IT Service Management in SAP® Solution Manager

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Introduction

The release of SAP Solution Manager 7.1 delivered an improved, sophisticated, and entirely overhauled platform to support customers throughout Application Lifecycle Management (ALM) and beyond—into the operations and optimization of their IT landscapes. Rather than renaming the product to merely keep up with product version standards, the latest release of SAP Solution Manager changes the game in regards to how customers are reacting to, focusing on, and investing in efforts to leverage as much functionality as possible.

With nearly just a year into the general availability of SAP Solution Manager 7.1, the adoption rates of the existing SAP customer base have been overwhelming. SAP’s investment in SAP Solution Manager proves that release 7.1 has been a key focus in regards to improvements in technology, openness, and usability. These improvements apply not only to SAP Solution Manager holistically, but also specifically to the new SAP IT Service Management (SAP ITSM) features delivered with release 7.1.

Problems, incidents, service requests, requests for change, and changes to the landscape are all managed from a central platform. The processes across these areas provide automation, efficiency, and flexibility while also ensuring reliance and control from an IT management perspective. Rather than relying on manual processes, third-party tools, or human intervention, SAP Solution Manager provides the tools and control to effectively deliver and manage services related to your IT landscape.

Some key benefits offered with SAP ITSM in SAP Solution Manager 7.1 include an enhanced infrastructure, web UI, and best-in-class messaging capabilities to deliver Application Incident Management (AIM) and Change Request Management (ChaRM) processes that are aligned to ITIL standards. Throughout this book, we will discuss how the following key improvements can be brought to life to enable an SAP ITSM solution for your organization:

- SAP ITSM supports the customer entire solution, beyond just SAP. IT assets such as mobile devices and printers can now be aligned to the processes within
SAP Solution Manager. A single, central platform can be leveraged to manage incidents and changes related to the entire landscape.

- The user acceptance rate is astonishing and can be attributed to the increased usability of SAP ITSM features. A flexible, simple, and customizable web UI is available for message processing and dashboard reporting.
- Guided procedures, which included automated setup features and integrated documentation, help to deploy the functionality at a more rapid and intuitive manner.
- SAP ITSM is not just a capability for the technical teams. Incident Management, Problem Management, Service Request Management, and Change Request Management span the entire IT and business organization.
- SAP ITSM is included in enterprise support. As of release 7.1, it's nearly impossible to develop a business case to procure, license, install, and support a third-party SAP ITSM application when SAP Solution Manager offers the same (if not better) capabilities.

Regardless of which application lifecycle phase you may be in or which products comprise your installed base, this book will walk you through the steps of transitioning the benefits of SAP Solution Manager 7.1 into a reality for your organization. This book will help build a strong business case for implementing and/or upgrading to SAP ITSM in SAP Solution Manager.

Who This Book Is For

This book has been developed to reach a wide audience. At a high level, the content within this book is intended for members involved in the delivery of IT services. For implementation projects, this means service strategy teams and stakeholders. For support projects, this typically means members of the Center of Excellence (COE).

The material within this book, depending on the chapter, is relevant to the CIO, IT leadership, service leads, team leads, support staff, and SAP Solution Manager owners and administrators. Certain chapters contain overview material, reporting capabilities, and process descriptions that appeal to managers and executives. On the other hand, a large portion of the book is reserved for how-tos, configuration activities, and lessons learned that will benefit those tasked with leading and implementing SAP Solution Manager.
What This Book Covers

Part I of the book starts with an overview of IT Service Management. We start by describing the processes at a high level to establish a foundational context that supports the overall content of the book. Following, we enter a discussion on the UIs available within the SAP ITSM features in SAP Solution Manager. We discuss the basic setup activities, including post-installation activities and master data setup, in order to prepare you to begin the functional configuration of SAP ITSM processes.

- Chapter 1
  This chapter provides a basic overview of SAP ITSM, ITIL, ALM, and how SAP Solution Manager delivers these functions in an integrated manner from a central platform. Readers who are new to these frameworks and methodologies will be provided with a high-level understanding of the concepts and terminology. The objective of this introduction is to set the foundation for the rest of the material, concepts, and functionalities described within this book.

- Chapter 2
  This chapter introduces you to the new SAP CRM Web Client UI delivered with 7.1 and explain its layout, navigation, and structure. Because Work Centers remain an integral part of SAP Solution Manager, this chapter will also explain the key features, navigation, and the structure of Work Centers.

- Chapter 3
  This chapter provides the post-installation steps that are required before deploying any of the SAP ITSM functionality. SOLMAN_SETUP, as it relates to SAP ITSM functionality and the required prerequisites, is explained in this chapter. This chapter also describes the security authorizations, master data settings, and UI setup required to execute both administration and end-user SAP ITSM functions.

We then begin Part II of the book, Application Incident Management. We provide an overview of Application Incident Management (AIM), discuss the ins and outs of its subprocesses, and describe how it integrates into Application Lifecycle Management (ALM) for SAP. We provide an overview of the features of AIM and then show you how to configure those features.

- Chapter 4
  This chapter provides an overview of AIM, including its goals, infrastructure, changes in the new release, and UI.
Introduction

- **Chapter 5**
  This chapter highlights the business partner roles that are delivered in release 7.1 for AIM. Their duties are described in an effort to prepare organizations to begin a role-mapping concept. Additionally, each transaction type’s corresponding process flow will be explained in detail.

- **Chapter 6**
  AIM can be aligned to any or all SAP implementation or operation phases. This chapter identifies when, where, and how AIM can benefit implementation or support teams. Recommendations are given for when and why to adopt AIM processes specific to your organization’s requirements.

- **Chapter 7**
  There are several options for initiating the AIM process (i.e., for an end user to request an incident to be sent to the SAP Solution Manager system). This chapter explains each method available for creating a problem or incident.

- **Chapter 8**
  This chapter explains the data and functionality contained in the AIM assignment blocks in the SAP CRM Web UI. Many of these functions have been overhauled since release 7.0 with both a different look and feel. This chapter describes each of the functions available for incident/problem creation, processing, and closing. Further, this chapter explains the steps necessary to leverage these functions according to best practices.

- **Chapter 9**
  This chapter describes some important functionalities within AIM: Time Recording, Service Level Agreements (SLAs), message dispatching, and knowledge articles. These are all important to the process of AIM, and many have new functionality offered in the 7.1 release.

- **Chapter 10**
  This chapter provides a description, as well as a step-by-step guide, for the configuration settings required to enable AIM. Tips, tricks, and best practices for configuring AIM features will be provided within each subsection.

Part III of the book, Change Request Management, is structured similarly to Part II; however, it’s tailored to address the ChaRM functionality within SAP Solution Manager. We close the book out by providing an overview of the SAP ITSM reporting and analytics capabilities and lessons learned throughout our prior engagements with SAP Solution Manager.
Chapter 11
This chapter provides an overview of ChaRM, including its goals, infrastructure, features of the new release, and UI.

Chapter 12
This chapter highlights the business partner roles that are delivered in release 7.1 for ChaRM. Additionally, each transaction type’s corresponding process flow is explained in detail.

Chapter 13
In addition to the core features of ChaRM, there are several additional features that support change control. This section describes those additional features that support customers who have dual landscapes, non-ABAP systems, and special handling procedures for specific objects.

Chapter 14
This chapter describes the process and steps to set up Transport Management System (TMS) for a ChaRM environment. Additionally, this chapter describes other basic technical setup activities that aren’t covered by the automatic configuration in SOLMAN_SETUP.

Chapter 15
This chapter provides a description, as well as step-by-step guide, for the configuration settings required to enable ChaRM. Tips, tricks, and best practices for configuring ChaRM features will be provided within each subsection.

Chapter 16
This chapter describes the maintenance and project administration activities required to begin a ChaRM project. It discusses the projects required to activate ChaRM as well as the steps required to generate a project cycle and a maintenance cycle.

In Part IV, we explain the reporting and analytics capabilities that are provided standard from SAP Solution Manager to support ITSM functions. We’ll provide an overview of the capabilities offered to measure ITSM KPIs that support executive leadership roles in the IT organization, down to the support staff. Capabilities that support both AIM and ChaRM will be covered, and we’ll also take a look into the SAP NetWeaver BW reporting features delivered with release 7.1.

Chapter 17
This chapter covers the SAP ITSM reporting and analytics capabilities available within SAP Solution Manager. Interactive reports, powerful search and monitoring
capabilities, dashboards, and the SAP Solution Manager plus SAP NetWeaver BW option are discussed.

- **Chapter 18**
  This chapter describes the main reporting tools available for ChaRM. In addition to reporting on the status of requests for change and change documents, transports objects are collected from the managed systems and presented in SAP Solution Manager as well.

We then provide two supplemental appendices.

- **Appendix A**
  This appendix provides lessons learned and best practices for implementing AIM and ChaRM for an organization. From strategy and design to go-live and support, this appendix explains how to avoid common pitfalls throughout implementation.

- **Appendix B**
  In many scenarios, customers will have ChaRM or Service Desk live in a release 7.0 environment. To protect that data, it’s recommended that you perform an upgrade to release 7.1. There are several issues to take into consideration when upgrading to release 7.1. This appendix describes what each customer who requires an upgrade will need to know, as well as best practices for making the transition.

All configuration samples and screenshots were prepared using SAP Solution Manager 7.1, Service Pack 07, available at the time of the writing of this book (December 2012).
Regardless of the size, complexity, or scope of the ITSM functionality you decide to deploy through SAP Solution Manager, there are preparatory activities that must be completed before diving into the functional configuration. This chapter highlights those activities, and provides use case examples that will help guide you through setting them up.

3 Preparing Your SAP Solution Manager System to Support SAP ITSM Functions

Now that you have a thorough understanding of the integration between Application Lifecycle Management (ALM) and IT Service Management (ITSM), as well as the supporting frameworks to enable the delivery of IT services, it's time to start standing these processes up in your SAP Solution Manager system. Before we dive into the meat of the SAP ITSM scenarios, we must begin by building a base.

This chapter provides an overview of the prerequisite and basic setup activities that will establish the foundation for subsequent activities related to building out your SAP ITSM strategy in the SAP Solution Manager system. Building this foundation consists of the following main areas:

- Post-installation and technical setup
- Authorization roles and security concept
- Master data maintenance
- Adapting the SAP CRM Web UI: configuration and personalization

The content described in this chapter spans technical, Basis, security, SAP Solution Manager, and SAP CRM tasks. Although we don't expect you to be an expert in all of these areas, our objective is to provide the information necessary for you to execute and/or lead the completion of tasks related to these areas to prepare your SAP Solution Manager system to receive SAP ITSM.
3.1 Post-Installation and Technical Setup

After the Basis team has finished either upgrading or installing the latest SAP Solution Manager 7.1 system and delivered it as available, you must take the necessary steps to stand up SAP ITSM.

This section provides an overview of the basic configuration steps required prior to configuring the SAP ITSM scenarios in SAP Solution Manager. We’ll describe which steps are critical and how to perform them before the SAP ITSM processes can be enabled.

The objective of this section is to provide you with the critical steps required to prepare your SAP Solution Manager system to run SAP ITSM processes. You’ll notice a lot of steps and activities that are touch points to other scenarios within SAP Solution Manager. For our purposes, we can ignore those. Additionally, there are cases where the guided procedures include tasks that will be discussed in detail in later chapters.

3.1.1 Overview

Most likely the first transaction you’ll execute after the SAP Solution Manager system has been installed is Transaction SOLMAN_SETUP. Transaction SOLMAN_SETUP provides guided procedures to help quickly deploy the basic configuration settings required before incorporating business and IT requirements into the SAP Solution Manager scenarios.

Documentation, accelerators, and direct links to the activities performed within the SAP Solution Manager system are provided within Transaction SOLMAN_SETUP. In many cases, automatic deployment of configuration is available to rapidly apply the configuration. In other cases, which will be noted, you must manually configure the settings. For these cases, documentation is provided along the way with step-by-step instruction.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>For guidance on the necessary authorizations to perform the basic configuration, see SAP Note 1560717: ST7.0 and 7.1 SP01 and Higher: Roles for SOLMAN_SETUP.</td>
</tr>
</tbody>
</table>

Figure 3.1 identifies the UI of Transaction SOLMAN_SETUP.
The following components make up the overall architecture of the basic configuration activities:

- **Navigation bar**
  Selecting an area within the navigation bar will determine which set of activities get displayed. For the purposes of SAP ITSM and to stick within the scope of activities within this book, we'll focus on the following areas:
  - **System Preparation**
  - **Basic Configuration**
  - **IT Service Management**

We recommend that the basic configuration activities be completed in their entirety after the SAP Solution Manager system has been installed and/or upgraded. For our purposes, we'll limit the overview and instruction to activities dealing specifically with ITSM.

- **Roadmap**
  The roadmap section identifies where you are within the basic configuration steps. Depending on which navigation item you select, the roadmap will update accordingly. At each phase in the roadmap, colored icons will identify the status of each phase (as described in Table 3.1).
Each Transaction SOLMAN_SETUP screen has a Help section that typically provides background information about the selected activity as well as expected results after the activity has been performed.

Activities
The Activities section provides links to execute both automatic and manual tasks as well as links to the associated documentation. Status information and execution status is recorded to help identify which tasks have been completed successfully.

Log
The Log section provides detailed information immediately following the execution of an activity. The log keeps a history of the activity that was performed, by who, when, and the resulting status.

3.1.2 System Preparation
For system preparation, we'll complete the steps described in the following subsections. You'll find a brief overview of each of these steps, as well as instructions on how to configure these basic settings.

Create Users
Creating the SAP Solution Manager users with Transaction SOLMAN_SETUP guided procedures is quick, simple, and automatic. After a few clicks, all of the required system and dialog users, passwords, and their roles are automatically created.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗝️</td>
<td>Step was performed successfully.</td>
</tr>
<tr>
<td>🚨</td>
<td>Step was performed with warnings (recheck needed).</td>
</tr>
<tr>
<td>⚠️</td>
<td>Step requires reexecution because of system update.</td>
</tr>
<tr>
<td>🕵️‍♂️</td>
<td>Step was performed with errors (recheck and re-execute).</td>
</tr>
</tbody>
</table>

Table 3.1 Transaction SOLMAN_SETUP Status Information Icons
You have the flexibility to perform any of the following maintenance activities, depending on whether the users need to be created or updated. For the following activities, ensure that you’re in the *System Preparation • Create Users* work area.

- **Create New Users** (use one of the following methods)
  - Select the button *Create All Users*.
  - Select each user one by one, and then select the *Execute* button.

- **Update Authorizations**
  - Select the user that requires the update (Transaction SOLMAN_SETUP will provide status information if this is the case).
  - Select the option to **Update Authorizations of Existing Users** in the *Action* field.
  - Click *Execute*.

- **Update Passwords**
  - Select a system user.
  - Select the option to **Update Password** in the *Action* field.
  - Select *Execute*.

---

**Note**

Keep the following in mind when maintaining users and passwords from SAP Solution Manager:

- Passwords for dialog users (e.g., SOLMAN_ADMIN) aren’t needed and therefore don’t require maintenance.
- If your system users are controlled via Central User Administration (CUA), they can’t be maintained from Transaction SOLMAN_SETUP.

---

Figure 3.2 identifies the area in Transaction SOLMAN_SETUP for creating users.

**Check Installation**

In these steps, the SAP Solution Manager automatically performs a series of various checks to validate that those specific parameters, system settings, connections, configurations, and prerequisites are fulfilled prior to configuring the scenarios in SAP Solution Manager.
To perform these steps, do the following:

1. Ensure you're in the System Preparation • Check Installation work area of Transaction SOLMAN_SETUP.
2. Select the button EXECUTE ALL.
3. Each activity description below should result in a green status after they have been executed as shown in Figure 3.3. Any errors or warnings will appear in the log in the bottom of the screen. Correct the errors and warnings before proceeding.

**Figure 3.2** Create Users: Transaction SOLMAN_SETUP

**Figure 3.3** Check Installation Activities Successful
Implement SAP Notes

Implementing the SAP Solution Manager central correction note is absolutely essential before beginning the configuration of SAP ITSM scenarios (or any SAP Solution Manager scenario). The central correction note contains a collection of notes that provides a foundation for configuration as well as fixes to various configurations within SAP Solution Manager. In the guided procedure, you must complete all of the following steps associated with applying the central correction note:

- Downloading the note from SAP
- Importing the note via Transaction SNOTE
- Performing post-processing

Transaction SOLMAN_SETUP provides the central point to launch these activities as well as track the processing status. However, the central correction note is applied via Transaction SNOTE (which you’ll notice when you begin to execute these activities).

Important!

Be sure to pay attention, note, and perform all required manual post-processing steps. While Transaction SNOTE will import the majority of the corrections automatically, there will be cases in which manual post-processing is required. Don’t overlook or think you can skip these steps. If you don’t perform them, you’ll encounter issues in the future.

Often, SAP will provide updates (new notes) to the central correction note associated with the support package your SAP Solution Manager system is currently on. There are three different ways to identify the updates:

- An information pop-up box appears when you access the System Preparation activities.
- An indicator in the roadmap next to the text IMPLEMENT SAP NOTE warns you that you must reexecute the activity.
- The UPDATES NEEDED field is flagged in the steps to implement the note.

Execute these activities by clicking on the relevant links as shown in Figure 3.4. You’ll be taken directly to the Transaction SNOTE in the SAP GUI. To complete
these activities, adhere to your organization’s standard process for implementing SAP Notes.

![Table](image)

**Figure 3.4** Steps to Implement Central Correction Note

### Configure ABAP

This simple, automated configuration performs the following key activities:

- Creates SAP Solution Manager as a system in your landscape
- Creates the logical systems for SAP Solution Manager
- Activates the Service Data Control Center (not relevant for SAP ITSM)

Simply clicking the **Execute selected** button above the SOLMAN_SETUP activity will achieve these basic configuration settings.

### Web Service Configuration

Web Service Configuration, although not directly related to the SAP ITSM functions, should not be skipped because we’re configuring all of the **System Preparation** tasks within Transaction SOLMAN_SETUP.

These basic configuration settings enable the necessary activation for web services related to SAP Solution Manager; that is, services related to web dispatcher, authentication types, and the creation of logical ports. Because these items are beyond the scope of our book we won’t go into depth about the web services.

The web services can be activated by clicking on their respective links and following the related documentation for how to configure them.

### Prepare Landscape

The activities within the **Prepare Landscape** section of Transaction SOLMAN_SETUP relate almost exclusively to synching content from the System Landscape Directory (SLD) to the Landscape Management Database (LMDB). The LMDB,
which can be considered the “next-wave” System Landscape area (Transaction SMSY), must be populated with the systems SAP ITSM will control.

As of SAP Solution Manager 7.1, certain key activities can’t be administered in Transaction SMSY. For example, the creation of Remote Function Call (RFC) connections must be set up in the LMDB. So, to begin configuring the ChaRM scenario within SAP ITSM, your managed systems must be populated within the LMDB.

Administering the SLD and LMDB are technical tasks that the Basis (technical) teams are responsible for. In subsequent chapters, we’ll discuss the LMDB further as well as describe how to generate the RFC connections to the managed systems within the LMDB.

In Transaction SOLMAN_SETUP, guided procedures and documentation are available to help you populate the LMDB with your systems via SLD synchronization.

### 3.1.3 Basic Configuration

In the Basic Configuration area of Transaction SOLMAN_SETUP, SAP ITSM is primarily concerned with the tasks within the Configure Automatically section. Like the other areas of Transaction SOLMAN_SETUP, we recommend that they are all configured as part of post-processing the SAP Solution Manager system. For the purposes of our book, we’ll continue to explain the basic configuration steps necessary to begin the configuration of SAP ITSM.

#### Configure Automatically

Specifically, the following tasks within the Configure Automatically section are critical for SAP ITSM:

- **Activate Piece Lists**
- **Create External Aliases**
- **Activate Services**
- **Prepare Business Partner Change**
- **Business Partner for SAP Support**
- **Generate Business Partner Screen**
Preparing Your SAP Solution Manager System to Support SAP ITSM Functions

- **SCHEDULE BACKGROUND JOBS**
- **CONNECTION TO SAP**
- **SCHEDULE STANDARD JOBS**
- **CLEAN-UP PRIORITIES FROM ISSUES SCHEMA**

At a minimum, these configuration activities must be completed prior to beginning the configuration of your SAP ITSM scenarios. The documentation within Transaction SOLMAN_SETUP will provide an overview of each of these activities.

To configure them, you can select either the **EXECUTE ALL** or **EXECUTE SELECTED** buttons, depending on your configuration approach.

### 3.1.4 IT Service Management

In this section of the Transaction SOLMAN_SETUP activities, we’ll describe the basic configuration specific to SAP ITSM. As previously mentioned, there will be some steps within this section that we’ll postpone for now. The postponed steps will be described in more detail in subsequent chapters. We will cover configuration and setup activities, including use case examples, throughout the following chapters:

- Chapter 10
- Chapter 14
- Chapter 15
- Chapter 16

**Incident and Problem Management**

From the main page of SOLMAN_SETUP, select the **INCIDENT & PROBLEM MANAGEMENT** button shown in Figure 3.5 to begin the guided procedures for the first SAP ITSM scenario.

![IT Service Management](image)

**Figure 3.5 Select Incident Management Guided Procedures**
Figure 3.6 shows the Transaction SOLMAN_SETUP areas specific to Incident and Problem Management. The activities shown in the gray boxes are covered in this chapter. When navigating through these areas, you’ll see a lot of other tasks that are related to this SAP ITSM scenario. For now, we’ll place those activities on hold until we reach a later chapter. For tracking and documentation purposes, you have the option to manually set the execution status for each activity to help you keep track of what still must be performed.

We’ll go over the areas shown in the figure in the following subsections.

**Check Piece List Activation**

This step will run a check to make sure that the piece lists have been activated (we performed the activation in **Basic Configuration**). After you execute the check, you should receive a log entry as shown in Figure 3.7. If you receive an error or warning, you may have skipped this in **Basic Configuration**.

**Copy Transaction Types**

A transaction type, also referred to as a document type, defines the attributes and characteristics of a SAP CRM business transaction. Transaction types exist in SAP Solution Manager for any functionality that leverages messaging capabilities. For
example, problem messages, incident messages, defect corrections, and requests for change are all transaction types in SAP Solution Manager.

Copying the standard transaction types into a customer namespace ensures that changes (both during implementation and in the future) to Customizing are not overwritten as a result of support packages, upgrades, or related maintenance activities.

SAP Solution Manager 7.1 provides a Transaction Type Copy Tool screen that automatically copies standard transaction types and their associated profiles (e.g., status, partner, action profiles). To use this screen, follow these steps:

1. Launch the Transaction Type Copy Tool screen by selecting the Start Transaction button next to the task Copy SAP Standard Customizing.
2. In the next screen (Figure 3.8), enter the value “SMIN” in the Source Transaction Type field, and the value “YMIN” in the Target Transaction Type field.

3. On the next page, Copy Transaction Type (SMIN → YMIN), select the Start Copying Process button ( ).
4. Confirm all of the prompts to store the Customizing in a transport request.
5. Confirm that your logs contain no errors as shown in Figure 3.9.
You must repeat this process for each transaction type in scope for your SAP ITSM scenario. Chapter 4 provides an overview of each transaction type relating to SAP ITSM functions.

**Maintain BCOS_CUST**

In the AUTOMATIC CONFIGURATION section, you execute the automatic activity that populates Table BCOS_CUST with the appropriate entry. For Incident Management, this entry is required when incidents are generated from the HELP • CREATE SUPPORT MESSAGE option.

**Specify Transaction Types for Incidents**

In the MANUAL CONFIGURATION section, you begin by specifying which transaction type will be triggered when a new incident is created from SAP Solution Manager. Because you have copied the standard SMIN into your customer namespace, you want to call the YMIN incident transaction type.

1. Select the link START TRANSACTION next to the activity SPECIFY TRANSACTION TYPE FOR INCIDENTS.

2. In the SAP GUI screen that appears, maintain your incident transaction type in the PROCESS_TYPE field as shown in Figure 3.10.

3. Click SAVE.

**Classify Transaction Types**

In this manual activity, you’ll classify the transaction type for Incident Management depending on one of four scenarios:
Preparing Your SAP Solution Manager System to Support SAP ITSM Functions

- Default (normal Incident Management usage)
- Software partner (you get messages from SAP regarding software development)
- Service provider (Incident Management is deployed for several customers)
- SAP Business ByDesign (Incident Management is deployed for SAP Business ByDesign)

Follow these steps:

1. Start the transaction for the activity CLASSIFY TRANSACTION TYPE(s).
2. In the SAP GUI screen that appears, click the NEW ENTRIES button.
3. Enter the details as shown in Figure 3.11, depending on your scenario.

Figure 3.11 Classify Transaction Type for Incident Management

Maintain SAP Customer Number
In this manual configuration activity, you maintain your SAP customer number(s) to use basic SAP Solution Manager functions:

1. Press the START TRANSACTION link to begin the activity MAINTAIN SAP CUSTOMER NUMBER.
2. In the SAP GUI screen that appears, select your customer number from the PROCESSED BY NUMBER field as shown in Figure 3.12.
3. Click EXECUTE.

Figure 3.12 Maintain SAP Customer Number

Maintain S-User for SAP Backend
In this manual configuration activity, you define which SAP Solution Manager users communicate with SAP support when leveraging the backend communication
via Incident Management. For these users, their SAP S-user must be maintained in SAP Solution Manager.

**Note**

Depending on your scenario (i.e., how many customer numbers are managed by SAP Solution Manager), you’ll want to examine the documentation within this activity to learn more about the requirements for your organization.

Follow these steps:

1. Start the transaction **Maintain S-User for SAP Backend**.
2. Click the **New Entries** button.
3. In the **User** column, enter the user ID of the person communicating to SAP.
4. Enter the S-user ID (without the leading zeros) in the **Contact Person** column as shown in Figure 3.13.
5. Click **Save**.

![Figure 3.13 S-User Assignment](image)

**Create Product Hierarchy**

In this manual configuration activity, you define a product hierarchy for service in which SAP Solution Manager will assign a subcategory and products. This is a one-time setup activity that is required by SAP Solution Manager. Follow these steps:

1. Start the transaction for **Create Product Hierarchy**.
2. In the SAP GUI screen that opens, execute the report.

**Change Request Management**

To conclude the guided procedures within Transaction SOLMAN_SETUP, you’ll perform the basic configuration pertaining to the Change Request Management (ChaRM) scenario of SAP ITSM. As we have previously mentioned with Incident Management, we’ll postpone the majority of these tasks for later explanation.
In Transaction SOLMAN_SETUP, select the Change Request Management radio button (Figure 3.14) to display the related tasks.

![Figure 3.14 Select Change Request Management Guided Procedures](image)

After selecting this radio button, you'll see activity areas that are similar to those within the Incident and Problem Management guided procedures. The additional activity area is Implement SAP Note, which is shown in Figure 3.15.

![Figure 3.15 Change Request Management Activities](image)

Similar to how we described the Incident and Problem Management activities, we’ll walk you through the basic configuration steps that are prerequisites to future content within this book.

**Check Piece List Activation**
Follow the same instructions as described in the previous section for checking the relative ChaRM piece lists.

**Implement SAP Note**
Just like the central correction note applied in System Preparation, SAP Solution Manager delivers a central note for ChaRM activities. The ChaRM central correction note is applied in the same manner. The note is automatically deployed via Transaction SNOTE when launched from Transaction SOLMAN_SETUP.
Post-Installation and Technical Setup

3.1 Copy SAP Customizing

Follow the instructions we provided for this step within the Incident and Problem Management guided procedures for the ChaRM transaction types:

- SMCR (Request for Change)
- SMHF (Urgent Change)
- SMMJ (Normal Change)
- SMTM (Defect Correction)

Maintain BCOS_CUST

In this activity, SAP Solution Manager makes the necessary table updates to Table BCOS_CUST required for ChaRM. You may automatically execute this task, as you previously did for Incident Management. Figure 3.16 shows how Table BCOS_CUST should look after you've completed this step for both scenarios (Incident Management and Change Request Management).

<table>
<thead>
<tr>
<th>App.</th>
<th>Dest.</th>
<th>UST500</th>
<th>UST500</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHARM</td>
<td>NONE</td>
<td>CUST500</td>
<td>1.0</td>
</tr>
<tr>
<td>CHARM_DEST</td>
<td>NONE</td>
<td>CUST500</td>
<td>1.0</td>
</tr>
<tr>
<td>OSS_MSG</td>
<td>NONE</td>
<td>CUST500</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Figure 3.16 Table BCOS_CUST (Complete)

Now that we’ve discussed the preparatory activities that can be completed via SOLMAN_SETUP (or manually from the SAP Solution Manager IMG), we will begin our discussion on authorization roles and security concepts for ITSM.
3.2 Authorization Roles and Security Concept

In this section, we describe which authorization roles are required within the SAP ITSM scenarios for technical and end users.

Table 3.2 identifies the authorization roles required to perform Incident Management process activities. Each role involved in Incident Management (e.g., administrator, processor, key user, and display user) will be assigned single roles, based on the matrix in this table. Alternatively, SAP provides composite roles that can also be assigned to the users. A composite role consists of several single roles that are related to processing the same set of activities.
### Change Request Management

Similar to Incident Management, Change Request Management (ChaRM) has roles that must be tied to end users. Table 3.3 identifies the authorization roles and corresponding end-user roles they must be matched to.

- **A**: Administrator
- **R**: Requester
- **C**: Change Manager

<table>
<thead>
<tr>
<th>Authorization Role</th>
<th>Admin</th>
<th>Processor</th>
<th>Key User</th>
<th>Display User</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_SM_BI_BILO</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_BI_E2E</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_BW_SPR_REPORTING</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_SM_BI_EXTRACTOR</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_SM_BI_ADMIN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP_SM_BI_SPR_REPORTING</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP_SM_BI_DISP</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SAP_SM_CRMD_UIU_FRAMEWORK</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_SM_CRMD_UIU_SOLMANPRO</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_SM_CRMD_UIU_SOLMANPRO_PROC</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP_SM_CRMD_UIU_SOLMANPRO_ADMIN</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SAP_SMWORK_BASIC_INCIDENT</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SAP_SMWORK_INCIDENT_MAN</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SAP_SUPPDESK_ADMIN</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SAP_SUPPDESK_PROCESS</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>SAP_SUPPDESK_CREATE</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
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</table>

*Table 3.2* Incident Management Authorization Role Matrix
D: Developer
T: Tester
I: IT Operator

<table>
<thead>
<tr>
<th>Authorization Role</th>
<th>A</th>
<th>R</th>
<th>C</th>
<th>D</th>
<th>T</th>
<th>I</th>
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<tr>
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</tbody>
</table>

*Table 3.3* Change Request Management Authorization Role Matrix
3.2.3 Security Concept

The standard SAP roles are delivered as templates to support and enable best practices within your IT organization. We recommend that you assign test users—who simulate end users in SAP ITSM—to these roles as a foundation for blueprint and discover. These activities are essential to understanding how the roles and functionalizes within SAP ITSM operate out of the box. After you've gained a level of familiarity with the standards, you can begin to tailor these roles to meet organizational requirements.

Important!

You should never directly modify the standard roles delivered from SAP. Copy authorization roles into a customer namespace beginning with a “Z” or “Y”. This will ensure that the roles you tailor specific to your organization's requirements are not affected during an upgrade.

3.3 Master Data Maintenance

Master data in SAP Solution Manager is used the same way in which other SAP products (e.g., SAP ERP) use master data. Like SAP ERP, SAP Solution Manager requires repetitive use of master data to support transaction-based processes and operations.

Common examples of master data in SAP ERP include the customer master, vendor master, pricing data, and bill of materials (BOM). Master data in SAP Solution Manager include the following:

- Business partners
- Organizational structure
- Installed base
- Number ranges

This data is intended to be reused over and over throughout the execution of SAP ITSM processes. You'll need test data in your development system to test your configurations. Furthermore, you'll need to establish production master data when it's time to go live with your SAP ITSM processes in SAP Solution Manager. Master data is non-transportable, which means you'll need to establish master
Several inbound channels are available to create and send messages to SAP Solution Manager. This flexibility allows organizations to roll out message creation options depending on their size, complexity, and volume of messages created for Application Incident Management.

7 Channels for Creating and Resolving Incidents and Problems

In Chapter 5, we discussed the steps for processing messages in SAP Solution Manager within the Incident Management and Problem Management processes. The steps, recommendations, and best practices explained for these SAP ITSM processes were specific to how messages were handled after they were received by a service team member. While the SAP CRM Web UI is the central platform for processing messages, organizations have several channels to select from for creating incidents and problems.

In this chapter, we’ll describe the various options available to create and send messages to the central SAP Solution Manager system to enable the messages to begin processing. The complexity of the organization, volume of messages being processed, and size of the end-user community with the ability to create messages will play a role in which channel(s) makes most sense for your organization to deploy. Understanding the channels available for creating service transactions will help you determine the strategy for rolling out Application Incident Management to your organization. It will provide you with several options, which can be chosen according to your preference, for initiating the Application Incident Management process.

On the tail end of the process, there are also activities supported by SAP Solution Manager related to the escalation, further processing, and knowledge management to fully confirm the completion of a message. In addition to explaining the methods for creating messages, we’ll also describe the follow-up channels that are available to support the post-processing and complete the resolution of a message. These follow-up channels will help you determine the actions that may need
Channels for Creating and Resolving Incidents and Problems

to be taken after an incident (for example) is confirmed. For example, integration into the Request for Change process would be required for an incident that requires a change to the SAP application.

7.1 Inbound Channels

In this section, we'll explain the various options organizations may make available to their community of requesters. An inbound channel is a means for how an incident or problem is generated and sent to the SAP Solution Manager system for processing. The inbound channels that we'll discuss include the following:

- SAP frontend integration
- Web self-service: SAP CRM Web UI
- Web self-service: work center
- Interaction center
- Email

Figure 7.1 illustrates the high-level graphical representation of the overall Incident Management and Problem Management processes, which you saw in Chapter 5. Because Incident Management and Problem Management are integrated tightly, the steps in the middle of this graphic summarize what is included in the processing of these related messages.

![Inbound Channels: Application Incident Management](image-url)
On the left side are the various channels available for creating messages (*inbound channels*). As you can see in Figure 7.1, any of these channels will enable the service team member to receive the message and begin processing.

Organizations may choose to roll out one option or a blend of several inbound channels depending on their environment. First, we’ll describe the SAP frontend integration.

### 7.1.1 SAP Frontend Integration

SAP frontend integration has been an option available to the Service Desk functionality in SAP Solution Manager since its earliest releases. SAP Solution Manager 7.1 has offered the market a best-of-breed processing tool for managing incidents related to both SAP and non-SAP applications. The benefits of AIM in SAP Solution Manager are plenty, especially with the integration of SAP ITSM.

Integration directly into the SAP landscape could not be achieved by another tool. The functionality was impressive, available with minimal customizing, and consistently reliable.

Fast-forward roughly a decade, and this functionality is still available within the most current releases of SAP Solution Manager. Although there are other best-of-breed selling points with SAP ITSM, SAP frontend integration still proves to be one of the most significant benefits of selecting SAP Solution Manager as an organization’s single platform for processing messages in AIM.

### Overview

SAP frontend integration allows for the creation of messages from any SAP GUI system in the customer landscape. As shown in Figure 7.2, each SAP GUI system has the HELP • CREATE SUPPORT MESSAGE option accessible from the title bar.

![Figure 7.2 Create Support Message Help Option in SAP GUI](image)
SAP frontend integration allows users in any SAP application with the SAP GUI to have a standard channel to create incidents related to the specific screen in which the error occurs. SAP Solution Manager automatically captures system details in the background specific to the time the error was saved and sends those details to the central SAP Solution Manager system.

The message is routed to the appropriate support team based on the SAP component automatically picked up by the system. The system details captured are used to process the message.

In addition to SAP GUI, the following SAP frontends are supported and integrated with AIM in SAP Solution Manager:

- SAP NetWeaver Business Client (NWBC)
- SAP NetWeaver Portal
- SAP CRM Web Client

With the SAP frontend integration option, there are two different kinds of details that are collected at the time the message is created. The functional details include items such as short description and priority. Technical details include information regarding the system at the time the message is created. We'll explain these two areas in the next sections.

**Functional Information Captured**

First, we will show you how to enter the functional details for the SAP frontend integration.

When selecting the Create Support Message option, the user is prompted with the Create Message screen as shown in Figure 7.3. In this window, there are four fields to maintain and/or confirm before sending the message to SAP Solution Manager:

- **Component**
  
  The Component field is automatically determined based on the SAP application and transaction in which the user encounters the error. The component is used for classifying the incident as well as automatically determining the appropriate support team when it's sent to the SAP Solution Manager system (described in Chapter 9). The component dynamically changes for each screen.
The user may override/change the component prior to sending the message to SAP Solution Manager.

- **SHORT TEXT**
  The SHORT TEXT field is maintained by the user and should describe the error at a high level.

- **PRIORITY**
  The PRIORITY field defaults to the value Low. It can be updated by the user. The values and which value is set to default can be changed in Customizing (explained in Chapter 11).

- **LONG TEXT**
  The LONG TEXT field should be utilized to thoroughly document and describe the error. You can configure templates to efficiently organize the description. To do this, you must save a text file locally on your computer. The contents of this file will contain the headings, descriptions, etc. that make up the template. You can use the LOAD LOCAL FILE button ( ) to load the text file into the long description area of the message. The contents of the text file can then be further expanded directly within the message.

- Additionally, supporting documents can be attached by selecting the ADD FILE button ( ).
Technical Information Captured

Select the DISPLAY ENTIRE MESSAGE button ( 
) in the CREATE MESSAGE window to produce the DISPLAY ENTIRE MESSAGE screen as shown in Figure 7.4.

![Display Entire Message](image)

**Figure 7.4** Display Entire Message

In this window, you can observe all of the technical and system details that are captured at the time the message is created. The figure shows a handful of the many details that are captured by SAP Solution Manager. You can identify by the scroll bar that an immense amount of data related to the SAP application is captured. This information is automatically sent to the SAP Solution Manager system when the user is done filling out the functional details (e.g., SAP component, short text, etc.).

These details can help technical support teams understand the environment at the time the error occurred. Additionally, if the message must be forwarded to SAP Support, these details are also sent.

This is a significant benefit in that SAP Support often won’t have to reply (sometimes 24 hours later) with inquiries related to details that have been captured about the system.
Figure 7.5 is the result of the SAP frontend integration. By selecting the **System Data** button, located in the Text assignment block in the incident, you'll produce the technical details that were sent to the SAP Solution Manager system.

![Figure 7.5 System Data in Text Assignment Block](image)

**Note**

We'll describe the prerequisites and configuration settings required to enable SAP frontend integration in Chapter 11.

### 7.1.2 Web Self-Service: SAP CRM Web UI

The SAP CRM Web UI is a universal platform that isn't limited to just message processors and IT professionals seeking out reporting and analytics that are related to SAP ITSM processes. The SAP CRM Web UI can also be enabled to serve as an end-user self-service platform for users who leverage SAP Solution Manager exclusively for creating incidents.

Chapter 2 and Chapter 3 covered the SAP CRM Web UI in detail. Refer to Chapter 2 for details on how to navigate to the SAP CRM Web UI. Refer to Chapter 3 for setup, Customizing, and security specifics. The objective of this section is to identify the SAP CRM Web UI as an inbound channel for creating incidents in SAP Solution Manager.
Business Role for Requester

A standard business role is delivered by SAP Solution Manager specifically for the purpose of an end-user self-service platform. Business role SOLMANREQU provides a slimmed down view of the SAP CRM Web UI, with the objective of providing end users basic and specific tasks related to requesting/creating messages.

Figure 7.6 shows what end users who have been assigned the SOLMANREQU business role will see when they first log on to the ITSM Home Page.

This business role can be customized further depending on the IT organization's requirements. Just as we pointed out in Chapter 3, you should create a copy of the standard business role into your own customer namespace (e.g., ZSOLMANREQU). Furthermore, the associated authorization role SAP_CRM_UIU_SRQM_REQUESTER should also be copied into the customer namespace prior to being assigned to the end users.

The SOLMANREQU business role provides a guided procedure that offers a limited number steps and an easy to follow method for creating incidents. Figure 7.7 provides an example of the view which the requesters see when they create an incident with the SOLMANREQU business role assigned to them.

Note

This standard business role creates service requests only. To provide end users with an interface for creating incidents and problems only, follow our configuration example in Chapter 3, Section 3.4.5.
7.1.3 Web Self-Service: Work Center

The Work Centers, also described in Chapter 2, are another inbound channel for creating incidents to be received in SAP Solution Manager. This UI, shown in Figure 7.8, provides end users with a role-based platform to perform user-specific activities. Functions within the Work Center are preconfigured to enable the following activities to be performed:

- Search queries definition
- Status reporting
- Watch list monitoring
- Preview incident details

After an incident is selected in the Work Center, the user is taken to the SAP CRM Web UI. Depending on their authorizations as a requestor, they may or may not have the ability to perform subsequent activities in the SAP CRM Web UI.
Channels for Creating and Resolving Incidents and Problems

7.1.4 Interaction Center

The *interaction center* is a multifunctional framework offered within SAP ITSM for support team members (specifically referred to as *IT Service Desk agents* in the interaction center) to perform all relevant functions related to a comprehensive and holistic service desk.

The interaction center is accessed by IT Service Desk agents who are assigned the IC_ITSDAGENT business role and corresponding Transaction PFCG role SAP_CRM_UIU_IC_ITSDAGENT in the SAP Solution Manager system.

The **interaction center**, as shown in Figure 7.9, has a direct integration with SAP Solution Manager’s AIM scenario to perform all activities related to processing messages. The interaction center isn’t required, but it’s available if IT organizations are already using or want to expand on their current SAP ITSM processes.

7.1.5 Email

Within the interaction center, you have the option to generate an incident or problem based on an email. The Email Response Management System (ERMS) in the interaction center allows the automatic creation of incidents and problems based on the details within an email.
As shown in Figure 7.10, you also have the ability to automatically link reply text from the email to the problem in SAP Solution Manager.

Figure 7.9  Interaction Center

Figure 7.10  Responding to a Problem from the Email Response Management System
In this section, we’ll provide configuration steps for areas that are referred to as extended configuration in the SAP Solution Manager IMG. Extended configuration refers to functionalities that support the management, control, and logistics of transport requests and their associated objects (most commonly).

15.7.1 Overview

The extended configuration setup activities are located in its own Extended Configuration node in the SAP Solution Manager IMG as shown in Figure 15.79.

Figure 15.79  Extended Configuration Setup Activities
For the purposes of our discussions regarding ChaRM, we’ll provide the configuration setup activities for the following activities:

- Critical transport objects
- Activating cross-system object lock (CSOL) and downgrade protection
- ChaRM reporting service
- Transport request import strategy

15.7.2 Critical Transport Objects

Critical objects require a special approval before they can be modified by a developer. The Critical Object Check tool in ChaRM has the ability to collect and define any number of objects that are deemed critical either by the enterprise, business unit, IT organization, or others.

Operational Use

If a developer tries to modify an object that is specified as “critical” in the central SAP Solution Manager system, a warning is issued, and a separate approval process must be met before the developer can move forward. The approval must occur before the critical objects can be imported into the target system(s).

In this section, we’ll show you how to activate/deactivate export checks for critical objects across the managed development systems in your landscape. We’ll also show you how to maintain critical object specifications.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to Chapter 13 for a detailed explanation of the Critical Object Check functionality.</td>
</tr>
</tbody>
</table>

Configuration Activities

1. Execute the IMG activity Specify Critical Transport Objects.

2. Select the Critical Objects tab. Each managed development system connected to the SAP Solution Manager system will be represented in the Critical Objects tab (Figure 15.80).

3. Flag the managed development system(s) that should be activated for the Critical Objects Check functionality in the Status column.
4. In the **Activate a System** information window, click **Yes** to confirm your selection (Figure 15.81).

5. In the right side of the window, click the **Create** button ( ) to maintain critical objects for the activated managed development system (Figure 15.82). You’ll notice that in the **Object Type** field, you can toggle between the critical objects maintained for customizing entries as workbench entries.

6. Maintain the specifications of the critical objects (Figure 15.83).

---

**Figure 15.80** Activate Critical Objects

**Figure 15.81** Confirm Activation

**Figure 15.82** Maintain Critical Objects

After clicking the **Create** button, the **Critical Objects** specifications window will appear as shown in Figure 15.83.
7. Click Save.

You’ll be returned to the MAINTAIN CRITICAL OBJECTS screen, where you’ll now be able to identify all of the critical objects specified for both Customizing and workbench objects according to each managed system. Figure 15.84 provides an example of critical objects that are currently specified in the SAP Solution Manager system.

Figure 15.83  Maintain Critical Objects Specifications

Note

For our example, we’re maintaining critical objects for Customizing (client-specific objects). For these objects, entries must be maintained in the MASTER TYPE and MASTER NAME fields.

For workbench objects (cross-client objects), the PROGRAM ID, OBJECT TYPE, and TABLE NAME fields are mandatory. Subobjects can be specified by using type LIMU. The export check for modifications can be activated by using the Report /TMWFLOW/CONFIG_SERVICES.

Figure 15.84  Critical Objects Maintained
**Expected Result(s)**

If a developer tries to export a change to the quality assurance system (e.g., by selecting the ACTION • PASS CHANGE TO Test), and the object is flagged as critical in the SAP Solution Manager, he will receive the following error and warning messages from in the change document (Figure 15.85).

![Urgent Change: 8000009846, Critical Objects Demo](image)

**Figure 15.85** Result of Critical Object Check

A change approver, or support staff member with appropriate authorizations, will need to process the critical object. Processing the critical object means that it goes through a separate approval procedure. If approved, the associated transport request can move to the quality assurance system.

**Note**

Refer to Chapter 14 for additional details on the processing and handling of change documents that contain transport requests with critical objects.

**15.7.3 Activate Cross-System Object Lock and Downgrade Protection**

Cross-system object lock and Downgrade Protection provide capabilities to proactively identify, monitor, and mitigate collisions that occur among transport request objects.

**Operational Use**

Cross-system object lock (CSOL) is a tool that provides the ability to identify conflicts between objects in transport requests that have the same production system (or client) as their transport target. When activated, the CSOL creates locks that are held in the SAP Solution Manager system for any object (workbench and Customizing) that is changed in the managed development system. Depending on the conflict scenario, a developer who needs to make changes to this object in another transport request is prevented from doing so until the lock is released.
The lock is released when the transport request is successfully promoted to the production system.

**Note**
For a detailed overview of the CSOL functionality, refer to Chapter 14.

**Configuration Activities**

1. Execute the IMG activity **Configure and Activate Cross-System Object Lock**.
2. Double-click the activity **Activate Cross-System Object Lock in Managed Systems** (Figure 15.86).

![Figure 15.86 Activate Cross-System Object Lock in Managed Systems](image)

3. In the **System Change Options** tab, expand a development system in the **Systems of Project** column (Figure 15.87).
4. In the **Cross-Sys. Obj. Lock** column, double-click the text that reads **inactive** for each development client that should be controlled by CSOL.

![Figure 15.87 Activate Cross-System Object Lock for Development Client](image)

5. In the resulting information box, confirm your selection by clicking **Yes** (Figure 15.88).
The text in the CROSS SYS. OBJ. LOCK column will be updated to read ACTIVE, for each development client modified to have this setting (Figure 15.89).

6. Click the BACK button to return to the CHOOSE ACTIVITY screen.

7. Double-click the option GLOBALLY ACTIVATE CROSS-SYSTEM OBJECT LOCK AND DOWNGRADE PROTECTION (Figure 15.90).

8. Select the radio button for CROSS-SYSTEM OBJECT LOCK ACTIVE (Figure 15.91).

9. In the CROSS-SYSTEM OBJECT LOCK DETAIL CONFIGURATION area, specify whether the DEFAULT or EXPERT configuration mode should be enabled for the CSOL settings.

Figure 15.91 provides an example of the default value selected.
Figure 15.91 Default Configuration Mode

Figure 15.92 provides an example of the **Expert Mode** configuration selected with the various conflict scenarios that can be chosen.

**Expected Result(s)**

If a developer attempts to modify a transport object in a development client that is activated by CSOL, he will receive errors or warnings depending on how the CSOL was enabled. When the developer attempts to collect and save these objects in a transport request, he will be presented with an error or warning as shown in Figure 15.93.
15.7.4 Change Request Management Reporting Service

The ChaRM reporting service must be activated if the tracking functionality is used to report on transport objects fetched from the managed development systems.

Operational Use

Reporting data that's related to a project can be automatically fetched by the background job. However, objects that were transported in transport requests can't be reported on unless the object reporting is activated.

In this section, we'll show you the brief activation steps to enable the object reporting for ChaRM tracking. As a reference, the ChaRM tracking report can be accessed via Transaction /TMWFLOW/TRMO. Refer to Chapter 18 for more details about this report.

Configuration Activities

1. Execute IMG activity Configure Change Request Management Reporting Service (or Transaction SE38, alternatively).
2. Enter the PROGRAM “/TMWFLOW/CONFIG_SERVICES” as shown in Figure 15.94.
3. Click **EXECUTE**.

4. In the **CHANGE MANAGEMENT SERVICES** screen, select the radio button next to the **OBJECT REPORTING ACTIVE** option (Figure 15.95).

5. Click **SAVE**.

**Expected Result(s)**

In the ChaRM tracking report, transport objects from the managed systems are fetched successfully when the object reporting is activated. Figure 15.96 provides an example of the results of this report.
15.7.5 Transport Request Import Strategy (Status-Dependent Imports)

With the release of SAP Solution Manager 7.1, you can now control the import strategy of the transport requests controlled by Change Request Management based on the status of the change document.

Operational Use

Background jobs that trigger the import of transport requests are concerned only that the transport request has been released and is awaiting import in the transport buffer. However, there are certain change document status values that are set after the transport request has been released but before it's intended to be imported into production. From an operational point of view, the change and release managers don’t necessarily want it to go to production just yet. Unfortunately, the status in the change document doesn’t prevent this unless you specify the transport request import strategy as we describe here.

With this functionality, changes will be imported into the production system based on their status value and not based solely on whether they are in the production buffer. This can invite risk for urgent change documents, especially because import jobs that run periodically would pick up urgent changes that are in the SUCCESSFULLY TESTED status.

In this use-case example, we’ll configure the transport request import strategy so that the transport request in an urgent change can’t be promoted to the production system unless the urgent change status reaches the AUTHORIZED FOR IMPORT status.

Configuration Activities

1. Execute the IMG activity SPECIFY TRANSPORT REQUEST IMPORT STRATEGY.
2. Select the NEW ENTRIES button.
3. Maintain the information in the IMPORT STRATEGY table as shown in Figure 15.97.
4. Click SAVE.
5. Highlight the entry you just created in the IMPORT STRATEGY table, and double-click the IMPORT STATUS DEPENDENT folder on the left side of the screen.
6. In the Change View “IMPORT STATUS DEPENDENT”: Overview screen, click the New Entries button.

7. In the IMPORT STATUS DEPENDENT table, make the relevant changes so that the appropriate transaction type, status profile, and status are maintained (Figure 15.98).

8. Click Save.

Expected Result(s)

When a periodic import job is run that imports released transports into the quality assurance system, transport requests associated with urgent changes can't be picked up by the import job unless the status is set to AUTHORIZED FOR PRODUCTION.

Keep in mind that this example is only to show you the benefit of the functionality and how to enable it for your customer transaction types. Each organization may or may not have a requirement that involves the maintenance of an import strategy that is dependent on status values. If no settings are made in these tables, all released transport requests for change documents will be imported if they are in the buffer when the import job runs, regardless of their document status.
must monitor and track how each service team (e.g., Level 1, Level 2, development teams, configuration teams, etc.) are performing. They service lead tracks this information in an effort to support and maintain Service Level Agreements (SLAs). Further, it’s the service lead’s responsibility to leverage the data and information extracted from SAP Solution Manager to identify areas of improvement.

▶ Team lead
The team lead (or team manager) is responsible for each service team in the IT organization. The team leads analyze the data collected in the SAP Solution Manager to monitor and track the performance of their individual teams. Time spent working on tickets, average workloads assigned to their support staff team members, and overall performance of each team member are all examples of information that team leads extract from the reports offered from SAP Solution Manager.

▶ Support Staff
The support staff (i.e., message processors, developers, technicians, etc.) have a personalized view of their own work, based on criteria that works best for them. The support staff can leverage the interactive search and monitoring analytics capabilities to determine their daily tasks and open items. They have the ability to view this information in a highly personalized format with an option to export the data to a spreadsheet or view it in pie or graph formats.

In the next section, we’ll begin presenting the reporting capabilities provided by SAP Solution Manager to support SAP ITSM analysis.

17.2  SAP IT Service Management Analytics Capabilities

In this section, we’ll discuss the options available for searching, monitoring, and reporting on service transactions across SAP ITSM. These capabilities are typically used by support staff members who must quickly search for and monitor service transactions for which they are responsible. These capabilities are delivered standard (with no setup required) and executable directly from the SAP CRM Web UI.

17.2.1 Search and Monitoring
SAP Solution Manager 7.1 provides powerful search and monitoring capabilities that benefit service leads, team leads, and support staff members who actively
view and work on tickets. With the search features, support personnel have quick access to their teams' tickets and their individual tickets. These searches can be saved as a “My Saved Search” for efficient, personalized monitoring.

You can initiate the search from the SAP SOLUTION MANAGER IT SERVICE MANAGEMENT home screen by selecting any of the processes from the navigation pane. Figure 17.1 provides an example of initiating the search for incidents.

![SAP Solution Manager IT Service Management home screen](image)

**Figure 17.1** Search for Incidents

Depending on which service transaction you're searching on, a resulting search screen will appear. For our example (Figure 17.2), the SEARCH: INCIDENTS screen appears.

From this screen, the user has the following options available for locating various problems, service requests, and incidents.

**Search Criteria**

Entering the search criteria is the first step to locate incidents. Figure 17.3 provides an image that narrows into the section of the screen where various search categories, operators, and category values are entered to initiate a search.
In the Search Criteria area of the Search screen, the user can enter one or many selection criteria to narrow down (or broaden) their search. They can specify the “operator” as well (e.g., IS, IS NOT, IS BETWEEN, IS EARLIER THAN, etc.). Each operator value will depend on the search criteria selected. For example, if Created On is selected as criteria, then the operator values will be IS, IS BETWEEN, IS EARLIER THAN, IS ON OR EARLIER THAN, IS ON OR LATER THAN, and IS LATER THAN. However, if the selection criteria is Incident ID, the operator values will be IS, CONTAINS, or STARTS WITH.

When the user enters the resulting values for the selection criteria, several formats are available depending on the category selected. For example, Incident ID will be a free-form field, Status will be a dropdown field, and the Created On category will provide a calendar look-up. Input helps are also used to enable lookups (e.g., for searching for business partners).

The Copy Line and Remove Line buttons (++) allow the user to add additional rows or delete them in case of an error when inputting the search criteria.
The maximum number of results can be increased or decreased as well. Further, the hide search fields link can improve the search feature by maximizing space in the screen.

Saved Search

The saved search capability allows end users to create personalized, quick-access search queries for various service transactions. For example, developers may want to view change documents that are in the status In Development while testers may want a search query set up to view change documents that are in the status To Be Tested. Change approvers would want to see all requests for change that are in status To Be Approved, and IT operators would want to see those that are in status Approved For Production Import. Of course, all of these search capabilities can be tailored down by a number of various search categories and provide these capabilities across all SAP ITSM functions.

The search can be saved by clicking the save button as shown in Figure 17.4 after entering the search criteria. The saved search is local to each user and defined based on the user's requirements for viewing various information.

![Figure 17.4 Create Saved Search](image)

The saved searches appear in the top-right corner of the SAP CRM Web UI. As shown in Figure 17.5, you can quickly access the saved searches by selecting them from a dropdown. The delete button removes the saved search.

![Figure 17.5 Select/Delete Saved Search](image)

A link for the saved searches also appears on the home screen in the SAP CRM Web UI in the My Saved Searches work center (Figure 17.6).
Personalize Search Criteria View

By selecting the PERSONALIZE button ( ), you can specify the columns you want to view when searching for various service transactions. If there are many search results, this option enables you to determine if the results should be available in a scrolling and/or paging view. The number of visible rows before scrolling and number of rows before paging can also be personalized by the end user. Figure 17.7 provides an image of the PERSONALIZATION web dialog screen, which appears when the user clicks the PERSONALIZE button.
As shown in Figure 17.8, the user also has the option to drag and drop each of the columns to change the order of how the search criteria is displayed.

**Figure 17.8** Drag-and-Drop Capability

### Export Report to Microsoft Excel

The Export to Spreadsheet button ( ) allows the user to export the data provided by the search to a Microsoft Excel spreadsheet. This is a basic export that only populates the spreadsheet’s cells with the data, without any formatting provided. Exports of the data into spreadsheet format allow for the post-processing of information by the user. For example, follow-ups can be sent to the support staff for incidents that have exceeded the maximum processing time based on SLAs. Figure 17.9 provides an example of a search that was exported to Excel.

**Figure 17.9** Export to Excel

### Graphical Representation

Graphical representation of the search results are available in the form of bar charts and pie charts in the Search screen. Selecting the Open Chart button ( )
will expand the **SEARCH** screen to include a chart area toward the bottom of the screen. In this area, you can select the data and the type of chart to be displayed (pie or bar), as well as increase/decrease the size of the chart. Figure 17.10 shows a pie chart that visually displays the priority values of the selected incidents.

![Pie Chart](image)

**Figure 17.10** Pie Chart

A color-coded legend will display at the bottom of the screen, indicating which sections of the chart are what in regards to the criteria. You can also hover over each section of the chart with your mouse, and the search criteria, number, and percentage will appear.

Figure 17.11 shows the same data, but in a bar chart format.

![Bar Chart](image)

**Figure 17.11** Bar Chart
Other Search and Monitoring Features

In addition to the core search and monitoring features just described, there are a few other helpful functionalities in the SAP CRM Web UI that help the support staff quickly search and monitor tickets that they are assigned to, or have an interest in.

- **Worklist**
  Support staff are typically most concerned with viewing their own tickets. For this reason, SAP Solution Manager provides a worklist in the SAP CRM Web UI.

  The user’s worklist (Figure 17.12) is a work center that is available from the navigation pane in the SAP ITSM SAP CRM Web UI. The worklist provides a standard search of the transactions belonging to the user. **Belonging** refers to tickets that are both assigned to and opened by a particular user. The search criteria is also provided in the worklist to filter the various results to a more detailed level.

![Figure 17.12 Worklist](image_url)

- **Favorites**
  Support staff can select the **ADD TO FAVORITES** button (⭐) from any service transaction. The incident (for example) now appears in a **FAVORITES** menu on the home screen (Figure 17.13). This is helpful for support staff members who are working on incidents that are taking a long time to resolve. IT operators also typically flag maintenance cycles as favorites if they need to access the maintenance cycle on a weekly basis for production imports.
The My Sharebox feature (Figure 17.14) allows support staff to share various items (e.g., favorites, saved searches, or reports) with other support staff members.

In the next section, we'll cover the other key component in the SAP ITSM analytics area: interactive reporting.
Interactive reporting is made up of a class of programs that provides the ability to facilitate and manage transaction-oriented applications. The technical process of facilitating and managing these applications is generally performed for data entry and retrieval transaction processing. With interactive reporting, the report is generated directly from the data of transaction-oriented applications.

An SAP Solution Manager administrator, or someone in charge of analytics in the IT service organization, has the ability to generate interactive reports based on input from the service lead or team leads. The generation of the reports takes place in the SAP CRM Web UI in a guided procedure/wizard. Interactive reports are generated on an individual basis from the wizard and then published (or shared) to the relevant parties from the SAP Solution Manager system.

Figure 17.16 is an example of an interactive report at its initial generation in the wizard in the SAP CRM Web UI of the SAP Solution Manager system. In this wizard, you enter selection criteria in various dropdown selections, tables, fields, and key figures. The data used in the wizard is specific to a single report and represents the information about the service transactions that are being monitored.

Figure 17.16 Create Interactive Report: Wizard

Interactive reports are presented in real time, allowing members of the support organization to have up-to-date and transparent views of the data across the SAP ITSM processes. These interactive reports are available for monitoring information across problem messages, incidents, requests for change, and other SAP
ITSM areas. The following list identifies a few examples of how interactive monitoring can provide information to be shared across the support personnel:

- Number of tickets in process
- Number of incidents that have been raised to request for change
- Closure rate
- Number of service transactions inside or outside the agreed service levels
- Average work and total duration

Figure 17.17 provides an example of a published interactive report. In addition to the information and data represented in numbers, percentages can be provided as well.

![Published Interactive Report](image)

**Figure 17.17 Published Interactive Report**

In the next section, we’ll provide an overview of the SAP Solution Manager plus SAP NetWeaver BW capabilities available to support SAP ITSM analytics.

### 17.3 SAP Solution Manager with SAP NetWeaver BW

In this section, we’ll provide an overview of how the SAP NetWeaver BW reporting infrastructure is used to support reporting and analytics across SAP ITSM functions. Predefined KPIs that are based on BI technology are used to deploy...
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