence	Lowest	Highest	Locked	Strategy	End Status	Cancel Status	Unlock Status
OCOPY_EDITING	<input checked="" type="checkbox"/>	10	10	20	<input type="checkbox"/>				
OTN_PROGRESS	<input type="checkbox"/>	20	20	30	<input type="checkbox"/>				
OREVIEW	<input type="checkbox"/>	30	20	40	<input checked="" type="checkbox"/>	ZDS_SHPPL	RELEASED	OTN_PROGRESS	
ORELEASED	<input type="checkbox"/>	40	40	40	<input checked="" type="checkbox"/>				

- 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

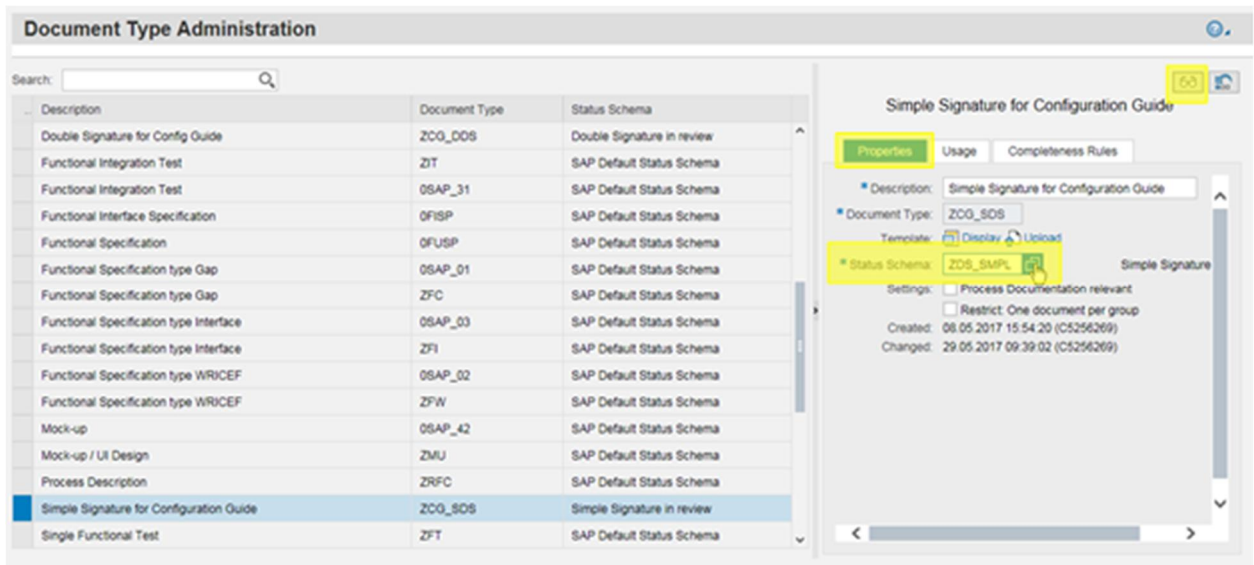
System Landscape Branches Change Control Landscapes Document Types Imports Properties

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_SDS	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 (OTED)	OTED	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 dropdown 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.



12. End the specification by choosing the toggle edit mode icon.

5.8 Configuration of Multi Tenancy Enhancement

5.8.1 Use Case

The Multi Tenancy function 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.

5.8.2 Activating the Piece List

Run transaction `SCC1` in your working client and use the piece list `/SALM/CHARM_EXT`, which supplies your system with the predefined customizing. The result of this activation can be verified in transaction `SCC3`.

5.8.3 Roles and Authorizations

To configure the Multi Tenancy Enhancement via transaction `SPRO`, the configuration user needs to have `SAP_OST_FB_CM_ITSM_CONFIG`.

There are several areas within the multi-tenancy enhancement. Each one may require different authorizations. The necessary adaptations are described in the for each area separately:

- Status Check for Transaction Types: Changes to Roles
- Business Partner Dependent Checks: Necessary Adaption to Roles
- Configuration Item Dependent Checks: Adaptions to Roles
- Restricting Access to Solutions and Documentation: Adaption to Roles

5.8.4 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

The system checks whether the type of the current document belongs to the configured types. In this case, it checks if the user is authorized display or edit the ticket in the current status.

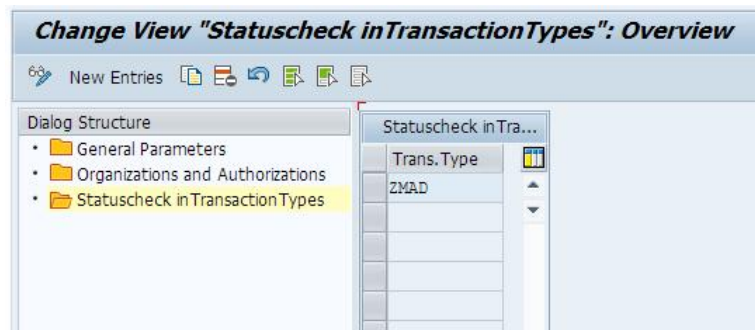
This chapter describes the necessary configurations you need to use the business partner dependent check. The configurations can be combined with Business Partner Dependent Checks and Configuration Item Dependent Checks. You also need to perform the steps described in chapter Activation.

5.8.4.1 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.

5.8.4.2 Changes to Roles

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:

- 02 = Change
- 03 = Display
- * = 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 gets 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.

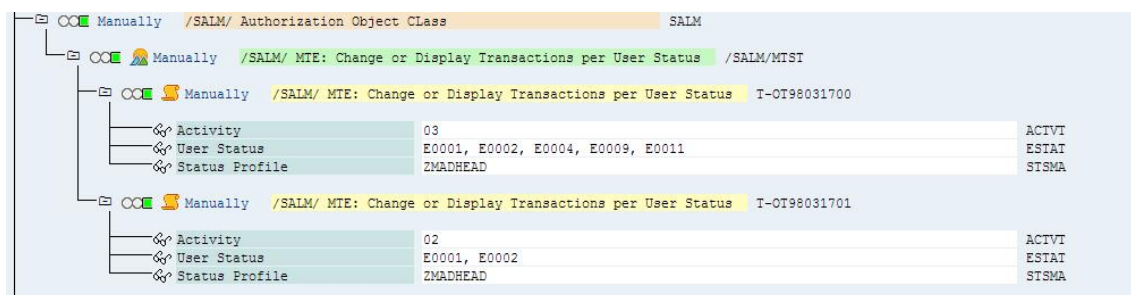
This new object must be added to the authorization roles of each process role, such as requester, developer, and change manager. Depending on their tasks in the process the values for the authorization fields must be set.

1. Run transaction `PF00` 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 `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.

There is also the delivered role `SAP_OST_FB_MULTI_TEN`, which contains only this object and can be used as template.

5.8.5 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_BUPA_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.

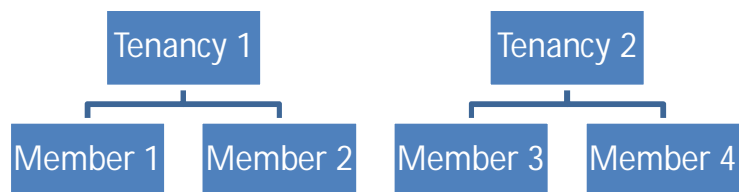
To access a ticket, the user needs to have the authorization for the sold-to party's authorization group. The user doesn't need to be assigned to the same organization.

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*.

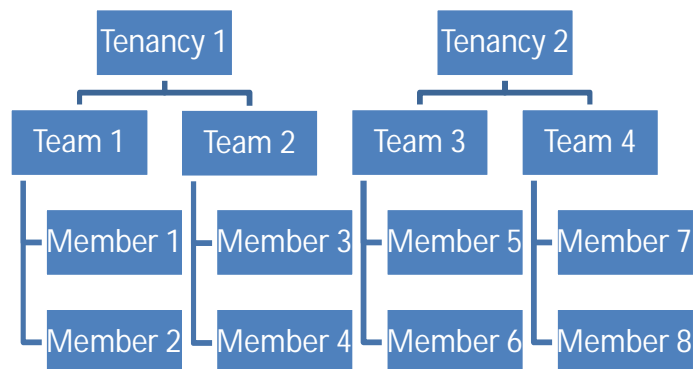
5.8.5.1 Organizational Structures

To maintain the master data, maintain an organizational model in SAP Solution Manager with one of the two structures.

Simple Relationship Model:



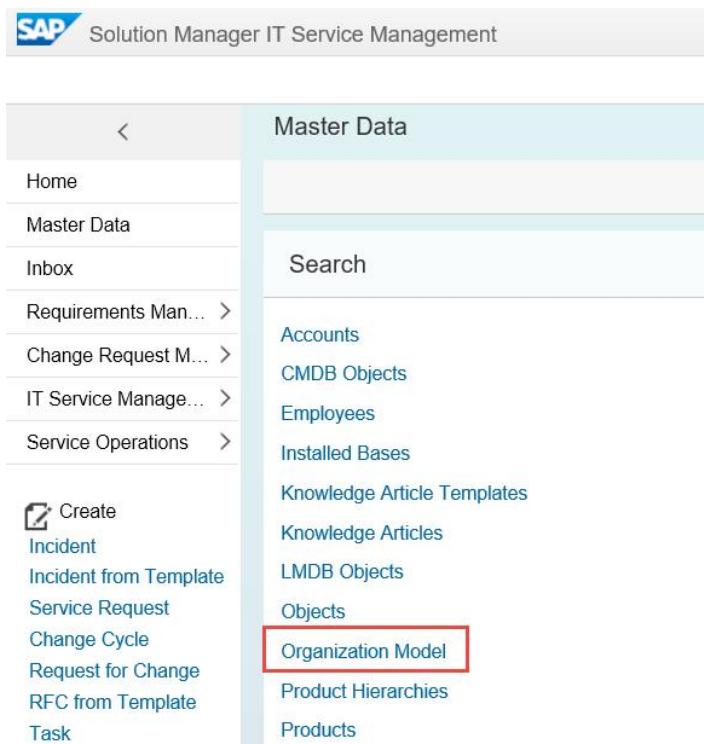
Team-based Relationship Model:



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).



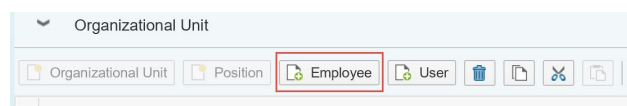
1. Choose [Create Root Organizational Unit](#). Alternatively, choose [Open your root organization](#) if it exists already.
2. Create organizational units and positions within your root organization according your needs. You need at least one position to assign all employees.

Assign Employees

All employees working for one tenant must 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 takes 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.

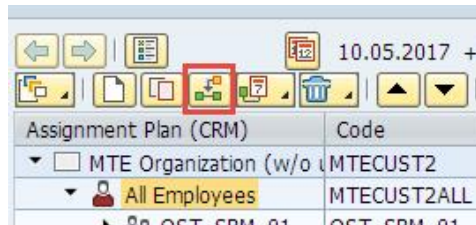
1. Start CRM WebUI, use a business role with access to [Master Data / Organization Model](#) (for example, /SALM/SM_PRO or SOLMANPRO).
2. Open your root organization.
3. Navigation to the position, where the employee should be assigned.
4. Choose [Add Employee](#).



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, you can assign the business partner in the SAP GUI transaction PPOMA_PRM.

9. Navigate to the position, choose *Assign* and select *Owner*.

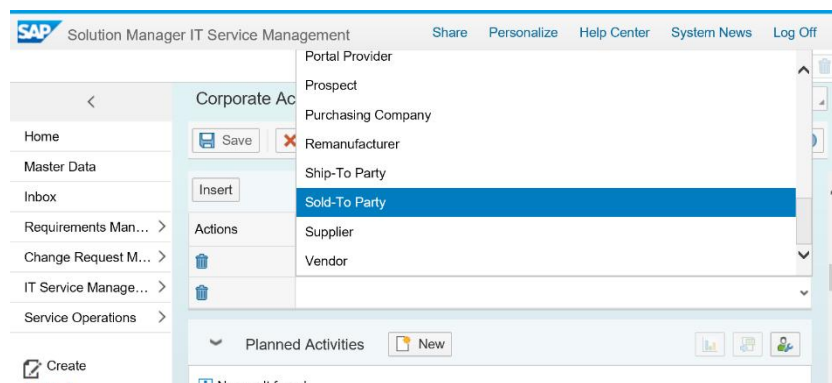


10. Search for the business partner to be assigned.
11. Select the business partner in the search result list. It is possible to select more than one business partners.
12. Save.

5.8.5.2 Add Role Sold-To Party to Business Partner

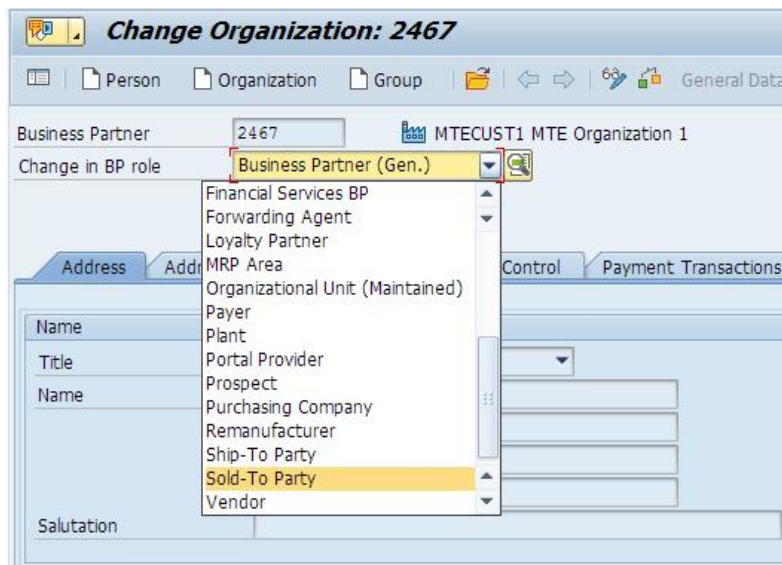
To control the access to the tickets, each ticket should have the root organization entered as *Sold-To Party*. This is only possible, if the corresponding business partner has the role *Sold-To Party*.

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.



5.8.5.3 Business Partner Authorization Groups

You can use authorization groups to stipulate which business partners a user can 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 system assigns the default authorization group 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 group. 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.

5.8.5.4 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 the *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 many business partners. 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 Report `/SALM/ITSM_MT_BP_AUTH_GRP` 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 are saved.
- o *Assign authorization groups*. The system updates the authorization group by analyzing the organizational assignment of existing business partners.
- o *Only assigned business partners* deactivated. Unassigned business partners get the configured default authorization group.
- o *Root organizations* taken from customizing. For more information, see chapter Organizational Structures.
- o *Business partner* prefilled with * to check all business partners.

Assign Authorization Groups to Business Partners

Processing Mode

Testmode ☒

Assign authorization groups ☒

Delete authorization group assignments ☐

Business Partner

Only assigned Business Partners ☐

Root Organizations to

Business Partner to

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, we recommend scheduling 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 considered.

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.

5.8.5.5 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.

Change View "General Parameters": Overview

New Entries

Dialog Structure

- General Parameters
- Organizations and Authorizations
- Statuscheck in Transaction

Parameter Name	Number	Parameter Value
ACTIVATE_MTE	1	X
ACTIVATE_MTE_BP	0	X
ACTIVATE_MTE_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
 - Quality Gate Management
 - Change Request Management**
 - Managed System Setup
 - Application Operations
 - Business Process Operations
 - IT Service Management
 - Engagement and Service Delivery
 - Data Volume Management

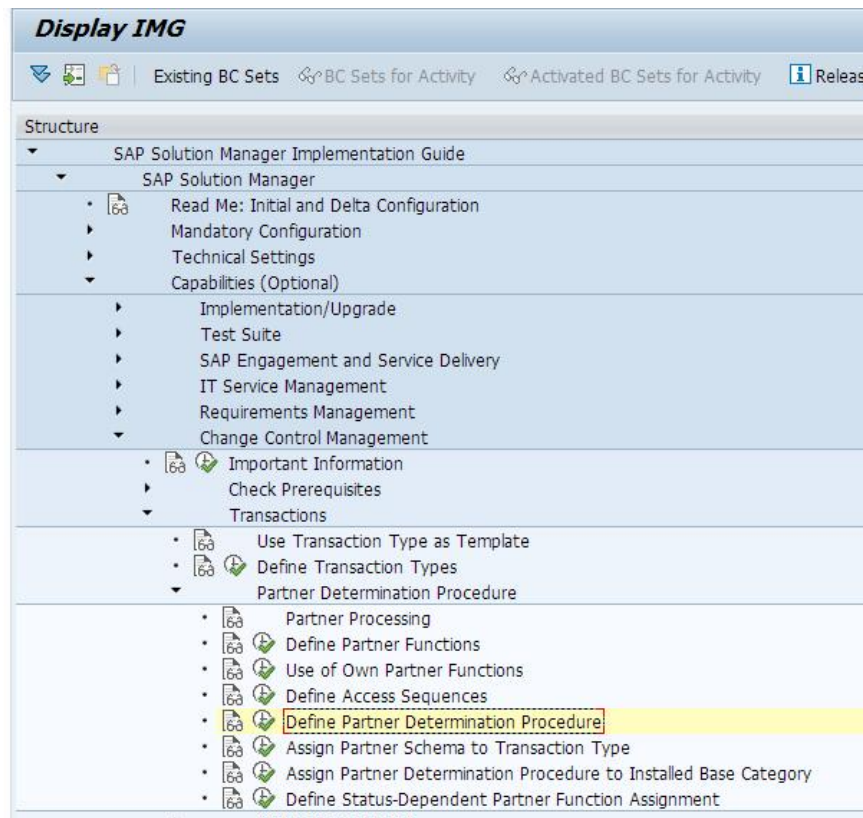
3.6 Set Up Business Partner

Help Text

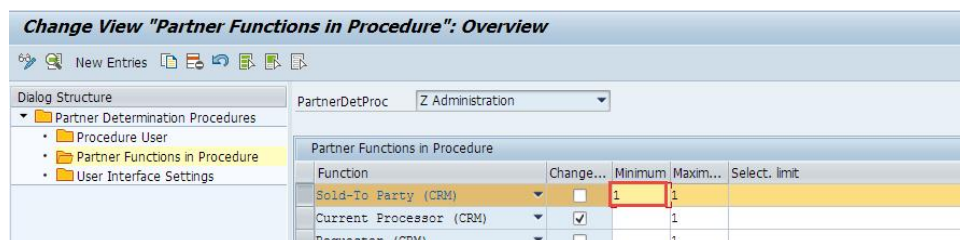
Manual Activities

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.



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.

5.8.5.6 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:
 - 01 = Create
 - 02 = Change
 - 03 = Display
 - 06 = Delete
 - * = 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/tenants 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 `PF06` 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)
 - Activity: **03** (= Display)
 - Authorization Group (refer to Business Partner 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.

5.8.6 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.

This chapter describes the necessary configuration to use the configuration item dependent check. They can be combined with Status Check for Transaction Types and Business Partner Dependent Checks. You also need to perform the steps described in chapter Activation.

5.8.6.1 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 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 must be assigned to the same systems.

5.8.6.2 Assign Business Partners to LMDB Objects

As soon as the organizational structure has been finished, the organizational units must be assigned to the LMDB objects.

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 partners of the organizational units and/or root organizations, which will need to access this system.
 - o Set Partner Function to **Service Employees Group** for all added entries.
6. Save LMDB Object.

5.8.6.3 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_OW** 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 their 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_OW.
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. For example, here are two applicable options available for administrators and support staff:

- 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.

5.8.7 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.

5.8.7.1 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 the user. 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 target elements trigger multiple elementary authorization that all have to be passed successfully to finish the operation.
 - Display elements 03 Display All elements
 - Create elements 01 Create All elements
 - Delete elements 06 Delete Elements and Sub-elements
 - Change attributes 02 Change All attributes
 - Sort elements 02 Change Parent element
 - Release changes 43 Release for current branch 07 Activate, generate for parent branch Selected and dependent elements
 - Discard changes 69 Discard Selected and dependent elements
 - Mark conflict as resolved 94 Override Selected and dependent elements
 - Move elements 50 Move 01 Create Only moved elements and target parent
 - Copy elements D1 Copy 01 Create Only copied elements and target parent
 - Merge elements 06 Delete for parent 02 Change for attributes of target element
 - 50 Move direct child elements
 - Change target 02 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 results in a 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. The action can be visible and the user can get 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
 - R - Major release
 - M - Minor release
 - E - Emergency release
 - O - Maintenance cycle
 - I - Implementation cycle
 - Q - Quality Gate Management
- CM_ACTVT - Specific functions to be controlled.
 - CHCH - Modify change in QGM
 - CHCR - Create change in QGM
 - CHDE - Delete change in QGM
 - CHFI - Complete change in QGM
 - CHRA - Reassign change in QGM
 - CHWD - Withdraw change in QGM
 - CTPR - Assign to Change Request Management cycle
 - CYDP - Display QGM cycle
 - CYED - Edit QGM cycle
 - QBAP - Approve quality gate as Quality Advisory Board member in QGM
 - QMAP - Approve quality gate as Quality Manager in QGM
 - SCDP - Display QGM scenario
 - SCED - Edit QGM scenario
 - SSDP - Display CTS status switch
 - SSED - Edit CTS status switch
 - TACR - Create transport task in QGM
 - TLCF - Complete task list
 - TLCR - Create task list
 - TRAP - Approve/withdraw critical object
 - TRAS - Assign transport request in QGM
 - TRCH - Modify transport request in QGM
 - TRCR - Create transport request in QGM
 - TRDC - Decouple transport request in QGM
 - TRDE - Delete transport request in QGM
 - TRIM - Set/reset import lock in QGM
 - TRRA - Reassign transport request in QGM (obsolete)
 - TRRL - Release transport request in QGM
 - TRTT - Create ToCs in QGM
 - UCAA - Approve urgent change as Quality Advisory Board member in QGM
 - 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.

5.8.8 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.

5.8.8.1 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.

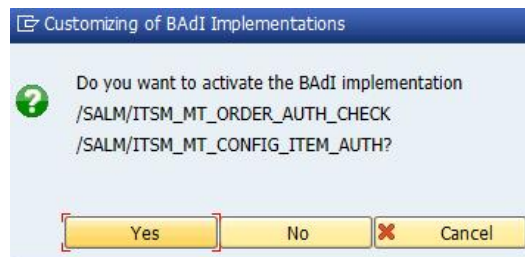
1. Run transaction `SPRO`, open [SAP Reference IMG](#).
2. Navigate to [SAP Solution Manager](#) → [Focused Build](#) → [Change Control Extensions](#) → [Multi Tenancy Extensions](#).
3. Start [Define Multi Tenancy Settings](#).
4. Select [General Parameters](#).
5. Select or create an entry for parameter `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 system calls the implementation class of `AI_SDK_EXT_AUTH_CHK`.

5.8.8.2 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.

5.8.8.3 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 works 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

ACTIVATE_MTE	ACTIVATE_MTE_BP	ACTIVATE_MTE_CI	Executed Checks
			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

5.9 Configure Status Dependent Check Framework

5.9.1 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 also be used in user-defined fields:

- Fast entry fields
- Business Partners
- Texts

Locked 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

5.9.2 Roles and Authorization

To configure the status-dependent check framework via transaction SPRO, the configuration user needs to have SAP_OST_FB_CM_ITSM_CONFIG.

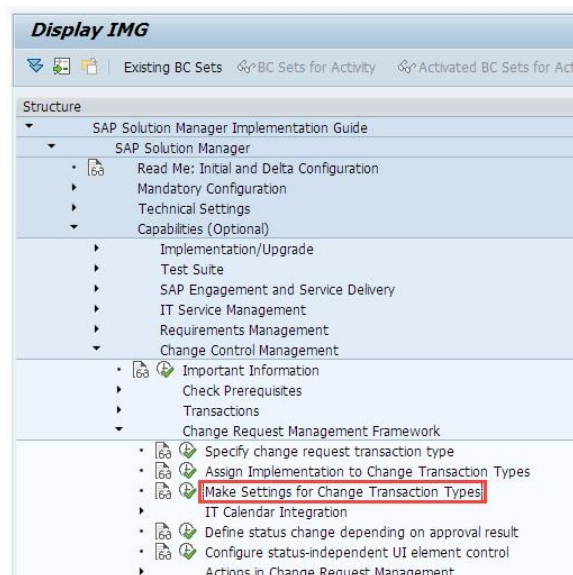
5.9.3 Activating the Piece List

Run transaction **SCC1** in your working client and activate the piece list **/SALM/CHARM_EXT**, which supplies your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

5.9.4 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 happens.

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

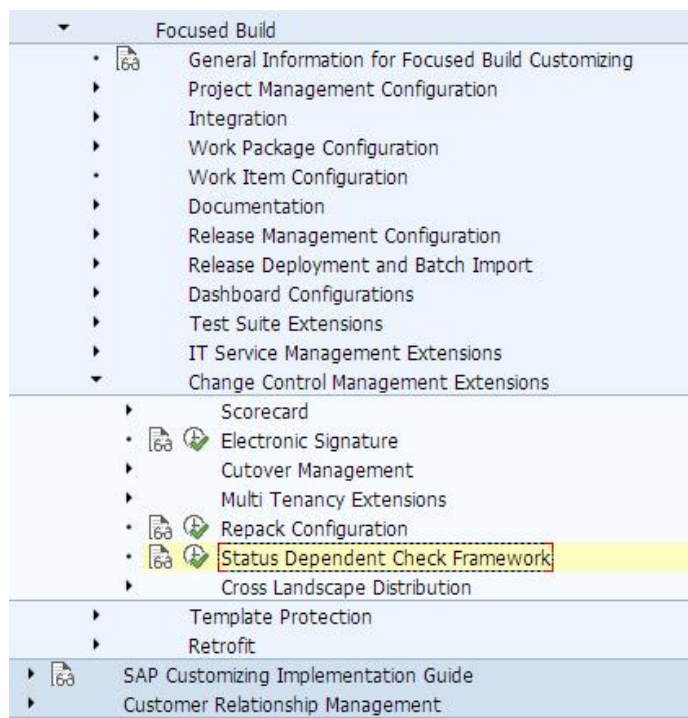
Assign Consistency Checks

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	MAINI_INST	SOCM_ACTION_LOG		Cancel
E0002	15	/SALM/CONS_CHECK	/SALM/IISM_CC	001	Cancel
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	/SALM/CONS_CHECK	/SALM/IISM_CC	001	Cancel
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/IISM_CC	001	Cancel

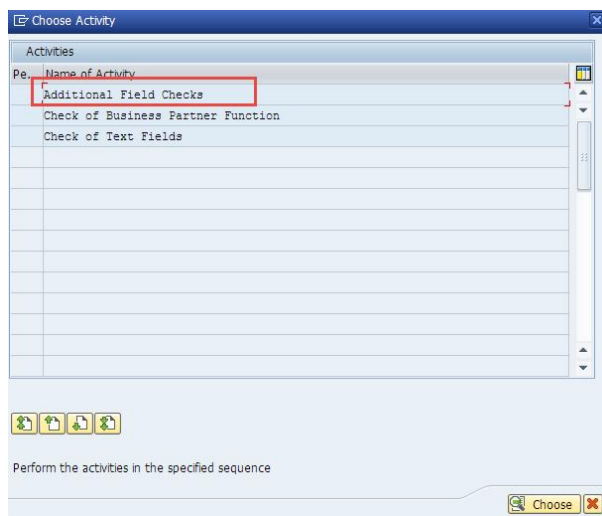
5.9.5 Additional Field Checks

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 the 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 needs 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 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_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	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
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 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

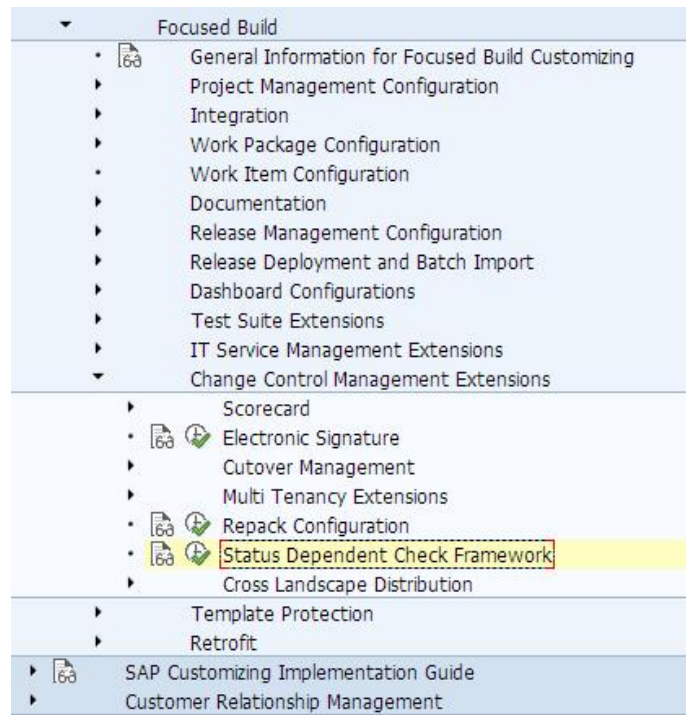
New Entries

Trans.Type	StatProf	UstrSt	Object Name	Field name - object	Mandatory	Display
ZMAD	ZMADHEAD	E0004	ORDERADM_H	DESCRIPTION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

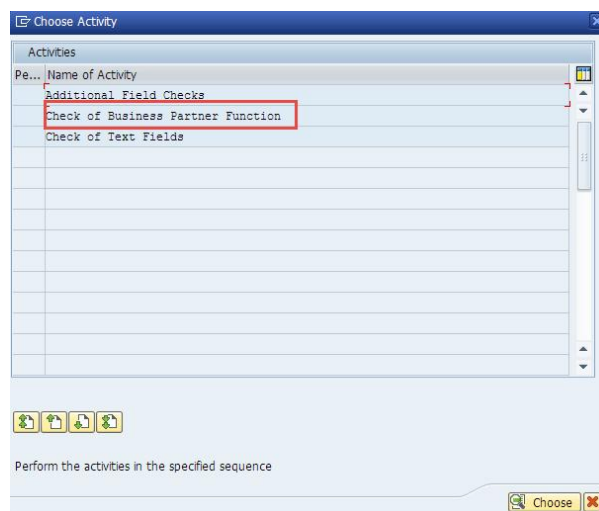
5.9.6 Check of Business Partner Function

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.

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships Manage Substitutes Open IT Calendar

Status Overview Related Transactions

1 Created 2 In Process 3 Completed 4 Confirmed 5 Withdrawn

Details Text Attachments Transport Management Downgrade Protection Landscape Solution Documentation

General Data

ID: 8000102126

Description:

IT Operator:

Change Manager

Current Processor:

Requestor:

Sold-To Party:

Processing Data

Status: Created

Priority: 4: Low

Release Data

Change Cycle / Phase:

Actual Release:

Go-Live Date:

Project Planning

PMO Project:

Sprint:

PMO Task:

Start Date:

Finish Date:

Task Duration:

4. Add consistency check to ZMAD as described in chapter Consistency Checks for Change Transaction Types.
 - o Select Transaction Type ZMAD.
 - o 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

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	FREDOC_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	/SALM/CONS_CHECK	/SALM/ITSM_CC	001	Cancel
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

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": ..

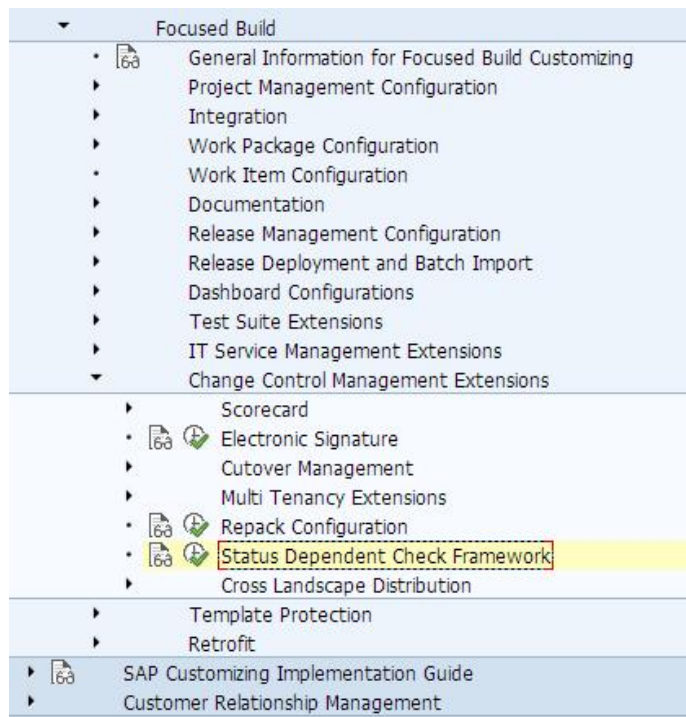
New Entries

Trans.Type	StatProf	UstrSt	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"/>

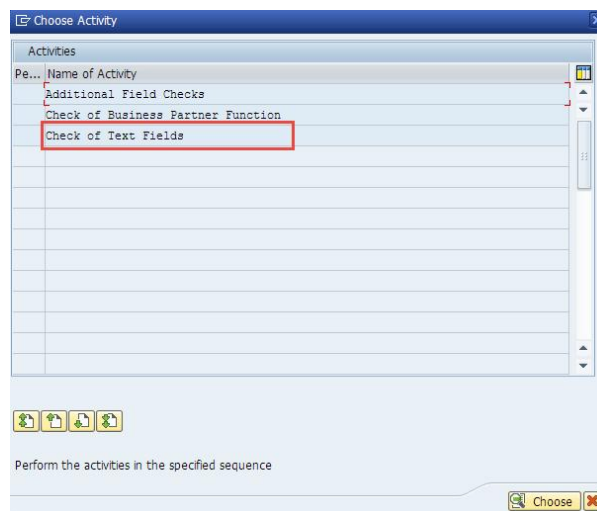
5.9.7 Check of Text Fields

In this customizing activity, you can add texts. Mark items for checks 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*

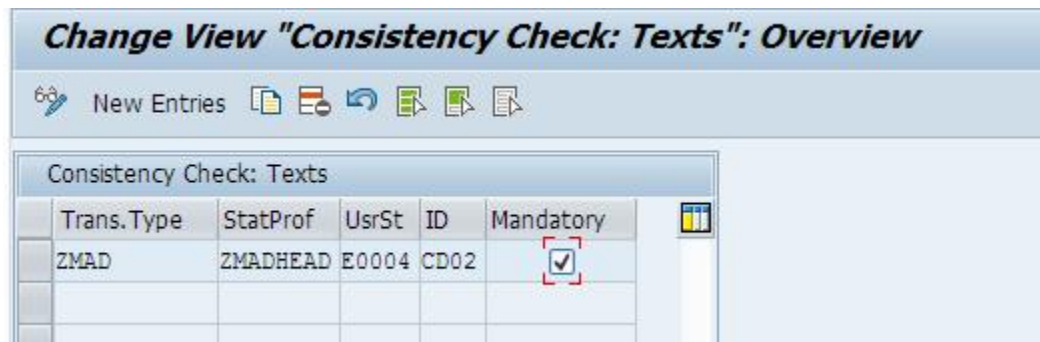


Choose the activity *Check of Text Fields* on next screen.



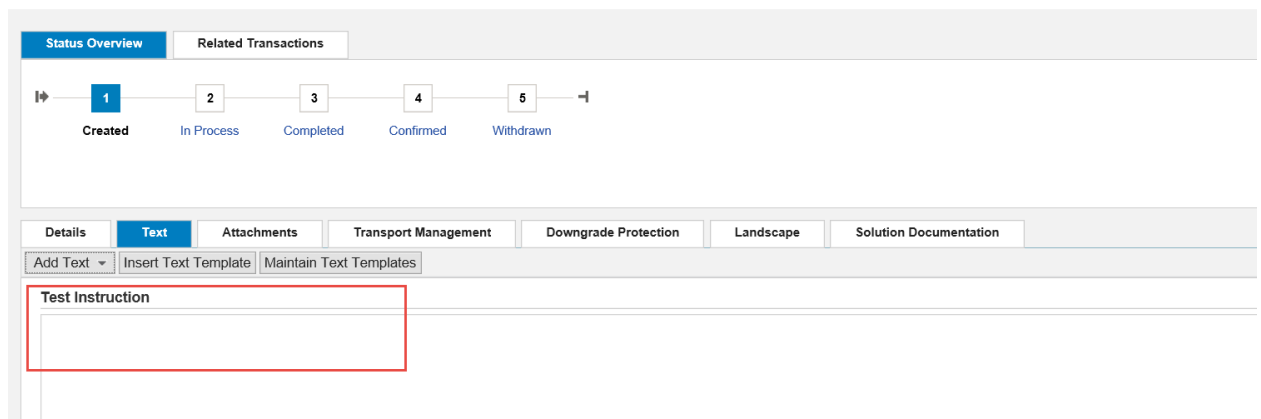
Create an entry for each text and status you like to check.

- 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 needs a value when the status is reached.



Example

You use the Change Management Transaction ZMAD (copy of admin change). Check that the *Test Instruction* is entered when the status *To be Tested* is set.



Add consistency check to ZMAD as described in chapter Consistency Checks for Change Transaction Types

1. Select transaction 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 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	MAINI_INST	SOCM_ACTION_LOG		Cancel
E0002	15	/SALM/CONS_CHECK	/SALM/IISM_CC	001	Cancel
E0002	50	FREDOC_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	/SALM/CONS_CHECK	/SALM/IISM_CC	001	Cancel
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/IISM_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

Consistency Check: Texts

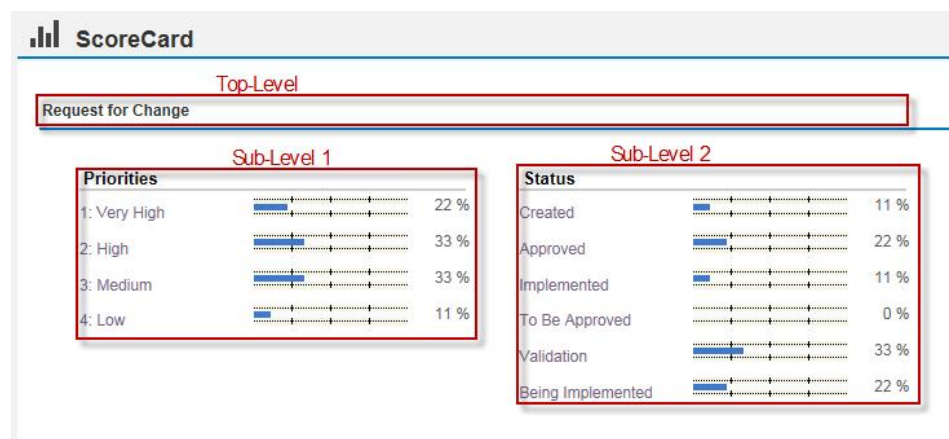
Trans.Type	StatProf	UsrSt	ID	Mandatory
ZMAD	ZMADHEAD	E0004	CD02	<input checked="" type="checkbox"/>

5.10 Configuration of Change Request Management - Scorecard

5.10.1 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 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.



5.10.2 Roles and Authorization

The scorecard is integrated in the business role `/SALM/SM_SM_PRO`. To use it, you need to have the following roles assigned:

- `SAP_OST_SM_CRM_UIU_SM_PRO`
- `SAP_OST_FB_CRM_UIU_CM`
- `SAP_OST_FB_CRM_UIU`

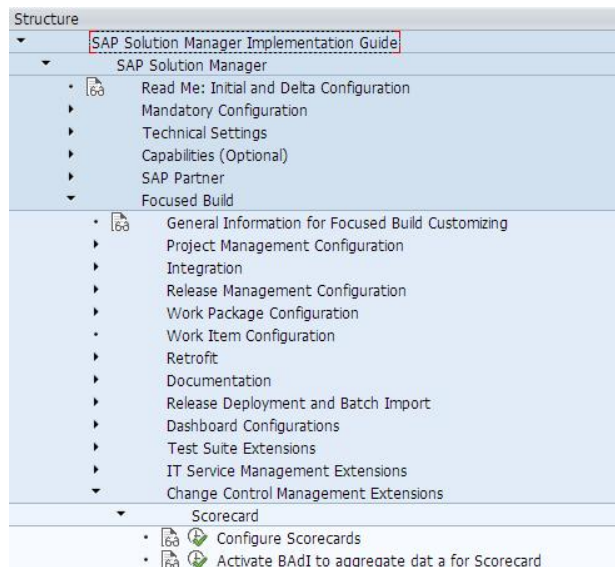
To configure the scorecard via transaction `SPRO`, the configuration user needs to have `SAP_OST_FB_CM_ITSM_CONFIG`.

5.10.3 Activating the Piece List

Run transaction `SCC1` in your working client and activate the piece list `/SALM/CHARM_EXT`, which supplies your system with the predefined customizing. The result of this activation can be verified in transaction `SCC3`.

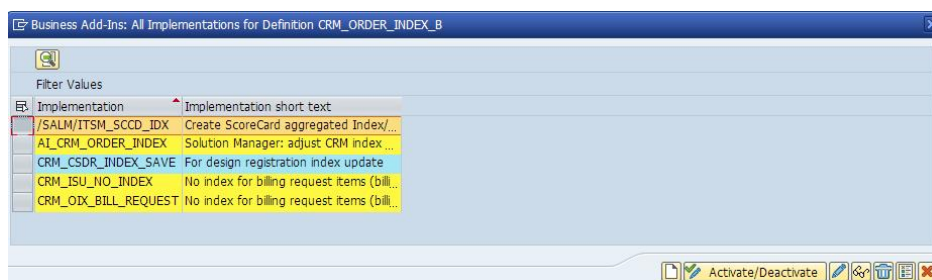
5.10.4 Customizing Scorecard

Please use the following SPRO entries to activate and customize scorecards in your system.



5.10.4.1 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.



5.10.4.2 Configure Scorecards

The configuration of the scorecard is to be done in a central view cluster accessible via **SPRO** or **SM34**:
`/SALM/ITSMSC_VC`

Dialog Structure	Define Usage Types		
Define Usage Types	SC Usage	Belongs To	External Object Name
Assign Transaction Types	CHM		BTQAICSearch
Status to be considered			
Assign Groupings			
Define Groups			
Text Access Field Mapping			

Changes in the customizing cluster must 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.
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 system delivers the following entries 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
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 ends 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 scorecard data. The system maps the data 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 system delivers the following entries 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 (must start with #)
Number = max. number of search result hits (not in use anymore)

The system delivers the following entries by default:

SC Usage	Belongs To	External Object Name	Bar Color	Number
CHM		BTQAICSearch	#3E79CB	1000

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`. Currently the allowed values are `CHM` and `ITM`.

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 system delivers the following entries 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 system delivers the following entries by default:

SC Usage	Trans. Type	UsrSt	Sort Order
CHM	SMAD	E0001	10
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

SC Usage	Trans. Type	UsrSt	Sort Order
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 is generic set from the attribute value of this group

The system delivers the following entries 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

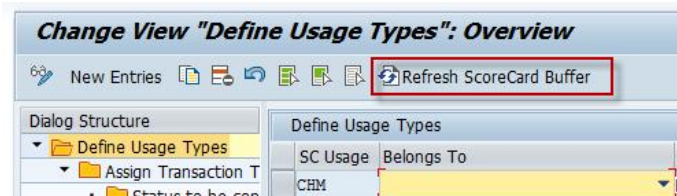
Note

On level 1 only one group can be assigned.

5.10.5 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 open the view cluster `/SALM/ITSMSC_VC` via SPRO or SM34. 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 needs be rebuild using transaction SA38 and executing report CRM_INDEX_REBUILD.

The system automatically fills or updates the scorecard buffer each time a score card relevant business transaction is changed.

5.11 Configuring Release Batch Import

5.11.1 Piece List Activation

The standard customizing of 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 copies the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again overwrites 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 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

Call transaction SCC1 in your working client and activate the piece list [/SALM/CHARM_EXT](#), which supplies your system with the predefined customizing. The result of this activation can be verified in transaction SCC3.

As another prerequisite to use the release batch import standalone enhancement, the full ChaRM Scenario has to be in place or in the process of being set up.

5.11.2 Required SAP Note Implementations

Before you start to configure release batch import, review the according master note for Change Request Management that fits to your SP Level and implement the latest version before moving on with configuration.

In addition, please implement the following SAP Notes:

SAP Note	Description	SAP Solution Manager	Managed System
1818804	Change Request Management: Enable client restriction for import subsets		X
1731806	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	

SAP Note	Description	SAP Solution Manager	Managed System
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	

5.11.3 Status-dependent Import Control as technical Prerequisite

The release batch import uses the status-dependent imports.

As technical prerequisite for utilizing the release batch import as standalone enhancement, the status-dependent import control must be activated and configured.

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
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 regarding *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)

<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 systems:

Display View "Batch Import Variants": Overview

Customizing Variant	Variant Description
/OST/PRE_PROD	Import to Pre-Production Systems
/OST/PROD	Import to Production System(s)
/OST/QAS	Import to Quality Assurance Systems
/SALM/COLLECTIVE_IMPORT	Focused Build Collective Import Variant
/SALM/DEFAULT	Default Variant for all systems (only from tasklist)
/SALM/INTEGRATION_TEST	Default Variant for integration test (batch processing)
/SALM/PRODUCTION	Import for parallel Production Import
/SALM/QAS	Focused Build Import Variant for QAS
/SALM/RELEASE	Focused Build Release Import Variant

Set your import variant to *Active* and activate *Weekday Specifications* as well:

Change View "Batch Import Variants": Overview

Customizing Variant	Active?	Wkdy Act.	Multi-Seq.	is col var
/OST/QAS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The checkbox *Multi-Seq.* must be activated if you intend to activate more than one import parameter per batch import variant and import configuration.

As a next step, the import configuration for your newly created import variant */OST/QAS* must be defined:

Import Config	Phase Chk	Continue
/OST/IMPORT_QAS	<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"/>

Set the status dependent import control active for

- Import Config. = */OST/IMPORT_QAS*
- Phase Check = Activate check box, if 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, if 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):

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	

If the customer has adapted the Change Request Management standard workflow for urgent change, adapt the CRM user status values accordingly.

New Entries: Overview of Added Entries



Dialog Structure

Batch Import Variants

Date & Time Validity

Weekday Specifications

Import Configuration

Import Customizing: Status

Import: Parameters

Valid Cycle Phases for Import

Maintain Import Sequence of Systems

Maintain Landscape Data

Maintain System Clients

Maintain LMDB only Clients

Variant

/OST/QAS

Import Config






/OST/IMPORT_QAS

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		

If the customer has adapted the Change Request Management standard workflow for normal change, adapt the CRM user status values accordingly.

New Entries: Overview of Added Entries


69     

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status**
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDR only Clients

Variant: /OST/QAS

Import Config: /OST/IMPORT_QAS

Import Customizing: Status				
Trans.Type	StatProf	UsrSt	UsrSt	
SMIM	SMTMHEAD	E0004		
SMIM	SMTMHEAD	E0009		
SMIM	SMTMHEAD	E0012		

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 Change Request Management standard workflow for defect correction, adapt the CRM user status values accordingly.



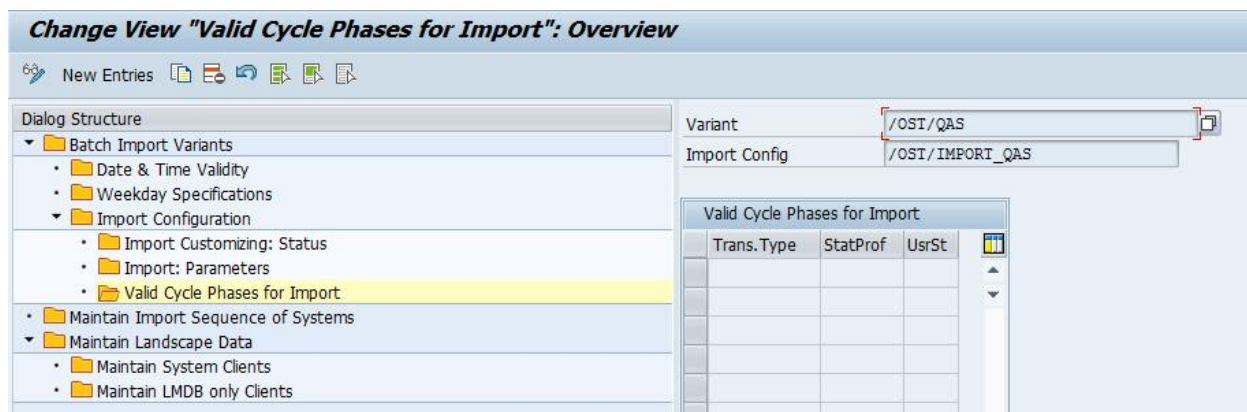
Caution

Transports without change belonging to the same cycle type are deployed in conjunction only when inserting an empty record into import strategies.

Import: Parameters:

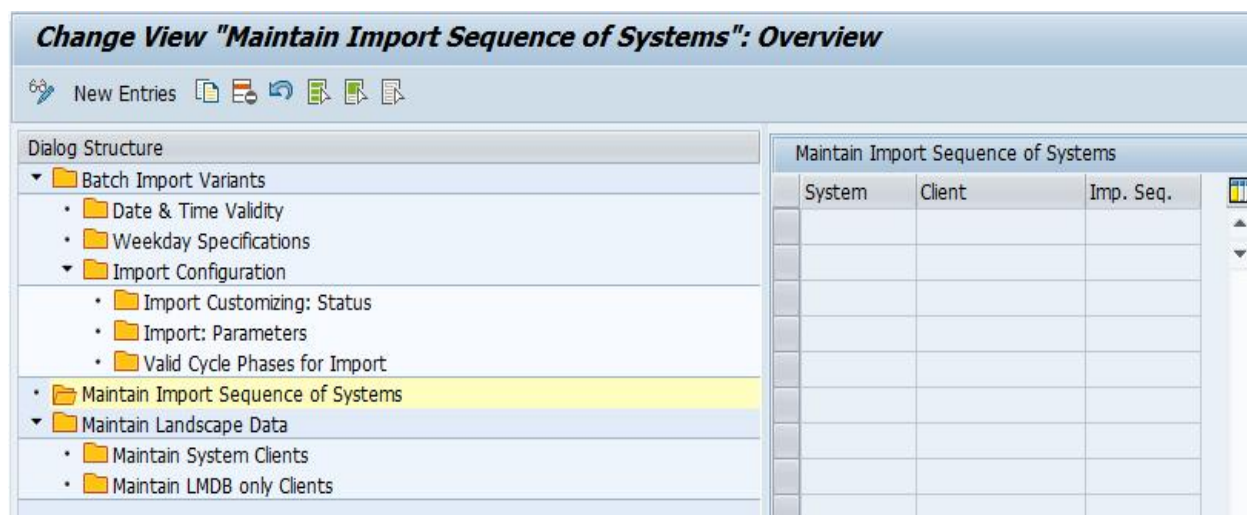
- Activate the following checkboxes:
 - *Active*
 - *Ignore Comp. Version*

Valid Phases for Import:



This configuration step is optional for the Import to the quality assurance system.

Maintain Import Sequence of Systems:



- Sequence:
 - Enter **10** for all systems and clients for a consolidated import.
 - For a sequence dependency, for instance between SAP ERP and SAP BW, set:
 - One entry for the SAP ERP System/Client with Imp. Seq. = **10**
 - A second entry for the SAP BW System/Client with Imp. Seq. = **20**.

Date & Time Validity:

Change View "Date & Time Validity": Overview

New Entries BC Set: Change Field Values

Variant: /OST/QAS

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Date & Time Validity

From	To	From	To
01.06.2017	31.12.9999	00:00:00	24:00:00

Weekday Specifications:

Change View "Weekday Specifications": Overview

New Entries BC Set: Change Field Values

Variant: /OST/QAS

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only 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"/>
					<input type="checkbox"/>

Set the status dependent import control active for:

ID	Solu...	Release Co...	Cycle ...	System	Non-ABAP	Import Config
5	*	*	A11 ...	OTO	<input type="checkbox"/>	/OST/IMPORT_QAS
					<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:

- ID = enter an ID manually. System validates entered ID to avoid duplicate keys,
- Solution ID = Enter your Solution ID; you can also use wildcard,
- Release Component = Enter your Release Component; 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*,
- System = Enter the relevant System; wildcard is not possible,
- Checkbox *Non-ABAP* = Activate the Checkbox if that the system has no ABAP Stack,
- Import Config. = /OST/IMPORT_QAS.

Note

Wildcard (*) is valid for Solution ID

Maintain System Clients:

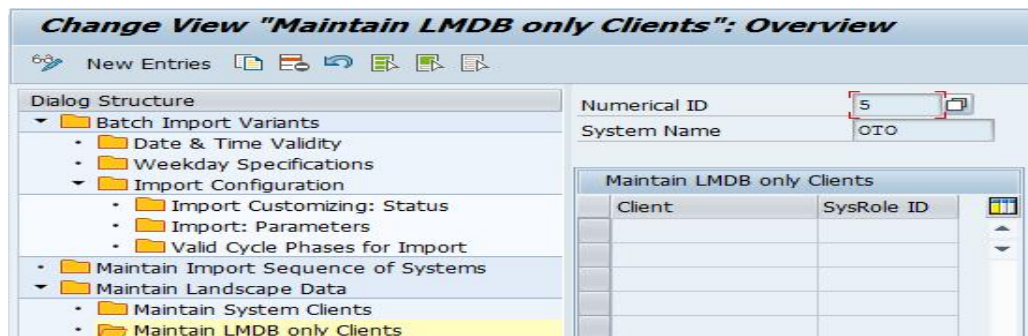
Client	SysRole ID	RFC Type	Comm.Clt
811	T	Trusted RFC	811
		Trusted RFC	

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),
- RFC Type = Select *Trusted RFC*, or *TMW RFC* as RFC Type,
- Communication Client = Here you enter the Client as Communication Client, which should trigger the Import to QAS. It is recommended to enter the Client, to which the Import takes place, as *Communication Client*),

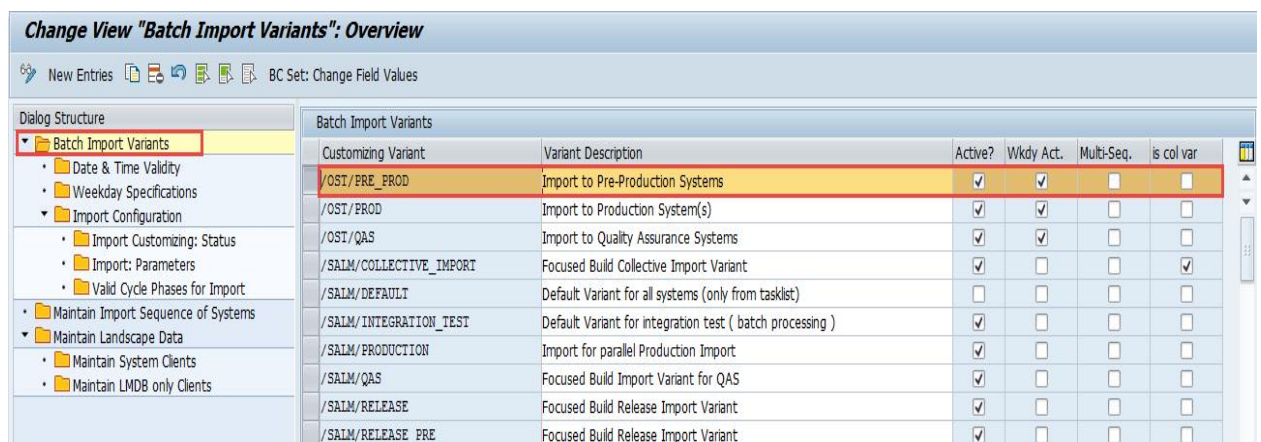
Maintain LMDB only Clients



Here you maintain, to which client's additional imports should be performed, when you do the import to QAS.

Create Import Variant for Pre-Production System

Create the new batch import variant /OST/PRE_PROD for the import to the pre-production systems:



Set your import variant to *Active*, and activate *Weekday Specifications* as well:

Change View "Batch Import Variants": Overview

New Entries BC Set: Change Field Values

Dialog Structure	Batch Import Variants						
	Customizing Variant	Variant Description	Active?	Wkdy Act.	Multi-Seq.	is col var	
Batch Import Variants	/OST/PRE_PROD	Import to Pre-Production Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Date & Time Validity	/OST/PROD	Import to Production System(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Weekday Specifications	/OST/QAS	Import to Quality Assurance Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Import Configuration	/SALM/COLLECTIVE_IMPORT	Focused Build Collective Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Import Customizing: Status	/SALM/DEFAULT	Default Variant for all systems (only from tasklist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Import: Parameters	/SALM/INTEGRATION_TEST	Default Variant for integration test (batch processing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Valid Cycle Phases for Import	/SALM/PRODUCTION	Import for parallel Production Import	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintain Import Sequence of Systems	/SALM/QAS	Focused Build Import Variant for QAS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintain Landscape Data	/SALM/RELEASE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintain System Clients	/SALM/RELEASE_PRE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintain LMDB only Clients							

Checkbox **Multi-Seq.**: Activate this checkbox if that you intend to activate more than one import parameter per batch import variant and import configuration. As a next step, define the **Import Configuration** for your newly created Import Variant /OST/PRE_PROD:

New Entries: Overview of Added Entries

Dialog Structure	Variant	Import Configuration	
		Import Config	Phase Chk
Batch Import Variants	/OST/PRE_PROD	/OST/IMPORT_PRE_PROD	<input type="checkbox"/>
Date & Time Validity			<input type="checkbox"/>
Weekday Specifications			<input type="checkbox"/>
Import Configuration			<input type="checkbox"/>
Import Customizing: Status			<input type="checkbox"/>
Import: Parameters			<input type="checkbox"/>
Valid Cycle Phases for Import			<input type="checkbox"/>
Maintain Import Sequence of Systems			<input type="checkbox"/>
Maintain Landscape Data			<input type="checkbox"/>
Maintain System Clients			<input type="checkbox"/>
Maintain LMDB only Clients			<input type="checkbox"/>

Set the status dependent import control active for:

- Import Config. = /OST/IMPORT_PRE_PROD
- Phase Check = Activate check box, if you would like to establish a phase check for the import to the PRE-PROD System (optional)
- Continue = Activate check box, if additional transport requests should be imported, if 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

A best practice to avoid blocking the import is to always set status values that are higher than the value to perform the import.

Import Customizing: Status:

Urgent Change (ZMHF):

New Entries: Overview of Added Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status**
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant: /OST/PRE_PROD
Import Config: /OST/IMPORT_PRE_PROD

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 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

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status**
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant: /OST/PRE_PROD
Import Config: /OST/IMPORT_PRE_PROD

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 change request management standard workflow for normal change, adapt the CRM user status values accordingly.

Defect Correction (ZMTM):

The screenshot shows the 'New Entries: Overview of Added Entries' dialog box. On the left is a 'Dialog Structure' tree with folders for 'Batch Import Variants', 'Date & Time Validity', 'Weekday Specifications', 'Import Configuration', 'Import Customizing: Status' (highlighted), 'Import: Parameters', 'Valid Cycle Phases for Import', 'Maintain Import Sequence of Systems', 'Maintain Landscape Data', 'Maintain System Clients', and 'Maintain LMDB only Clients'. On the right, there are input fields for 'Variant' (set to '/OST/PRE_PROD') and 'Import Config' (set to '/OST/IMPORT_PRE_PROD'). Below these is a table titled 'Import Customizing: Status'.

Trans.Type	StatProf	UsrSt	UsrSt
SMTM	SMTMHEAD	E0009	
SMTM	SMTMHEAD	E0012	

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 change request management standard workflow for defect correction, adapt the CRM user status values accordingly.

Import: Parameters:

The screenshot shows the 'New Entries: Details of Added Entries' dialog box. The 'Dialog Structure' tree on the left has 'Import: Parameters' highlighted. On the right, there are input fields for 'Variant' (set to '/OST/PRE_PROD') and 'Import Config' (set to '/OST/IMPORT_PRE_PROD'). Below these is a section titled 'Import: Parameters' containing several checkboxes.

Variant
/OST/PRE_PROD

Import Config
/OST/IMPORT_PRE_PROD

Import: Parameters

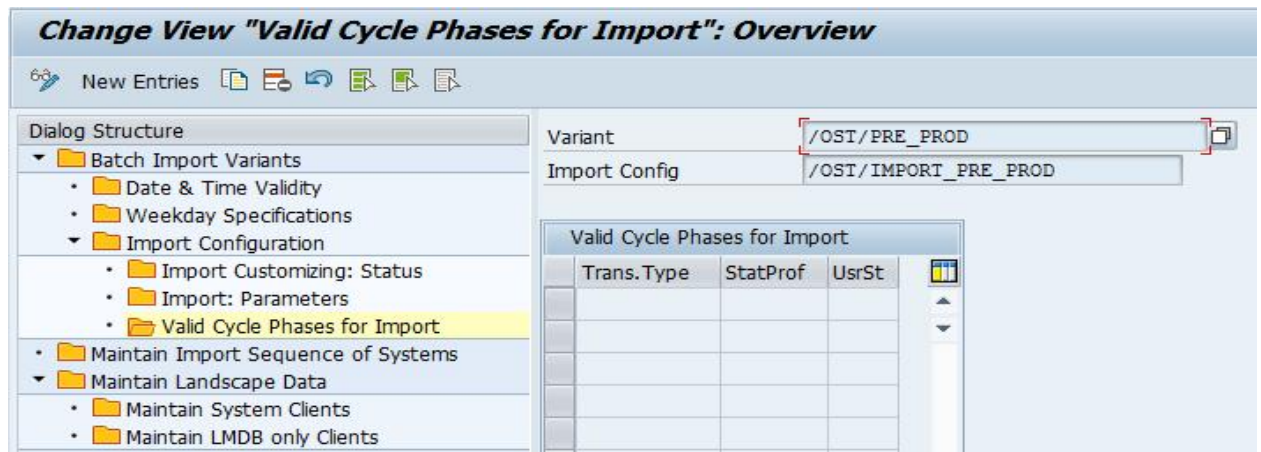
- ☒ Active?
- ☐ Preliminary Import
- ☐ Repeat Import
- ☐ Overwrite Originals
- ☐ Overwrite Repairs
- ☐ Ignore Unauth. TType
- ☐ Ignore QA Approval
- ☐ Ignore Predecessor
- ☒ Ignore Comp. Version

- Select the following checkboxes:
 - *Active?*

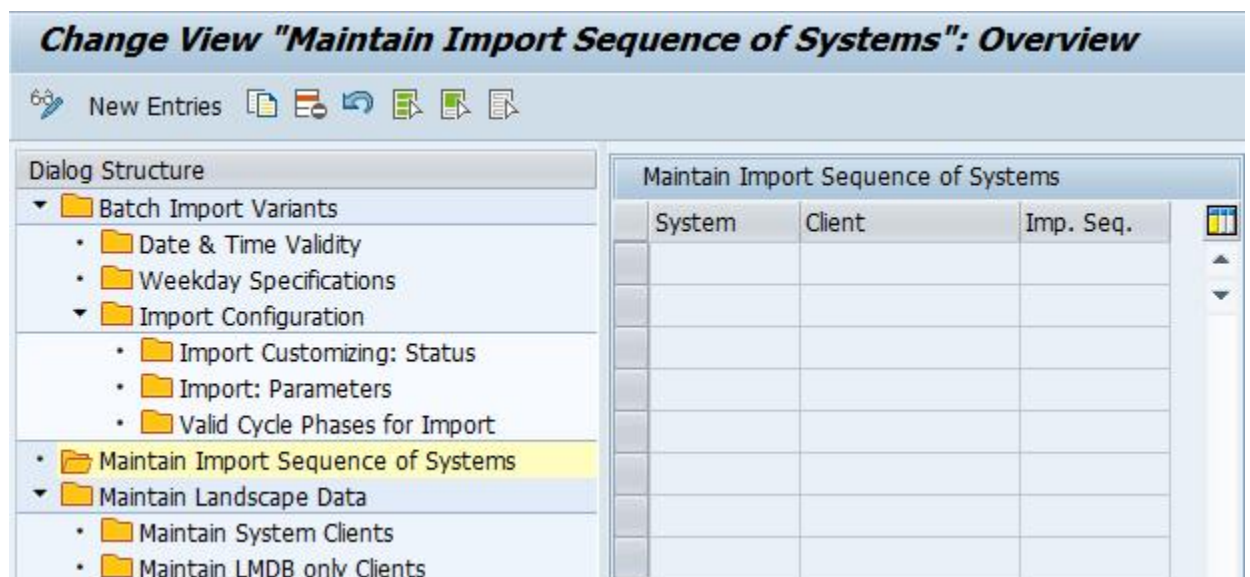
- o *Ignore Comp. Version*

Valid Phases:

This configuration step is optional for the import to the pre-production systems.



Maintain Import Sequence of Systems:



- Sequence:
 - o Enter **10** for all systems and clients for a consolidated import.
 - o For a sequence dependency, for instance between SAP ERP and SAP BW, set
 - o One entry for the SAP ERP System/Client with Imp. Seq. = **10**, and
 - o A second entry for the SAP BW System/Client with Imp. Seq. = **20**.

Date & Time Validity:

Change View "Date & Time Validity": Overview

New Entries BC Set: Change Field Values

Dialog Structure

- Batch Import Variants
 - Date & Time Validity**
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant /OST/PRE_PROD

	From	To	From	To
	01.06.2017	31.12.9999	00:00:00	24:00:00

Weekday Specifications:

Change View "Weekday Specifications": Overview

New Entries BC Set: Change Field Values

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications**
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant /OST/PRE_PROD

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 for PRE-PROD:

Finally, you must maintain the relevant landscape data for which the selected import configuration should be utilized:

New Entries: Overview of Added Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data (selected)
 - Maintain System Clients
 - Maintain LMDB only Clients

ID	Solu...	Release Co...	Cycle ...	System	Non-ABAP	Import Config
6	*	*	All ...	OTO	<input type="checkbox"/>	/OST/IMPORT_PRE_PROD
					<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:

- ID = Enter an ID manually. System validates entered ID to avoid duplicate keys,
- Solution ID = Enter your Solution ID; you can also use wildcard,
- Release Component = Enter your release component; 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*,
- System = Enter the relevant system; wildcard is not possible,
- Checkbox *Non-ABAP* = Activate the Checkbox if that the system has no ABAP Stack,
- Import Config. = /OST/IMPORT_PRE_PROD.

Note

Wildcard (*) is valid for solution ID and release component.

Maintain System Clients:

New Entries: Overview of Added Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients (selected)
 - Maintain LMDB only Clients

Numerical ID: 6

Solution ID: *

Release Component: *

Cycle Type: ▼

System Name: OTO

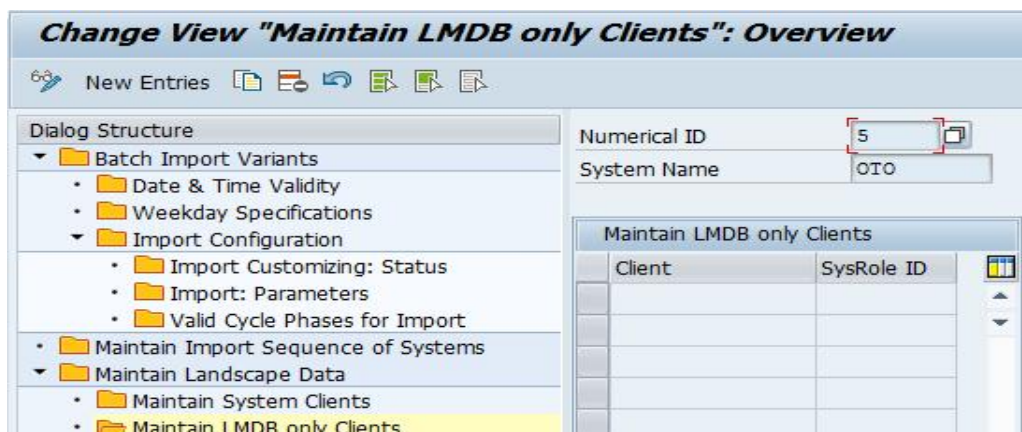
Client	SysRole ID	RFC Type	Comm.Clt
812	1	Trusted RFC	812
		Trusted RFC	

Set the status dependent import control active for:

- Client = Enter the relevant client for import to the pre-production systems,
- System Role ID = 1 (for pre-production system),

- RFC Type = Select *Trusted RFC*, or *TMW RFC* as RFC type,
- Communication Client = Here you enter the client as communication client, which should trigger the import to *PRE-PROD*. It is recommended to enter the client to which the import takes place as *Communication Client*.

Maintain LMDB only Clients:



Here you maintain additional imports to select clients, when you import to *PRE-PROD*.

Create Import Variant for PRD

Create the new batch import variant /OST/PROD for the import to the production systems:

Batch Import Variants							
Customizing Variant	Variant Description	Active?	Wkdy Act.	Multi-Seq.	is col var		
/OST/PRE_PROD	Import to Pre-Production Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/OST/PROD	Import to Production System(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/OST/QAS	Import to Quality Assurance Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/COLLECTIVE_IMPORT	Focused Build Collective Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
/SALM/DEFAULT	Default Variant for all systems (only from tasklist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/INTEGRATION_TEST	Default Variant for integration test (batch processing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/PRODUCTION	Import for parallel Production Import	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/QAS	Focused Build Import Variant for QAS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/RELEASE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
/SALM/RELEASE_PRE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Set your import variant to *Active* and activate *Weekdays Specifications* as well:

Change View "Batch Import Variants": Overview						
New Entries BC Set: Change Field Values						
Dialog Structure	Batch Import Variants					
<ul style="list-style-type: none"> Batch Import Variants <ul style="list-style-type: none"> Date & Time Validity Weekday Specifications Import Configuration <ul style="list-style-type: none"> Import Customizing: Status Import: Parameters Valid Cycle Phases for Import Maintain Import Sequence of Systems Maintain Landscape Data <ul style="list-style-type: none"> Maintain System Clients Maintain LMDb only Clients 	Customizing Variant	Variant Description	Active?	Wkdy Act.	Multi-Seq.	is col var
	/OST/PRE_PROD	Import to Pre-Production Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/OST/PROD	Import to Production System(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/OST/QAS	Import to Quality Assurance Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/COLLECTIVE_IMPORT	Focused Build Collective Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	/SALM/DEFAULT	Default Variant for all systems (only from tasklist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/INTEGRATION_TEST	Default Variant for integration test (batch processing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/PRODUCTION	Import for parallel Production Import	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/QAS	Focused Build Import Variant for QAS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/RELEASE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	/SALM/RELEASE_PRE	Focused Build Release Import Variant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Checkbox *Multi-Seq.*: Activate this checkbox if that you intend to activate more than one Import Parameter per Batch Import Variant and Import Configuration. As next Step the Import Configuration for your newly defined Batch Import Variant /OST/PROD has to be defined:

New Entries: Overview of Added Entries			
Dialog Structure	Variant: /OST/PROD		
<ul style="list-style-type: none"> Batch Import Variants <ul style="list-style-type: none"> Date & Time Validity Weekday Specifications Import Configuration <ul style="list-style-type: none"> Import Customizing: Status Import: Parameters Valid Cycle Phases for Import Maintain Import Sequence of Systems Maintain Landscape Data <ul style="list-style-type: none"> Maintain System Clients Maintain LMDb only Clients 	Import Configuration		
	Import Config	Phase Chk	Continue
	/OST/IMPORT_PROD	<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"/>

Set the status dependent import control active for:

- Import Config. = */OST/IMPORT_PROD*
- Phase Check = Activate Check Box, if you would like to establish a Phase Check for Import to the Production System (highly recommended).
- Continue = Activate check box, if additional transport requests should be imported, if 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

A best practice to avoid blocking the import is to always set status values that are higher than the value to perform the import.

Import Customizing: Status:

Urgent Change (ZMHF):

New Entries: Overview of Added Entries

Variant: /OST/PROD
Import Config: /OST/IMPORT_PROD

Import Customizing: Status

Trans.Type	StatProf	UsrSt	UsrSt
SMHF	SMHFHEAD	E0006	E0007
SMHF	SMHFHEAD	E0009	E0006
SMHF	SMHFHEAD	E0007	E0008
SMHF	SMHFHEAD	E0008	

The entry in the second column *UsrSt* determines which follow-up CRM user statuses are automatically set to the Urgent Change by the program /SALM/BATCH_IMPORT_TRIGGER, if that the import to Production has been successful. For instance, if the import to PROD was successful, the program /SALM/BATCH_IMPORT_TRIGGER automatically set the Urgent Change to CRM User Status *Imported into Production* (E0006). As the CRM User Status *Confirmed* (E0007) has been entered as Follow-up User Status, the CRM User Status of the Urgent Change automatically switch to *Confirmed*.

Normal change with TR (ZMMJ):

New Entries: Overview of Added Entries

Variant: /OST/PROD
Import Config: /OST/IMPORT_PROD

Import Customizing: Status

Trans.Type	StatProf	UsrSt	UsrSt
SMMJ	SMMJHEAD	E0006	
SMMJ	SMMJHEAD	E0014	E0006

Defect correction (ZMTM):

New Entries: Overview of Added Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status**
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant:
Import Config:

Trans.Type	StatProf	UsrSt	UsrSt
SMTM	SMTMHEAD	E0012	E0009
SMTM	SMTMHEAD	E0009	

Import: Parameters:

New Entries: Details of Added Entries

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters**
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant:
Import Config:

Import: Parameters

- ☒ Active?
- ☐ Preliminary Import
- ☐ Repeat Import
- ☐ Overwrite Originals
- ☐ Overwrite Repairs
- ☐ Ignore Unauth. TType
- ☐ Ignore QA Approval
- ☐ Ignore Predecessor
- ☒ Ignore Comp. Version

- Select the following checkboxes:
 - Active?
 - Ignore Comp. Version

Valid Phases:

For the import to the production systems it is highly recommended to establish a phase check. To do so, a two-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, define the details of the phase check. For instance, if you use [Release Management](#), the phase check verifies 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 does not execute any imports to the production systems:

New Entries: Overview of Added Entries

Variant: /OST/PROD
Import Config: /OST/IMPORT_PROD

Valid Cycle Phases for Import

Trans. Type	StatProf	UsrSt
SMRE	SMREHEAD	E0006

If you use a Phase Cycle, the following Customizing Entry is required:

Trans. Type	StatProf	UsrSt
SMIM	SMIMHEAD	E0006

Maintain Import Sequence for Systems:

Change View "Maintain Import Sequence of Systems": Overview

New Entries

Maintain Import Sequence of Systems

System	Client	Imp. Seq.

- Sequence:
 - Enter **10** for all systems and clients for a Consolidated Import.
 - If of a Sequence Dependency, for instance between SAP ERP and SAP BW, make
 - One entry for the SAP ERP System/Client with Imp. Seq. = **10**.

- o A second entry for the SAP BW System/Client with Imp. Seq. = 20.

Date & Time Validity:

Change View "Date & Time Validity": Overview

New Entries BC Set: Change Field Values

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant: /OST/PROD

Date & Time Validity			
From	To	From	To
01.06.2017	31.12.9999	00:00:00	24:00:00

Weekday Specifications:

Change View "Weekday Specifications": Overview

New Entries BC Set: Change Field Values

Dialog Structure

- Batch Import Variants
 - Date & Time Validity
 - Weekday Specifications
 - Import Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients
 - Maintain LMDB only Clients

Variant: /OST/PROD

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 for PROD:

Finally, 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 Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data (selected)
 - Maintain System Clients
 - Maintain LMDB only Clients

ID	Solution ID	Release Component	Cycle Type	System	Non-ABAP	Import Config
7	*	*	All Typ...	OTO	<input type="checkbox"/>	/OST/IMPORT_PROD
					<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:

- ID = enter an ID manually. System validates entered ID to avoid duplicate keys,
- Solution ID = Enter your Solution ID; you can also use wildcard,
- Release Component = Enter your Release Component; 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*,
- System = Enter the relevant System; wildcard is not possible,
- Checkbox *Non-ABAP* = Activate the Checkbox if that the system has no ABAP Stack,
- Import Config. = /OST/IMPORT_PROD.



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 Configuration
 - Import Customizing: Status
 - Import: Parameters
 - Valid Cycle Phases for Import
 - Maintain Import Sequence of Systems
 - Maintain Landscape Data
 - Maintain System Clients (selected)
 - Maintain LMDB only Clients

Numerical ID: 7

Solution ID: *

Release Component: *

Cycle Type: [dropdown]

System Name: OTO

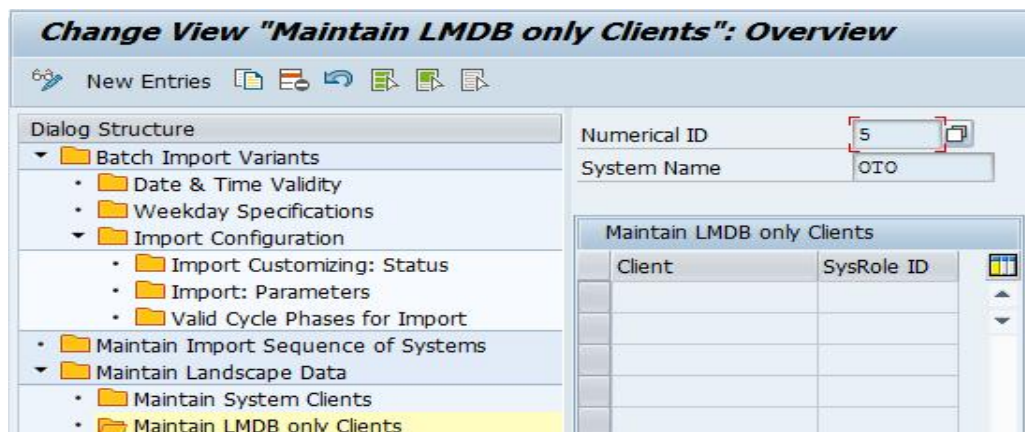
Client	SysRole ID	RFC Type	Comm.Clt
800	P	Trusted RFC	800
		Trusted RFC	

Set the status dependent import control active for:

- Client = Enter relevant Client for productive Import,
- System Role ID = 'P' (for Production System),

- RFC Type = Select 'Trusted RFC', or 'TMW RFC' as RFC Type,
- Communication Client = Here you enter the Client as Communication Client, which should trigger the Import to PRE-PROD. It is recommended to enter the Client to which the Import takes place as 'Communication Client'

Maintain LMDB only Clients:



Here you maintain additional imports to clients, when you import to *PRE-PROD*.

Special Setup for TMW

If you would like to use the TMW RFC Connection instead of TRUSTED RFC, check for RFC User:

SAP_SOLMAN_READ

SAP_SOLMAN_TMW

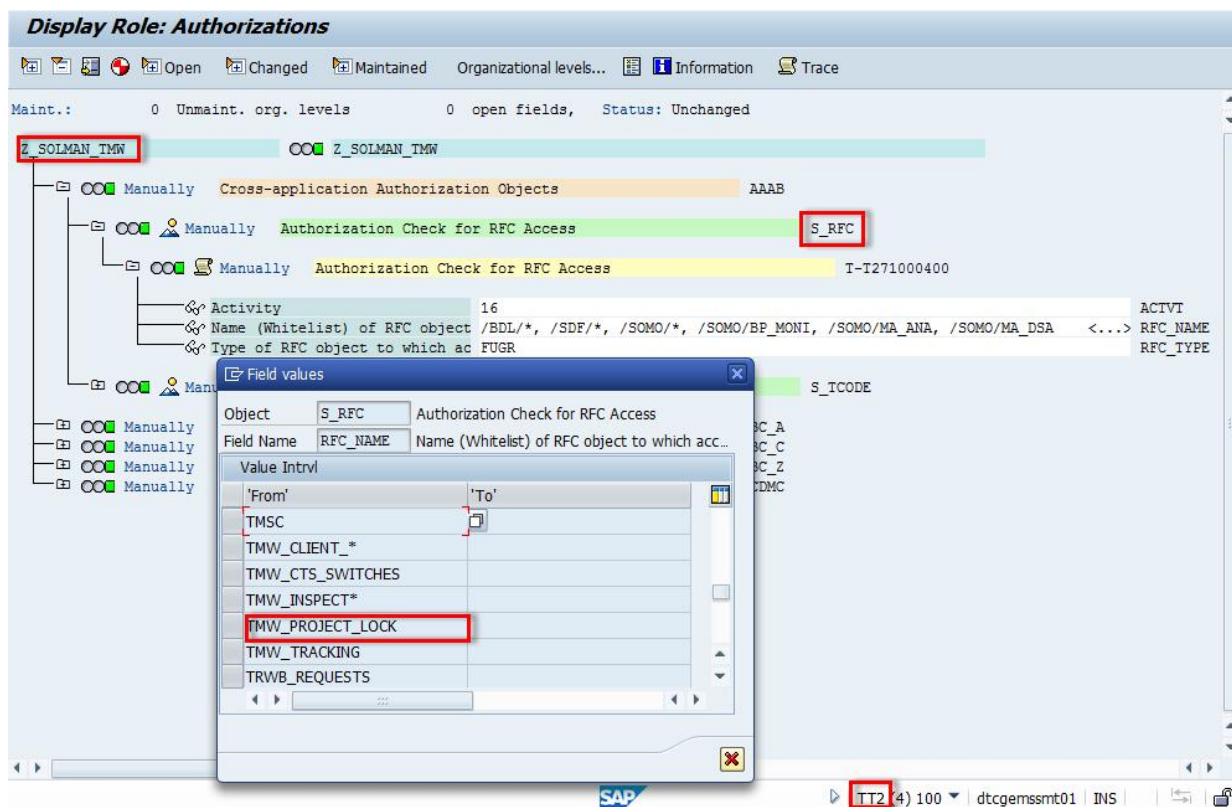
(Relevant for Systems until SAP_BASIS 7.01, according to SAP Note 2257213)

SAP_SOLMAN_READ_702

SAP_SOLMAN_TMW_702

(Relevant for Systems as of SAP_BASIS 7.02, according to SAP Note 2257213)

Additional authorization is required for communication (such as reading buffer). 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.



On top the TMW RFC User needs to have authorization for IMPORT: New Authorization Object SM_CM_TASK must be configured for this user, if imports are triggered from a SAP Solution Manager 7.2 system.



5.11.4 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(s) to Import  

☐ Import into Production Systems

Import Variant 

☐ Allow Transports of Task List without Change assigned

☒ Test Mode (No Import)

☐ Process only Test transports

Scheduling Options

☐ Enable Automatic Rescheduling

Minutes until auto restart

Name of Job

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 systems, the import should be controlled by the IT operator, but not be scheduled automatically by the system.

Program /SALM/BATCH_IMPORT_TRIGGER - General Options

Start/Schedule Import based on Variant

General Options

Release(s) to Import  

☐ Import into Production Systems

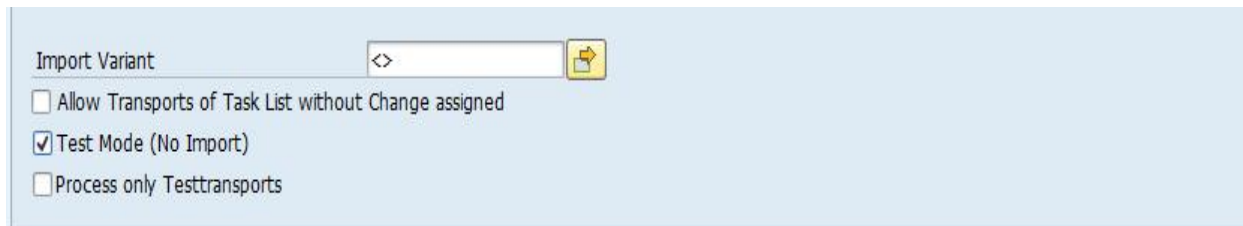
- Release to Import

Choose the cycle type which should be imported based on the entered import variant.

You can also enter multiple releases or use wildcard. If you would like to import several releases (or cycles) please refer to chapter 2.2.1 Maintaining AGS_WORK_CUSTOM and look for parameter /SALM/BI_MULTIPLE_RELEASES.

- Import into Production Systems

Here you can decide if the import would be performed into a production system.



- Import Variant

The import variants are defined via the customizing for release batch Import.

Defines which systems should be considered for import.

Provides restrictions which must be fulfilled, (such as system roles or CRM User Status of Change Documents).

- Allows Transports of Task List without Change assigned

Transports not assigned to a change document are imported.

- Test Mode (No Import)

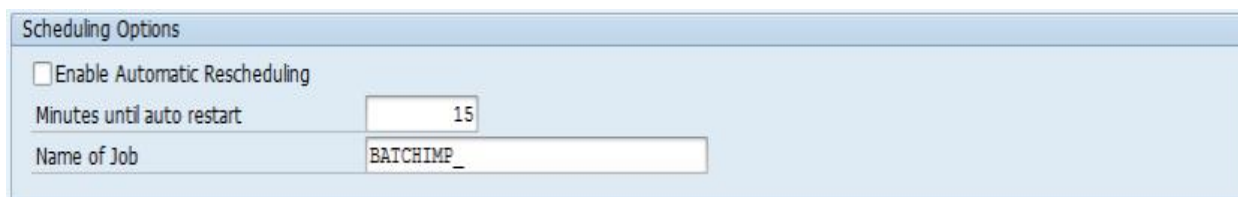
The system performs all checks but does not trigger an import.

- Process only Test transports

Only Transports of Copies (ToC) are imported,

During the transport selection all non-ToCs are removed from the selection.

Program /SALM/BATCH_IMPORT_TRIGGER - Scheduling Options



- Enable Automatic Rescheduling

After the program is finished, it schedules 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 automatic rescheduling is active permanently, so the job has to be removed manually to stop the rescheduling.

Program /SALM/BATCH_IMPORT_TRIGGER - Check Options for Downgrade Protection

- Downgrade Protection on

Performs check on possible downgrades,

Found downgrades are logged.

- Skip downgrade Transports

If this option is disabled and if transports from the selection are affected from a downgrade, no import triggered,

If this option is enabled transports which are affected from downgrades are 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. No import triggered as a result.

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 using 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 SLG1:

Object: [/SALM/](#)

Sub-Object: /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.

5.12 Configuration of Template Protection

5.12.1 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).

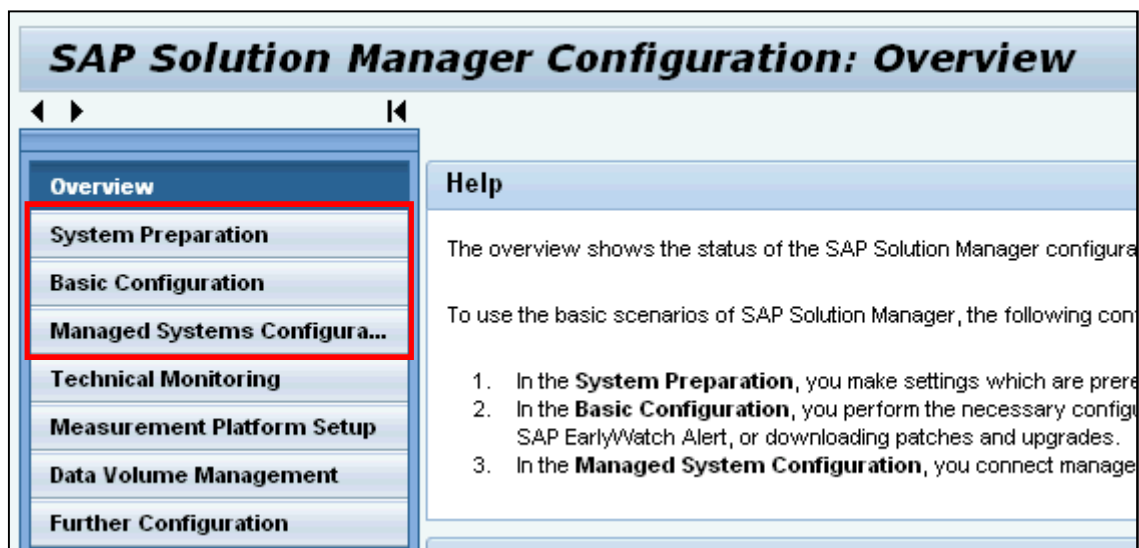
Therefore, navigate to [SAP Solution Manager Implementation Guide à SAP Solution Manager à Basic Configuration à Basic Configuration: Guided Procedure](#).

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 SAP 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 SAP Solution Manager via RFC. This is important, since Change Request Management requires a READ, TMW and TRUSTED RFC connection to every managed system/client. To ensure that Change Request Management works perfectly with managed systems, a minimum SP Level is required. For further details, check SAP Note 907768.



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, perform the basic configuration for Change Request Management.

5.12.2 Piece List Activation

The standard customizing of 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 copies the standard customizing from Client 000 into the working client of SAP Solution Manager.

Activating the piece list again overwrites 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 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](#). This predefined configuration allows direct usage of Simple IT Request without any further adjustments.

5.12.3 Prerequisite for Template Protection

Before you start to configure Change Request Management, implement the according master note for Change Request Management in the latest version, which fits to your SP level.

The configuration of Change Request Management is a prerequisite for the utilization of template protection.

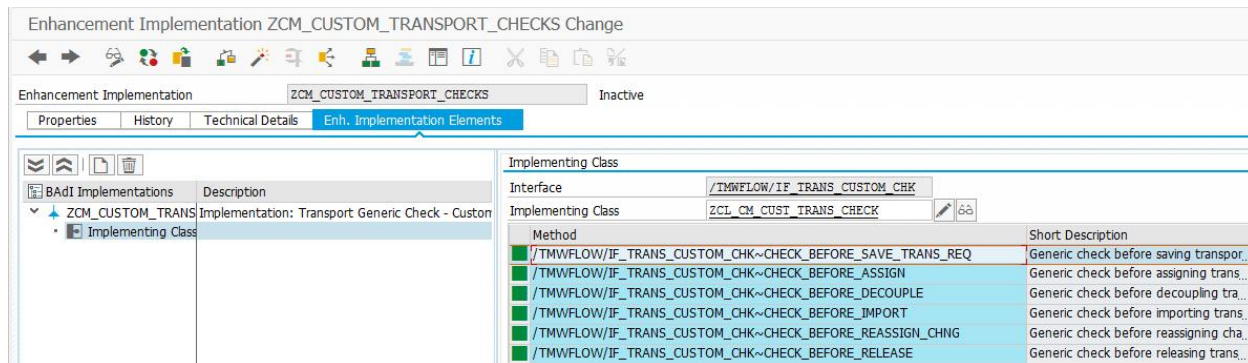
5.12.4 Activation of Template Protection Checks

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

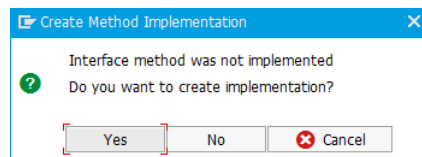
5.12.5 Check at Save of Objects

The following implementation activates the check at the time of saving objects. When you maintain objects and save the changes to the transport request, the template protection checks are 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 action in the dialog box.



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 ).
```

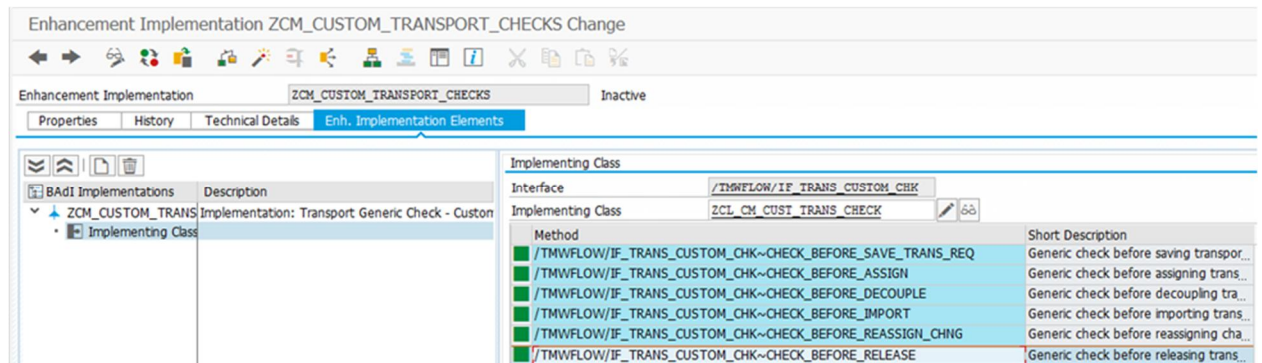
```
ENDMETHOD.
```

Save and activate the method.

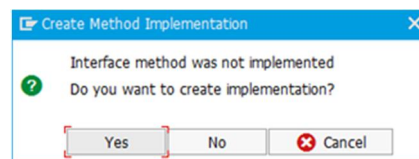
5.12.6 Check at Release of Transport Requests

The following implementation activates the check at the time of releasing transport requests. When a transport request is being released within Change Request Management, Quality Gate Management, or directly via the task list, template protection checks are 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 select.



Confirm the action in the dialog box.



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.

5.12.7 Central Customizing for Template Protection

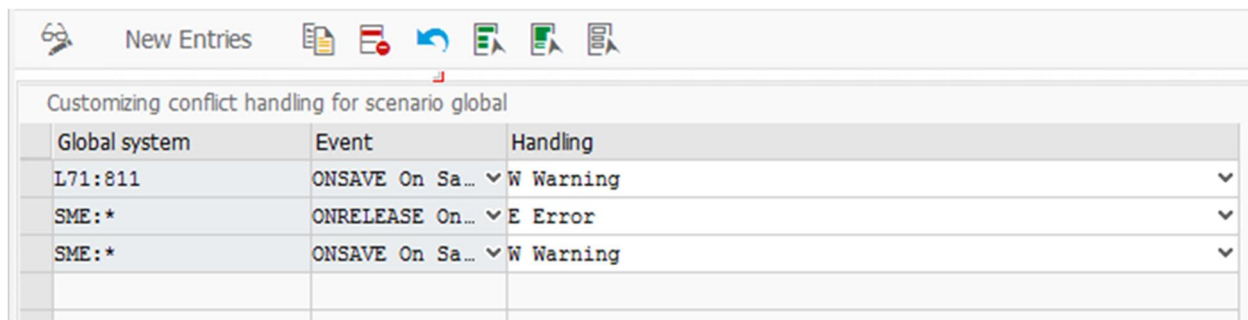
Customizing Parameters

With transaction SM30 you can open the maintenance view [/SALM/TPP_CUST](#). This gives 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

With transaction SM30, you can open the maintenance view [/SALM/TPP_SG_CHD](#). This gives you access to the conflict handling for the global/local scenario.



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 need to define the system, for which the locks have been maintained. The desired setting is 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.

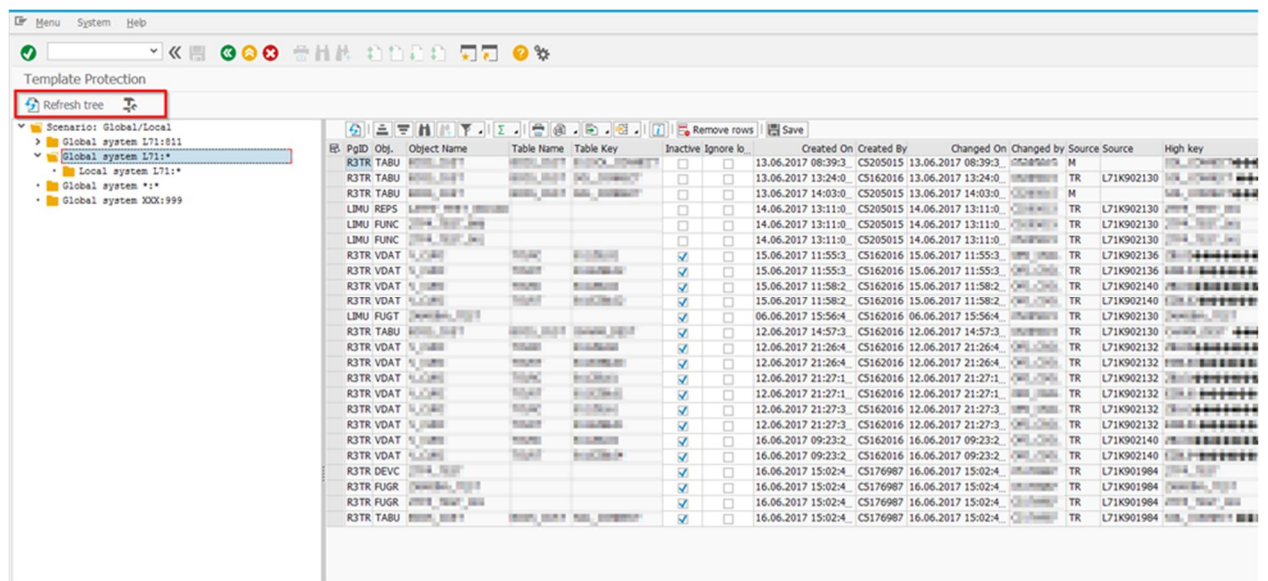
In the field [Handling](#) you can define, whether a warning message (W) or an error message (E) should be shown. Depending on the type of message, the process may be cancelled, so that the object cannot be saved or the transport request cannot be released.

5.12.8 Maintenance of Locks in Template Protection

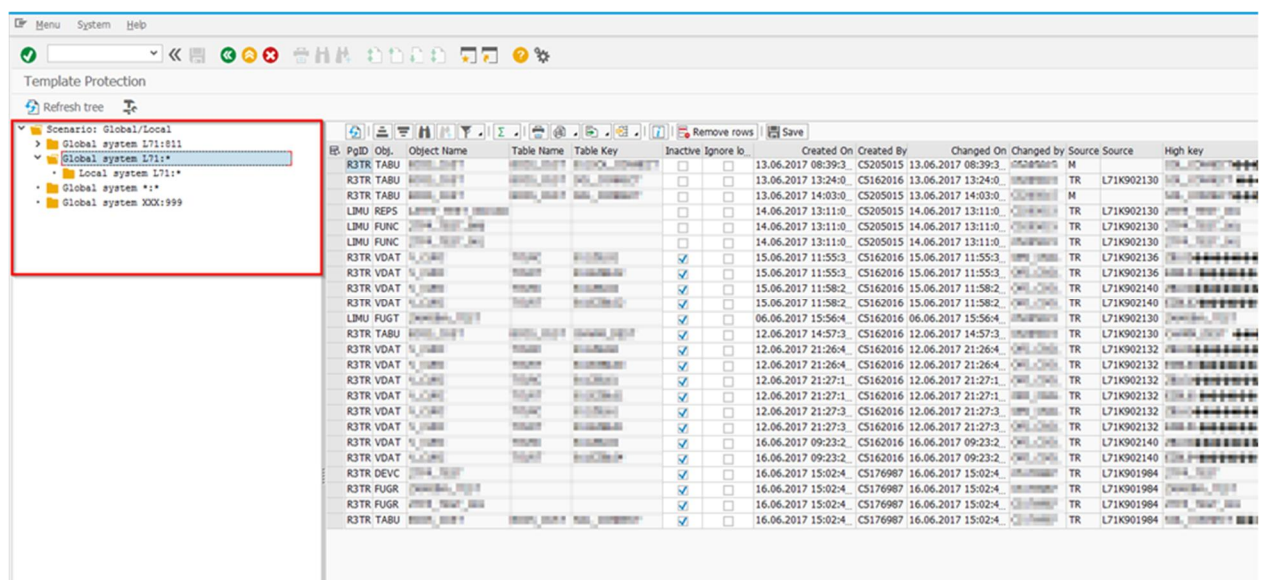
You can reach the maintenance of the template protection via transaction [/SALM/TPP_START](#). Please be sure to add **/n** at the beginning of the transaction.

The template protection consists out of the following parts:

Menu bar:



Tree view:



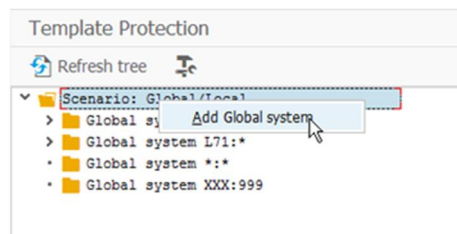
Details of the selected tree view item:

PgID	Obj.	Object Name	Table Name	Table Key	Inactive	Ignore lo.	Created On	Created By	Changed On	Changed by	Source	High key
R3TR	TABU	<input type="checkbox"/>	<input type="checkbox"/>	13.06.2017 08:39:3	CS205015	13.06.2017 08:39:3	...	M	...
R3TR	TABU	<input type="checkbox"/>	<input type="checkbox"/>	13.06.2017 13:24:0	CS162016	13.06.2017 13:24:0	...	TR	L71K902130
R3TR	TABU	<input type="checkbox"/>	<input type="checkbox"/>	13.06.2017 14:03:0	CS205015	13.06.2017 14:03:0	...	M	...
LMU	REPS	<input type="checkbox"/>	<input type="checkbox"/>	14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130
LMU	FUNC	<input type="checkbox"/>	<input type="checkbox"/>	14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130
LMU	FUNC	<input type="checkbox"/>	<input type="checkbox"/>	14.06.2017 13:11:0	CS205015	14.06.2017 13:11:0	...	TR	L71K902130
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.06.2017 11:55:3	CS162016	15.06.2017 11:55:3	...	TR	L71K902136
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.06.2017 11:58:2	CS162016	15.06.2017 11:58:2	...	TR	L71K902140
LMU	FUGT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	06.06.2017 15:56:4	CS162016	06.06.2017 15:56:4	...	TR	L71K902130
R3TR	TABU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 14:57:3	CS162016	12.06.2017 14:57:3	...	TR	L71K902130
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:26:4	CS162016	12.06.2017 21:26:4	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:27:1	CS162016	12.06.2017 21:27:1	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.06.2017 21:27:3	CS162016	12.06.2017 21:27:3	...	TR	L71K902132
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140
R3TR	VDAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 09:23:2	CS162016	16.06.2017 09:23:2	...	TR	L71K902140
R3TR	DEVG	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984
R3TR	FUGR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984
R3TR	FUGR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984
R3TR	TABU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16.06.2017 15:02:4	CS176987	16.06.2017 15:02:4	...	TR	L71K901984

Maintain System Hierarchies

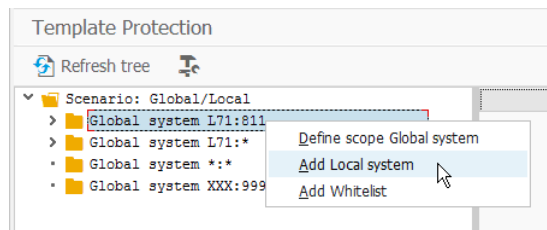
On global system-level you define all objects that should be locked on that system. On local system-level you define, the systems on which checks should be performed to secure the global objects.

As a first step, create a global system. Select the folder *Scenario: Global/Local* with a right mouse click. Select *Add Global system*.

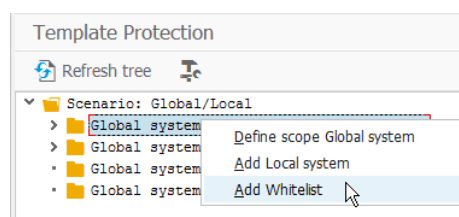


Define a System ID and a Client. You can use wildcards for both fields.

To assign a local system, select the global system with a right mouse click, and select [Add Local system](#). Define a System ID and a Client. You can use wildcards for both fields.



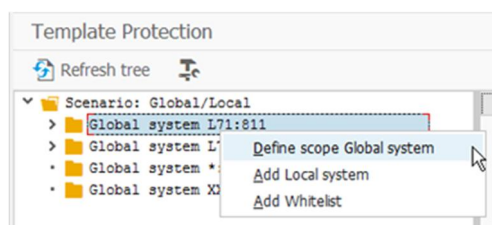
You can also add a Whitelist. All objects maintained for the whitelist are ignored as part of the template protection checks



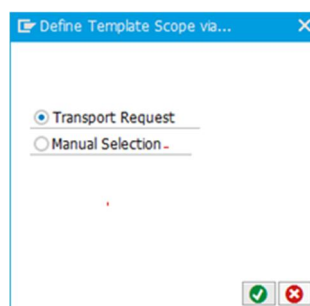
Define Scope - Transport Request based Scoping

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:

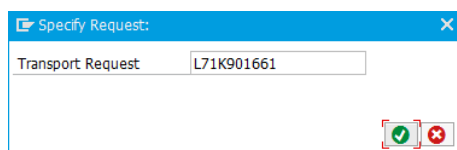


In the following dialog box, select [Transport Request](#).



Now you can define a transport request, which should be added to the template protection. The F4 help shows you all transport requests, which are created on a system matching the pattern of the global system. For example,

if you use L71:* as a global system, you see all transport requests which are created on any client of L71 and managed by ChaRM.

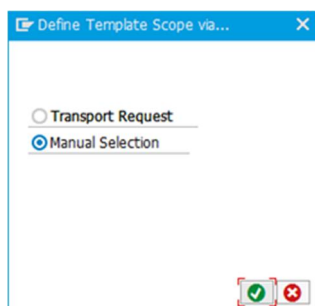


Define Scope - Manual Scoping

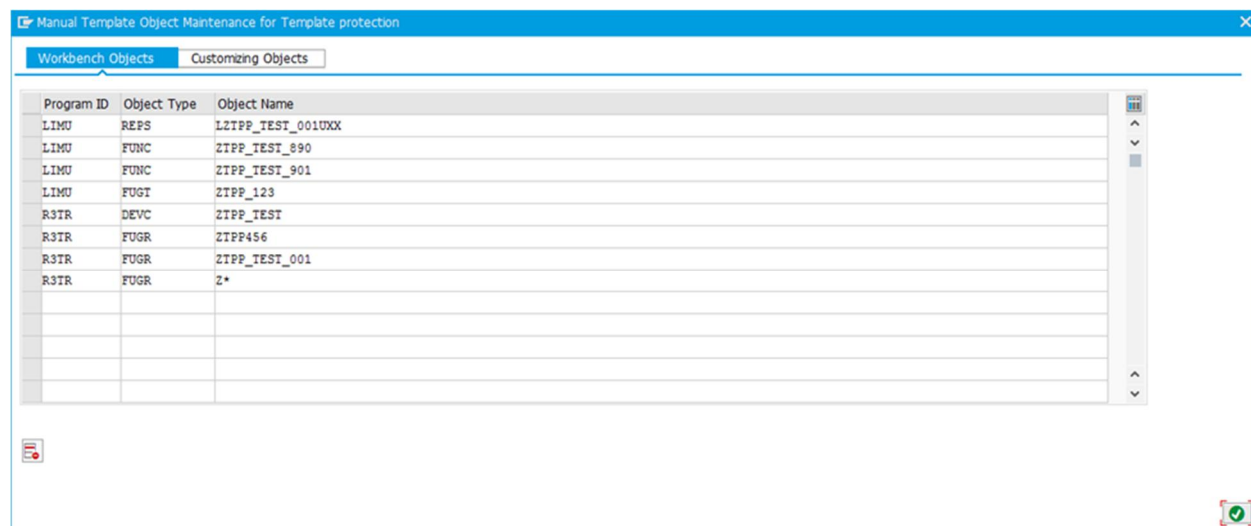
You can manually define objects for global systems and whitelists via manually entering the objects using the manual scoping

To do so, start the scoping as shown in the transport request based scoping.

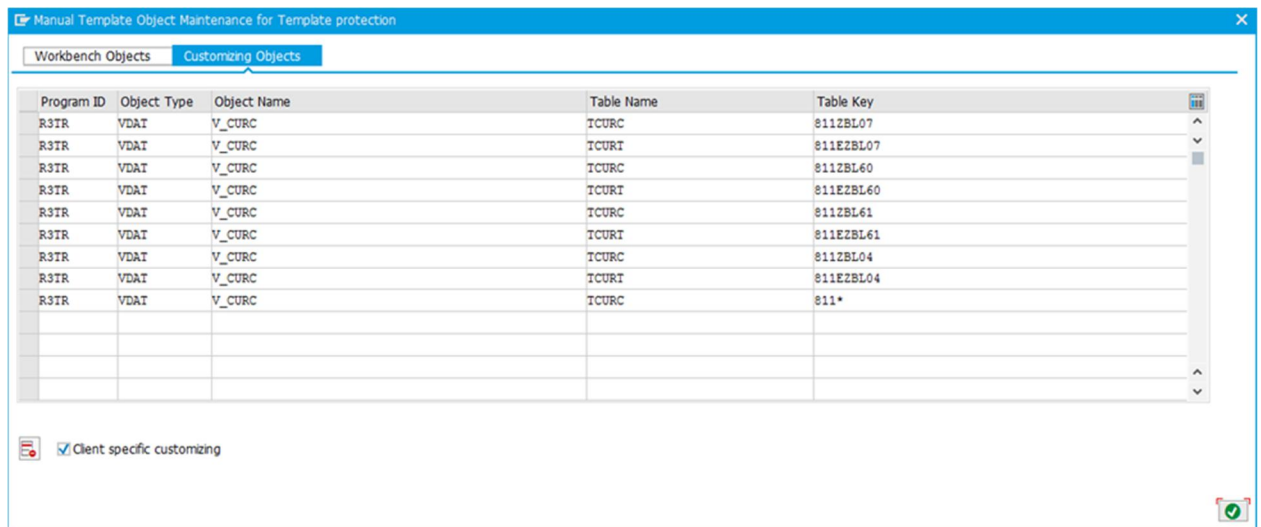
In the following dialog box select *Manual Selection*.



Now you have the possibility to maintain Workbench Objects via the Tab *Workbench Objects*. Wildcards are supported at the end of the Object Name.

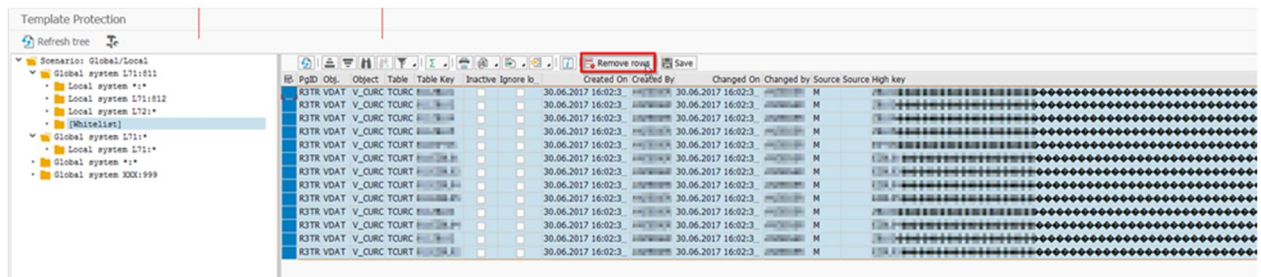


You can maintain Customizing Objects via the Tab Customizing Objects. Wildcards are supported at the end of the Table Key. If you want to maintain cross client customizing, you need to do this in a separate run and make sure to deactivate the checkbox *Client specific customizing*.



Delete Locks and Hierarchies

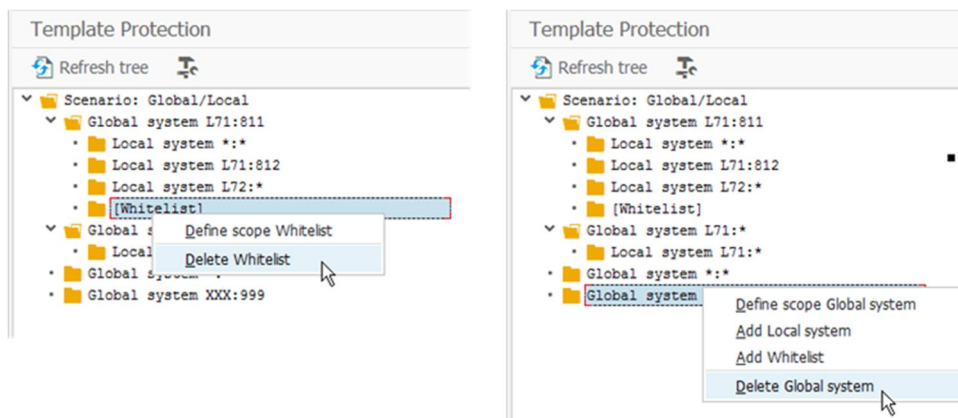
To delete locks out of a whitelist or a global system, you first need to select the corresponding node. In the detail view you can then select and delete the locks.



Make sure to save the deletion via the button [Save](#). After saving you see a confirmation dialog box.



Once a node is completely empty, you can delete it via the right mouse button.



5.13 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. Such as 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 connection as they also differ in some major parts. You still want to distribute changes from one global development Landscape to other local landscape.

Distribution Modes

The XLD Function therefore supports 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 allows 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 responsibility to ensure that only users with the knowledge of 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 always imports 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.

Execution Modes

There are two different execution modes for the Cross Landscape Distribution

- Wizard Based
 - User interaction to specify target
 - Distribution to only one target
- Automated Distribution
 - No interaction with user, target is determined by customizing
 - Is only working in strict mode
 - Can distribute to several targets at the same time

Process

After the target is specified the following 4 steps are executed automatically.

10. Create a ToC from the Source Transport
11. Release ToC from the Source System and add it to the Queue of the Target System
12. Import the ToC in the Target System
13. Merge Object List from ToC with the Transport of the Target Change

5.13.1 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 you have create a role **SAP_OST_CM_TRANSPORT_M** that you need to assign to each user to allow them to execute the Cross Landscape Distribution.

5.13.2 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.

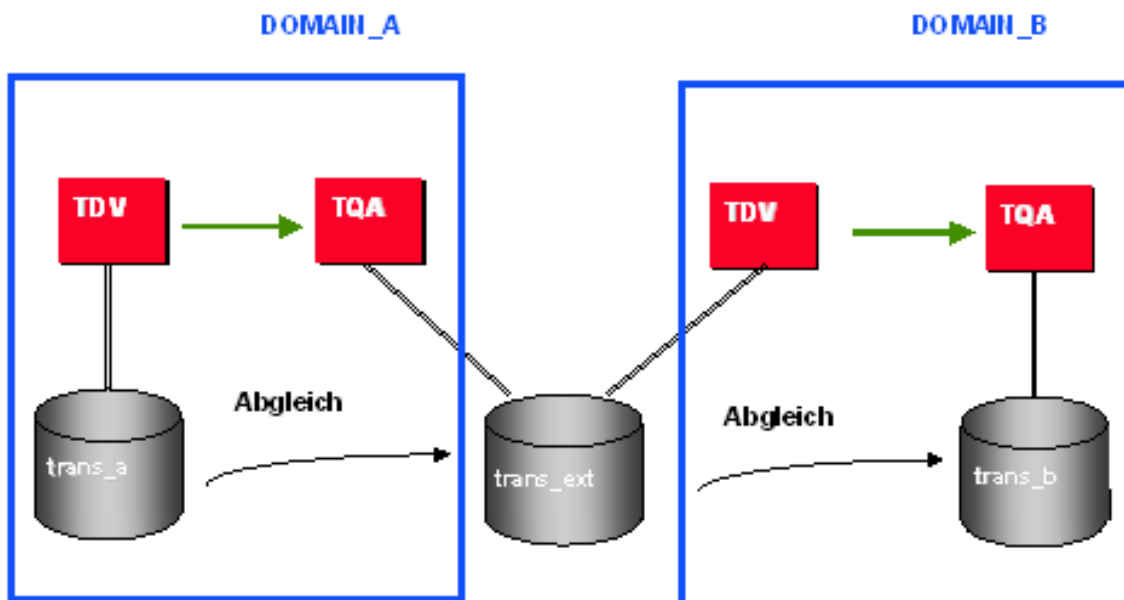
For this you need to do a “manual” Cross Landscape distribution.

1. Export the Package [/SALM/CHARM_XLD_MS](#) and all its Content from SAP Solution Manager into a Transport or ToC
2. Import the Transport into all Development Systems between you want to allow distribution.

5.13.3 Prerequisite for TMS RFC Free Setup

To be able to distribute with XLD transports between any 2 developments systems by default these development systems need to have a domain link between each other.

Just if you don't want to create domain links between every development system (due to a very huge landscape) there is also an option do this without domain links.



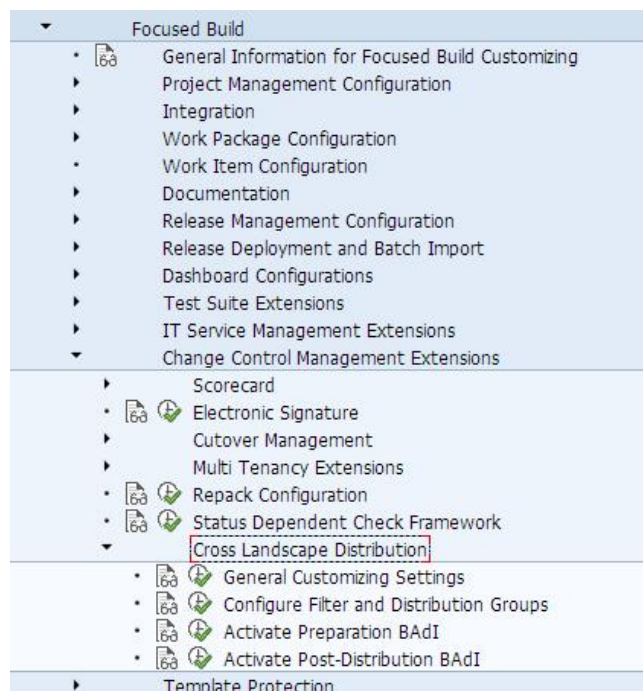
Let's assume you have 2 Development systems TDV and TQA. You want to setup a distribution from TDV to TQA. Therefore you need to create on the domain controller for TDV an external System Instance with the system id TQA (can be done Tx:STMS® system overview) and on the domain controller for TQA you need to create an external systems instance with system id TDV. Both external systems need to share the same transport directory.

5.13.4 Prerequisites for Automated Cross Landscape Distribution

The Automated Cross Landscape Distribution provides a way to distribute objects and customizing to several systems at the same time. As all targets are predefined in the customizing the user do not need to select them. Per default the needed target transport requests for the distribution are created automatically and assigned to the current change document. Therefore, the change cycle to which the change document is assigned to needs to know all possible target systems. This behavior can be overwritten by creating your own BAdI implementation.

5.13.5 Customizing Cross Landscape Distribution

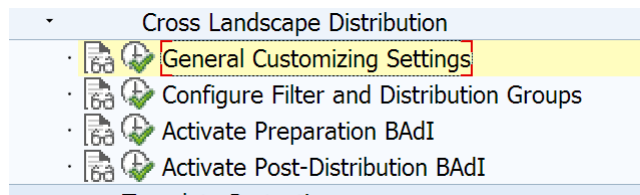
For the customizing, there are two view cluster configured that can be access via **SPRO** or **SM34**.



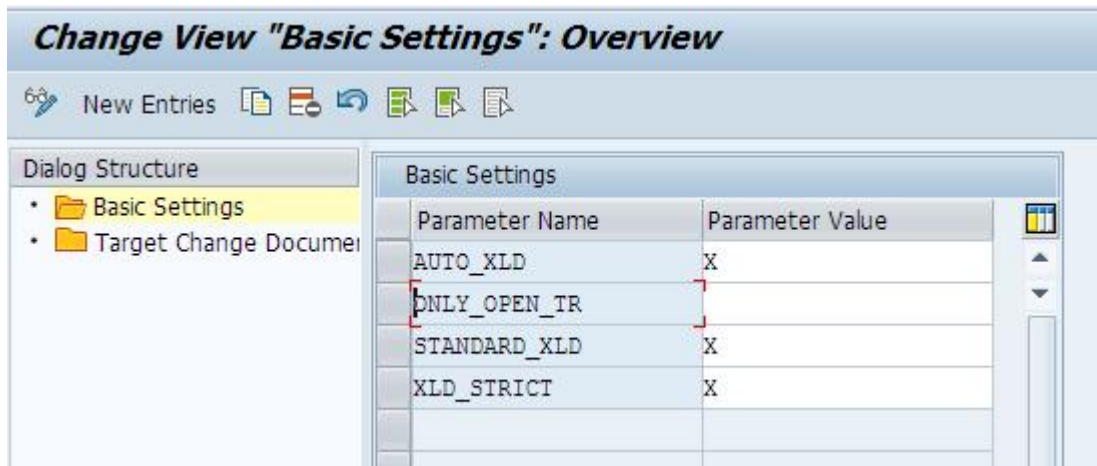
- View Cluster for *General Customizing Settings*: [/SALM/CM_XLDCFG](#)
- View Cluster for *Configure Filter and Distribution Groups*: [/SALM/CM_XLDOBJ](#)

Changes in *General Customizing Settings* have to be recorded into a transport whereas all changes in the *Configure Filter and Distribution Groups* can be done directly in the Productive Solution Manager.

5.13.5.1 General Customizing Settings



Basic Settings

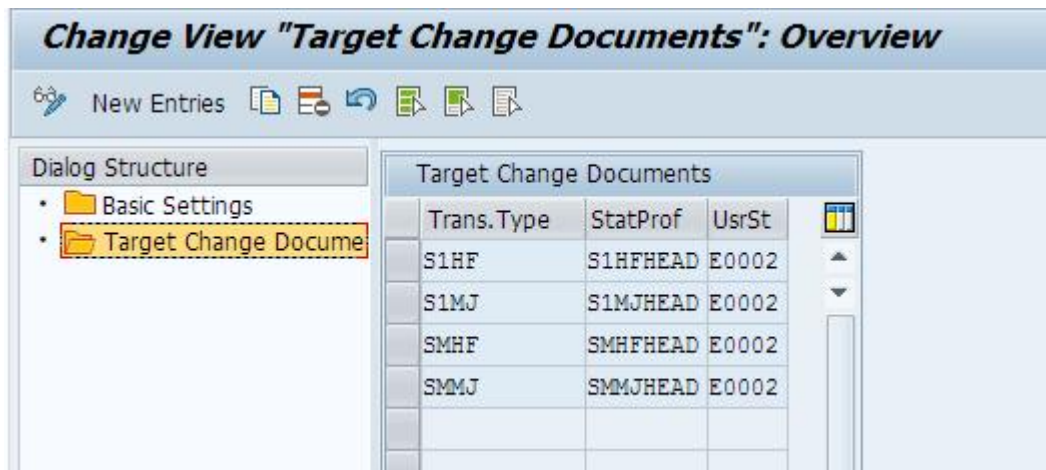


Here you can set some basic customizing flags. Add a new entry for the needed parameter and set its value to **x** to activate.

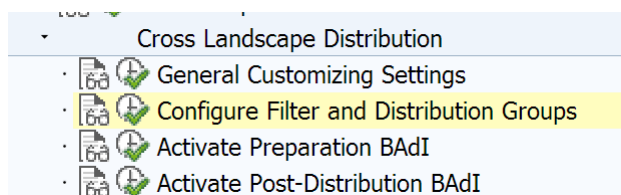
- **STANDARD_XLD**
Activates the wizard based Cross Landscape Distribution.
- **AUTO_XLD**
Activates the Automated Cross Landscape Distribution.
- **ONLY_OPEN_TR**
Only open transports are distributed. Released transport requests are ignored. If this option is deactivated (or not specified) the release status of the transport requests is not taken into account.
- **XLD_STRICT**
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 if all of those objects are correctly distributed.

Target Change Documents

When you run the Cross Landscape Distribution wizard with selection for change documents, you can customize with this table what types of change documents are allowed and in what status they have to be.

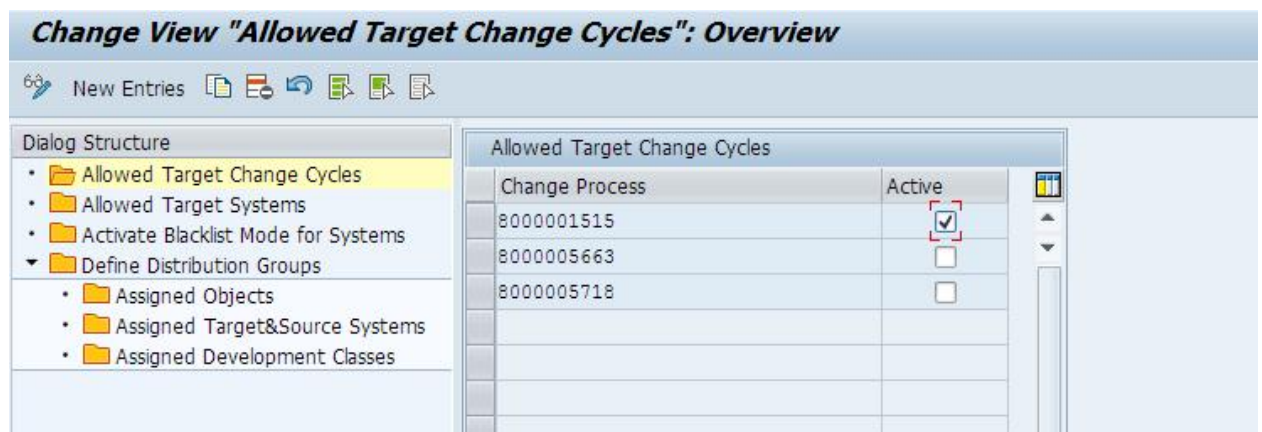


5.13.5.2 Configure Filter and Distribution Groups



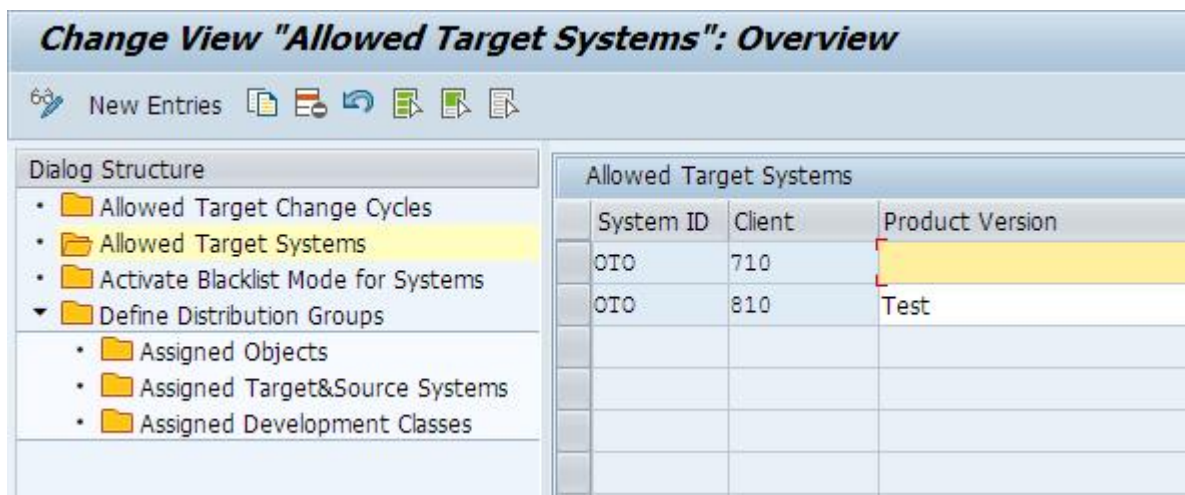
Allowed Target Change Cycle

When you run the Cross Landscape Distribution Wizard 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.



Allowed Target Systems

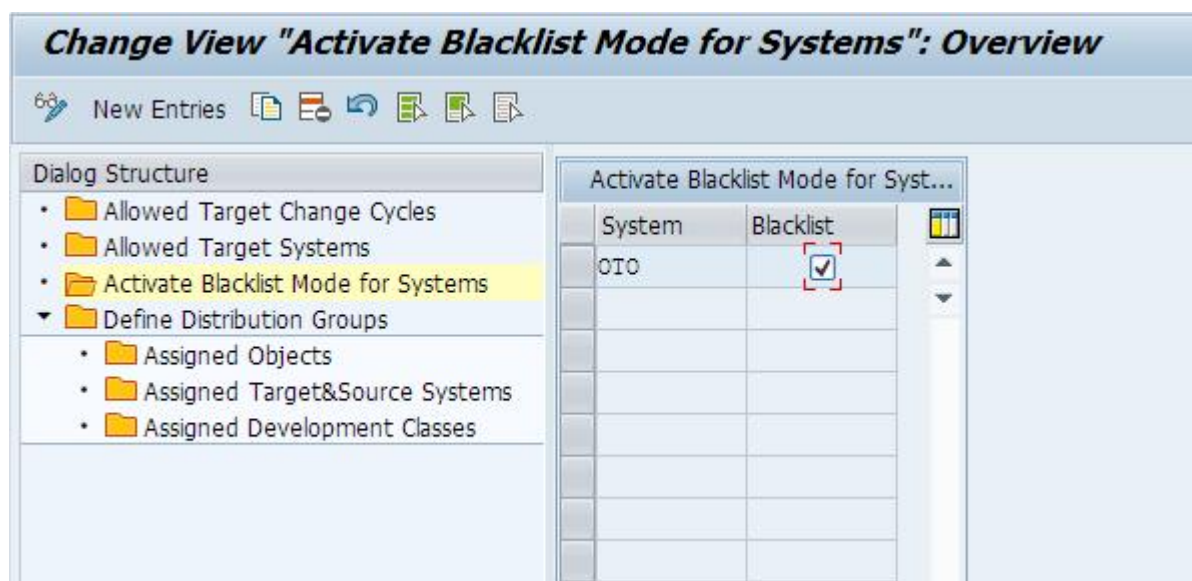
When you run the Cross Landscape Distribution Wizard with selection for transports you need to select a target system. The displayed systems need to be defined in this table. If this table is empty, no system is available.



Activate Blacklist Mode for Systems

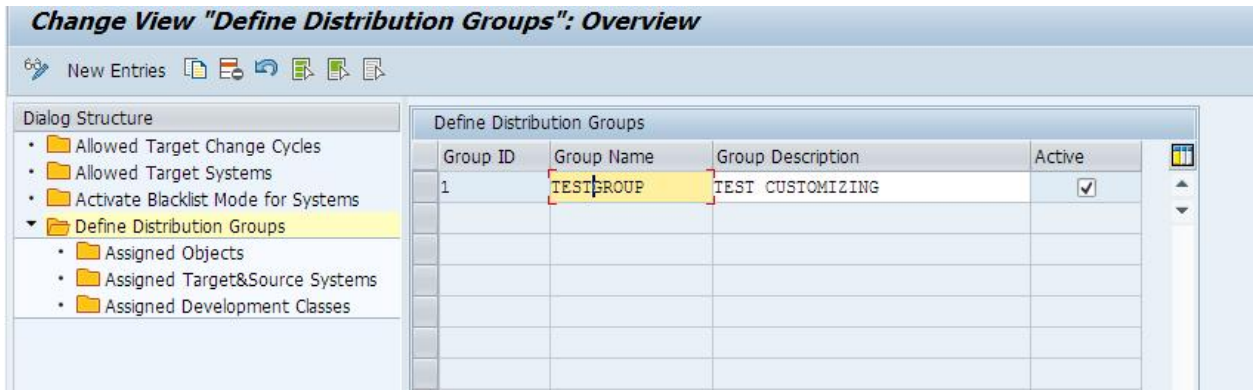
When you use the Cross Landscape Distribution with strict mode you can define here in which mode you want to define the object lists.

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.



Define Distribution Groups

When using the Cross Landscape Distribution in strict mode, you need to define which objects should be taken into consideration. For this purpose, you can create a new group with a [Group ID](#), [Group Name](#) and a [Group Description](#). In the Subfolders you can then assign the objects, development and target or source systems and development classes. Each distribution group can be activated or deactivated by setting flag in the column [Active](#)



• Assigned Objects

In this customizing setting you can define objects to be distributed. These objects can be workbench or customizing objects:

A Customizing transport object is classified uniquely by its master type and master name. There are four master types, which also contain sub-objects:

- View cluster master type CDAT - A view cluster can contain multiple views as sub-objects.
- View master type VDAT - A view can contain multiple tables as sub-objects. Table content master type TDAT
- The master type TDAT - can contain multiple tables as sub-objects.
- Table content master type TABU - The master type TABU references exactly one table.

Additionally, you can define a table key, which is used to filter the distributed objects.

Note

For examples of client-specific transport objects and their sub-objects, see tables E071 and E071K (transaction [SE16](#)).

Example: Master type object R3TR CDAT:

This definition of a transport object references the cluster [SCMGV_ATTRPROFA](#) as a subobject of the view cluster [SCMGVC_ATTRPROF](#). The table is part of the view [SCMGV_ATTRPROFA](#).

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	SCMGATTRPROFA
Table Name	SCMGATTRPROFA
Master Name	SCMGVC_ATTRPROF
Master Type	CDAT
Viewname	SCMGV_ATTRPROFA



Example: Master type object R3TR VDAT

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

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	BAOPHASE
Table Name	BAOPHASE
Master Name	V_BAOPHASE
Master Type	VDAT
Viewname	V_BAOPHASE



Example: Master type object R3TR TDAT:

This definition of a transport object references the TDAT object BDBG. The table is part of the master type object BDBG.

Column Name	Value
PGID	R3TR
Obj. Type	TABU
Object Name	BAOPHASE
Table Name	TBDBE
Master Name	BDBG
Master Type	TDAT
Viewname	*



Example: Master type object R3TR TABU:

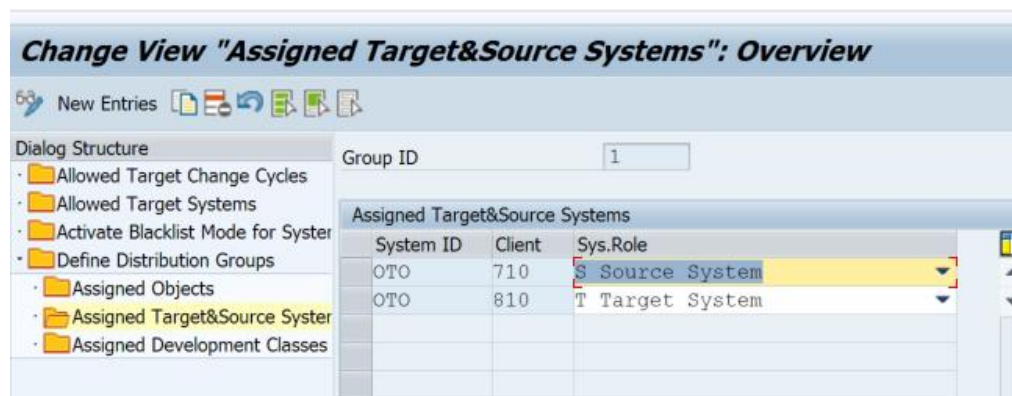
This definition of a transport object references the TABU object **UST04**. The table is the entire content of the master type object **UST04**.

Column Name	Value
PGID	R3TR
Obj. Type	TABU

Column Name	Value
Object Name	UST04
Table Name	UST04
Master Name	UST04
Master Type	TABU
Viewname	*

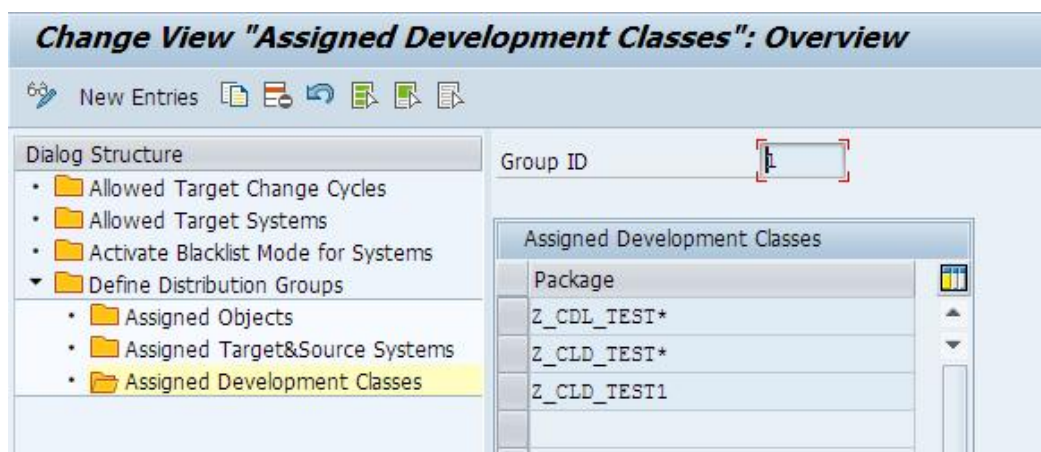
- *Assigned Target & Source Systems*

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.

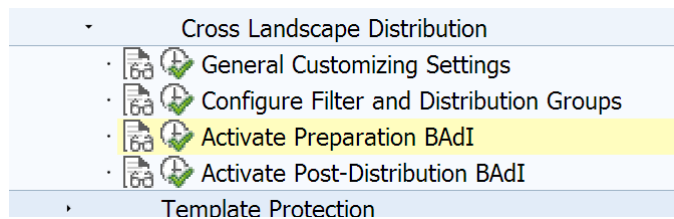


- *Assigned Development Classes*

Workbench Objects can be specified via Development Package. The setting here is valid for all objects in this Package. This setting is valid for all source and target system of the same Distribution Group.



5.13.5.3 Activate Preparation BAdI



This activity can be used to activate the implementation of BAdI /SALM/CM_XLD_PREPARE_DISTR. The standard implementation is /SALM/IM_CM_XLD_PREPAREDIST of enhancement implementation /SALM/IM_CM_XLD_DISTRIBUTION.



Active(IMG)	Active(Impl.)	Enhancement Implementation	BAdI Implementation	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	/SALM/IM_CM_XLD_DISTRIBUTION	/SALM/IM_CM_XLD_PREPAREDIST	XLD: Default implementation of /SALM/CM_XLD_PREPARE_DISTR

This implementation is used to calculate, which object needs to be distributed to which target system.

The delivered standard implementation reads the rules defined in Customizing and determines all necessary distributions based on the objects in the source transports. For the found distributions transport requests are created automatically for each target system if there are no suitable transports in the current change document.

This determination can be overridden by creating your own implementation for BAdI /SALM/CM_XLD_PREPARE_DISTR. The implementation of the following two methods is necessary.

- /SALM/IF_CM_XLD_PREPARE_DISTR~PREPARE_DISTRIBUTION
prepare cross landscape distribution
- /SALM/IF_CM_XLD_PREPARE_DISTR~PROCESS_RULES
check object lists against rules

The default implementation is modular. If its implementation class /SALM/CL_IM_CM_XLD_PREPAREDIST is used as super class, you need to redefine only the steps that are different in your scenario. This could be done by overriding one of the following methods:

- CREATE_NEW_TARGET_TRANSPORT
XLD: create a new target transport for system/client
- READ_RULES
Get configured rules from database
- CHECK_DISTR_GROUPS_FOR_SOURCE
Check objects in source transports against the distribution rules
- CHECK_DEV_CLASSES
check dev classes (used in check_distr_groups_for_source)

- `CHECK_OBJECTS`
check objects (used in `check_distr_groups_for_source`)
- `CHECK_KEYS`
check keys (used in `check_distr_groups_for_source`)
- `GET_DISTR_SOURCES`
get sources for distribution (transports, systems, clients)
- `GET_DISTR_TARGETS`
get targets for distribution (transports, systems, clients)
- `CHECK_PREREQUISITES`
additional check before the distribution preparation starts

After the active BAdI implementation is called, the returned result is verified in the following points before the distribution was actually executed.

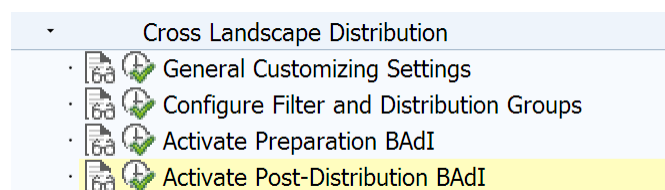
- For all source systems:
 - TMW RFCs must be defined
 - The user used must have authorization for executing the functions `TMW_CREATE_TRANSPORT_OF_COPIES` and `TMW_GET_TRANSPORT_LIST`.
- For all target systems,
 - TMW RFCs must be defined in the Solution Manager,
 - The function `/SALM/CM_XLD_MERGE_REQUESTS` must exist there
 - The user must have authorization for this function.
- Source and target systems must be different
- There has to be objects to be distribution for each identified target.
- The determined destination transports must not yet be released

To use your own implementation, you need to deactivate the delivered version `/SALM/CM_XLD_PREPARE_DISTR` before activating your own one.

Note

There can be only one active implementation at the same time.

5.13.5.4 Activate Post-Distribution BAdI



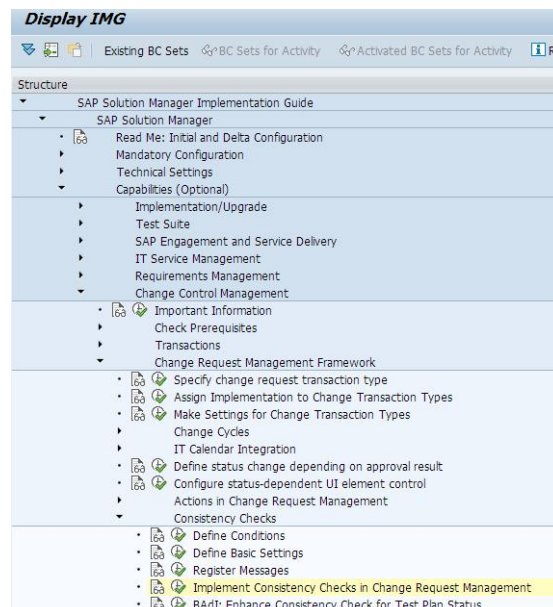
It is also possible to implement and activate your own implementation of BAdI /SALM/CM_XLD_AFTER_DISTR. This BAdI is named after the automated distribution is finished. As long as there isn't any implementation you create a new implementation when calling this activity.

5.13.5.5 Consistency Check

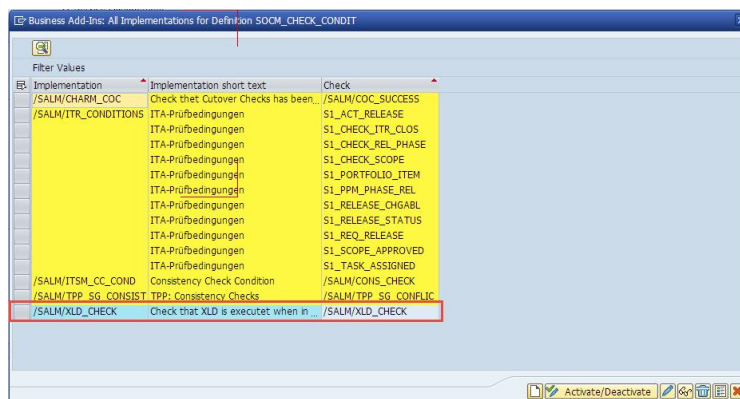
Additionally, there's the consistency check /SALM/XLD_Check, which can be carried out on specified status changes. It validates, if all distributions were executed before the status can be set. This check only works in strict mode as you need to have defined targets. To use this check, the following steps needs to be performed:

3. Activate BAdI which implements the check

Within transaction **SPRO** open the activity *Implement Consistency Checks in Change Request Management* in folder *SAP Solution Manager -> Capabilities (Optional) -> Change Control Management -> Change Request Framework -> Consistency Check*.

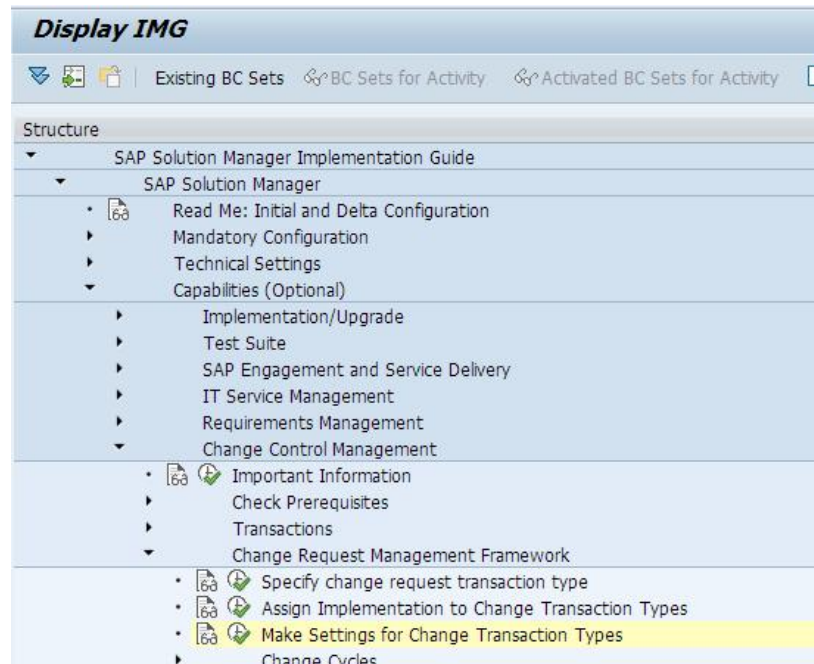


Make sure the implementation /SALM/XLD_Check is activated. If necessary activate it.



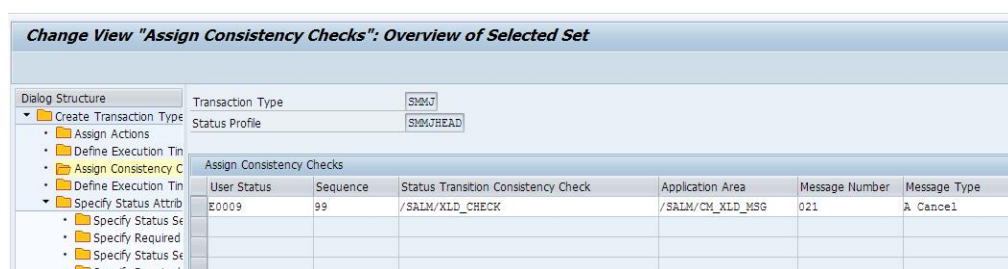
Add check to your transaction types

To add the check to your transaction types, open the activity *Make Settings for Change Transaction Types* in folder *SAP Solution Manager -> Capabilities (Optional) -> Change Control Management* within transaction **SPRO**.



Go to *Select Transaction Type* in the left tree. After selecting your transaction type in the displayed table, open *Assign Consistency Checks*. Create a new entry for the status to which the distribution is to be completed.

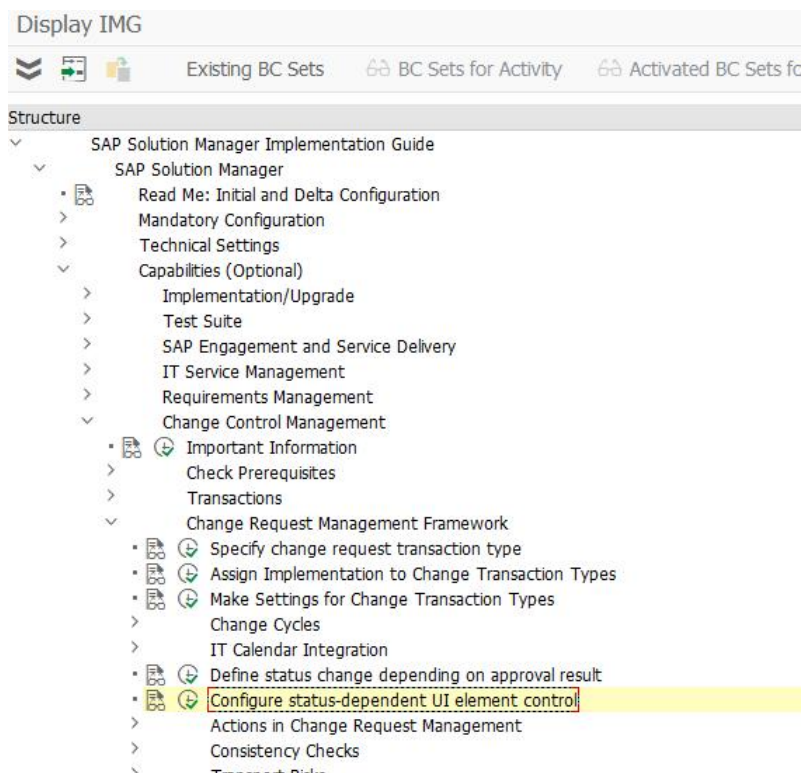
You may use Application Area */SALM/CM_XLD_MSG* with message number **021** ("XLD Error: Transports not distributed to all cross landscape targets.")



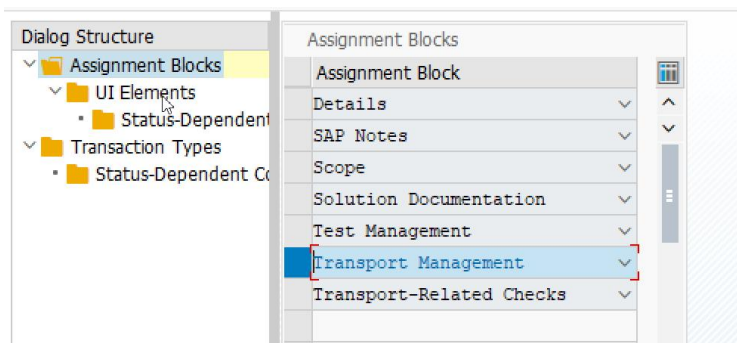
5.13.5.6 Configure status-dependent UI element control

Without further customizing the button to call the Cross Landscape Distribution Wizard in the WebUI will be disabled for all transactions types. You need to add the status, in which it should be available, to the status dependent field customizing.

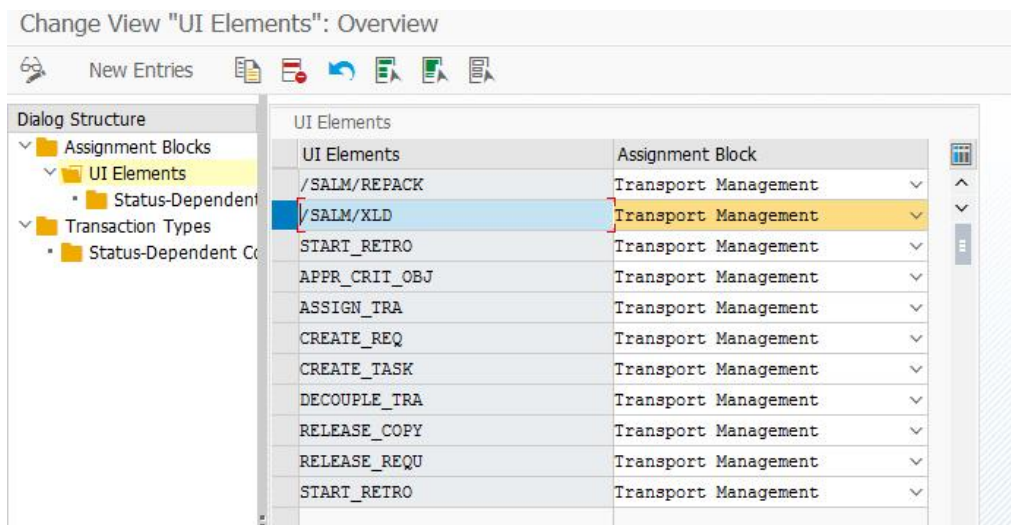
1. In transaction SPRO select the entry *Configure status-dependent UI element control*.



2. There select the folder *Assignment Blocks*. Select the assignment block *Transport Management* on the right side and double-click on the sub-folder *UI Elements*.



3. Create the new entry `/SALM/XLD` for the assignment block *Transport Management*.



4. Select your new entry and go to **Status-Dependent Control of UI Elements**.
5. Here you need to define your customizing for all transaction types.
 - o Add an entry for each status value of your transaction types.
 - o Select a value for *Editable/Executable* as required.
 - o Make sure that you activate all entries in the last column *Active*

The following screenshot displays an example for ZMHF and ZMMJ. Please note the other attributes (e.g. *Visible*) are ignored.

New Entries: Overview of Added Entries							
Status-Dependent Control of UI Elements							
Transaction ...	UI Element	Status Profile	User Status	Editable/Executable	Visible	UI Co	
ZMHF	/SALM/XLD	ZMHFHEAD	E0001	Not Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0002	Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0004	Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0005	Not Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0006	Not Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0007	Not Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0008	Not Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0009	Editable/Executable	Not Visible		
ZMHF	/SALM/XLD	ZMHFHEAD	E0010	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0001	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0002	Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0004	Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0006	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0009	Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0010	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0011	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0012	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0013	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0014	Not Editable/Executable	Not Visible		
ZMMJ	/SALM/XLD	ZMMJHEAD	E0015	Not Editable/Executable	Not Visible		

5.14 Configuration of Cutover Checks and Post Cutover Activities

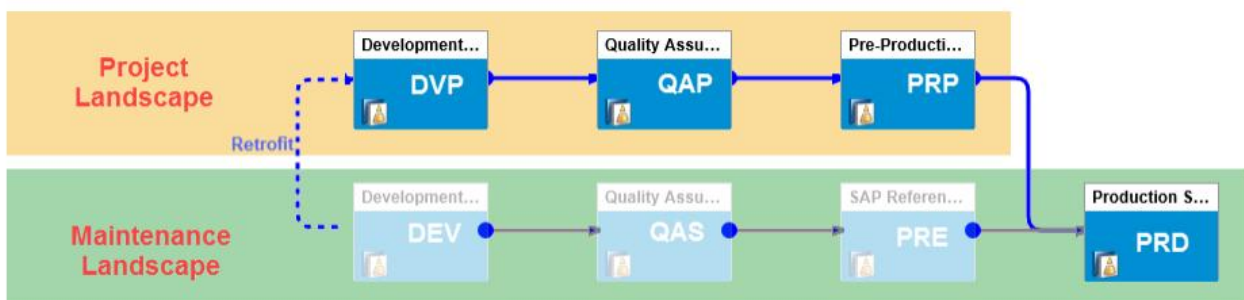
The Cutover related checks and activities are valid within a so-called N+1 system landscape. There is one maintenance landscape that supports the productive system(s) and one project or development landscape in place. The maintenance landscape should be assigned to the maintenance branch and the project landscape to the development branch of the solution.

The project systems (Development, Quality Assurance and Preproduction Systems) deliver to the maintenance system track (Development, Quality Assurance and Preproduction Systems).

Please refer to the corresponding content activation guides of SAP Solution Manager 7.2 that are available on the support market place for further reference and best practices for the solution and landscape setup.

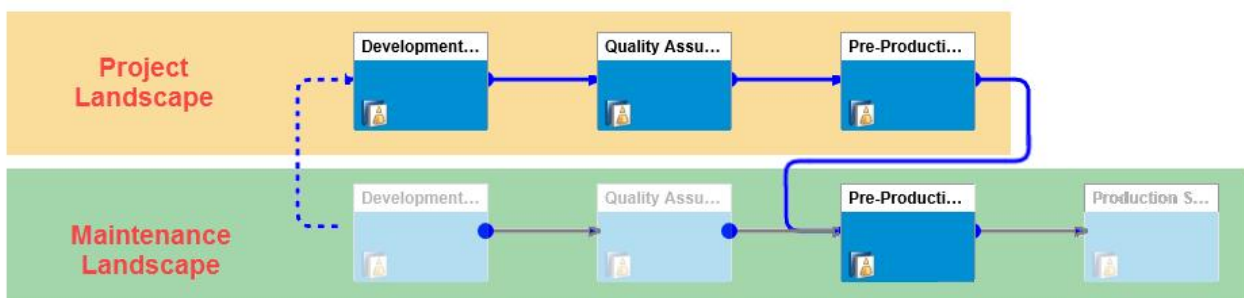
Scenario 1:

In this scenario, the cutover from the project landscape takes place into the productive system of the maintenance landscape



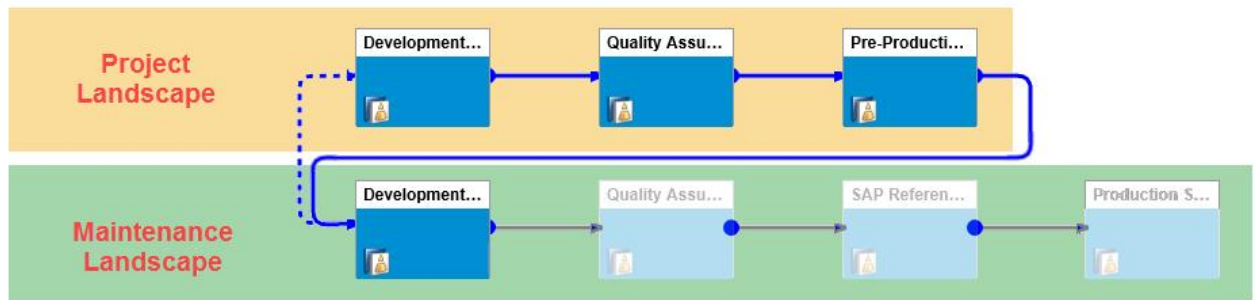
Scenario 2:

The cutover from the project landscape takes place into the pre-production system of the maintenance landscape.



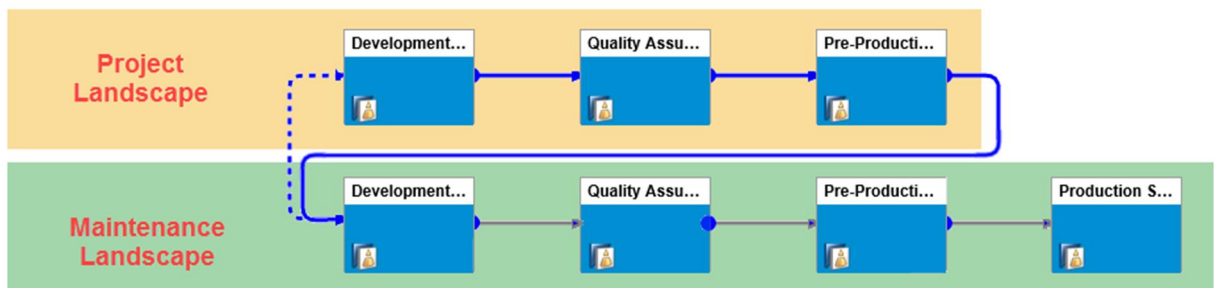
Scenario 3:

In Scenario 3, the cutover from the project landscape takes place into the Development system of the maintenance landscape and Repack needs to be done after the cutover



Scenario 4

The cutover from the project landscape takes place into the Development system of the maintenance landscape and the changes are then transported through the Maintenance Landscape to the Production System



Cutover Checks

The Cutover Checks shall be executed before the cutover actually takes place. The checks ensure that the risk that may arise during the cutover into the maintenance landscape are known and can be mitigated.

The change cycles that are created within a branch different than the Maintenance branch do contain a new assignment block in the WebUI providing the necessary elements to execute the cutover checks as well as to verify the check results.

Post Cutover Activities

The Post Cutover Activities should be executed after the cutover has been performed and all necessary software has been deployed into the maintenance track. The Post Cutover Activities are executed for each system of the maintenance landscape individually. Which Post Cutover Activities are available for those systems depend on their role in the landscape and whether the actual cutover took place in a system before or after them given the transport track defines the order of the systems.

5.14.1 Activating the Piece List

Call transaction **SCC1** in your working client and activate the piece list **/SALM/CHARM_EXT**, which supplies your system with the predefined customizing. The result of this activation can be verified in transaction **SCC3**.

5.14.2 Roles and Authorization

5.14.2.1 Roles in Solution Manager

The Cutover Checks and Post Cutover Activities are integrated in the business role **/SALM/SM_SM_PRO**. To use it you need to have the following roles assigned:

- **SAP_OST_SM_CRM_UIU_SM_PRO**
- **SAP_OST_FB_CRM_UIU_CM**
- **SAP_OST_FB_CRM_UIU**

To start a check or activity the user need some additional authorizations, for example to schedule background jobs and to read LMDB objects. These authorizations are contained on the authorization role **SAP_OST_CM_CUTOVER**.

To configure this function via transaction **SPRO**, the configuration user needs to have **SAP_OST_FB_CM_ITSM_CONFIG**.

5.14.2.2 Roles in Managed Systems

To execute the checks and the activities some remote function calls are done.

TMW RFC is used

Make user the user of the TMW RFC has the following authorizations in the managed systems:

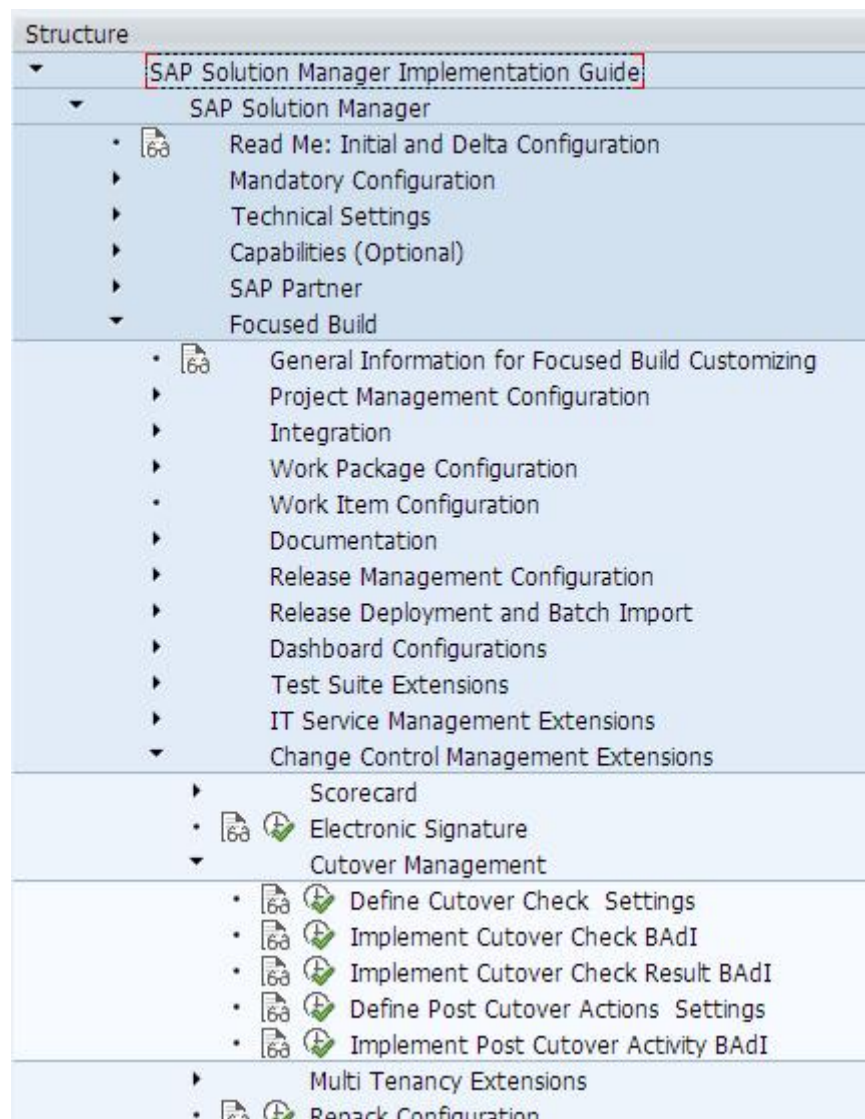
S_RFC for function modules

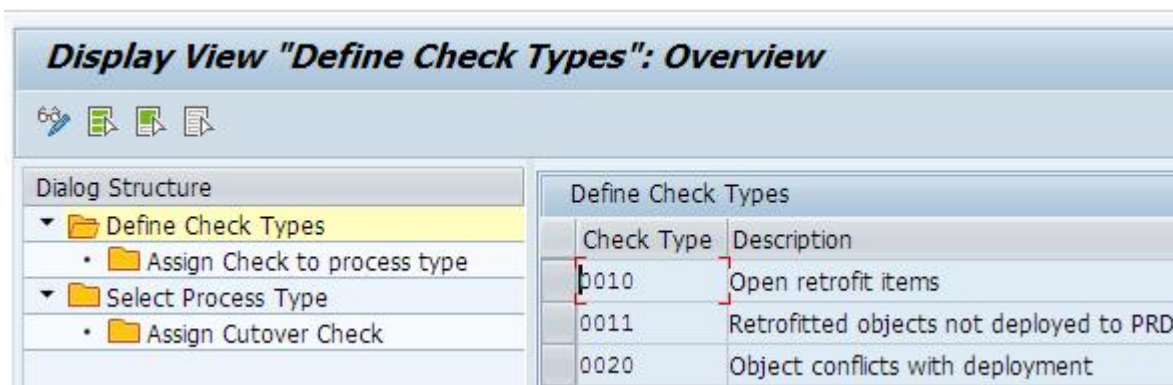
- **TMW_ADJUST_ORIGINAL_SYSTEM**
- **TMW_IMPORT_REQUEST**
- **TMW_CREATE_TRANSPORT_OF_COPIES**
- **FUNCTION_IMPORT_INTERFACES**
- **TR40_CREATE_PRETRANS**

5.14.3 Customize Cutover Checks

5.14.3.1 Define Cutover Check Settings

The central entry point to configure the cutover checks is the view cluster `/SALM/CHM_COC_VC`. This could be maintained using transaction `SPRO` or `SM34`. Changes to this Customizing Cluster have to be recorded into a transport request.





Define Check Types

Here you define the Cutover Checks that should be available to be executed.

- **Check Type**
Identifier of the check
- **Description**
Language dependent description of the check. Appears in the UI.
- **Table Name**
Name of a DDIC structure that defines the columns of the check result shown in the UI

The following entries are delivered by default:

Check Type	Description	Table Name
0010	Retrofit Scope	/SALM/CHARM_CO_CHECK_RES_RETRO
0011	Retrofit Deployment	/SALM/CHARM_CO_CHECK_RES_RETRO
0020	Transport Dependencies	/SALM/CHARM_CO_CHECK_RES_TRDEP
0030	Development Conflicts	/SALM/CHARM_CO_CHECK_RES_CSOL

Note

Please note that for each defined check type a corresponding BAdI implementation with the check type identifier as filter value has to be implemented.

Assign Check to process type

Here you assign the different checks that should be available for the certain process types.

- **Check Type**
Identifier of the check
- **Trans.Type**
Transaction the check should be assigned to

The following entries are delivered by default:

Check Type	Trans.Type
0010	SMIM
0010	SMRE
0011	SMIM
0011	SMRE
0020	SMIM
0020	SMRE
0030	SMIM
0030	SMRE

In general, the maintenance starts with [Define Check Types](#) and continues with [Assign check to process type](#). Sometimes it's hard to see all checks, which currently assigned to an individual transaction type. To overcome this, there is a second entry point in the view cluster. This entry point [Select Process Type](#) allows to select the process type first and then navigate to [Assign Cutover Checks](#).

The data is stored into the same data base table. The content is presented from a different angle only and can be maintained in both ways.

5.14.3.2 Implement Check Types

The default delivered check types does already have an active implementation. The check types implement the enhancement definition `/SALM/CHARM_CO_CHECKS`. This enhancement contains 2 BAdI definitions which need to be implemented with a filter value representing the check type assigned to each. The delivered enhancement implementation containing the implementation of those 2 BAdI is `/SALM/IM_CHARM_CO_CHECK`.

BAdI `/SALM/CHARM_CO_CHECK_EXECUTION`

The implementation of this BAdI executes the check that has been identified by the check type. The method `PERFORM_CUTOVER_CHECK` that contains the process logic runs in the background. As this method is executed asynchronous, it saves the check result in a check type-dependent database table. This table needs to be defined for each check type. This database table includes at least the key fields of DDIC structure `/SALM/CHARM_CO_CHECK_RES_KEY`.

BAdI `/SALM/CHARM_CO_CHECK_RESULT`

The implementation of this BAdI provides the check results to the end user in the UI. The methods of this BAdI are called if the background execution of the corresponding check has been executed and finished. The BAdI provides 3 methods that need to be considered.

- `GET_OVERALL_RESULT`

This method provides the overall result status and descriptive message for this status to be displayed in the overview list of all checks that has been executed. The overall result should be determined by the results that has been persisted by the check execution.

- **GET_RESULT_DETAILS**

This method provides the detailed list of the check results. Usually this is the list that has been persisted during the check execution, may be enhanced with some descriptive information.

- **GET_P_T_RESULT**

This method allows to influence the visualization of certain columns to some extent. It allows to hide column or to display specific columns as images / icons. If a column should be displayed as icon it should contain the internal 4 characters' icon code as value. The framework translates this into the correct image.

5.14.4 Customize Post Cutover Activities

The central entry point to configure the post cutover activities is the view cluster /SALM/CHM_PCA_VC. This could be maintained using transaction **SPRO** or **SM34**. Changes to this Customizing Cluster have to be recorded into a transport request.

5.14.4.1 Define Actions

Here you define the Post Cutover Actions that should be available to be executed.

- **Action ID**
Identifier of the action
- **Description**
Language dependent description of the action. Appears in the UI.
- **Exec. Type**
Defines whether this action can be executed only once per system or several time and whether it is an online or batch execution
- **Validity**
Defines the systems in the cutover track this action should be available depending on the cutover scenario
- **Sort Order**
This defines the order the actions appear in the UI

The following entries are delivered by default:

Action ID	Description	Exec. Type	Validity	Sort Order	Predec. ID
IMPO	Import Synchronized Deployment	Multi Batch Execution	Before	30	IMP

LOGN	Logon to System	Multi Batch Execution	Before	10	
ORGS	Adjust Original System	Multi Batch Execution	Before	20	SYNC
SYNC	Synchronize Deployment (ToC to buffer)	Multi Online Execution	Before & After	5	

Note

Please note that for each defined action a corresponding BAdI implementation with the action id as filter value has to be implemented.

5.14.4.2 Assign Relevant System Roles

Here you define the system roles the Post Cutover Actions should be relevant and available for execution.

- *Action ID*
Identifier of the action
- *Role Type*
System role type in the landscape
- *SysRole ID*
System role identifier

The following entries are delivered by default:

Action ID	Role Type	SysRole ID
SYNC	Source Systems	C (Development)
SYNC	Target Systems	1 (Pre-production)
SYNC	Target Systems	S (SAP reference system)
SYNC	Target Systems	T (Quality Assurance)
ORGS	Source Systems	C (Development)
LOGN	Source Systems	*
LOGN	Target Systems	*
LOGN	Production Systems	*
RPCK	Source Systems	C (Development)
IMPO	Source Systems	C (Development)
IMPO	Target Systems	*

5.14.4.3 Define Popups

Here you assign WebUI components and their interface window that should be displayed as dialog boxes before the post cutover action is performed. This could be used to request further data from the user to ensure proper action execution or to completely perform this action in the dialog box.

Note

To control whether the action should be executed after the dialog box has been closed the BAdI `/SALM/CHARM_PCA_POPUP_CONTROL` could be implemented. The implementation is based on the filter for the action id.

- *Action ID*
Identifier of the action
- *BSP Application*
WebUI Application providing the dialog box window
- *Interface Window*
Name of the interface window of the WebUI component added to the component interface in the runtime repository
- *Dialog window title*
OTR alias providing the language dependent dialog box window title
- *Width*
Width of the dialog box window (default is 500px if not provided)
- *Height*
Height of the dialog box window (default is 500px if not provided)

The following entries are delivered by default:

Action ID	BSP Application	Interface Window	Dialog window title	Width	Height
LOGN	/SALM/CM_CUTOVR	/SALM/CM_CUTOVR/SystemLogonWindow	AGS_TD/SYSTEMLOGON		
RPCK	/SALM/CM_R3PACK	/SALM/CM_R3PACK/PopupWindow	/SALM/CHARM_REPACK_UI/POPUP_TITLE	1024	768

5.14.4.4 Implement Post Cutover Activities

The default delivered post cutover actions does already have an active implementation. The actions implement the enhancement definition `/SALM/CHARM_PCA_ACTIONS`. This enhancement contains the BADI definition `/SALM/CHARM_PCA_EXECUTION` which need to be implemented with a filter value representing the post cutover

action id assigned. The delivered enhancement implementation containing the implementation of this BADI is /SALM/IM_CHARM_PCA_EXECUTION.

BAdI /SALM/CHARM_PCA_EXECUTION

The implementation of this BAdI is executed if the corresponding post cutover action is processed. Based on the execution type this would be in batch or dialogue mode. The signature of the method EXECUTE_ACTION provides all necessary information to process this action. Each action is executed for a dedicated system of the transport track the cutover takes place into. The execution for each system is triggered by the user within the corresponding assignment block in the WebUI.

- EXECUTE_ACTION

This method is called while executing the corresponding post cutover action. The processing logic need to be implemented here.

5.14.5 WebUI Configuration

The visualization of the Cutover Checks and Post Cutover Activities is implemented in the WebUI component /SALM/CM_CUTOVR. The cycle documents are accessed through WebUI component AIC_CMCD_H. If this feature should be available, a corresponding component usage needs to be defined and the context node binding to context node BTAdminH should be setup. This is all done in the delivered WebUI component /SALM/CMCD_H. Once the component usage has been setup the embedded window should be assigned to the view area of the overview page in the runtime repository. Once done the UI configuration of the overview page should be enhanced to cover this new assignment block.

The assignment block for the cutover feature is dynamically hidden in case the cycle document is assigned to a maintenance branch. This is implemented in the method DETACH_STATIC_OVW_VIEWS of the overview page implementation class.

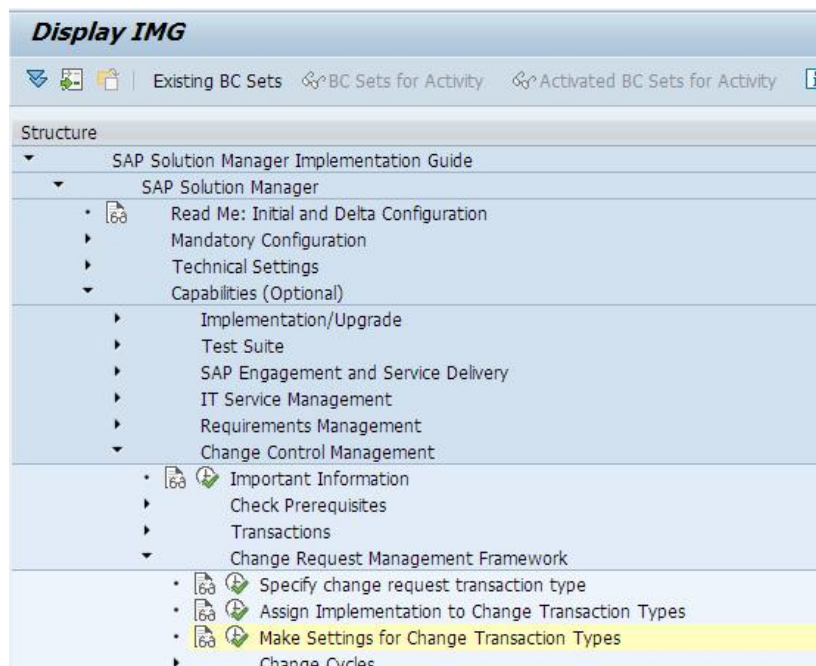
5.14.6 Activation of Webservice cm_cutovr

The Webservice cm_cutovr needs to be activated to use the Cutover Checks in the CRM. It can be activated in Transaction **SICF** and found in the path /default_host/sap/bc/bsp/salm/.

5.14.7 Condition Check /SALM/COC_SUCCESS

To ensure, that all checks are passed before the cutover to the maintenance track is perform, add the check to your transaction types:

1. Open the activity *Make Settings for Change Transaction Types* in folder *SAP Solution Manager -> Capabilities (Optional) -> Change Control Management* within transaction **SPRO**.



2. Go to [Select Transaction Type](#) in the left tree.
3. After selecting the transaction type (SMIM or SMRE) in the displayed table, open [Assign Consistency Checks](#).
4. Create a new entry for the status to which the distribution is to be completed.

You may use Application Area [/SALM/CM_XLD_MSG](#) with message number **021** ("[XLD Error: Transports not distributed to all cross landscape targets.](#)")

This check should be added to your change cycle (e.g. SMRE or SMIM) to be executed when the Production status is reached.

5.14.8 Ignored Tracks

It might be necessary to ignore some maintenance tracks, e.g. in a simulation landscape.

It can be customized per development transport track, which maintenance development systems should be ignored. Therefore you may open table [/SALM/CHARMCOISI](#) in transaction **SM30**. Add a new entry for the transport track of your current implementation cycle and each maintenance development system, which should be ignored.

New Entries: Overview of Added Entries		
ChaRM Cutover Checks - Landscape Calc...		
Tran.Track	ExtSID	Client
TR000091	XX1	101

Afterwards the added systems are not taken into account for calculating the affected tracks and therefore no checks and no activities could be performed for these systems.

5.15 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:

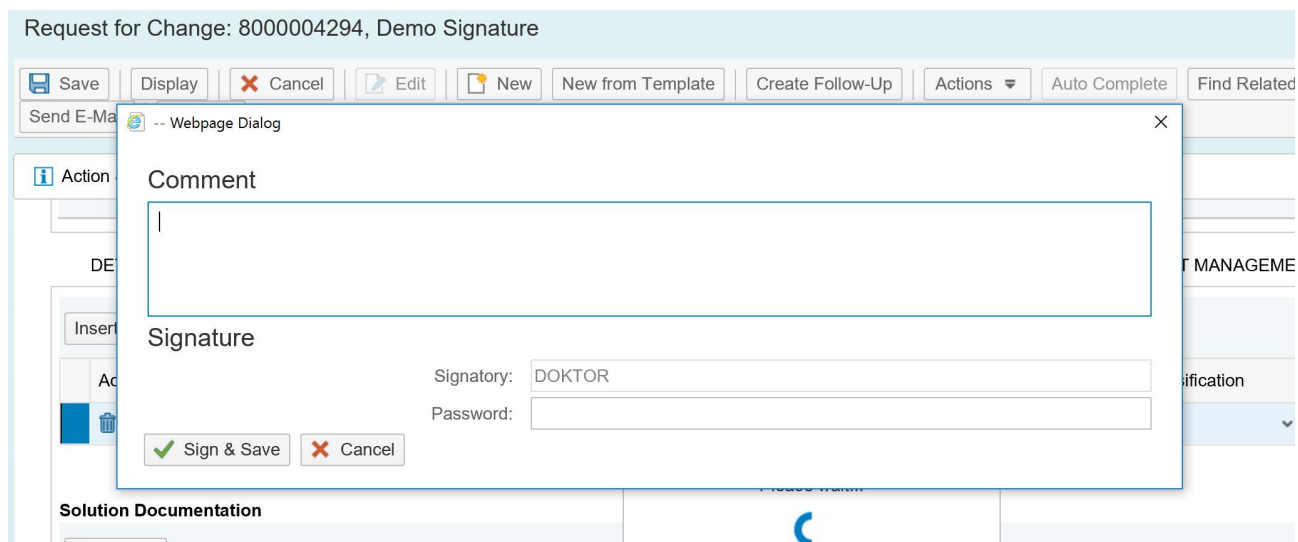
21 CFR §11.10(e) System must assure that record changes (create, modify, delete) do not obscure previously recorded information by implementing secure, computer-generated, time-stamped audit trails. These audit trails must be retained for as long as the subject electronic records and be available for 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, executes 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.

- During an Approval Step, that uses the Approval Procedure.
- During any Status switch within a change request or change document executed via actions.

5.15.1 Activating the Piece List

Call transaction `SCC1` in your working client and activate the piece list `/SALM/CHARM_EXT`, which supplies your system with the predefined customizing. The result of this activation can be verified in transaction `SCC3`.

5.15.2 Roles and Authorization

The Electronic Signature is integrated in the business role `/SALM/SM_SM_PRO`. To use it you need to have the following roles assigned:

- `SAP_OST_SM_CRM_UIU_SM_PRO`
- `SAP_OST_FB_CRM_UIU_CM`
- `SAP_OST_FB_CRM_UIU`

To execute a digital signature there is the additional authorization `C_SIGN` object required.

The Authorization Object requires the following Attributes:

- **C_SIGN**
 - Activity: 73
 - Application of the Digital Sig: `/SALM/CR`
 - Digital Signature Object: `/SALM/CR`

This authorization is contained in the role `SAP_OST_FB_CM_ESIGN`.

To configure the Electronic Signature via transaction **SPRO**, the configuration user needs to have **SAP_OST_FB_CM_ITSM_CONFIG**.

5.15.3 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	Possibl	Possibl	Possibl		
R System Signature with Authorization by SAP User ID/Password						
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.

3. Go to **SM30** open View **SIGNOBJECT_V**

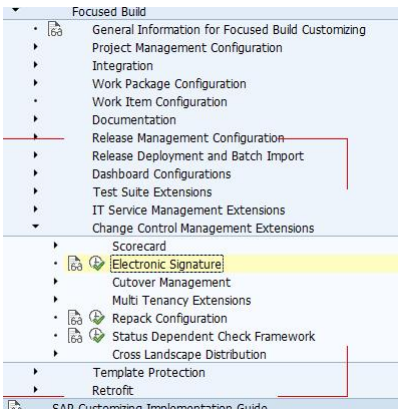
Register Signature Objects for Digital Signature			
Appl.	Object	Meta Table	LogStruct.
/SALM/CR	/SALM/CR	/SALM/DS_CR	/SALM/DS_LOG
AUDIT	ACTION	PLM_AUDIT_DS	PLM_AUDIT_DS_LOG
AUDIT	AUDIT	PLM_AUDIT_DS	PLM_AUDIT_DS_LOG
DS_EXAMP	DS_OBJ	DSIG_META_EX	DSIG_EXAMPLE_SIGN_LOG
SMD	SMD_DOC	SMD_DS	SMD_DS_LOG
SMT	TPLN	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:

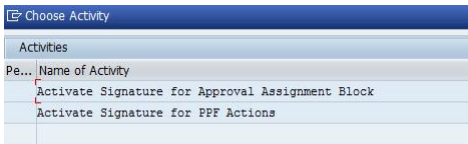
Column Name	Value
Mata Table	/SALM/DS_CR
LogStruct.	/SALM/DS_LOG
Comment	Possible
Remark	Possible
Document	Possible
Description	Signature for Change Management

5.15.4 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`. This table can be access via SPRO node *Electronic Signature*.



Choose Activity *Activate Signature for Approval Assignment Block*.



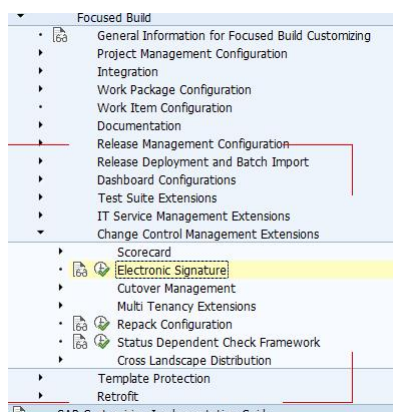
You can define up to 10 different transaction types where you want to activate digital signature with attribute names `DSIGTYP0` to `DSIGTYP9`.

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
DSIGTYP0	CHARM Electronic Signature Tran	▼ SMCR
EFF_UNIT	Preferred Effort Unit	▼ PDA
MODE_WP	Mode for creating the Work Packa	▼ A

5.15.5 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_UL_POPUP](#) via transaction **SM34** or **SPRO** node *Electronic Signature*.



Choose Activity *Activate Signature for PPF Actions*.

Choose Activity	
Activities	
Pe...	Name of Activity
	Activate Signature for Approval Assignment Block
	Activate Signature for PPF Actions

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
SMCR	SMCR_ACTIONS	SMCR_QUALIFY_CHANGE	10	/SA
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
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 dialog box title	/SALM/CHARM_DS/POPUP_TITLE
Before PPF Call	Signature must be executed before the action. If the signature fails, action does not take place	Checked
After PPF Call	Do not use	Not checked
Activate	Activate the customizing settings	Checked

5.16 Configuring Test Steps

This guide describes the configuration of Test Steps with SAP Solution Manager 7.2, SP08 and ST-OST, SP03.

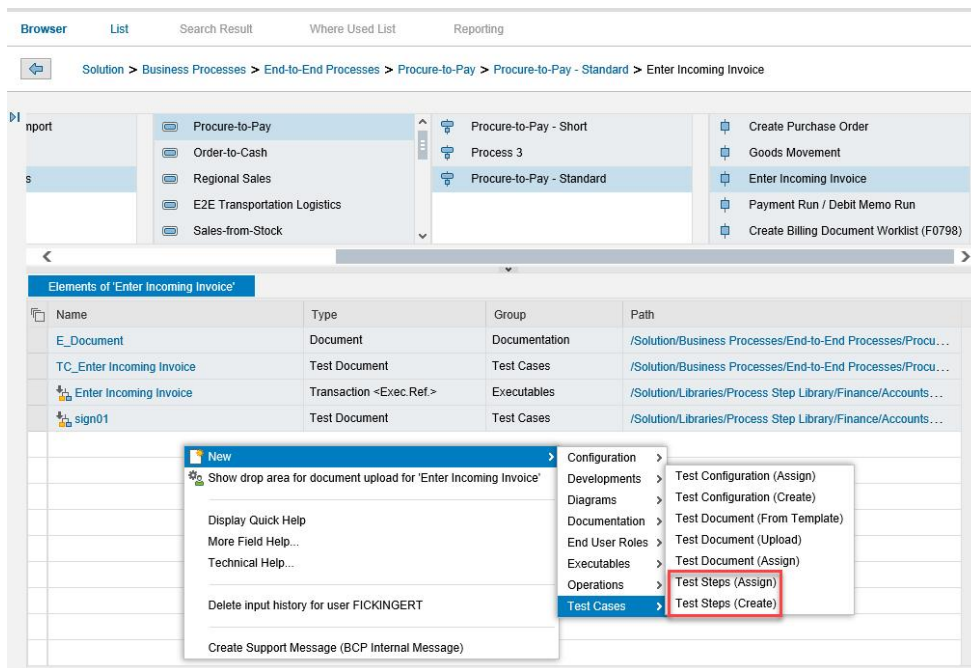
5.16.1 Overview

The objective is to offer the test case designers and testers an alternative to document test cases (else based on word or excel documents). Test Cases can be designed at the level of steps directly in SAP Solution Manager Fiori Application *Test Steps Designer* without the need to upload or download documents such as excel spreadsheets. Testers can execute these test cases via the Fiori Application *My Test Execution* and document the test results.

Step	Description	Expected Result	Instructions	Executable	Partner	Attachment	Evidence	Hidden
1	Quotation	New quotation document posted	Use standard quotation type. Test data is provided via link Test Data Container (TDC). Please document the quotation number for the second test step.	Create Quotation	Sales 2471		<input checked="" type="checkbox"/>	<input type="checkbox"/>
1.1	Verify that quotation was posted	new quotation is available	Display quotation with display transaction					<input type="checkbox"/>
2	Sales Order	New Sales Order document posted	Use standard sales order type with reference to quotation. Use reference to quotation posted in the previous step. Test data provided via link Test Data Set	Create Sales Order	Sales 2471		<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Delivery	new delivery posted	Use reference to Sales Order from previous step	Create Outbound Div	Logistic Execution 2472		<input type="checkbox"/>	<input type="checkbox"/>
4	Transfer Order	create TO for Delivery	Create TO for Delivery	Create TO for Deliver	Logistic Execution 2472		<input type="checkbox"/>	<input type="checkbox"/>
5	Goods Issue	new goods issue posted	Use reference to Sales Order from previous step	Change Outbound Dt	Logistic Execution 2472		<input type="checkbox"/>	<input type="checkbox"/>
6	Billing	new billing document posted	Use reference to previous steps	Create Billing Docum	Billing 2473		<input type="checkbox"/>	<input type="checkbox"/>

Test Steps are of type test case and could be maintained stand alone in the test step designer application (not recommended but possible) or could be maintained in Solution Documentation (transaction SOLDOC) directly. For a test case, different languages can be maintained, including version handling and reusing test cases via a template library. The navigation is simplified and intuitive.

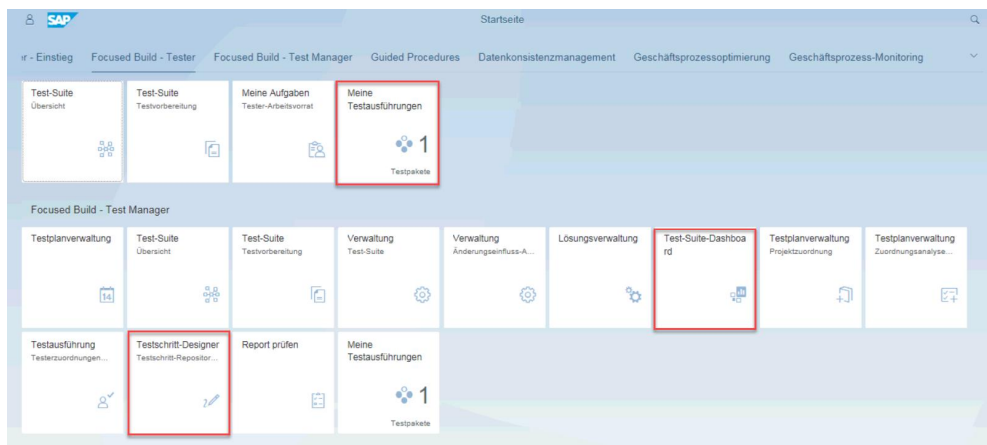
You can open *Test Steps Designer* from Solution Documentation using the *Test Steps (Create)* function via right mouse select. This gives you the option to directly add a Test Steps Document to a structure node in Solution Documentation. If you created a Test Steps Document directly from the Designer App, you can still assign it to Solution Documentation using the *Test Steps (Assign)* function.



After the configuration of the following applications:

- Test Step Designer
- My Test Execution
- Test Suite Dashboard

You can access the applications by using these tiles:



5.16.2 Prerequisites

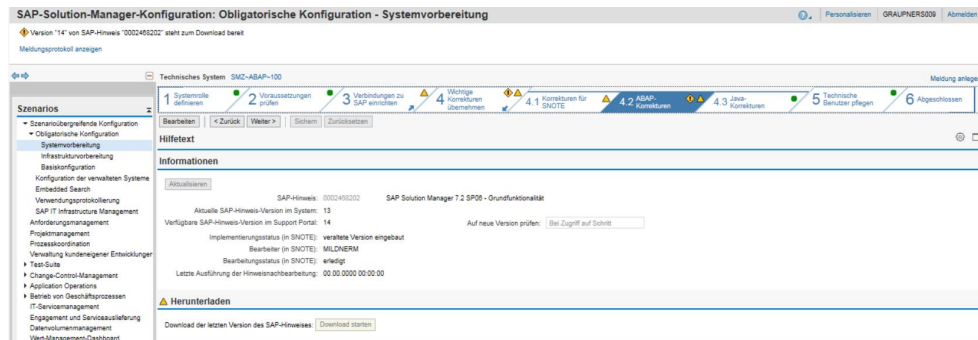
Mandatory Configuration of Test Suite in Solution Manager Setup has been performed (Transaction SOLMAN_SETUP)

Even if there are some yellow or red traffic lights in SOLMAN_SETUP – for Test Suite and Test Steps these should

not be relevant. Also, the missing customizing in Test Suite configuration is not critical for usage of Test Steps.
Check: OK / not OK

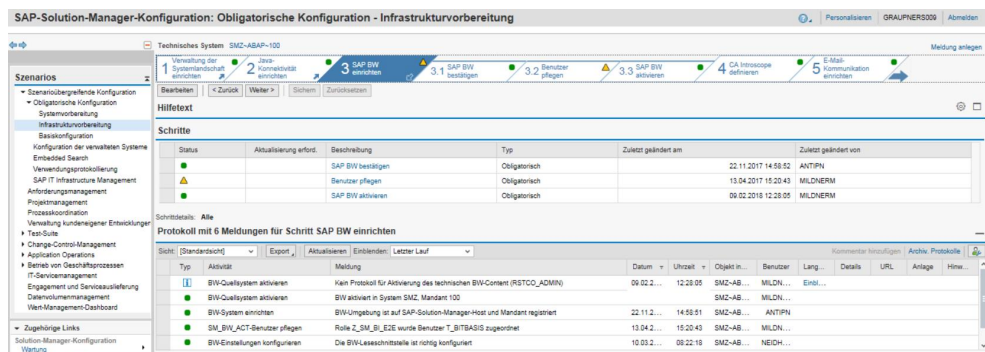
Yellow light in SOLMAN_SETUP to

System Preparation: Check: OK / not OK An update of an essential SAP Note should be implemented. It is recommended to start with the latest note version on the productive Solution Manager environment.



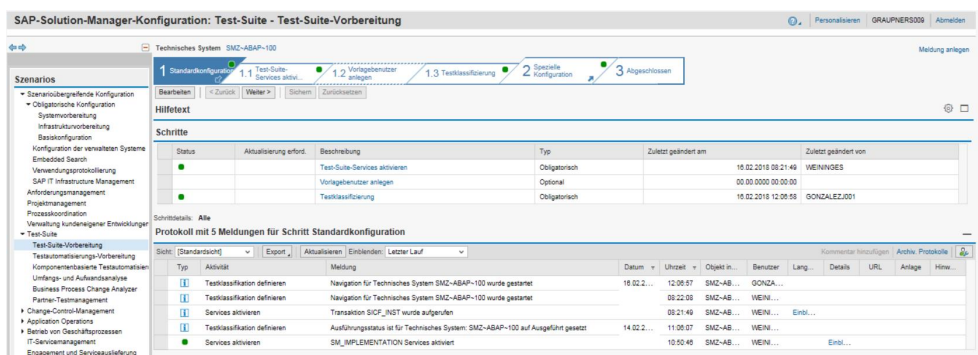
Yellow light in SOLMAN_SETUP to

Infrastructure Preparation: not relevant for Test Steps



Status Test Suite Preparation in SOLMAN_SETUP:

Overall Status OK



5.16.3 Activating Piece List

The customizing for solution Test Steps is included in piece lists /SALM/TEST_STEPS, /SALM/TEST_STEPS_SP2 and /SALM/TEST_STEPS_SP3.

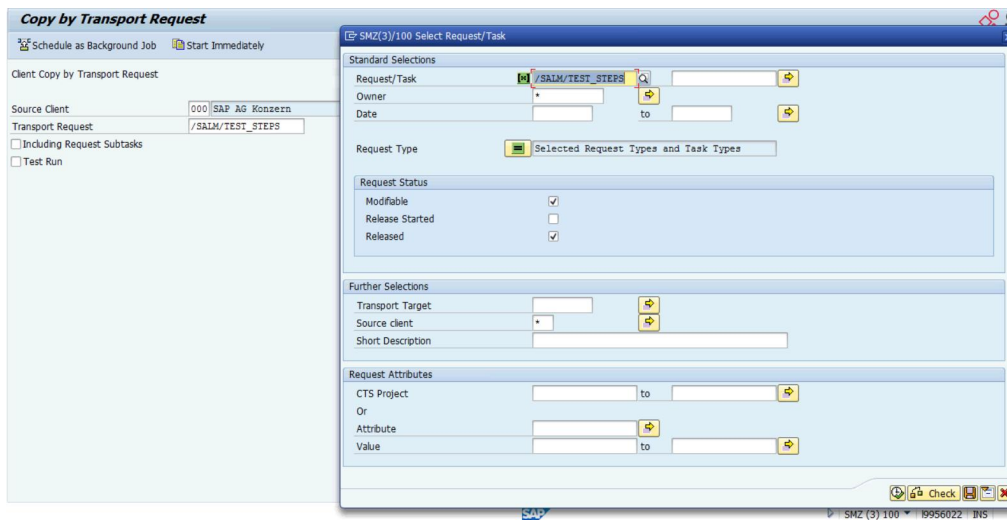
As the piece list should be activated only once, please first verify if this already has been done in the working client of the SAP Solution Manager system. If the piece list already has been activated, you'll find a respective entry in SCC3.

- Call transaction SCC3.
- Click on Transport Requests
- Search for /SALM/TEST_STEPS

If not already done this piece list has to be activated. To do so you have to copy it from client 000 to your working client:

- Call transaction SCC1.
- Enter piece list (transport request) /SALM/TEST_STEPS and afterwards /SALM/TEST_STEPS_SP2
- For a first test without database update you can set flag Test Run
- Start the import either as background job or immediately using the respective button
-

Please note: after the piece list has been successfully activated you need to run report rsmuda_model_buffer_reset via transaction SE38 to reset the model buffer of Solution Documentation.



The result of this activation can again be verified in transaction SCC3.

Client Copy/Transport Log Analysis					
Delete Log All Clients All Transport Requests Exports Complete Copies					
Copy by Transport Request in Client 100 : 8					
Date	Time	Source	Status Text	Request/Task	Test mode
14.02.2018	14:52:16	000	Successfully Completed	/SALM/TEST_STEPS	
14.02.2018	14:51:22	000	Successfully Completed	/SALM/TEST_STEPS	X
09.02.2018	12:37:13	000	Successfully Completed	AI_CUSTOMIZING	

Client Copy/Transport Log Analysis	
Details File Log	
Target Client	100
Source Client	000
Copy Type	Copy by Transport Request
Transport Request	/SALM/TEST_STEPS
Status	Successfully Completed
User	WEININGES
Start on	14.02.2018 / 14:52:16
Last Entry on	14.02.2018 / 14:52:18
Statistics for this Run	
- No. of Tables	13 of 13
- Lines in Old Objects	5
- Lines in New Objects	101

5.16.4 SAP Notes

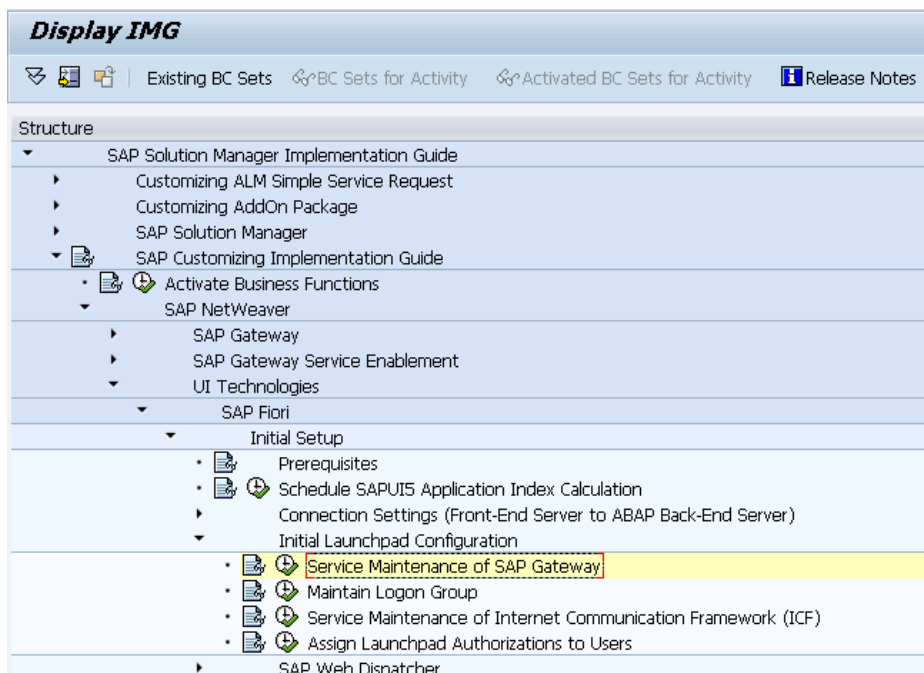
Please implement the latest version of the following notes:

- [2713570](#) - Focused Build: Technical collective note for ST-OST 200 SP03
- [2713624](#) - Focused Build: Central Note for Focused Build 2.0 SP03 for SAP Solution Manager 7.2 SP08

5.16.5 Service Maintenance

5.16.5.1 Verify Initial Launchpad Configuration

Assure that the Initial Launchpad Configuration has been performed. Especially the Service Maintenance of SAP Gateway.



Several SAP NetWeaver Gateway services are needed for running SAP Fiori launchpad. Here you can activate and maintain details of these services.

Default Settings

For running SAP Fiori launchpad as an end user, you need the following services as a basis (these are the external service names):

- /UI2/INTEROP
- /UI2/PAGE_BUILDER_PERS

For running SAP Fiori launchpad designer as an administrator, you need the following services in addition:

- /UI2/PAGE_BUILDER_CONF
- /UI2/PAGE_BUILDER_CUST
- /UI2/TRANSPORT

Activities

For each above-mentioned external service name do the following:

- Add the service to the service catalog (you can restrict the filter by a local system alias).
Specify the technical service name in the customer namespace.
Use the highest available version.
- Activate the Internet Communication Framework (ICF) node ODATA.

- Assign an SAP system alias that uses the local system.
- Choose Call Browser to check the connection and to automatically generate authorization-related hash values.

5.16.5.2 Activate SICF Services

Use transaction SICF and activate /check the following services:

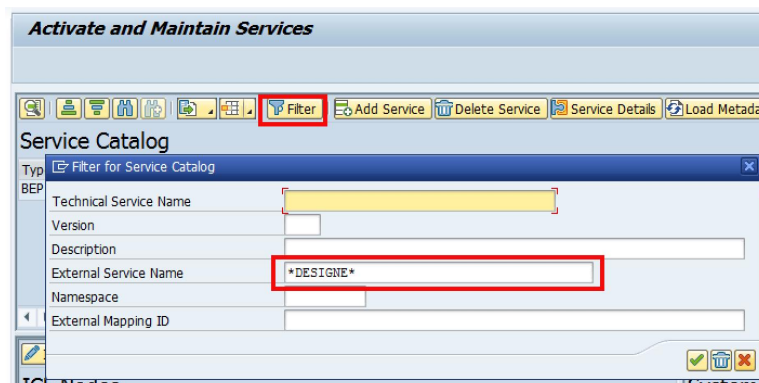
- /sap/bc/bsp/salm/tm_ts_des
- /sap/bc/ui5_ui5/salm/tm_ts_des
- /sap/opu/odata/salm/tm_ts_designer_srv

Virtual Hosts / Services	Documentation
▼ default_host	VIRTUAL DEFAULT HOST
▼ sap	SAP NAMESPACE; SAP IS OBLIGED NOT T...
▼ bc	BASIS TREE (BASIS FUNCTIONS)
▼ bsp	BUSINESS SERVER PAGES (BSP) RUNTIME
▼ salm	namespace??
• tm_ts_des	Test Steps Designer App
▼ sap	NAMESPACE SAP
▼ ui5_ui5	SAPUI5 Application Handler SAPUI5 Applic...
▼ salm	namespace
• tm_ts_des	Test Steps Designer App
▼ opu	UData for SAP Products
▼ odata	Standard Mode
▼ salm	Namespace
• tm_ts_designer_srv	TM_TS_DESIGNER_SRV

5.16.5.3 Define System Aliases for oData Services

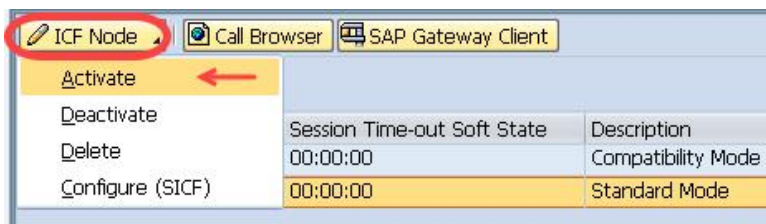
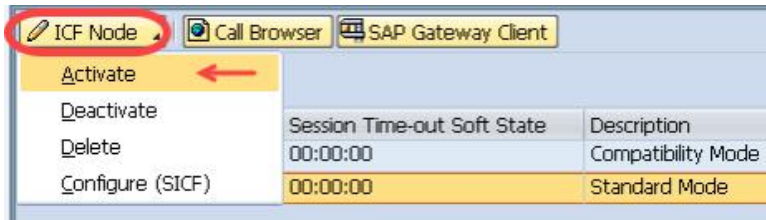
For the UI5 applications of the Test Steps solution to the OData Services System Aliases must be defined.

- Start transaction /n/IWFND/MAINT_SERVICE (put /n in front to start it from SAP GUI)
- Filter for service /SALM/TM_TS_DESIGNER_SRV Test Step Designer

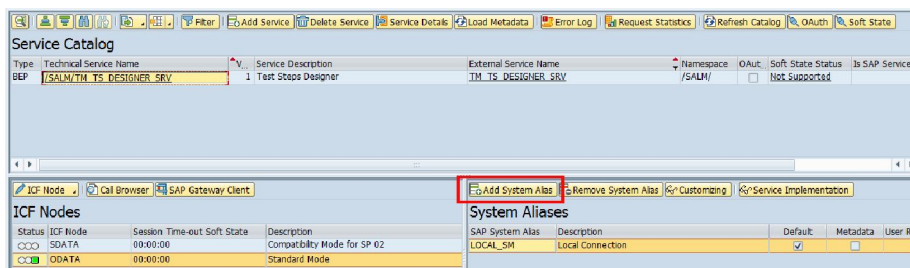


For the service:

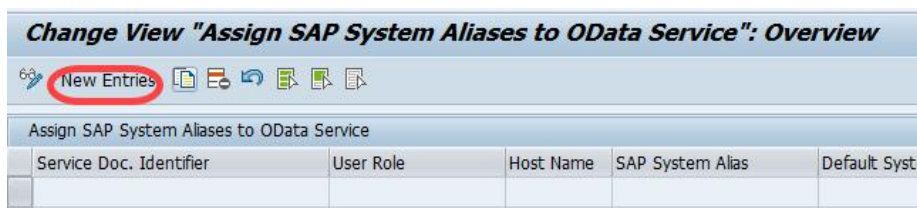
- In screen area ICF Nodes select the OData entry
- Assure that the status to the ODATA service is green – if this is not the case activate the ICF node.



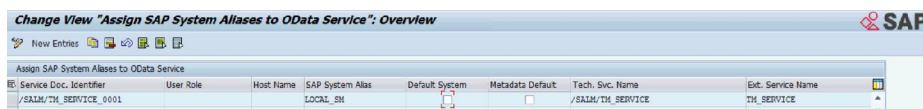
- Check that the SAP System Alias for the local Solution Manager is assigned. Add it as follows:
 - Select *Add System Alias*



- Select *New Entries*



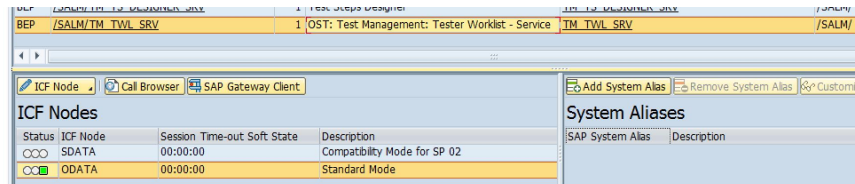
- Add the entry like below:



- Save

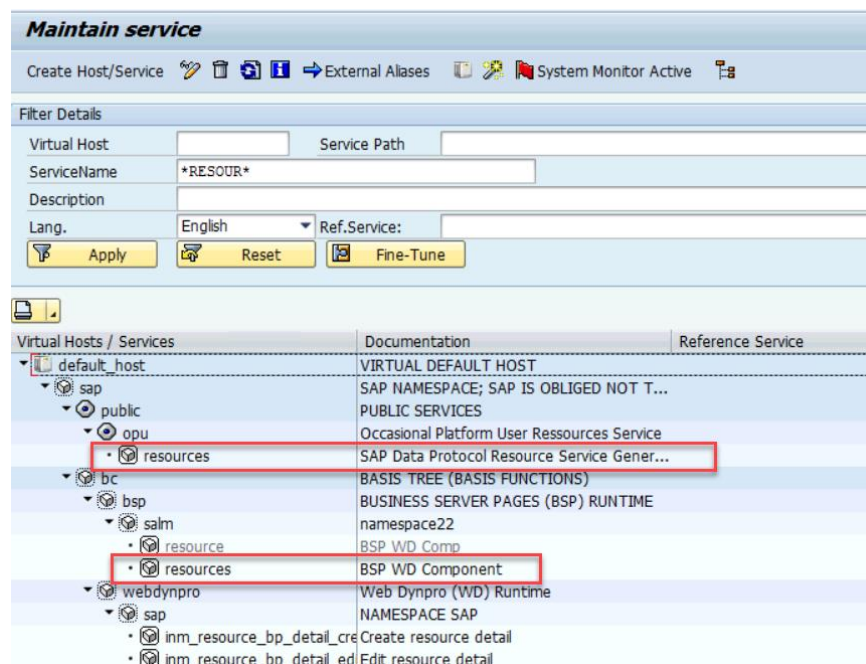
Make sure that system alias and service activation as described above is done also for the following service:

- /SALM/TM_TWL_SRV Tester Worklist
- /SALM/TM_SERVICE Test Management Dashboard

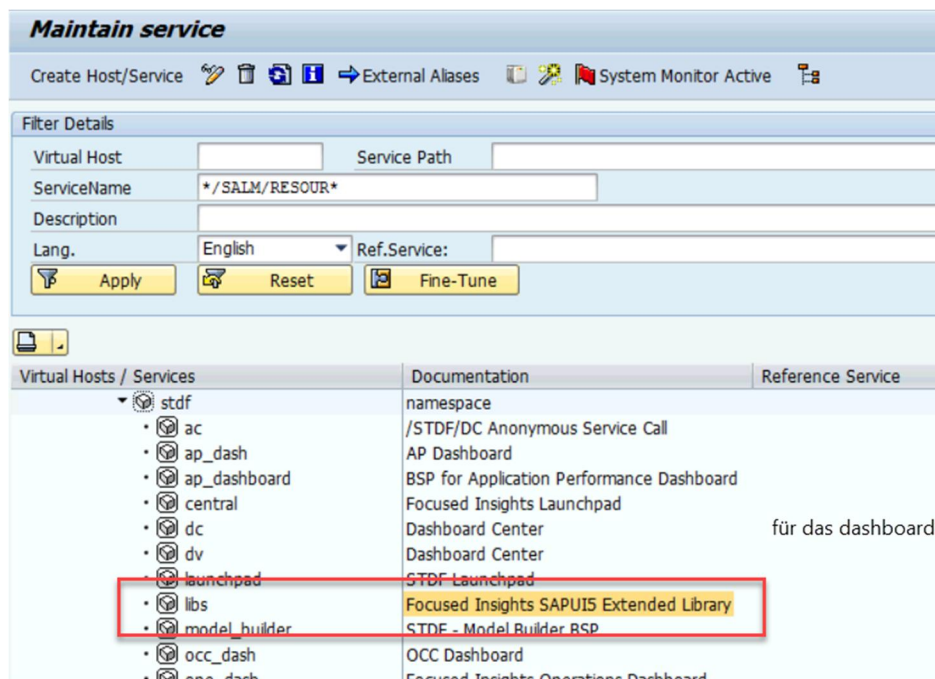


5.16.6 Test Suite Dashboard

Make sure that the 'Resources' Service in transaction SICF is activated:



Additionally, please check that the libs service also is activated (was already active):



For Data Extraction for Test Management Dashboard please refer to chapter 17 Setup Steps (@ background Processing).

For the activation of Ex-Queries please refer to chapter *Configure exceptions for naming of automatically created KPI documents*

This functionality is delivered active. The default option for document title generation for automatically created documents is:

< Document Type technical ID >_< Name of structure node where document is created >.< File Extension >

Within this configuration you can define exceptions of this naming rule as well as deactivate the automated document creation.

4. Start the customizing for "Exceptions for naming of automatically created KPI documents" using the transaction `spro`. Click on [SAP Reference IMG](#) button and follow the path: [SAP Solution Manager – Focus Build - Documentation - Exceptions for naming of automatically created KPI documents](#), then select the appropriate checkmark.

Configuring Test Suite Extensions.

5.16.7 Checking Test Suite Configurations and User Authorizations

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

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

Select the following:

7. 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.
8. 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
9. To check the authorizations related to Test Suite applications for a user, select [User Authorization Checks](#) and select a user.

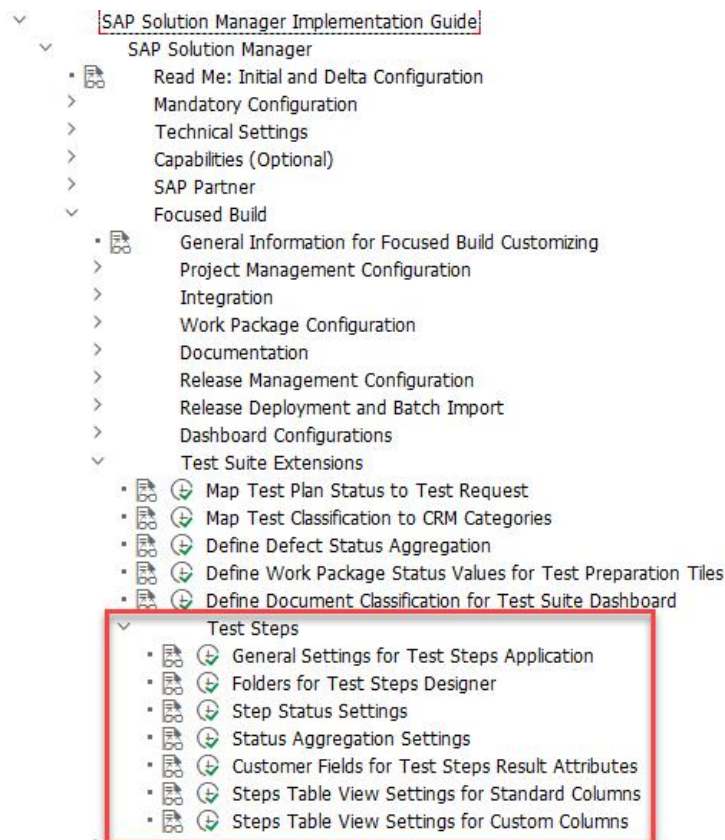
5.16.8 CUSTOMIZING OPTIONS

Test Steps is delivered with predefined customizing and authorization roles. This predefined configuration allows direct usage of Test Steps without any further adjustments.

However, the pre-defined customizing for Test Steps (received from the piece list – see chapter Activating Piece List) can be adapted. This is described in this chapter.

Further details, standard customizing settings and configuration examples can be found in the corresponding documentation and customizing tables in the IMG of the SAP Solution Manager system:

[SAP Solution Manager Implementation Guide -> SAP Solution Manager -> Focused Build -> Test Suite Extensions -> Test Steps](#)



5.16.8.1 General Settings for Test Steps Application

In view /SALM/TM_C_GSET general settings for Test Steps are defined. The following parameters should be set:

- SUBSTEN: Enable design of sub steps in Test Steps Designer application
- STEPSEQ: Define default value for step sequence setting. Strict sequence forces all testers to execute test steps in the defined sequence. Flexible sequence enables all testers to execute test steps in any sequence. Individual setting enables test case designers to define on test case level whether the test steps should be executed in strict or flexible sequence.
- LANG: Test Steps based Test Cases can be translated in different languages. Here you can define the available languages for translation. You can use the sequence parameter to define the display sequence. This also influences the sequence in which fallback texts are loaded in case no translated text exists in the selected language. That is, if the user selects "English" but no text exists in "English", the UI shows the text in the language which is available following the sequence defined here (e.g., "German").
- TESTING: You can define the status during test execution that covers the semantic of "currently testing" or "in progress". This status is used for aggregation purposes during test execution, e.g., when a new run is created.
- STSCHM: Here you can define the ID of a custom specific document status schema which is used for status selection in Test Steps Designer. The schema itself can be maintained via view cluster maintenance (transaction SM34) with view cluster SMDDOCSTATUS. If not defined, the standard schema ODEFAULT is considered.

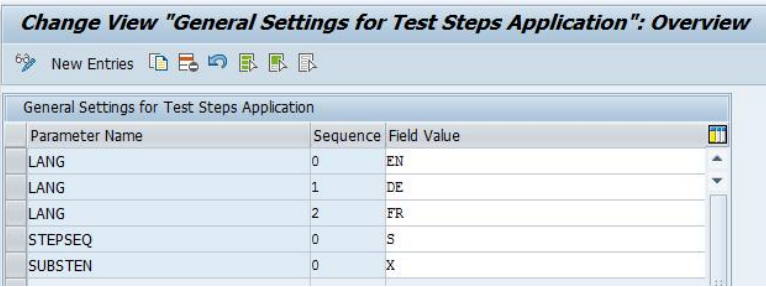
- **INITSTAT:** With that parameter you can define the initial status for new test cases created in Test Steps Designer. This status should refer to the status schema you define with parameter STSCHM (see above).
- **DEFPRIO:** Here you can maintain the Priority ID for Test Steps test cases which is taken as default when a new test case is created in Test Steps Designer. Priorities can be maintained in Maintenance View V_SMDDOCPRIORITY via transaction SM30.
- **DEEPSEARCH:** In Solution Documentation you can search for Test Steps Documents by name and content. By default, the search only covers the lang. dependent texts on header level (Description, Prerequisites, Exit Criteria). If you also want to include the lang. dependent texts on step level (Description, Instructions, Expected Results, Customer Text Field), you can activate the so-called "deep search" by setting this parameter true ('X').

Special parameters for machine translation:

The following parameters are required only in case you want to apply the machine translation API. Further details on how to configure the machine translation for test cases can be taken from the respective chapter below.

- **TRANSL:** You can apply the automated translation API which is offered for Test Steps Designer. By setting this parameter to 'X', users can perform an automated translation of test case contents in Test Steps Designer. The API is implemented in Enhancement Spot /SALM/TM_TS_TD_TRANSLATE. A sample Badi implementation is delivered: /SALM/TM_TS_TD_TRANSL_BADI_IMP. This implementation connects to your SAP Cloud Platform account and uses the respective translation service.
- **TRANSLPETC:** Name of the Ext. Http Connection to the Translation Service Productive Token Endpoint.
- **TRANSLPESU:** URL to the Translation Service Productive Endpoint.
- **TRANSLSESU:** URL to the Translation Service Sandbox Endpoint.
- **TRANSLSEKY:** API Key for the Translation Service Sandbox Endpoint. This is required only in case you want to apply the machine translation API using a sandbox account.
- **TRANSLPH:** Translation Service Proxy Host. This is required only in case a proxy needs to be maintained to connect to external Http endpoints.
- **TRANSLPS:** Translation Service Proxy Service. This is required only in case a proxy needs to be maintained to connect to external Http endpoints.

Change View "General Settings for Test Steps Application": Overview



Parameter Name	Sequence	Field Value
LANG	0	EN
LANG	1	DE
LANG	2	FR
STEPSEQ	0	S
SUBSTEN	0	X

5.16.8.2 Definition of Folders for Test Steps Application

In view /SALM/TM_C_FOSET folders can be defined by the customer which later can be used in the Designer application to structure test cases into different groups/folders. These folders enable a better overview and navigation within the designer application and are valid across test steps test cases.

FITFBSP02	Functional Integration Test (FIT) FB 7.2 SP02
O2C	Order to Cash (O2C)
P2P	Procure to Pay (P2P)
SALES	Sales

5.16.8.3 Definition of Step Status Settings

In view /SALM/TM_C_SSET the settings for step status can be defined.

Properties of step status:

- Status: unique identifier of a status
- Label: language dependent label of a status
- Default: default status during test execution
- Evidence: An evidence documents the results or errors during test execution and can be attached to a step. This setting defines whether an evidence (such as upload of screenshot) is required during test execution if a certain status is set at step level. This option is checked in dependency with the test case design where an evidence can be defined as required at step level.
- Color: color coding of status at step level
- Finish Step: indicates whether a step has reached a completion status which then leads to automatic checks of the entered test results such as evidence, actual result and others.

Change View "Step Status Settings": Overview					
New Entries					
Step Status Settings					
Status	Default	Evidence	Color	FinishStep	
RETEST_OK	<input type="checkbox"/>	<input type="checkbox"/>	Without Errors	<input checked="" type="checkbox"/>	
TESTING	<input type="checkbox"/>	<input type="checkbox"/>	Without Result	<input type="checkbox"/>	
TEST_ERROR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	With Errors	<input type="checkbox"/>	
TEST_OK	<input type="checkbox"/>	<input type="checkbox"/>	Without Errors	<input checked="" type="checkbox"/>	
UNTESTED	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Without Result	<input type="checkbox"/>	

5.16.8.4 Status Aggregation Settings

In view cluster /SALM/TM_C_SRVC the settings for status aggregation rules can be defined. These rules aggregate step status to test case status during test execution (for instance, status *error* on steps level can be aggregated to status *error* on test case level automatically).

Properties of Rules

- Rule: unique identifier of a rule
- Label: description/label of a rule

- Test Case Status: Target status of an aggregation at test case level

Properties of Status Aggregation for each rule

- Status: Status on step level
- Occurrence: Occurrence of status on step level across the entire test case during execution (None: No occurrence. Single: At least 1 occurrence. All: All steps in the test case execution have this status)

Change View "Rule": Overview

New Entries

Dialog Structure

- Rule
 - Status Aggregation

Rule	Label	Test Case Status
1	Step Results OK	TEST_OK
2	Step Results not OK	TEST_ERROR
3	Untested	NOT_TESTED
4	Being Processed	TESTING
5	Step Results OK mixed with Untested	TESTING
6	Step Results Almost OK mixed with Untested	TESTING
7	Step Results Retest OK mixed with Untested	TESTING

Change View "Status Aggregation": Overview

New Entries

Dialog Structure

- Rule
 - Status Aggregation

Rule for Step Status: 1

Status	Occurrence
TESTING	None
TEST_ERROR	None
UNTESTED	None
	Single
	All
	None

5.16.8.5 Customer Fields for Test Steps Result Attributes

In view /SALM/TM_C_CFLD custom fields can be defined that can be used in Test Steps Test Cases during design and execution time. Test Case Designers can pick from the set of defined custom fields and use them when designing Test Steps based Test Cases. These custom fields allow testers during test execution the documentation of test results such as Sales Order IDs or others.

Properties of custom fields:

- Label: Language dependent label of a field.

- Data Element: Selectable from the data dictionary. Defines the length and (optional) value range by the assigned domain of the data element.
- Rendering: Defines how the field is rendered for testers during execution time.
- Multiple Use: Defines whether a field can be used multiple times within the same test case or not.

The screenshot shows a SAP 'Change View' dialog box titled 'Change View "Custom Fields for Test Steps Test Cases": Overview'. It includes a 'Customer C' button in the top right. Below the title bar is a toolbar with icons for 'New Entries', 'Save', 'Cancel', 'Help', and 'Print'. The main area is a table titled 'Custom Fields for Test Steps Test Cases' with the following columns: 'Customer Field ID', 'Label', 'Data Element', 'Rendering', and 'Multiple Use'. The table is currently empty.

A sample field could be "MATERIAL_DOC" with the label "Material Document", Data Element "CHAR10", Rendering "Input Field", and Multiple "true".

5.16.8.6 Steps Table View Settings for Standard Columns

In view /SALM/TM_C_STSET the settings of the test steps table view are defined. This affects the appearance of steps in design time and execution time. Here you can show/hide columns in the steps table or change the sort order.

Please note that not all settings should be changed here. In the list below, these settings can be changed by customers without effecting the application behavior negatively.

Properties of column settings:

- Column Name: unique identifier of a column (must not be changed)
- App: defines in which of both apps this column setting applies (design time, execution time, both) (can be changed)
- Column Label: language dependent label of a column (can be changed)
- Column Type: rendering type of a column (Dropdown, Value Help, Text Line, Text Area, Attachment, Checkbox, Technical Field, Icon) (should be changed only in alignment with SAP)
- Order: defines the order in which columns are displayed in the table view (can be changed)
- Visible: defines whether a column is displayed in the table view (can be changed)
- Sub Step: defines whether a column should be also displayed at sub step level (can be changed)

5.16.8.7 Steps Table View Settings for Custom Columns

In view /SALM/TM_C_STCS the settings for custom columns of the test steps table view are defined. This affects the appearance of steps in design time and execution time. Here you can show/hide columns in the steps table or change the sort order. By default, all custom columns are hidden.

For custom columns you can also provide custom value helps. This is possible for the columns Cust_01, Cust_02, Cust_03. The value helps can be implemented via Enhancement Spot /SALM/TM_TS_CUST_VHLP. There you will also find a sample Enhancement Implementation which demonstrates how to implement the custom value help: /SALM/TM_TS_CUST_VHLP_SAMPLE.

Properties of column settings:

- Column Name: unique identifier of a column (must not be changed)
- App: defines in which of both apps this column setting applies (design time, execution time, both) (can be changed)
- Column Label: language dependent label of a column (can be changed)
- Column Type: rendering type of a column (Dropdown, Value Help, Text Line, Text Area, Attachment, Checkbox, Technical Field, Icon) (should be changed only in alignment with SAP)
- Order: defines the order in which columns are displayed in the table view (can be changed)
- Visible: defines whether a column is displayed in the table view (can be changed)
- Sub Step: defines whether a column should be also displayed at sub step level (can be changed)
- Exec. Edit: defines whether the column should be editable during Test Execution (in app My Test Executions) (can be changed)

5.16.9 Setup of Machine Translation API

With Focused Build SP03 a machine translation API is introduced that allows to translate contents of Test Steps test cases via an external translation service. You can implement the API with a service of your choice. SAP Cloud Platform also offers a machine translation service and an example implementation is shipped with SP03 that illustrates how an external service can be called to make use of the translation function.

If you want to enable the machine translation API you need to perform the following steps:

1. Export Service Endpoint Certificate: You will need to Endpoint Certificate of your external translation service on your Solution Manager. Therefore, you first need to get this certificate by downloading it via your Browser. Go to the service endpoint via browser, logon to the endpoint if necessary (for token URL do not add the token suffix at the end, only the URL). Via your browser you can then review the certificate and download it to your local computer.
2. Afterwards you need to add the certificate via transaction STRUST to your SAP Solution Manager as SSL Client (Standard) certificate. Please press SAVE at the end.
3. Now you need to restart ICM (SMICM -> Admin -> Exit Hard -> Global)
4. To contact the external service, you need to create a RFC Connection of type "HTTP Connections to External Server". In case you want to reach the machine translation service offered by SAP Cloud Platform you maintain the RFC connection as follows:
 - URL = SCP cloud foundry Token URL
 - Port 443
 - Path prefix: /oauth/token
 - Basic Authentication
 - User: [your client id from SCP]
 - Password: [your client secret from SCP]
 - SSL active; default certificate
5. Afterwards you should do a connection test. If it was successful the HTTP Response is "400"
6. With that preparation you now have to perform the customizing in general settings table (see chapter above on customizing of Test Steps within this configuration guide)

7. Finally, you have to implement the API BAdI in order to call the service from your SAP Solution Manager. You can find an example implementation that would already work when calling the SAP Leonardo Machine Translation service offered via SCP.
 Enhancement Spot: /SALM/TM_TS_TD_TRANSLATE
 BAdI Definition: /SALM/TM_TS_TD_TRANSLATE_BADI
 Example BAdI Implementation (inactive): /SALM/TM_TS_TD_TRANSL_BADI_IMP

The screenshot shows the 'Test Case for Create Sales Order' configuration page. At the top, there are tabs for Header, Test Steps, Attachments, Notes, and Change Log. Below the tabs, there are two warning messages: 'This Test Case is not assigned to Solution Documentation. You cannot assign executables to it.' and 'No text in selected language found. Text in fallback language English loaded.' The 'Perform Translation' button is highlighted with a red box. The 'General' section is expanded, showing the 'Properties' tab. The properties include: Version (1 - Initial Version), Version Title (Initial Version), Testing Mode (Shared Test Results), Status (In Progress), Priority (Very High), Owner (Tobias Meinzer), Strict Step Sequence (YES), and Duration (min) (45). The 'Instructions' section shows a description 'Create a standard Sales Order' and prerequisites 'System access and test users were provided. All required authorizations were given to the test user.'

5.16.10 Users and Authorization Roles

For demo, evaluation and test purposes of capability Test Steps respective users should be created. It must be clarified with the customer who (customer, partner, or you as delivery team) creates the users and create and configure the respective authorization roles.

Detailed information about the definition of users and authorization roles can be found in the Focused Build for SAP Solution Manager – Security Guide and in [Security Guide SAP Solution Manager 7.2 - Application-Specific Guides](#).

5.16.10.1 User

Demo users for the Test Suite RDS Test Steps have to be created using SU01.

For the usage of the capability Test Steps the following user and role assignments are suggested:

User	Purpose	Role
TESTMGR1	Test Manager	SAP_OST_FB_TEST_M_COMP
TESTER1	Tester	SAP_OST_FB_TESTER_COMP

Suggestion:

User TESTMGR1 as Test Manager.

Purpose: designs Test Cases of different types including Test Steps. Uses these Test Cases within Solution Documentation and Test Plans build upon this.

User TESTER1 as Tester.

Purpose: Access to Fiori application *My Test Executions* to execute and document tests using Test Cases of different types which were assigned via Test Packages.

5.16.10.2 Authorization Roles

For Test Steps the following standard composite roles are delivered and can be used as copy master:

For the Test Manager: SAP_OST_FB_TEST_M_COMP

For the Tester: SAP_OST_FB_TESTER_COMP

It is recommended to copy these roles into the customer namespace.

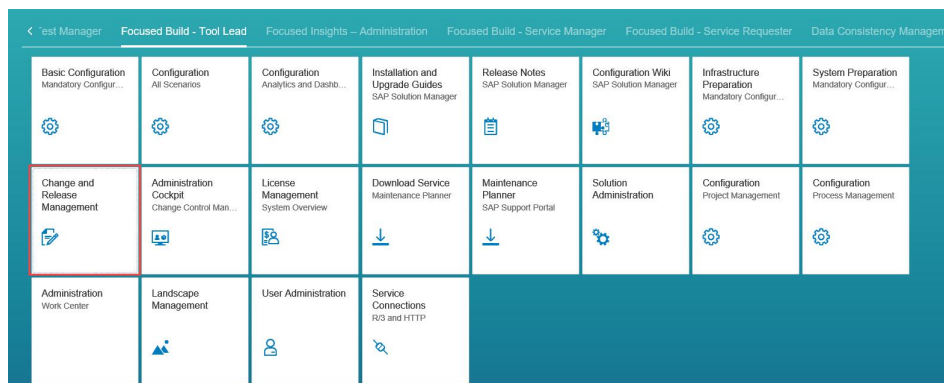
6 Appendix

6.1 Useful SAP Notes

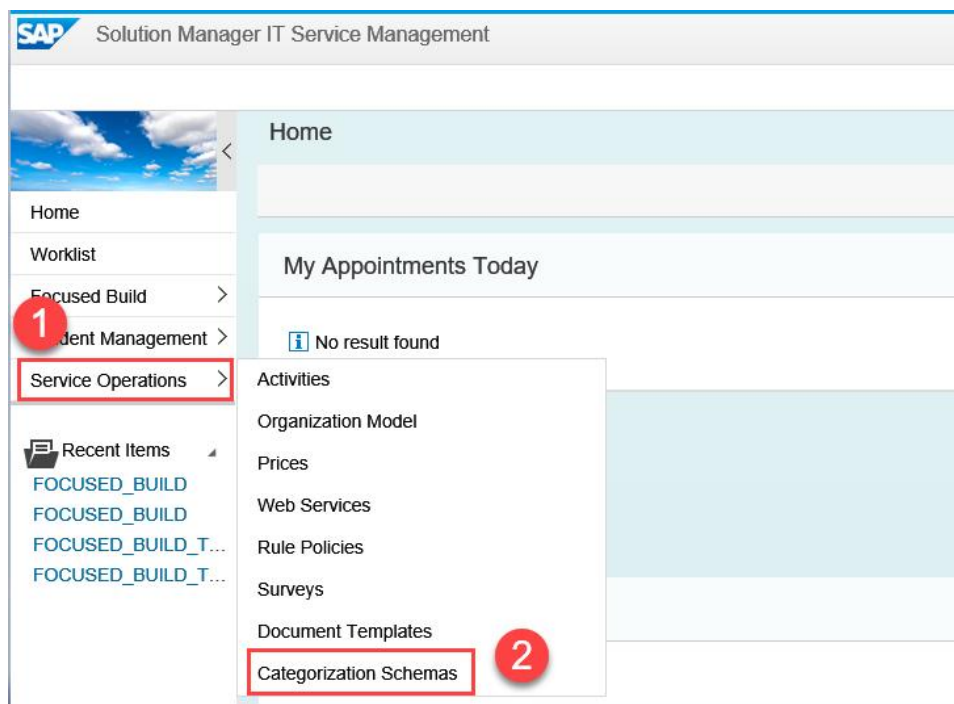
SAP Note No.	Description
1384598	Information about the new remote infrastructure
1803899	Report /RPM/CUST_TABLES_COPY deletes customizing entries
907768	Change Request Management: Information about the required support package levels of managed systems
2257213	Information about authorizations for SAP Solution Manager RFC users
1483276	Use of Customizing Parameters in DNO_CUST04, AGS_WORK_CUSTOM and ICT_CUSTOM
1604651	Bad Performance when loading runtime repositories
1586185	Project selection fails for some transaction types
2447548	Report for Replacing Ibase component in documents
2456627	Document Type Administration Dump Object Types with Namespace
2194123	Setup HTTP connections to import SAP Best Practices Packages into solutions
1156507	Language supplementation, RSREFILL and client maintenance

6.2 Adjust Category Schema

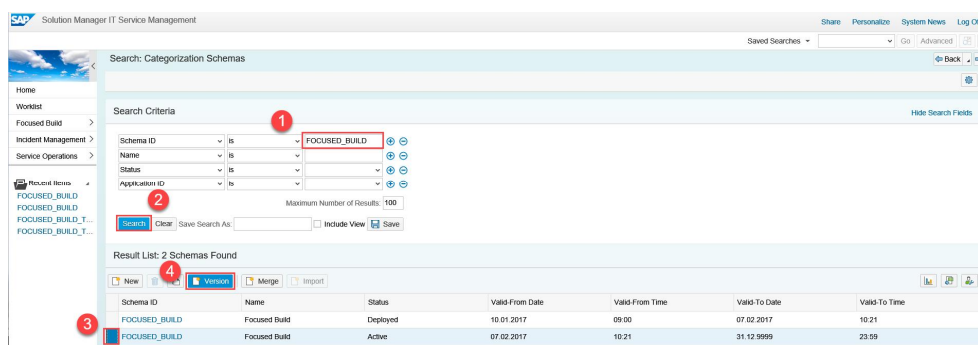
1. Launch Change and Release Management



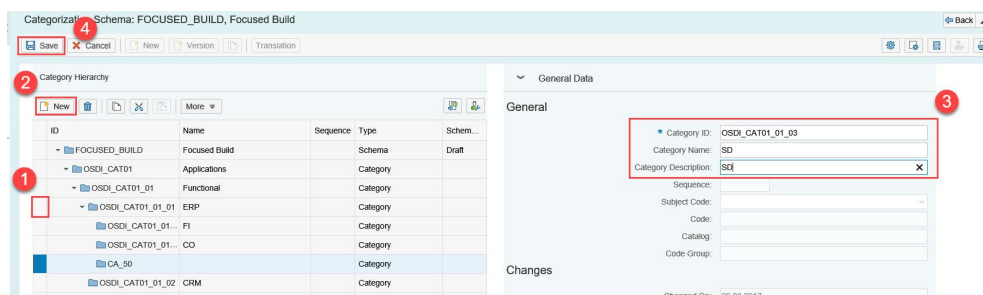
2. Select Service Operations à Categorization Schemas



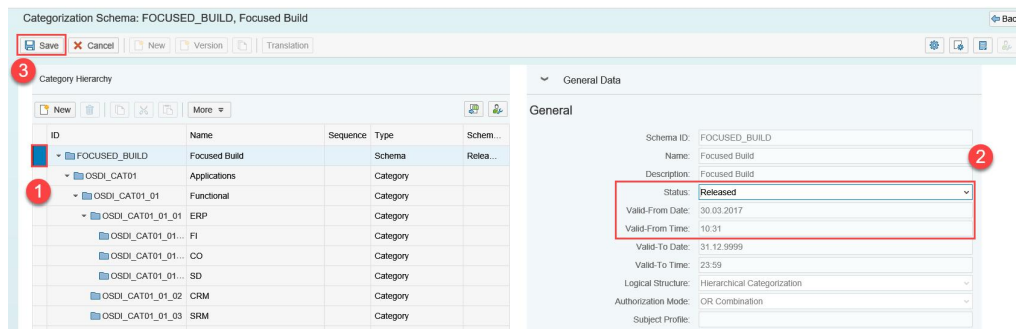
3. Search for Schema ID: 'FOCUSED_BUILD', select the active one and then Create Version button



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.

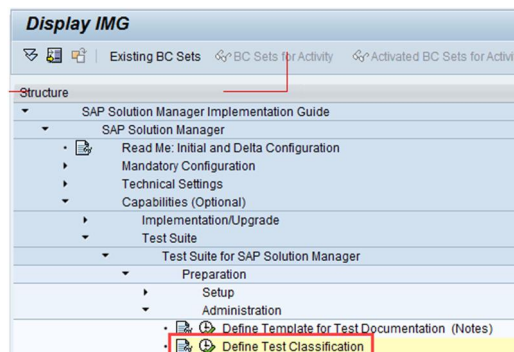


The schema is available for new documents starting from specified Valid-From Date and Time.

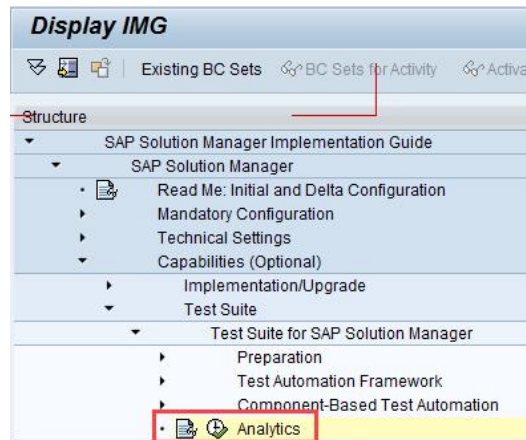
6.3 Mandatory Standard Configuration for Test Suite

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.

6.3.1 Test Classification



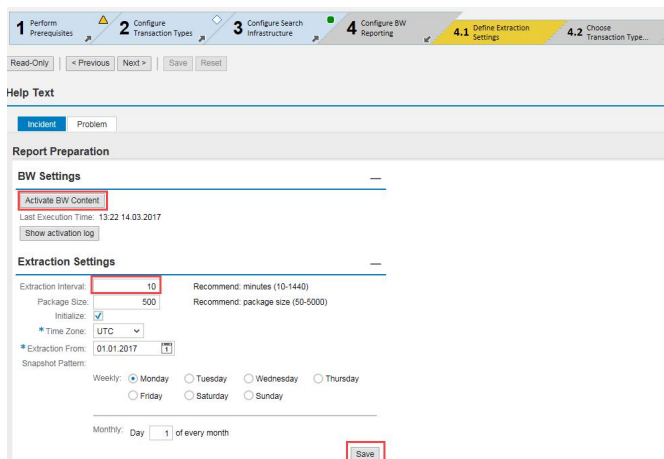
6.3.2 Analytics for Test Suite



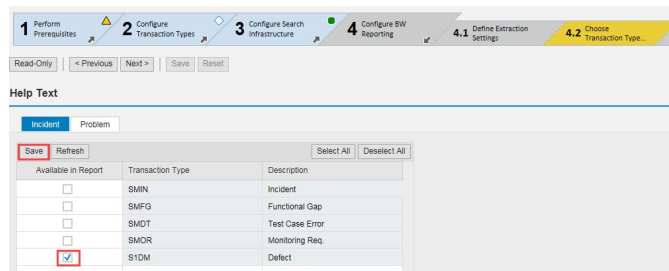
6.3.3 Analytics for ITSM

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



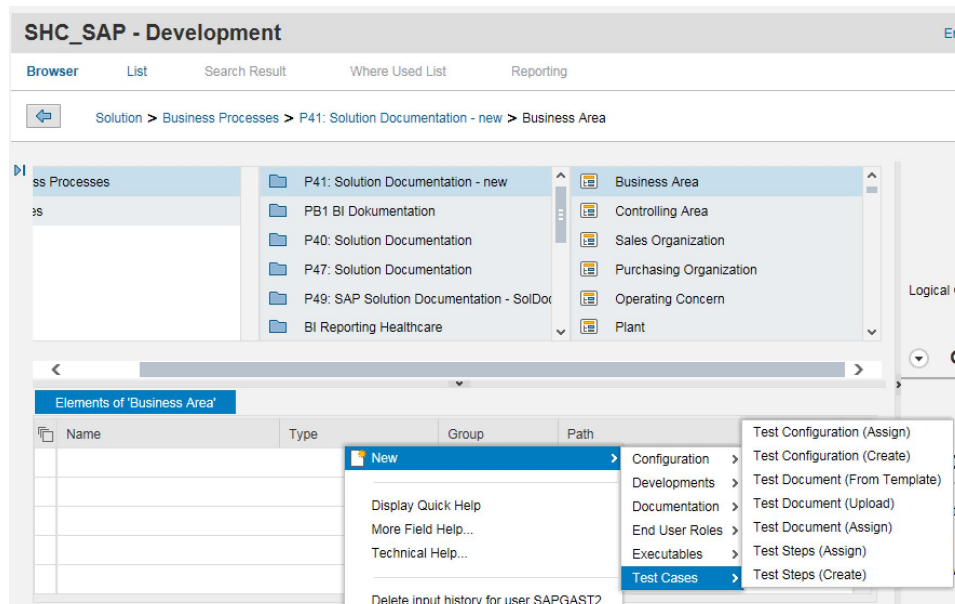
6.3.4 Context menu for Test Steps missing in Solution Documentation

After the setup is done you navigate to Solution Documentation and try to create or assign a Test Case of type Test Steps. You open the context menu but cannot find the entries "Test Steps (Create)" or "Test Steps (Assign)".

Make sure that the piece list was activated properly (see chapter 3)

Clear SMUD Buffer with report RSMUDA_MODEL_BUFFER_RESET

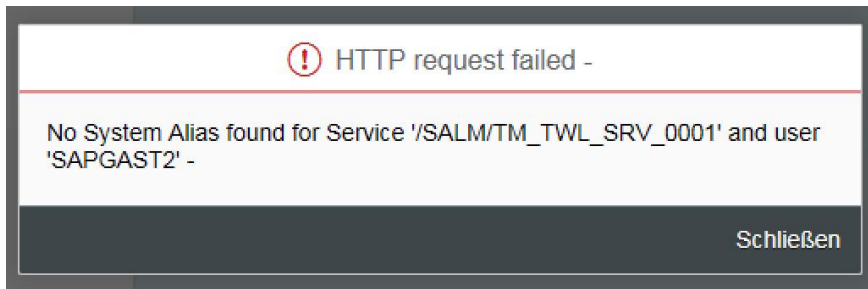
Afterwards the context menu for Test Steps can be found in Solution Documentation:



6.3.5 Error message when starting app "My test executions"

After creating a test case of type Test Steps and assigning it to a Test Plan and Test Package you try to open the app "My Test Executions". In the role of the "Focused Build Tester" you navigate to Fiori Launchpad and select on

"My Test Executions". You receive the error message "No system alias found for service /SALM/TM_TWL_SRV_0001 and User ...".



Make sure that you activated the corresponding gateway service (/SALM/TM_TWL_SRV_0001) and assigned a system alias in transaction /n/IWFND/MAINT_SERVICE as described in chapter 4.

Afterwards try opening the app "My Test Executions" again.

You open the app "My Test Execution" and you get only a white screen.

- Run report /UI2/INVALIDATE_GLOBAL_CACHES
- Run report /UI5/APP_INDEX_CALCULATE and allow some time before calling My Test Execution again
- Please delete the cache of the used browser. Please also try to open the link in another browser (e.g. Chrom) and check if the problem persists.

6.3.6 Upload of Attachments to Steps or Test Cases does not work

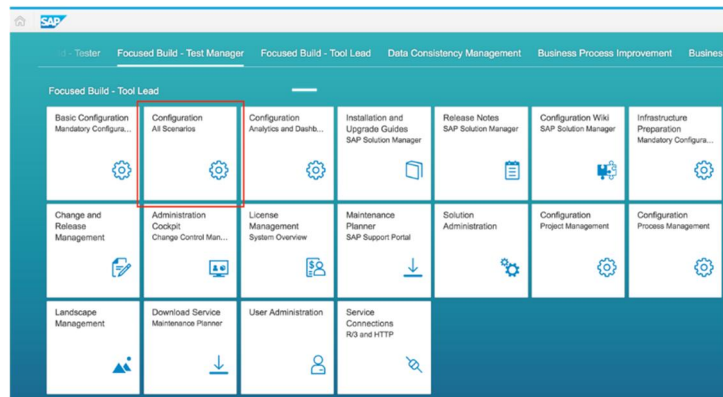
Usually, this error occurs related to the Gateway Virusscan Settings. There are two options to overcome this issue:

- You do not use a dedicated virus scanner and virus scan profile to scan documents uploaded via SAP NetWeaver Gateway to your SAP Solution Manager. In this case you should deactivate the virus scan via transaction /IWFND/VIRUS_SCAN (put /n in front to access the transaction).
- You plan to use or already use a virus scanner on your SAP Solution Manager. Make sure that all settings are defined properly and follow the instructions in IMG path:
SAP Customizing Implementation Guide > SAP NetWeaver > Application Server > System Administration > Virus Scan Interface

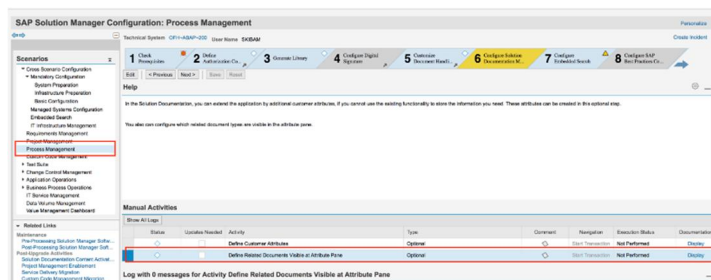
6.4 Activating BAdI for Related Transaction in Solution Documentation Attributes Panel

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.

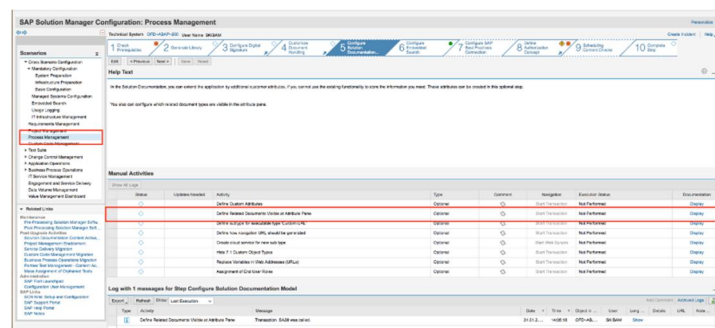
Run transaction **SM_WORKCENTER** and select *Configuration All Scenarios*.



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(IMG)	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 (Fiori in
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	/SALM/SMUDE_LCO_EXT_WI	/SALM/SMUDE_LCO_EXT_WI	Implementation: Integration of related d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	/SALM/SMUDE_LCO_EXT_WP	/SALM/SMUDE_LCO_EXT_WP	Related Work Packages (Focused Build) in
<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_SMUD_LCO_INCIDENTS	Incident integration in Solution Documen
<input type="checkbox"/>	<input type="checkbox"/>	AGS_CRM_API_LCO_ISSUES	AGS_CRM_API_LCO_ISSUES	Issue integration in Solution Documentat
<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 Solu
<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"/>	AGS_CRM_API_LCO_CD	AGS_CRM_API_LCO_CD	Change Documents related to Solution Doc

These BAdI implementations for ST-OST (/SALM/) should be active:

- /SALM/SMUDE_LCO_EXT_BR
- /SALM/SMUDE_LCO_EXT_WP
- /SALM/SMUDE_LCO_EXT_WI

6.5 Package and Namespace Selection in bc-Set Activation

If you are uploading or activating a bc-set in the scope of Focused Build, select an appropriate package.

Mostly you can use [/SALM/CORE](#).

6.6 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	

6.7 Hints and Pitfalls Regarding Virus Scan Profiles

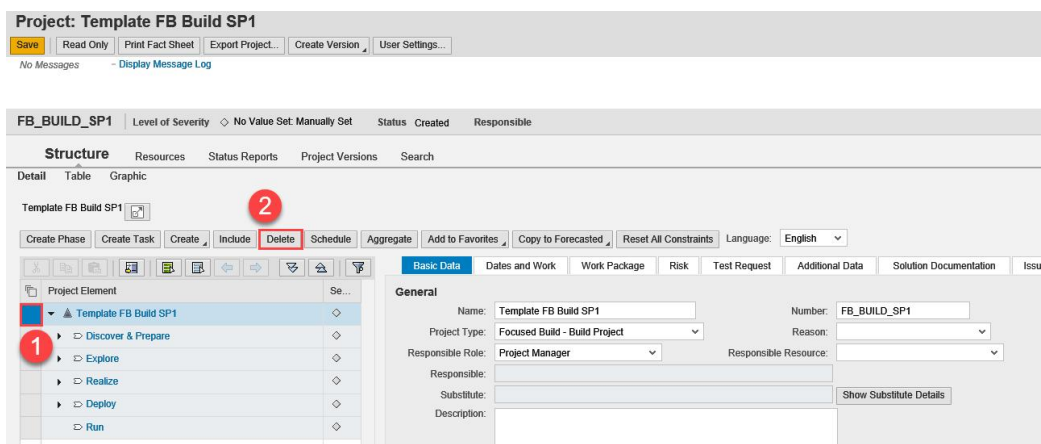
- Please refer to http://help.sap.com/saphelp_smp304svr/helpdata/en/7c/2d509370061014a2af8bb629919d56/content.htm?frameset=/en/6e/0e4c04ebf445e79fb57230a2fb4fa3/frameset.htm¤t_toc=/en/7c/1feb92700610148db1c136782f3f1f/plain.htm&node_id=262&show_children=false
- Check if a virus scanner is defined in transaction **VSCAN**
- Check virus scan profile in transaction **VSCANPROFILE**

6.8 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.

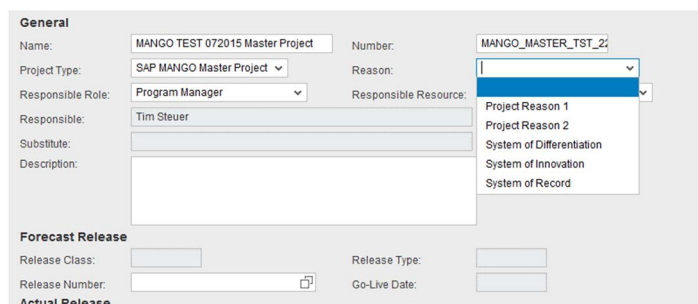
A prerequisite for deletion of projects is that the project is still in status **CREATED**.

Just enter the project in **Read only** modus, select the top node of the project tree and press **Delete**.



6.9 Adapting Project Reasons

In project management, you can select various project reasons:



You can configure the project reasons in Customizing. To adapt project reasons, do the following:

1. In the Customizing for SAP Solution Manager, choose [SAP Customizing Implementation Guide](#) → [SAP Portfolio and Project Management](#) → [Project Management](#) → [Structure](#). → [Define Project Reason](#).
2. Change the reasons for projects.

6.10 User Roles, Authorizations and Business Partners

6.10.1 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, 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).

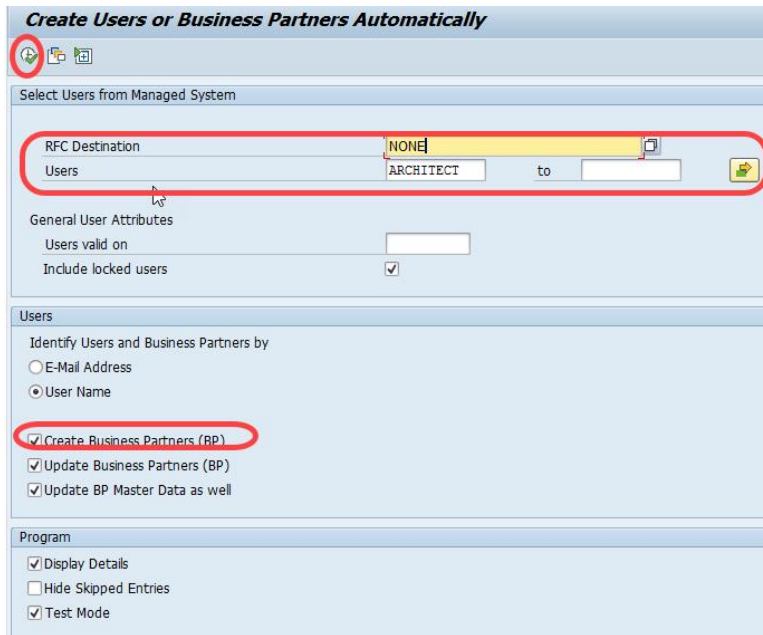
Template Users

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
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

6.10.2 Authorization Roles and Users in Systems Belonging to the Project

Depending on their 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
Tester		X		X		
Test Coordinator	X	X	X	X	X	
Tool Lead	X	X	X	X	X	X

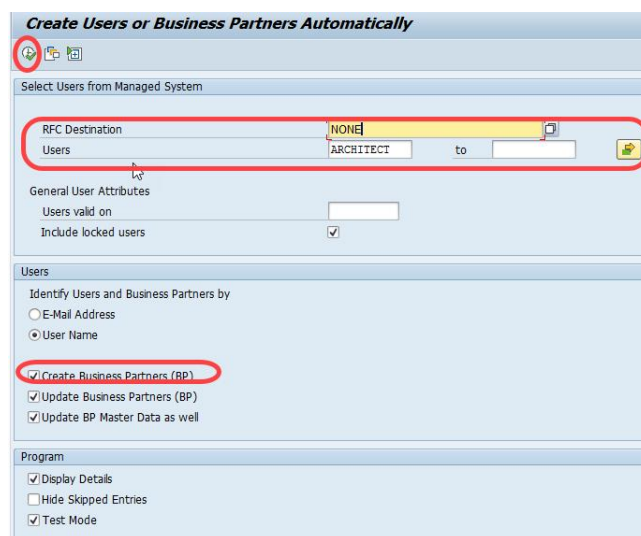
Which authorizations the users get in which of the respective systems has to be verified with the project team.

6.10.3 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**).

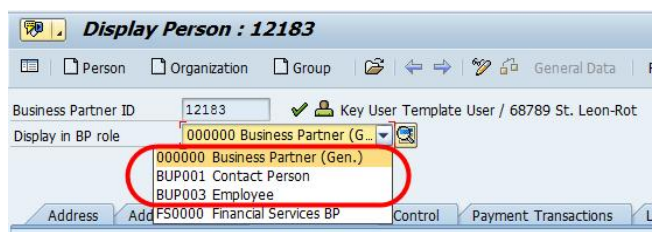
Create business partners to the template users created in chapter Authorization Roles and Users in SAP Solution Manager System® *Template Users*:

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:



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:

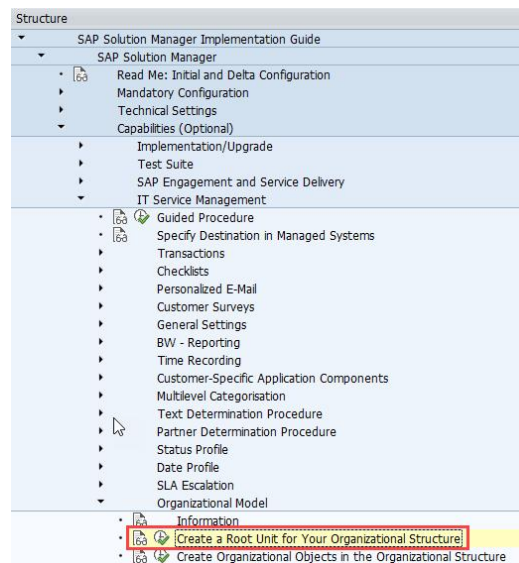
IDType CRM001

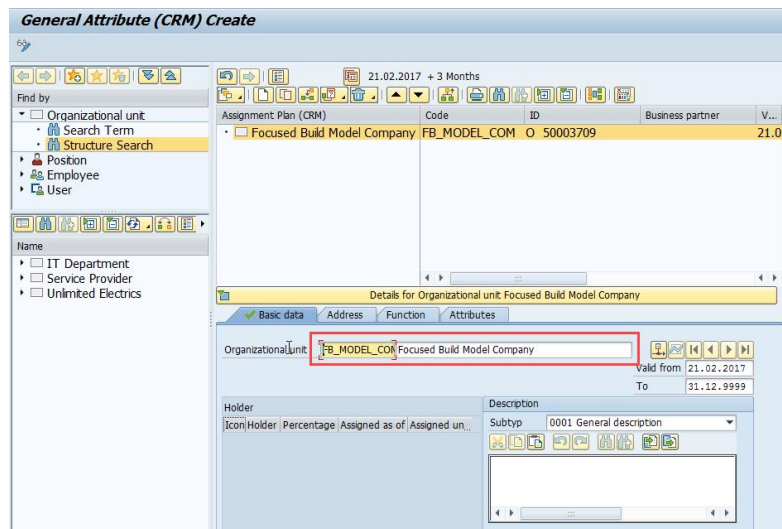
Identification Number <SysID><blank><installation number><blank><client><blank><user>

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	

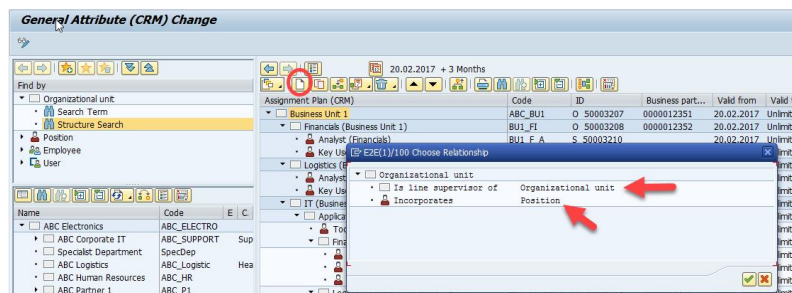
6.11 Organizational Model (optional)

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:



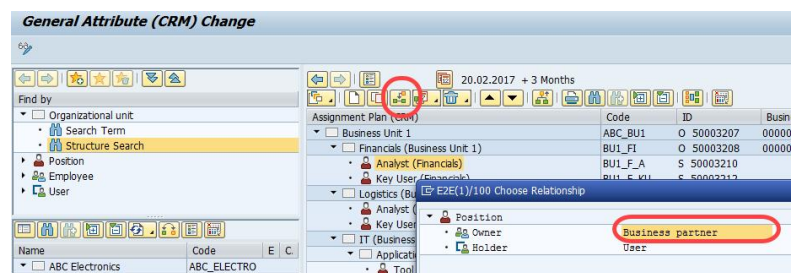


If you would like to enhance an existing organization model you can directly use transaction **PPOMA_CRM** to do so. To create new organizational units and positions always select the upper organizational unit, select on **Create** and then choose either **Organizational Unit** or **Position**:



Name the new unit respectively.

To assign business partners to the positions select the respective positions, select on **Assign** upper organizational unit, select 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

20.02.2017 + 3 Months			
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	

6.12 Multitenancy Enhancement

6.12.1 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, **Error! Reference source not found..**

Start report

Open report via **S^{PRO}** (*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	2467	to	<input type="text"/>
Business Partner	* <input type="text"/>	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 **Error! Reference source not found.**).

Root organizations

The root organizations will be prefilled with your customized root organizations (see chapter **Error! Reference source not found.**). 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 **PFCG**.

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	*	

Authorization Object	Authorization Values		Comment
B_BUPA_RLT	Activity	02, 03	Change authoriatzion group of business partner in database
	BP Role	*	

6.13 Clickjacking protection framework in SAP NetWeaver AS ABAP an AS JAVA

You are experienting that nothing can be done in the release planning application anymore running within CRM_UI:

The screenshot displays the SAP Solution Manager IT Service Management Release Planning interface. The main table lists release versions with columns for Landscape / Release Version, Status, Go-Live, and a timeline for July - December 2018. A red 'X' icon is visible in the timeline area. On the right, the console log shows network requests and a red error message: "Reached timeout of 10000ms waiting for a response from parent window - jQuery.sap.frameoptions".

To overcome such a situation please refer to SAP note 2319727.



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