How to Utilize Templates and Functionality Available in SAP Solution Manager to Ensure Project Governance

Marci Braybrooks, IBIS America
LEARNING POINTS

- Get an understanding of templates, projects, and solutions available in SAP Solution Manager that can be used to facilitate project governance and ensure compliance
- Explore how SAP Solution Manager 7.1 accelerators can be utilized to maintain a single source of truth
- Find out how to set up a global template to govern and communicate to distributed implementation teams
- See how you can utilize a maintenance project to capture and implement production support requirements for your solution
- Learn how to automate updates to solution documentation
- See how to communicate and document process change using compare and adjust functionality
WHAT WE’LL COVER

- Understanding projects, templates, and solutions
- Ensuring compliance with a global template
- Facilitating project governance using template management
- Rolling in at go-live with Compare and Adjust
- Wrap-up
• Understanding projects and solutions
  • Architecture of SAP Solution Manager
  • Re-using content to support your Application Lifecycle Management (ALM) processes
• Establishing a global template
Run SAP like a Factory

Application Lifecycle Management

Integration Validation

Source: SAP

ALM PROCESSES SUPPORTED BY SAP SOLUTION MANAGER

Incident, Problem & Request Management

Portfolio & Project Management

Business Process Operations

Solution Documentation & Implementation

Application Operations

Change, Test & Release Management

Maintenance Optimization & Security

Single Source of Truth

Run SAP like a Factory

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Upgrade Management
Identification, adaptation, and implementation of new and enhanced business and technical scenarios

Custom Code Management
Comprehensive insight on how companies can efficiently and effectively manage their home grown Custom Code

Maintenance Management
Software correction packages: from discovery and retrieval to test scope optimization, including optional automatic deployment into the production environment

Business Process Operations
Application-related operations topics needed to ensure the smooth and reliable flow of the business processes

Technical Operations
Monitoring, alerting, analysis, and administration of SAP solutions with end-to-end reporting functionality

Application Incident Management
Centralized incident and issue message processing on multiple organization levels. A communication channel for all relevant stakeholders of an incident

Solution Documentation
Process-oriented documentation of business processes and technical landscape

Solution Implementation
Identify, adapt and implement new and enhanced functionality. Technical installation can be managed separate from business innovation

Template Management
Provides tool-driven governance for customers with multi-site SAP installations to efficiently manage their business processes across geographical distances

Test Management
Supports the integration testing requirements, test scope, execution and results analysis

Change Control Management
Workflow-based management of changes with integrated project management, quality management, and synchronized deployment capabilities
SAP Solution Manager

“To-Be” Design
Future State

“As-Is” View
Current State

Single Source of Truth
Business Processes
Documentation
Systems

Process templates

SBX, DEV, QAS, Pre-PRD

SAP ERP
SAP CRM
SAP SCM
Non-SAP

PRD
Projects provide information about how business processes are going to be used in the future:

- Definition of business processes
- Configuration documentation
- Development
- Testing scripts, procedures
- Training materials

Solutions contain information about how business processes are currently used in a productive environment:

- Business process monitoring
- Technical monitoring
- System administration
- Error handling
- Analysis
<table>
<thead>
<tr>
<th>Project Type</th>
<th>Used for Objectives</th>
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<tbody>
<tr>
<td>Implementation Project</td>
<td>Implement business processes in an SAP landscape</td>
</tr>
<tr>
<td>Template Project</td>
<td>Template-driven implementation, such as roll out across organizational entities</td>
</tr>
<tr>
<td>Upgrade Project</td>
<td>Upgrade existing systems</td>
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<tr>
<td>Optimization Project</td>
<td>Optimize the flow of business processes or the use of a software solution</td>
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<tr>
<td>Safeguarding Project</td>
<td>Resolve a critical situation in the implementation or use of SAP</td>
</tr>
<tr>
<td>Maintenance Project</td>
<td>Maintain a solution</td>
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</tbody>
</table>
Same content (business process structure, documentation, transactions, objects) will be re-used, not only across project phases, but also between project types and solution(s).
### RE-USING CONTENT TO SUPPORT ALM PROCESSES (CONT’D)

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<td>Transactions</td>
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<td>Configuration/Development</td>
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<td>Test Cases</td>
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<td>E-Learning</td>
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<tr>
<td>Systems/ Servers</td>
<td>Logical Component</td>
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</tbody>
</table>

* Limited re-use of information

**Solution Documentation is Re-Used in ALM Processes**
ESTABLISHING A GLOBAL TEMPLATE

1. Create a template project
   • Manually by using Project Administration (SOLAR_PROJECT_ADMIN)
   • Automatically by copying an existing implementation project

2. Build the blueprint structure of the template project
   • Manually by selecting content from the SAP Business Process Repository (BPR)
   • Automatically by copying an existing implementation project
   • Manually by selecting content from a solution

3. Maintain the project using Project Administration
   • Select “Global Rollout Functionality is Active” indicator
   • Define one or more functional templates
   • Assign the functional templates at the Scenario level of the blueprint
4. Assign global attributes
5. Maintain the General Documentation tab*
6. Assign business configuration sets, if appropriate
7. If necessary, translate the template

* Maintain additional content for re-usability (development objects, test scripts, training materials)
- Plan and design global requirements
- Implement a pilot
- Roll out template

Select Roadmap for “Global ASAP Template” in Project Administration, Scope tab
Copy Project/Solution in Work Center Implementation/Upgrade

Select Source Project, enter Target Project ID, Title, and select Template Project.

Copy documents, retain title, status, and person responsible for original.
- Copy Projects using SOLAR_PROJECT_ADMIN
- Project → Copy

Enter Target Project ID, Title, and select Template Project
Copy documents, retain title, status, and person responsible for original
Structure can also be adopted from an existing solution

Use for functionality already implemented in production in a solution to establish the relationship for subsequent compare and adjust.
WHAT WE’LL COVER

- Understanding projects, templates, and solutions
- Ensuring compliance with a global template
- Facilitating project governance using template management
- Rolling in at go-live with Compare and Adjust
- Wrap-up
- Define functional templates for scope restriction
- Assign global attributes
- Maintain general documentation
- Implement Business Configuration Sets (BC Sets)
RESTRICTING SCOPE USING FUNCTIONAL TEMPLATES

- Maintain template project using SOLARPROJECT_ADMIN
- Create functional templates to package functionality for scope

Activate “Global Rollout Functionality”
Change visibility to make available to scope selection
ASSIGNING TEMPLATES TO SCENARIOS

- Access the Business Blueprint structure of the template project
- Select the functional templates to assign at the scenario level
A functional template:

- Can be assigned only at business scenario level
- Can be assigned to several business scenarios
- Can be used in several roll-out projects
- Must be manually versioned (i.e., there is no active versioning of functional templates available)
- Manage the changeability of the content
- Identify scenarios and processes of the global template according to the following global attributes:
  - Global
  - Standard Complete
  - Standard Partial
  - Harmonized
  - Local
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>Must be used “as is”</td>
<td>Operating concern</td>
</tr>
<tr>
<td>Standard Complete</td>
<td>Must be executed in the same way, local team may extend according to the standard</td>
<td>Pricing procedure</td>
</tr>
<tr>
<td>Standard Partial</td>
<td>Standard is defined, but localization is required</td>
<td>Sales order processing</td>
</tr>
<tr>
<td>Harmonized</td>
<td>No standard has been defined</td>
<td>New process introduced by local team</td>
</tr>
<tr>
<td>Local</td>
<td>Only locally defined</td>
<td>Nota Fiscal for Brazil</td>
</tr>
</tbody>
</table>
### Manage the changeability with respect to changes in the structure (e.g., scope)

<table>
<thead>
<tr>
<th>Global Attribute</th>
<th>Structure Change</th>
<th>Change Scope</th>
<th>Delete Structure Element</th>
<th>Insert Structure Element</th>
<th>Delete a Row in a Tab</th>
<th>Change Mode for Tabs (if BAdI active)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
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<tr>
<td>Standard Complete</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>☑</td>
</tr>
<tr>
<td>Standard Partial, Harmonized, Local</td>
<td>☑</td>
<td>☒</td>
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<td>☒</td>
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</tr>
</tbody>
</table>
Also, manage the changeability of documents assigned to the structure

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</thead>
<tbody>
<tr>
<td>Global</td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="true" alt="Copy" /></td>
<td><img src="true" alt="Force" /></td>
</tr>
<tr>
<td>Standard Complete</td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="true" alt="Copy" /></td>
<td><img src="true" alt="Copy" /></td>
<td><img src="true" alt="Force" /></td>
<td><img src="true" alt="Force" /></td>
</tr>
<tr>
<td>Standard Partial, Harmonized, Local</td>
<td><img src="true" alt="Copy" /></td>
<td><img src="true" alt="Copy" /></td>
<td><img src="true" alt="Copy" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
<td><img src="false" alt="No Change" /></td>
</tr>
</tbody>
</table>
The impact of global attributes on roll-out content can be changed using BAdI:
BADI_SA_DEFINE_GLOBAL_ATTR

You can create your own global attributes using the same BAdI

Availability of those attributes in SOLAR01 can be switched for the project in its administration (SOLAR_PROJECT_ADMIN)
Assigned on the Structure tab

- Use “Pass On Global Attribute” to assign quickly to all sub-nodes in a scenario or to all process steps in a business process
- Adjust exceptions to the assignment
- Communicate global design standards on the General Documentation tab
- Maintain additional content on tabs for re-usability, including development objects, test scripts, and training materials

The General Documentation tab can only be updated in a template project.
Customizing settings can be collected by processes into BC Sets

BC Set activation writes the values in the BC Set into the tables of the activation system

Use transaction:
- SCPR3 to create BC Set
- SCPR20 to activate
- **Standard**
  - Data is treated analogous to data in a transport request
- **Fixed (unchangeable)**
  - Certain customizing must not be changed by subsidiaries
  - This set of settings is defined by global headquarters
  - Subsidiaries cannot change these settings in local system (repairs are possible)
  - Fixed attribute is only active in activation system
- **Variable (value prompt)**
  - Org. units in global and local systems may differ
  - Option to change these values during activation
- **No copy option**
  - Select if a dedicated column should not be copied into the BC Set
  - This will delete the attribute icon and the column from display
WHAT WE’LL COVER

- Understanding projects, templates, and solutions
- Ensuring compliance with a global template
- Facilitating project governance using template management
- Rolling in at go-live with Compare and Adjust
- Wrap-up
- Create implementation projects for distributed teams
- Set up IMG projects
- Communicate changes to the project teams
- Create an implementation project for each roll-out team

- Access the Scope tab in Project Administration and select functional templates defined in the Template project

Functional templates defined and visible in the template project are accessible in the Scope tab.
Plan and implement local rollouts based upon the global template design

Select Roadmap for Global ASAP Rollout in Project Administration, Scope tab
- System landscape assignment is adopted from the scope template
- Use *Replace Log. Components* to adjust to the local landscape

If the logical component you want isn’t listed, select *All Logical Components*
- Set up the system landscape for the implementation project
- Create IMG projects in the managed systems to track changes against the implementation project
- Create IMG project views in the managed systems to control access to configuration
- Disable SPRO in the managed systems
Blueprint structure is adopted from the global template based on functional template selection (e.g., scope).

Blueprinting involves further scoping, but compliance to design standards will be managed by the global attribute.
Communicate template changes to the roll-out teams using Compare and Adjust functionality

- **SOLAR_PROJECT_ADMIN**: Go to → Compare and Adjust
- Or, run transaction SA_PROJECT_UPGRADE

Select changes to communicate based on tabs to be compared

Job is automatically scheduled in background.
▪ Roll-out project receives changes
▪ Compare and adjust to selectively accept changes
▪ Use Find Next for comparison differences
- Choose which adjustments to copy or select *Adjust All*
- You must select *Complete comparison* to remove the notification flag
- You can choose to complete the comparison without adjusting any content
- Force changes into a Target project (e.g., at start-up or go-live)
- Can be used to automatically send changes from the template without selective activation

![Diagram of project management system](image-url)

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Project Preparation

- Set up roll-out project framework
  - Create a local roll-out project (type: implementation)
  - Select one or more functional templates and related scenarios

Business Blueprint

- Scope and enhance global template
  - Adapt harmonized and local processes to local-specific requirements (e.g., enhance process scope)
  - Document local-specific requirements of harmonized/local processes

Realization

- Configure global and local requirements
  - Apply template-specific customizing for global processes
  - Perform final configuration via IMG activities based on local-specific requirements
  - Re-use master data samples, developments, test cases, training materials
  - Use as templates to adapt to local-specific requirements
WHAT WE’LL COVER

- Understanding projects, templates, and solutions
- Ensuring compliance with a global template
- Facilitating project governance using template management
- Rolling in at go-live with Compare and Adjust
- Wrap-up
- Maintain the solution during rollout using a maintenance project
- Manage template changes
- Create new template versions
- Create and assign a maintenance project to the solution (SOLMAN_DIRECTORY)
- With or without integration to change management (ChaRM)
- Check-out processes for maintenance
- Processes are available for change in the maintenance project
- Check in to go live
Roll in template requirements
• Feedback from local sites for improving and enhancing templates
  • Local sites give feedback on:
    • Template improvements (e.g., customer-specific enhancements to be implemented)
    • Template corrections

Create new template version
• Scope and enhance global template
  • Implement feedback from local sites
  • Adapt template to new or updated SAP solutions (new building blocks from process library) or new, customer-specific processes
    • Increment version before next version update
    • All versions are automatically archived
Roll in changes to the template and solution automatically using the Compare and Adjust functionality

- Select the template or solution
- Select comparison to successor project
- Select tabs for the comparison
- Job is automatically scheduled in background
Create a new version of the template functionality to incorporate changes introduced by the local rollout.

Increment version counter; initial visibility is private.
WHAT WE’LL COVER

- Understanding projects, templates, and solutions
- Ensuring compliance with a global template
- Facilitating project governance using template management
- Rolling in at go-live with Compare and Adjust
- Wrap-up
RESOURCES

- http://service.sap.com/alm-processes *
  - Follow Overview → Processes → Template Management
- http://service.sap.com/rkt-solman *
  - Select SAP Solution Manager 7.1 → Select the Learning Map for Template Management
- D. Russell Sloan, “Roll In Compare and Adjust 7.1 Enhancements to Your Global Template” (SAPexperts Solution Manager hub, April 2012).
  - SAP Community Network forum for SAP Solution Manager
  - Template translation

* Requires login credentials to the SAP Service Marketplace
BEST PRACTICES

- Use the SAP Roadmaps for Global Template Implementation and Rollout to support you
- Ensure compliance to Global Design Standards using the Global Attribute
- Drive quick, repeatable project implementations using the centralized template definition and rollout
- Compare and adjust to push content out to disparate teams and roll in updates to the template and solution at go-live
- Re-use functional templates and related contents to minimize your investment in redundant development (collateral material and technical development)
KEY LEARNINGS

- Projects and Solutions are fundamental to using SAP Solution Manager for Application Lifecycle Management
- A template project allows you to govern and communicate to distributed implementation teams
- Functional templates are used to bundle business processes and corresponding content for use by local roll-out teams
- Global attributes can be used to restrict scope changes and document changes during rollout
• BC Sets can be used to restrict implementation teams to a predefined configuration template during rollout
• A maintenance project is used to capture and implement production support requirements for your solution
• The Compare and Adjust functionality in SAP Solution Manager 7.1 provides bi-directional content adjustments for projects and solutions
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How to contact me: Marci Braybrooks braybrooks@ibisamerica.com
THANK YOU FOR PARTICIPATING

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