

SM255

Change Request Management with SAP Solution Manager 7.2 - Configuration

COURSE OUTLINE

Course Version: 20
Course Duration:

SAP Copyrights, Trademarks and Disclaimers

© 2021 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see <http://global12.sap.com/corporate-en/legal/copyright/index.epx> for additional trademark information and notices.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials may have been machine translated and may contain grammatical errors or inaccuracies.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

Contents

vii Course Overview

1 Unit 1: The SAP Solution Manager Concept

- 1 Lesson: Benefits of SAP Solution Manager
- 1 Lesson: Exploring User Interfaces and Authorization Concept for Change Request Management

3 Unit 2: Change Request Management - Overview

- 3 Lesson: Introducing Change Control Management
- 3 Lesson: Introducing Change Request Management

5 Unit 3: Basic Setup Steps for Change Request Management

- 5 Lesson: Explaining System Prerequisites for the Basic Configuration
- 5 Lesson: Explaining Basic Configuration Steps in the SAP Solution Manager System
- 5 Lesson: Explaining Basic Configuration Steps in the Managed Systems

7 Unit 4: Master Data for Change Request Management

- 7 Lesson: Creating Business Partners
- 7 Lesson: Using Installed Base Components for Change Request Management

9 Unit 5: The Use of the WebClient UI for Change Request Management

- 9 Lesson: Granting Authorizations to Employees
- 9 Lesson: Customizing the WebClient UI Framework
- 9 Lesson: Using Categories

11 Unit 6: Landscape Definition for Change Request Management

- 11 Lesson: Defining Solution, Branches, Change Control Landscapes and Logical Component Groups
- 11 Lesson: Change Cycles and Task Lists
- 11 Lesson: Introducing the Administration Cockpit
- 11 Lesson: Addendum: Enhanced Integration into Solution Documentation

13	Unit 7:	Change Request Management Processes
13		Lesson: Creating and Approving Requests for Change
13		Lesson: Processing Normal Changes
13		Lesson: Dealing with Urgent Changes
13		Lesson: Implementing Corrections During the Test Phase with Defect Corrections
13		Lesson: Implementing Administrative Changes
13		Lesson: Using Standard Changes
14		Lesson: Addendum - Documenting General Changes
15	Unit 8:	Change Request Management-Specific Customizing I
15		Lesson: Explaining the Idea of Transaction Types in Change Request Management
15		Lesson: Customizing the CRM Service Transaction
17	Unit 9:	Features of the Administration Cockpit: Task Lists and Monitoring Options
17		Lesson: Using Task Lists in Change Request Management
17		Lesson: Monitoring Change Request Management
19	Unit 10:	System Protection Against Downgrades
19		Lesson: Explaining Reasons for Downgrades
19		Lesson: Activating and Monitoring Cross-System Object Locks
19		Lesson: Explaining Downgrade Protection
21	Unit 11:	Retrofit
21		Lesson: Understanding Retrofit - The Basic Idea
21		Lesson: Configuring the System Landscape for Retrofit
21		Lesson: Performing a Retrofit
23	Unit 12:	Change Request Management-Specific Customizing II
23		Lesson: Copying and Changing Transaction Types in Change Request Management
23		Lesson: Customizing Multilevel Categorization in Change Request Management
23		Lesson: Customizing the Approval Procedure
23		Lesson: Explaining Preliminary Import and Selective / Status-Dependent Import of Transport Requests
25	Unit 13:	Addendum: Central Change and Transport System
25		Lesson: Addendum - The General Idea of the Central Change and Transport System

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Change Manager
- Technology Consultant
- System Administrator

Lesson 1: Benefits of SAP Solution Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Highlight the benefits from the integration of IT Service Management into Application Lifecycle Management

Lesson 2: Exploring User Interfaces and Authorization Concept for Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- List different user interfaces to be used with Change Request Management
- Outline the authorization concept for SAP Solution Manager

Lesson 1: Introducing Change Control Management

Lesson Objectives

After completing this lesson, you will be able to:

- List tools that SAP offers for Change Control Management and describe their use

Lesson 2: Introducing Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the process flow for SAP Solution Manager Change Request Management

Lesson 1: Explaining System Prerequisites for the Basic Configuration

Lesson Objectives

After completing this lesson, you will be able to:

- Prepare the SAP Solution Manager system for the basic configuration of the Change Request Management scenario

Lesson 2: Explaining Basic Configuration Steps in the SAP Solution Manager System

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the main steps that are needed to configure the SAP Solution Manager system for the Change Request Management scenario

Lesson 3: Explaining Basic Configuration Steps in the Managed Systems

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the main steps that are needed to configure the managed systems for the Change Request Management scenario

Lesson 1: Creating Business Partners

Lesson Objectives

After completing this lesson, you will be able to:

- Create business partners

Lesson 2: Using Installed Base Components for Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Create the Installed Base Components for Change Request Management

Lesson 1: Granting Authorizations to Employees

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the relationship between business roles and authorization roles

Lesson 2: Customizing the WebClient UI Framework

Lesson Objectives

After completing this lesson, you will be able to:

- Explain different personalization options for the WebClient UI
- Outline different configuration options for the WebClient UI

Lesson 3: Using Categories

Lesson Objectives

After completing this lesson, you will be able to:

- List usages of multilevel categorization in the context of Change Request Management

Lesson 1: Defining Solution, Branches, Change Control Landscapes and Logical Component Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the idea of branches and logical component groups

Lesson 2: Change Cycles and Task Lists

Lesson Objectives

After completing this lesson, you will be able to:

- Outline how the status of a change cycle controls the actions on transport requests

Lesson 3: Introducing the Administration Cockpit

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the use of the Administration Cockpit within Change Request Management

Lesson 4: Addendum: Enhanced Integration into Solution Documentation

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the integration of Change Request Management into Solution Documentation

Lesson 1: Creating and Approving Requests for Change

Lesson Objectives

After completing this lesson, you will be able to:

- Create and approve requests for change

Lesson 2: Processing Normal Changes

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the process flow for normal changes

Lesson 3: Dealing with Urgent Changes

Lesson Objectives

After completing this lesson, you will be able to:

- Process urgent changes

Lesson 4: Implementing Corrections During the Test Phase with Defect Corrections

Lesson Objectives

After completing this lesson, you will be able to:

- Implement corrections during the test phase

Lesson 5: Implementing Administrative Changes

Lesson Objectives

After completing this lesson, you will be able to:

- Implement administrative changes

Lesson 6: Using Standard Changes

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the process for standard changes

Lesson 7: Addendum - Documenting General Changes

Lesson Objectives

After completing this lesson, you will be able to:

- Document changes to non-SAP components with the help of Change Request Management and general changes

Lesson 1: Explaining the Idea of Transaction Types in Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the meaning of transaction types for Change Request Management

Lesson 2: Customizing the CRM Service Transaction

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the meaning of determination procedures and profiles that are assigned to transaction types for change transactions

Lesson 1: Using Task Lists in Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the structure of Task Lists

Lesson 2: Monitoring Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Evaluate the use of different Change Request Management reporting tools

Lesson 1: Explaining Reasons for Downgrades

Lesson Objectives

After completing this lesson, you will be able to:

- List reasons for downgrades
- Outline the idea of downgrade protection with SAP Solution Manager Change Request Management

Lesson 2: Activating and Monitoring Cross-System Object Locks

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the concept of Cross-System Object Locks

Lesson 3: Explaining Downgrade Protection

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the system landscape for the use of downgrade protection

Lesson 1: Understanding Retrofit - The Basic Idea

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the need for a retrofit

Lesson 2: Configuring the System Landscape for Retrofit

Lesson Objectives

After completing this lesson, you will be able to:

- Configure system landscapes for the use with retrofit

Lesson 3: Performing a Retrofit

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the process flow for retrofits

Lesson 1: Copying and Changing Transaction Types in Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Copy a transaction type into the customer namespace
- Adapt a transaction type by adding a new status to it

Lesson 2: Customizing Multilevel Categorization in Change Request Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to assign application areas to a categorization schema

Lesson 3: Customizing the Approval Procedure

Lesson Objectives

After completing this lesson, you will be able to:

- List the steps that are needed to customize the approval procedure for Change Request Management

Lesson 4: Explaining Preliminary Import and Selective / Status-Dependent Import of Transport Requests

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the process flow for the preliminary import of normal changes
- Outline the use of selective / status-dependent imports in Change Request Management

Lesson 1: Addendum - The General Idea of the Central Change and Transport System

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the general idea of central Change and Transport System
- Explain the terms transport collection and system cluster