Tips to Exploit New ChaRM Capabilities:
Lessons from an SAP Solution Manager 7.1 Ramp-Up Company

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Learning Points

- Discuss SAP Application Lifecycle Management (ALM) and how it is now integrated with IT Service Management (ITSM)
- Provide highlights of how SAP Solution Manager 7.1 has been significantly enhanced over previous releases
- Share lessons learned and first impressions as a ramp-up partner and SAP Solution Manager experts
- Tour the all new SAP Solution Manager Web UI
- Present 10 brand new features delivered with Change Request Management 7.1
Agenda

- Highlights of SAP Solution Manager 7.1
- Overview of Change Control Management
- Lessons learned with the new Change Control
- A Tour of the CRM Web Client UI Framework
- What’s new? 10 all new features delivered with ChaRM 7.1
- Conclusion and Q&A
Application Lifecycle Management from SAP

- Provide processes, tools, services, and an organizational model to manage SAP and non-SAP solutions throughout the complete application life cycle
- Complete life cycle application management processes
  - Leverage best practice processes
- SAP Solution Manager application management solution and integrated SAP and third-party management tools
  - Optimize your tool portfolio
- Support and consulting services
  - Gain access to expert knowledge, educational services
  - Empower your workforce
- Organizational aspects
  - Utilize best-practice methodology, organizational model, and standards
SAP’s Application Lifecycle Management (ALM)

**Upgrade Management**
- Comprehensive project support release transitions

**Landscape Transformation**
- Management of business and IT-driven changes in SAP solution landscapes

**Maintenance Management**
- Management of corrective software packages, reduction of waste in custom code

**Business Process Operations**
- Help ensure business continuity
- Provide business KPIs
- Business process benchmarking

**Technical Operations**
- Central monitoring and alerting infrastructure
- Unique end-user experience monitoring
- Central administration tools

**Application Incident Management**
- Integrated service desk
- Involvement of partners in problem resolution
- Root-cause analysis for complex landscapes with diverse technology stacks

**Solution Documentation**
- Central documentation of processes, system landscape, custom code, partner applications and more

**Solution Implementation**
- Discover and realize enhanced business functionality
- Avoid disruption of business

**Template Management**
- Standardize configuration across multiple projects

**Test Management**
- Change impact analysis
- Complete test management

**Change Control Management**
- Integrated quality management
- Synchronized transports of various components
- Controlled and documented adjustment of business processes and Approval process

**Real Experience. Real Advantage.**
SAP Solution Manager 7.1 Highlights

- Integration – IT Service Management based on SAP CRM 7.01 EhP1
  - ITIL-aligned IT Service Management and ALM Processes
  - Easy extension to CRM capabilities, aligned with the release strategy of SAP Business Suite
- Ease of use – simplified user interface
  - Fully Work Center Enabled
  - Change and Incident Management: Complete Web-based user interface
  - Test Management: New intuitive user interface for Tester Worklist
  - Enhanced Business Blueprinting: Easily blueprint your solution with one Business Process Modeling Notation (BPMN) compliant tool
SAP Solution Manager 7.1 Highlights (cont.)

- **Efficiency – New Monitoring and Alerting Infrastructure**
  - Avoid alert flooding with one central infrastructure and correction/aggregation of alerts
  - Minimize TCO and “Run SAP Like a Factory” with a minimum of FTEs

- **Openness – Seamless integration with non-SAP technologies**
  - Test Management: IBM Rational, Worksoft, as well as HP Quality Center
  - Incident Management: HP Service Manager, IBM Tivoli, REALTECH Infrastructure Management
  - Solution Documentation: IBIS Content Integration to enhance usage analysis

- **Scope – Extended usage rights**
  - Single point of contact to cover the IT Service Management
Integrating ALM and ITSM

- SAP Solution Manager 7.1 covers all aspects of IT Service Management as well as Application Lifecycle Management

<table>
<thead>
<tr>
<th>Why SAP?</th>
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<tbody>
<tr>
<td>Single platform to support service processes</td>
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<tr>
<td>Integration into SAP and non-SAP applications</td>
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<tr>
<td>Flexible, intuitive Web use interface</td>
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<tr>
<td>Computer telephony integration</td>
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<td>Openness to third-party tools</td>
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<td>Core instance for SAP’s business IT solution</td>
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Change Control Management in 7.1

- Change Request Management
  - User Interface
  - Request for Change
  - Change Documents
  - Projects
  - Retrofit
  - Critical Objects
  - Cross System Object Lock (CSOL)
- Quality Gate Management
- Enhanced Change and Transport System
- Change Diagnostics and Configuration Validation
Most Significant Capabilities for ChaRM in 7.1

- New SAP CRM UI interface offers improved user acceptance
- Search capabilities have been extended
- Multiple approval procedures are supported
- Change Requests (now called Requests for Change) can contain multiple scope items
- Message templates for quick reuse
- SAP ALM Integration
- Transparent view between change documents and technical details
Most Significant Capabilities for ChaRM in 7.1 (cont.)

- Transports and associated tasks are linked within each change document
- Enhanced reporting
- Retrofit functionality has been enhanced to cover more object types
- Multilevel categorization supports full scale usage beyond just SAP components
If you are upgrading to SAP Solution Manager 7.1, you will need to transition from 7.0-based transaction types for SAP ALM processes.

SAP has included all new transaction types for use in SAP Solution Manager 7.1.

These transaction types, along with their enhanced functionality, are only offered through SAP CRM UI transaction processing.

<table>
<thead>
<tr>
<th>7.0</th>
<th>7.1</th>
<th>Description</th>
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<tbody>
<tr>
<td>SDCR</td>
<td>SMCR</td>
<td>Request for Change</td>
</tr>
<tr>
<td>SDMJ</td>
<td>SMMJ</td>
<td>Normal Change with TMS</td>
</tr>
<tr>
<td>SDHF</td>
<td>SMHF</td>
<td>Urgent Change with TMS</td>
</tr>
<tr>
<td>SDAD</td>
<td>SMAD</td>
<td>Administrative Change w/out TMS</td>
</tr>
<tr>
<td>SDDV</td>
<td>SMDV</td>
<td>For Impl., Tmpl. or Upgrade Projects</td>
</tr>
<tr>
<td>SDMM</td>
<td>SMMM</td>
<td>Alternative for Task List Variant SAP0</td>
</tr>
<tr>
<td>n/a</td>
<td>SMCG</td>
<td>Change of IT assets or legacy systems</td>
</tr>
<tr>
<td>n/a</td>
<td>SMQC</td>
<td>Quality Gate Change Management: Change</td>
</tr>
<tr>
<td>n/a</td>
<td>SMCT</td>
<td>Change Request Template</td>
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Lessons Learned with Change Control in 7.1

- Change Control Management in 7.1 – our thoughts

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<thead>
<tr>
<th>Functionality</th>
<th>Description</th>
<th>Significance</th>
</tr>
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<tr>
<td>Change requests and change documents</td>
<td>• Processing in the WebClient UI</td>
<td>![Green Circle]</td>
</tr>
<tr>
<td>Change request</td>
<td>• Create several change documents for a change request</td>
<td>![Green Circle]</td>
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- Change Document

  • New change document: General change
  • Transport Management assignment block: Work with transport requests and tasks in a change document
  • Landscape assignment block: Overview of the transport landscape for the change
  • Terminology changes:
    - Urgent correction (prev.) — Urgent change (new)
    - Normal correction (prev.) — Normal change (new)
    - Test message (prev.) — Error correction (new)
    - Administration message (prev.) — Administrative change (new)

![Green Circle] More Significant | ![White Circle] Less Significant
### Lessons Learned with Change Control in 7.1 (cont.)

#### Change Control Management in 7.1 – our thoughts (cont.)

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<tr>
<th>Functionality</th>
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<tbody>
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<td>Application log (transaction SLG1)</td>
<td>• Now available as the <em>Application Log</em> assignment block in change documents</td>
<td>More Significant</td>
</tr>
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Great Feature: Simple, Flexible Web User Interface

- Previous challenges
  - Yesterday’s SAP Solution Manager had mixed user acceptance
  - “Look and feel” could be perceived to be too closely related to the SAP GUI
  - System could be difficult to navigate by users

Real Experience. Real Advantage.

The 7.1 Challenge: Enhance SAP Solution Manager to be more attractive, even beyond SAP
Great Feature: Simple, Flexible Web User Interface (cont.)

- SAP Solution Manager 7.1 solution
  - A focus has been placed on promoting user acceptance, streamlined navigation, and improved access to information
  - An overhauled user interface is the result
  - Work centers remain an integral piece to executing SAP Solution Manager functions
SAP Solution Manager 7.1 CRM Web Client UI Framework

- The new Web UI is extended to support Change Control Management activities
- Broad personalization across all software areas allows the users to decide what works best for them
The Solution Manager IT Service Management Interface

- Leverages CRM UI
- Fields based on IT Service Management for processing Requests for Change and Change Documents
- Simple and flexible means to personalize according to user preference
7.1 Web UI Feature: Assignment Blocks

- Access multiple channels of information
  - Scope of change (Urgent, Normal, etc.)
  - Approval procedures, owners, status
  - Related knowledge articles and transactions
  - Attachments and notes
  - SAP ALM process integration
  - Related business processes
  - Dates and duration
  - Time recording
  - Organizational data
  - Change history and processing log
- Fully integrated with the Request for Change and change documents
Home Screen Personalization

Start collapsed or expanded

Choose which items should appear in the Home Page

Select Filter Options

Drag-and-Drop boxes

Real Experience. Real Advantage.
Personalize Favorites Folder

- Simplified, flexible, and personal way to manage your favorite items
- Significant improvement over prior Service Desk, which relied on variants and/or custom transactions
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1. Multilevel Categorization

- Requests for change and change documents are classified based upon multiple (up to four) levels of categories
- Supports a flexible design of categorization and robust reporting capabilities
- Create schemas specific to your requirements for tracking both SAP and non-SAP-related items
2. Change Request Scope Assignment Block

- Change Request Scope Assignment Block offers a significantly better way to classify follow-on documents.
- Classification is defined beyond just the change category.
  - Object ID
  - Installed Base
  - Business Partner
  - Transaction Type
  - Status

New Terminology: In 7.1, follow-on transaction types are defined as Change Categories. 7.0 defined them as Subjects.
3. Validate Change Request

- The Change Manager performs a validation on the Request for Change prior to its approval by the Change Advisory Board (CAB).
- This step validates that the Service Desk employee has entered information relating to a future change in the production system.
4. Multiple Approval Procedures

- Approval procedures control the approval process for each Request for Change.
- You may optionally define multiple approval procedures for various scenarios (each is defined individually).
- Approval procedures can be maintained manually or integrated into your ChaRM workflow.
4. Multiple Approval Procedures (cont.)

- Additionally, functionality is available for your procedures in the Approvals assignment block
  - Monitor approval steps and related information (business partner, status, comments, etc.)
  - Add approvers other than the change manager (defaulted)
  - Add or remove additional approval steps and approvers before the Request for Change is approved
5. Extending the Scope of a Change

- Multiple correction types can now be linked to a change request, extending the scope of a change.
- Huge benefit over prior version(s) of ChaRM, which allowed only a 1:1 scope assignment.
- The scope of a change request can be extended after it has been approved.

New Status: “In Implementation” after Change Request approved.
6. Test Workbench Integration

- Test Management assignment block links Test Plans and Test Packages from the Test Workbench into the Change document.

The Add button will prompt the search box.

Link Test Packages or Test Plans in the search box.
6. Test Workbench Integration (cont.)

- Add other Test Management data to fully take advantage of this integration

**Diagram:**
- Access Status Info System
- Launch Test Report
- Delete the relationship
- Launch Test Package
- Launch Test Plan
- View Status of Test Package
- View Status of Test Cases within Test Package
7. Manage General Changes

- Distinction between administrative and general changes in 7.1
  - Administrative: Non-transport-related change but still assigned to an iBase component (e.g., a change to a number range)
  - General: Non-transport-related change not connected to your landscape (e.g., adding a printer to your workstation)
- Good way to classify changes completely outside SAP, with no assignment to TMS or a Maintenance Project
8. Central Access to TMS Landscape Data

- Transport Management assignment block
  - Task details for all transport requests included in the change document
  - Access to transport request and task log details from the change document
  - Perform activities directly within ChaRM with one click
  - All information is updated and stored on the change document

- Landscape assignment block
  - Overview of all systems in change control process
  - Single click to log on to system
9. Enhanced Text Management

- Use text templates (local or global)
- Adjust amount of data in the text area
- Filter on text types

Before

Large view to Text Log
10. Knowledge Articles

- Follow up with change documents by creating Knowledge Articles
- Knowledge Articles can explain the reason and/or solution to the incident
- Knowledge Articles can help speed to resolution of “like” changes
10. Knowledge Articles (cont.)

- To streamline processing, knowledge articles can be linked to each Request for Change or change document.
- Knowledge articles with the same categorization as a change document can be proposed when choosing “Find Knowledge Articles”.
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Key Learnings

- With SAP Solution Manager 7.1, SAP shifted to an even more holistic approach of application lifecycle management
- Most transactions are fully Web-enabled
- Better user interface will speed up acceptance and adoption
- You need a solid strategy if you plan to upgrade from 7.0 to 7.1 with ChaRM already deployed
- Work centers are now replacing even more transactions
- You can now also manage non-SAP changes with new transaction types
- It is now much more difficult to make a business case for third-party Change, Release, and Transport Management tools
Thank you for participating.

Please remember to complete and return your evaluation form following this session.

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