Upgrade to SAP Solution Manager 7.2 – What will change? (ChaRM)

What will stay?
- Overall process and scenarios are kept stable
- User interface kept stable, only minor adjustments required
- Near zero impact for typical “ChaRM” end users

What will change?
- New user interface for task list (moved to ABAP WebDynpro)
- New process management capabilities replace SOLAR environment
- New change cycle types

Which features may reduce existing custom code?
- Release Management
- Enhanced Solution Document Integration (semi-automatic activation of updated content)
- Enhanced project management integration
- New admin cockpit (replaces several outdated GUI transactions)
- New transport related check framework
ChaRM – Preparation

**Change Request Management**
The master data concept for Change Request Management has changed significantly in SAP Solution Manager 7.2. Previously, change cycles, task lists, and change transactions were grouped by project. In SAP Solution Manager 7.2, they are grouped by change cycles.

You therefore need to activate all SAP Solution Manager 7.1 projects that use Change Request Management with an open change cycle and open task list for use in the new master data concept. To support this transition you need to perform content activation on all 7.1 projects that use Change Request Management with an open task list.

The supported types of change cycles also differ. SAP Solution Manager 7.1 supported maintenance cycles (SMMM and SMMN) and project cycles (SMDV). In release 7.2, these are replaced by continual cycles (SMAI), phase cycles (SMIM), and release cycles (SMRE). Release cycles support release management.

We recommend to close all requests for change and all change documents in SAP Solution Manager 7.1, which are assigned to a SAP Solution Manager 7.1 project, which you will not use in SAP Solution Manager 7.2 anymore. Such non-activated change documents and requests for change are read-only in the CRM UI in SAP Solution Manager 7.2 and can only be changed into a final status using the report SOCM_CRM_SERVICE_REPORT.
Going to SAP Solution Manager 7.2 – Required Post-Upgrade Work

Automatic Steps
- As part of the content activation data persistency is managed automatically
- New change cycles will automatically be created and replace existing (unfinished) Change Cycles
- All references are automatically updated and refreshed

Manual Steps
- Update and check of existing custom implementations: Interfaces to SOLAR environment
- Update of customer specific user interface configuration required; replace former project/solution fields with new delivered attributes, or copy the SAP standard user interface configuration again to customer specific user interface configuration and adjust manually.
- End-User education – mostly for change managers, administrators and release managers
Content activation is split in two major parts:
A: Define scope (pre-upgrade)

B: Content activation (post-upgrade)

In part A customers select which SOLAR projects shall be considered for the migration

Change Request Management migration **ONLY** considers projects with active cycles and task lists
Step 1: Get started

Part B is a guided procedure which is split in 3 steps:

In step 1, you verify that the prerequisites for the content activation procedure are met.

This step for change request management contains one activity:

• Check Readiness of ChaRM content

This step will be executed automatically!
Step 2: Activate content

In step 2, the content activation activities are executed.

This step for change request management contains three activities:

- Adapt number ranges
- Adapt IT calendar configuration
- Start content activation job

All steps will be executed automatically!
Step 3: Close activation

In step 3, you finish the content activation procedure. Afterwards, you are ready to work with your content that has been activated for SAP Solution Manager 7.2.

**Important remark:** This action cannot be reverted, and you cannot change anything in the guided procedure after closing it.
Checklist for manual steps after activation

Due to the fact that a new CRM Enhancement Package is part of SAP Solution Manager 7.2, typical CRM upgrade procedures need to be taken into account:

The user interface requires manual adaption:
- New fields have been introduced – old fields are obsolete
- **Example:** Project field, Solution field → replaced by change cycle field, …

Technical interfaces and BADIs need to be checked
- Due to architectural changes, existing BADIs or functions and methods that rely on SOLAR Environment need to be manually checked and updated
- Effort depends on the amount of customer individual adoptions and implementations
- **Retrofit for BW Badi needs to be de-activated before upgrade!**
- **ST-OST component must be part of the upgrade!**
Detailed Content Activation Steps in the context of ChaRM

1. Match Landscape of Projects
2. Create Change Control Landscape
3. Create Cycles
4. Re-Assign Task Lists
5. Cycle Mapping
6. Re-Assign Transactions
7. Update References (opt.)
8. Done
What happens during the automatic content activation?

1. As part of the content activation, change request management will look for change control landscapes with corresponding landscape definitions to the system landscape which was defined in the SOLAR project before.

2. If there are change control landscapes, those will be re-used – otherwise new change control landscapes will be created.

3. The job will then create new change cycle documents for each selected SOLAR project which has active task lists / change cycles. Those will be assigned to the change control scenarios and respective branches.

4. The existing task lists will be re-assigned to the newly created change cycles automatically.
What happens during the automatic content activation?

5. All SMDV and SMMN will be mapped to a “phase cycle”. All SMMM will be mapped to a “continual cycle”. Each change cycle will have the same status as before.

6. After the cycles have been updated, all open change transactions (request for change and change documents) will be re-assigned from their former SOLAR project assignment to the newly created change cycles automatically.

7. Optional: existing references to processes, steps or scenarios in solutions or projects will also be automatically updated to the new entity in the related branch.

8. At this point, technically the content activation is over. However, please be aware of additional manual activities, which have to be checked.
Simplified Cycle Types in SAP Solution Manager 7.2

- Urgent only
- Maintenance SAP1 (SMMM)
- Continual Cycle
- Template Upgrade Implementation
- Project SAP0 (SMDV)
- Phase Cycle
- Maintenance SAP0 (SMMN)
- Release Cycle
- SMAI
- SMIM
- SMRE
Aspects to be considered

**Does the customer use ChaRM in 7.1?**

Content Activation procedure is necessary to be performed: open change cycles are taken into the scope automatically and rolled out as new cycle types.

**Has the customer configured own Z-Transaction Types for ChaRM Workflows?**

Perform adjustments, as recommended in SAP note 2394599. Check and if necessary adjust authorization concept for ChaRM scenario (e.g. new authorization object for Import). Perform proper testing before to start productive usage of ChaRM functionality.

**Has the customer used interfaces to SOLAR-Environment for own implementations?**

Update and check the assigned implementations according to new Process Management Infrastructure. Probably a customer developed interface can be replaced by the tight integration of Solution Documentation and ChaRM in SAP Solution Manager Release 7.2.
Aspects to be considered

Has the customer performed any adjustments in the ChaRM UI in 7.1?

Update of customer specific User Interface Configuration required; Replace former Project/Solution fields with new delivered attributes, or copy the SAP standard User Interface Configuration again to customer specific User Interface Configuration and adjust manually.

Has the customer planned/ included End-Used training activities into the upgrade project plan?

Clarify with customer necessity of End-User Training for Change Managers, Administrators, Release Managers (if necessary), according to the ChaRM functions and features in SAP Solution Manager 7.2.

Has the customer planned the initial scenario testing bevor the upgrade?

To be able to decide the ChaRM readiness for Go-Live after the Upgrade project, some customers performing the initial testing of their configuration. The inconsistencies and issues, available before the upgrade project should be taken into account for Go/No-Go decision for ChaRM scenario in 7.2.
ChaRM – User Interface Changes

With SAP Solution Manager 7.2, there are some changes in the user interface configuration forms for Change Request Management. The following describes, what is new, what is not supported any longer, and how to get from 7.1 to 7.2.

New fields

- Landscape //BTAICREQUESTCONTEXT/STRUCT.SLAN_DESC
- Branch //BTAICREQUESTCONTEXT/STRUCT.SBRA_NAME
- Change Cycle Description //BTAICREQUESTCONTEXT/STRUCT.PROJECT_TITLE
- Change Cycle ID //BTAICREQUESTCONTEXT/STRUCT.RELEASE_CRM_ID
- Change Cycle Type //BTAICREQUESTCONTEXT/STRUCT.RELEASE_TYPE
- Release Number //BTAICREQUESTCONTEXT/STRUCT.RELEASE_NUMBER
- Change Cycle Status //BTAICREQUESTCONTEXT/STRUCT.USER_STATUS_DESC
- Development Close //BTAICREQUESTCONTEXT/STRUCT.DEV_CLOSE_DATE
- Go-Live Date //BTAICREQUESTCONTEXT/STRUCT.GO_LIVE_DATE

Non supported fields

- Project //BTAICREQUESTCONTEXT/STRUCT.PROJECT_ID

Solar Project ID (reused by change cycle attribute), but should not be displayed anymore, since this field only contains a technical value (number range object)
ChaRM – User Interface Changes

New Assignment Blocks

- Solution Documentation; here you can maintain references to Solution Documentation elements. In case of Change Documents, you can see, which solution documentation elements were changed in the context of the particular change.

Non supported Assignment Blocks

- Solutions (can be displayed via customizing, existing entries are still available, but read-only); Content is migrated into Solution Documentation assignment block, as far as possible*
- Documents (can be displayed via customizing, existing entries are still available, but read-only) Content is migrated into Solution Documentation assignment block, as far as possible*
- Projects (can be displayed via customizing, existing entries are still available, but read-only) Content is migrated into Solution Documentation assignment block, as far as possible*

*) content was migrated, as far as possible. Means, in case the respective project was migrated in regard to Solution Blueprint, the content of these 3 assignment blocks will be migrated as references to SMUD occurrences into the solution documentation assignment blocks. Please note, in the projects assignment block, you can reference to process steps, where in the projects assignment block, you can see the path of the process step (scenario, process, process step); in the Solution Documentation assignment block, you can only see the process step, but not the path.
ChaRM – User Interface Changes

How to get new fields in the UI:

- If there is no customer specific user interface configuration from 7.1 → nothing has to be done, the new UI form works immediately.

- If there is a customer specific user interface configuration, some adjustments must be done so that the new fields are displayed.
  - Fastest way is just to delete the customer specific UI Configuration, then the SAP Standard Default UI configuration is used. This standard UI configuration can be used as copy template to copy this into your Z-Transaction Types. Then the customer can adjust the UI according to the specific needs again.
  - Alternative, the customer can keep the existing customer specific UI configuration, and adjust this UI configuration. This means, the new fields from 7.2 standard are inserted manually.
ChaRM – User Interface Changes

Best practices to get to 7.2

- As said, if there is no customer specific UI configuration, no actions are required at customer side.
- If there are customer specific user interface configurations, there is no single best practices way. The general remark, to remove a field can be done easier and faster than to add a field.
- If there is a customer specific UI configuration, where 2 customer specific fields were added, it is faster to delete the customer specific configuration, copy the SAP standard UI configuration into the customer specific UI configuration, and to add the 2 customer specific fields again manually.
- If the customer has 10 customer specific fields added to his UI configuration, it is faster to keep this customer specific UI configuration and add the missing SAP Standard fields manually.
- If the customer specific UI configuration was just implemented to rename some field labels, or to remove SAP fields, it is recommended to delete the customer specific UI configuration, copy the SAP standard UI configuration, and do the adjustments again.

General remark:
All these actions are performed in the development system of the SAP Solution Manager, after the system was upgraded to 7.2 and after the SolMan Setup was done, and after the migration was done. When the production SAP Solution Manager System is upgraded, these changes done in the development system will be imported into production, which means additional 3 minutes downtime.
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