“ChaRM, CSOL and Incident in SAP Solution Manager 7.1”

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Introduction
SAP Solution Manager: Your IT Management Platform

IT Service Management
- Enhancement
- Service Request
  - Minor Release
  - Urgent Change
- Incident
- Problem
  - Request for Change

IT Portfolio and Project Management
- Business Requirement
- Portfolio
- Project
  - Change
    - Design Mgmt
    - Build Mgmt
    - Test Mgmt
    - Release & Deployment Mgmt
    - Build Execution
    - Test Execution
    - Deployment execution

Run SAP like a Factory
- Business Process Monitoring and Analytics
- Monitoring of Systems, Technical Scenarios and End User Experience

Build SAP like a Factory

Single Source of Truth
SAP Solution Manager verified for ITIL® Service Lifecycle

Service Strategy
- Service Portfolio Management
- Financial Mgmt. for IT Services

Service Transition
- Change Management
- Service Asset & Configuration Management
- Release & Deployment Mgmt.
- Knowledge Management

Service Operation
- Event Management
- Incident Management
- Request Fulfillment
- Problem Management

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Incident Management

ITIL Service Lifecycle Phase: Service Operations
SAP’s Best Practice Process for Incident Management

Process

Business User

Create IT message
Categorize IT Ticket with guided procedure
Send to IT Support
Receive incident
Search for solutions
Provide solution
Optional - Handover to Problem Mgmt.

1st Level

IT Support

Screens

Self Service UI
1st Level UI
Expert UI

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Incident Management is highly integrated with other processes
Change & Release Management

ITIL Service Lifecycle Phase: Service Transition
Change Control Management Portfolio in SAP Solution Manager

- Change Request Management
- Quality Gate Management
- Central Transport Management
- Retrofit
- Change Control Management
- Change and Transport system (SAP / Non SAP)
- Transport Analytics / Configuration Validation
Missing Release Management or Transport Strategy

Workload

Imports per hour [last six months]
How to Manage Changes in Complex Environments?
The Fight between Flexibility and Stability

**Business Unit**
- Fast reaction on business demands
- Less formalism and bureaucracy
- Less time to test
- Focus on own business

**IT**
- Solid operation
- Solid change management
- Only planned transports
- Only tested and approved changes into production

Flexibility vs. Stability
Challenges for Change & Release Management

Growing **complexity of IT infrastructure** leads to issues with changes in organization

Many **general issues with Changes** and their implementation in the company

**Organizational challenges** with existing Change Management processes
Key Benefits with Change Request Management

1. Best-Practice Processes
2. Risk Minimization
3. Integration in technical Tools
4. Better traceability of Changes
5. Easy Adoption and highly customizable
1 Best-Practice Processes
Separate Requests from Change Implementation & Deployment

**Process Layer:** Change & Release Management Process

1. **Request for Change**
2. **Change Document**
3. **Change Cycle**
Control impact: bundle changes for a joint-deployment

Change Request Management supports **Release Management** process – for better change deployment control and risk mitigation.

Individual request and implementation of Changes  
Release compilation via Change Cycle  
Joint Deployment
Maximize flexibility with Single Change Strategy

Possibility to manage **Independent Changes** if Release Management is not applicable for organization or IT

Individual request and implementation of Changes  Individual Deployment
Risk Minimization
Ensure authorization of Changes via Approval Procedures

**Avoid & reduce risk of un-authorized changes via Approvals**

Create Request for Change → Validate Request for Change → Approval → Implementation
Lower risk through consistent testing of Changes

Avoid surprises via built-in **4-eye principle** and integration with Test Management

as well as **Business Process Change Analyzer**
3 Integration in technical Tools
Change Request Management closes gaps between Processes and Technical Tools

**Process Layer:** Change & Release Management Process

- Create Request for Change
- Process Request for Change
- Handover to Execution
- Manage Change Execution
- Coordinate Release & Deployment
- Close Change

**Technical Layer:** Implementation / Execution of Changes
Major benefits through deep technical integration

1. Save time and money: less manual effort through integration
Increase working comfort with integrated functions

Manage **ABAP** and **Non-ABAP** technologies via CTS+

Create and Release **Transports** in direct context of Changes

Control technical Deployment via Workflow
Automatic tracking of transports and changes

Get rid of endless spreadsheets through automatic change tracking for easier Release deployment
The Three Step Approach for Retrofitting Transports

Minor Releases

1. Select Transport

2. Choose Method (based on conflict detection)

3. Do the Retrofit
   - Automatic
   - Tool Supported (Conflict Case)
   - Manual (Conflict Case)

Major Releases

- Development
- Quality Assurance 1
- Pre-Production
- Production
Synchronizing Maintenance and Innovation is an Issue

1) Start of Release Development
2) Issue in Production – Fix required
3) Perform Correction in Maintenance
4) Transport fix to Production
5) Synchronization issue in DEV
6) Manual check for conflict
   1) No conflict case: manual re-transport required
   2) Conflict case: manual resolution with high effort
7) Back to regular maintenance operations

Report XYZ

Version 1.1

High Synchronization Effort Required!

Version 1

Version 2.1

Version 2

Maintenance

Innovation
Synchronizing Maintenance and Innovation is an Issue

1) Start of Release Development
2) Issue in Production – Fix required
3) Perform Correction in Maintenance
4) Transport fix to Production
5) Synchronization issue in DEV

6) Automatic check for conflict
   1) No conflict case: no action required automatic transport
   2) Conflict case: easy resolution through tool support (e.g. split screen)

7) Back to regular maintenance operations

Retrofit fully automates 90% of synchronization tasks between tracks with Retrofit!
Major benefits through deep technical integration

1. Save time and money: less manual effort through integration

2. Ensure integrity and safety for your IT infrastructure
Ensure proper testing and reduced downtime

“Transport of Copies” is built-in into standard Change Request Management processes

Iterative testing: Possibility to test changes in QAS, without releasing original transports

Only original transport will be released - less transports for import mean less import times
Ensure integrity and safety for your IT infrastructure

Receive warnings **before creating potential downgrade situations** or creating a real downgrade!

1) Cross-System Object Lock (CSOL)

2) Downgrade Protection Checks
Keeping your landscape consistent with Downgrade Protection

- Protection at Change
- Protection at Release
- Protection at Import

1st Change of Object A  Release Object A V1  Import Object A V1
2nd Change of Object A  Release Object A V2  Import Object A V2
Major benefits through deep technical integration

1. Save time and money: **less manual effort** through integration

2. Ensure **integrity and safety** for your IT infrastructure

3. Get **more flexibility** without risking consistency
Flexibility for Managing Changes and Transports

Changes can be **reassigned** to another Change Request Management project

Transports can be **assigned** or **decoupled** from a Change Document
Flexibility when Importing Changes into Systems

Changes can be taken out of the Release and preliminary imported if required
Major benefits through deep technical integration

1. Save time and money: less manual effort through integration

2. Ensure integrity and safety for your IT infrastructure

3. Get more flexibility without risking consistency

4. Keep the overview and benefit from additional transparency
Keep the overview and benefit from additional transparency

Instantly see all related technical transports, tasks and information when checking the content of a change

![Diagram showing transport management and tasks](image-url)
Don’t loose the link between Process- and Technical-Layer

Track the status of the imports directly in the Change Documents

Get notifications about potential risks or transport errors

- Missing Transports
- Transport Errors
- Missing Synchronization
- Open Transports
4 Better traceability of Changes
Powerful monitoring and search functionality
Powerful reporting and analytics capabilities based on SAP BW

- Multiple Filter Values to redefine data
- Tabular Data
- Graphical representation of Data: Requests for Change by Status
5 Easy Adoption and highly customizable
Highly configurable according individual requirements

Entirely modular solution to ease adoption as much as possible

Many Customization and Configuration options to adapt to individual process requirements

Completely flexible User Interface for high end-user satisfaction
Lower TCO and get quicker ROI with Change Request Mgmt.

**No installation required** - mostly SAP Solution Manager is already part of IT landscape

Similar features as other tools plus **deep technical integration**

**Highly preconfigured:** best-practice processes from SAP for faster Return on Investment

**No additional license cost** – reduce longterm TCO
Change Control Management
The whole is more than the sum of its parts
More information needed?

Visit our **IT Service Management Wiki** in the SAP Community Network

- Presentations, Information, Demos around IT Service Management and Change Request Management
- Content is targeted and tailored for Managers, End-Users and Administrators

**Link:** [http://wiki.sdn.sap.com/wiki/display/SAPITSM](http://wiki.sdn.sap.com/wiki/display/SAPITSM)
Questions & Answers
Thank you

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Backup Slides

If more is needed….more is there 😊
Highlights of “Incident Management” within SAP Solution Manager

**Highlights**

- Multiple inbound channels
  - Web Self Service, Mobile app, SAP Frontend integration, Telephony integration, Email inbound
- Role specific pre-delivered UIs
- Workflow framework (escalations, notifications)
- Seamless integration in SAP Support process
- Related searches based on Categorization
- Flexible UI enhancements and personalization
- (Auto) Dispatch to Teams based on end user data or system data or categorization
- SAP authorization framework
- Out of the box Reporting & Dashboards
- Survey suite (e.g. for PCC) included

**Detailed information**

Documentation & Logs overcome risk of undocumented Changes

Keep Overview via **Detailed Logs** and **Change History**

![Screen shot of Detailed Logs and Change History](image_url)
System Landscape for End-to-End Integrated Service Management

SAP ERP*
Financial Management

Incident Management  Problem Management
Request Fulfillment  Change Management
Release & Deployment Management  Service Level Management
Service Asset & Configuration Mgmt.  IT Service Desk
Capacity Management  Service Portfolio Management
Availability Management  Event Management
Service Catalog Management  IT Service Continuity Mgmt.

SAP Solution Manager

* = separate license required
Supporting the Whole Customer Solution – E2E Support for SAP and non-SAP

Business Processes

IT Services

Applications

IT Infrastructure & End User Devices
Change Request Reporting & Tracking Functionalities

**Change Request Management - Reporting**

- **Which** change requests are in process/completed...?
- **How long** do change requests take to be completed?
- **Which** transports belong to which change request and vice versa?
- **What** is the current transport status (in which system)?
- **How many** change requests were declined?

**Change Request Management - Tracking**

- **Sequence Dependency** analysis: Find out about sequence violations of customizing and workbench requests.
- **Delta Analysis** for Change Request Management based transports and changes.

**BW Content** NEW