Template documentation in SAP Solution Manager 7.2
Describe the approach for template documentation rollout in two different use cases
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Introduction: Why template documentation

A lot of SAP customers want to foster synergies and improve transparency by harmonizing their business processes across all business units. One common approach is to centrally define a common process template, which is rolled out to the various business units. One important step in this process is the documentation and ongoing adaption of the template business processes.

This document is focusing on the documentation aspects of global process rollouts. There are additional functionalities in SAP Solution Manager 7.20 supporting the template rollout strategy further on more technical level (e.g., Template protection).

At the beginning of the template process approach, you must define and specify the global (or reusable) content. Translated into the SAP Solution Manager language, you are going to create global processes, assign global documentation, test case descriptions, technical objects like transactions and developments, predefined configuration units. This content can now be initially rolled out to a subsidiary or a country. The local implementation can extend the global content with additional, country or subsidiary specific information and use this extended content for implementation, test and monitoring activities.

Figure 1.1: Step by step approach
While this, the origin template documentation content can be changed and rolled out as a delta rollout. The documentation delta rollout can be used for another country or subsidiary or just update previously rolled out content. All changes and additions done during the rollout projects to the global content can be reused as a kind of retrofit for another incoming rollout.

There are three main decision drivers for template documentation rollout:

- **Organizational reasons**: your organization is divided into global group and local group(s). These groups have separate responsivities and act independent from organizational perspective.
- **Content separation**: a good example is here global vs. local content. Global processes are defined by the global organization and shall not be changed by the local implementation. However, the implementation may adopt it or create additional local variants.
- **Content reuse**: Definition of business processes that must be reused for several implementations (e.g. in several countries or regions).

This document will describe options for the roll out of template documentation in SAP Solution Manager 7.2 and how this impacts the way content is structured so that it can be protected.
1. **System landscape options for template rollout**

The way in which the system landscape is organized, will impact directly the template rollout use in SAP Solution Manager.

- **Simple shared landscape**: all systems, of the same product, are grouped in one Logical Component Group (LCG). Transport paths can be defined between all system/client assignments to the LCG. For this type of landscape, the template method can be used as a kind of content reusability. The first roll-out/implementation of the Global and local processes can define and document the solution. Following roll out projects can re-use this process-oriented solution information applying the global processes to the next region or country.

The example image below shows an LCG is used by all implementations of the solution, where a product has a single development (DEV), Test (TST), Pre-production (PPR) and single Production (PRD) system.

- **Shared landscape (with ‘sites’)**: The Logical Component Group is collecting all system under one complex landscape. ‘Sites’ are used within the definition of the LCG.

  - the global landscape which consists of global development and global test system (DEV and TST)
  - two local system groups consisting of local configuration, test and production systems

The ‘Site’ is represented in Process Management by a structure and object attribute. This attribute can have in our example case three values:

  - Empty: all structure elements like scenarios, business processes, process steps or documents are global.

  - Site “A” and Site “B”. Objects with this attribute value represent landscape specific information. This attribute value will be for example used for local business processes, local configuration and similar.
The ‘Site’ is also used for navigation purposes. When accessing executables, development or configuration objects the ‘site’ will be used along with the ‘system role’ in defining the system/client to be accessed to show the documented object. For more information about Site, please follow this link.

- **Distributed landscape**: This landscape is represented by local independent Logical Component Groups which are supplied by transports from the global template landscape.

These Landscapes will have separate technical libraries (executable, development, configuration and interface libraries) as well as physically independent processes.

The example above shows one global template LCG and set of systems that

The type of landscape and the organizational aspects can lead to a different template documentation use case in SAP Solution Manager 7.2. While the single and ‘site’ landscape leads most likely to the template documentation within one solution, the separated landscapes will indicate more the use case with multiple ‘solutions’.

Figure 1.2: Decision tree for template documentation use case

The descriptions below, in later sections, will explain the two different approaches where either of the following are used:

- Single ‘solution’
- Multiple ‘solutions’
2. **Template rollout documentation method**

This chapter describes how template documentation can be organized in regard to used branches and structuring of processes and libraries within SAP Solution Manager 7.2.

2.1. **Template rollout and branch concept**

One of the main aspects when preparing the template documentation concept in SAP Solution Manager system is the branch concept. This concept describes typical activities per branch and defines procedures to change the content.

![Figure 2.1: Basic branch concept for template rollout](image)

**Design branch:**
The design branch would be the initial branch to setup the template documentation. In this branch the global organization is responsible for the global content and will organize the content in a way which was described in the section [2.2 Content Organization](#).

Once the global content is prepared and ready for the first implementation, the global organization can release it into the Development branch.
**Development branch:**
Here, the local project can take over the global content, define project scope and based on it perform the local implementation. The implemented processes and added documents will be marked by an appropriate attribute highlighting the country or area into which the processes are rolled out. Based on the global content with local adjustments and local business processes you perform all reporting, build and testing activities in this branch.

**Production branch:**
After successful tests, the entire content (country implementation) can be fully or partially released for production. This can be done with help of Change Request Management integration or by manual content release. The content released to production is seen in the production branch where it is made available in display only and officially represents the currently productively running application.

**Maintenance branch:**
With the appearance of the global and local content in the production branch, the maintenance branch gets filled as well. Here the productive content can be changed in case of maintenance (‘fix & enhance’).

Where SAP Best Practice content, and Model Company content, is used, you may need to create an additional branch underneath the design branch. This **import branch** can be treated as a temporary branch just to import and view the content of SAP Best Practice without interacting design or development branch. Selected content from this import branch can be made available (released to) the design branch and later implementations in the development branch.

*Figure 2.2: Branch setup for e.g. SAP Best Practice use*
2.2. Content organization

One of the most important topics in template documentation and its rollout is how the content is structured in the following. how to structure the content. Relevant is here not the automated organized executable and development library but the content of:

- Process Step Library
- Configuration library
- Interface library
- And finally, business processes

Note: The Executable and Development Libraries have automated population and organization and not discussed here

The folder structure of these areas shall reflect business structure, but also include the categorization of global and local content. The way how the folders are organized, will have big impact on the question who will be allowed to edit the content. Please refer in this context also to the last chapter of this document (“6. Authorization in template documentation”).

2.2.1. Process step library

Process steps are reflecting a business use of an executable. Therefore, the process steps shall be organized in the same way as your business organization is structured. So, it will include folders like:

- Human Resources
- Finance
- Logistics
- ...

with subfolders grouping the process steps more detailed if required. A very important aspect is also the ownership of the content which includes the definition of new process steps (process step variants), assignment of documents and technical objects (transactions, developments). However, the organization of process steps shall also consider the fact if they are global, localized or local process steps.

As shown on figure 2.3, there is a differentiation between the folder “Process step library” and functional business folders (“Sales”, “Finance”, “Quality Management” ...) into global and local process steps. This separation is motivated by two important aspects:

Access to the global and local business process steps.

By putting global steps together, the global organization can easily define their area of responsibility.
**Authorization**

The changeability of global business process steps shall be just reserved for global organization and their members. As the authorization area can just point into a folder, it is recommended to create a suitable folder structure.

![Figure 2.3: example for structuring process step library](image)

In general, you can decide if the folder “Global process steps” and “Local process steps” are in front of the functional structure or just repeated under each functional folder.

### 2.2.2. Configuration library

The Configuration Library will hold documentation associated with customer configuration settings and developments (WRICEF) solution information. The structure in this library is mainly following the same rules as the process step library; whichever content shall be documented in the Configuration library; the separation of global and local area shall be guaranteed. The existence of the two folders enables to simplify the access, responsibility and authorization as already described in the chapter for business process step library.

![Figure 2.4: example for structuring configuration library](image)
As shown in the figure 2.4, the configuration library can be used to document:

- **Scenario independent configuration:**
  you document general configuration tasks like calendar, currency or other basic system configuration.

- **Scenario dependent configuration:**
  for scenario dependent configuration you create configuration units which collect and centralize configuration of a *functional area* (e.g. Sales, Quality Management, Warehouse Management), or, to specific processes / process steps. You can assign these configuration units to the business process or process step original/reference.

- **WRICEF structures:**
  central documentation of WRICEF (Workflow, Report, Interface, Conversion, Enhancement, Form) elements. By that concept, you collect all WRICEF elements (defined as configuration units) under a WRICEF folder structure.

  You can bundle in each WRICEF element (specific Report, Workflow, Interface...) development objects (coming from development library), IMG activities and documentation into one logical package. Such a package (technically, a configuration unit) can be then linked to a process step, an interface or to another configuration unit (WRICEF element).

- **Authorization documentation:**
  Configuration units can also be used to document the authorization setup of managed systems. In case this documentation must be separated in global and local content, please separate it by folders. In any case it makes sense to separate the information by system (Logical Component Group).

![Figure 2.5: example for structuring configuration library for authorization documentation](image-url)
2.2.3. Interface library
The interface library provides the possibility to centralize the collection of interface documentation. This interface definition together with the technical attributes can be:

- a foundation not only for well documented process flows (in end to end or modular processes), but also
- reused in business process and interface monitoring.

![Figure 2.6: example for structuring interface library](image)

We recommend separating this library into the global interfaces, which are valid for global processes from the locally used ones.

2.2.4. Business process area
The process area is generally divided into two main areas:

- End to End processes
- Modular Processes

2.2.4.1. End to End processes
These processes are documenting the big integrative processes like “Order to Cash”, “Procure to Pay” or similar. These processes are mainly used for the big integrative and regression test as well as for documentation purposes. These processes are usually defined under a scenario having the same name (“Order to Cash”) as a collection of different Order to Cash process variants.

In general, there are three types of diagrams

- **Process diagram**: available just at process level and describes the sequence of process step/interface execution using BPMN 2.0
• **Collaboration diagram**: available at process level and in addition to what the process diagram it can show relation between the process and the black/white box pool.

• **Universal diagram**: this type is available for all structure elements and is using free elements. It can represent capabilities (capability map), value chain diagram, application landscapes, process landscapes, or any other kind of diagram. Please consider descriptions below on how to best use it around end to end processes (see also Figure 2.7).

Typically, you can combine the three diagram types to achieve a perfect and holistic documentation.

**Example:**
The scenario in the End to End area can include a universal diagram which shows overview about the processes which are involved into the big end to end process “Order to Cash”.

![Figure 2.7: example for universal diagram for Order to Cash](image)

The Order to Cash end to end processes shall contain a process or a collaboration diagram based on process steps, interfaces and other BPMN artefacts (Figure 2.8).
This diagram is representing one (or several) sequences from the big universal diagram.

The BPMN process representation supports a detailed use of documentation (business process descriptions, process variations) and test management (integration test cases) as well as deep integration between them and change control.

### 2.2.4.2. Modular processes

These are describing a business case/flow within an SAP module. The functional or modular processes are constructed mostly out of process steps and interfaces. The process sequence in such processes will be represented exclusively by BPMN process or collaboration diagrams.
2.2.5. Global and local Processes

Both business process types shall be divided into two groups:

- **End-To-End Processes**
  - Global E2E Processes
  - Local E2E Process
- **Modular Processes**
  - Global Processes
  - Local Processes

The split of the global and local processes can be done on different levels. Figure 2.10 shows an example of modular process area organization with the separation.

![Figure 2.10: Organization of modular processes in global and local](image)

While the global folders are storing the information about globally/commonly used business processes across countries or regions, the local folders will be the place where specific local processes will be stored. In there you find also local process variants of the global processes.

For the topic process variant documentation please refer to the document “*Use of SAP Solution Manager 7.2 in green field situation*”, chapter: “4. Data refinement by reflection of variants”.


3. Template rollout documentation using one solution

3.1.1. Global content creation

As described in section 2.1 (branch concept), the global content will be prepared in the design branch. This content can be created out of:

- SAP Best Practice: in this case the branch setup shall be extended by additional “Import” branch. The SAP Best Practice will be imported into this temporary branch, revised, relocated into the target process and library structures and released to the design branch.
- Model Company content: using the same approach as SAP Best Practice content but conducted and supported by dedicated Services.
- Created and modelled in SAP Solution Manager by manual creation of global processes, their diagrams and required documentation.
- Synchronized from another leading modelling tool: relevant process models can be synchronized directly from 3rd party modelling tool into design branch

The organization of the content in business process and library areas (process step, configuration and interface libraries) shall be done in respect to the description of previous chapter 2.2 Content organization.

In context of the global Processes Management you can create:

- Global processes
- Dedicated process diagrams based on global process steps,
- Describe the process design by creating business process descriptions,
- Assigning functional specifications and executables to the process step originals
- Specifying global developments required to execute the transactions in the given business use case
- Assigning technical specifications to the executables, developments and configuration objects

To improve the reporting of global processes, you can define custom attribute of type flag and assign it to global processes, process steps, configuration and interfaces.

The flag “Global” can be activated in mass and simplifies reporting of type “show me all functional specifications/transactions for global process steps”. 

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To prepare the way in which the global processes shall be used in Test Management, you can:

- assign test case descriptions and specify the test type they serve, for example:
  - Executable => Generic functional test
  - Process step original => Single functional test
  - Process step reference => part of integration test
  - Business Process => Integration/regression test

- Define on test case assignment type at process step original or reference: this attribute decides if the test plan creation will consider the test case assignments from libraries (process step original ⇔ executable)

- Create TBOMs for later use of Business Process Change Analyzer.

In preparation for live operations you can, during the creation of global processes, you can use the alert definitions and assign them to the process step or interface references. This will prepare your global processes for the Business Process and Interface Monitoring.

As an alternative to the clean global content creation approach, you can also define the global processes during the first template documentation roll out. However, during this, a strong governance is recommended to store the global content in appropriate folders.

3.1.2. Initial Rollout

Once the global content is predefined in design branch, the first roll out can start by selecting their global scope and releasing this into the development branch where the local design & implementation work will be documented.

The scope of the rollout project can be grouped by creation of a Solution Documentation Scope (see figure 3.1). This scope can define a persistent documentation area like a module or for project-use, describing precisely the rollout specific project documentation scope. In a project based scope you can contain relevant global processes but also already predefined local folders (see process area structuring in section “2.2.4. Business process area”).
The implementation team has full access to the global process information as well as to all necessary and previously globally defined developments, executables, process steps and interfaces. The changeability of the global content can and shall be controlled for the local implementation team by authorization setup based mainly on Authorization area (please refer to the chapter “5. Authorizations in template documentation”).

Depending on your detail approach, the local roll out project can change or add new, local information on top of the predefined global process documentation. This can happen with help of:

- Maintenance of country attribute for global processes to highlight which global processes has been implemented in which country /region
- Creation of local documentation for global processes
- Creation of local processes including functional and technical documentation.

After the successful test phase, the global and local content can be released to the production branch. It is recommended to include approval into the release strategy. This means that for instance just the content/process/area owners will approve the edited documentation and finally release it. This activity can be supported by a strong Change Request Management integration and automate the releasing or appropriate documentation content.

3.1.3. Template update/next wave

After the release of the content of the first roll out project, the updated documentation is available in development branch for the next rollout wave. The following project will repeat activities described in the section “3.1.2 Initial rollout”
During or after the current rollout, the design branch can be used to set the global content to the new version. New global processes or process variants can be planned and modelled there. The decision when the new content will be made available for project is connected to the physical release to the development branch.

3.1.3.1. Rules for new version creation

Rework on the current template documentation version should follow few simple rules. The proposals are described below:

- Creation of new structures: you can create new folder structures under the global content folder adding new process areas or simply adding new processes to the already existing content. Once the addition is released to the development branch, the creation will be recognized and made visible in e.g. List View by using the filter on “Change status” = Created. The implementation team can now focus on the new content in the next rollout or as addition to the previous rollout.

- Update of already available content: here you must carefully distinguish what type of change will it be. Changes to content already rolled out can have a significant impact on countries or subsidiaries and their implementations. While the addition of informative documentation is not dramatic, assigning of new process steps or redesigning of available business processes may have consequences in test and training area. Therefore, changes on process design shall lead more into a creation of a new process variant instead of adjusting already existing ones. The new process variant can then sunrise with the next roll out phase, whilst the “old” process variant can be sunset and finally, if no country/subsidiary is actively using it, marked as obsolete or even deleted.

- Deletion of content: Since after the first roll out the global content is implemented and in use, there is no simple deletion strategy for the content. The deletion needs to be commonly agreed by all countries/subsidiaries where the content is implemented. An alternative to a hard deletion, the content can be marked by a prefix or attribute highlighting the obsolete nature of it.
4. Template rollout documentation in multiple ‘solutions’

An alternative to the above described template documentation approach (using a single ‘solution’) is provided with the template documentation rollout in multiple ‘solutions’. This approach is recommended to customers with distributed landscapes for the global content. This means that several countries or subsidiaries are using global processes but in separate SAP S/4HANA systems. For this scenario a mapping of the valid system landscape is required per country or subsidiary. This can just be achieved by use of multiple ‘solutions’. The following sections explain the concept, typical setup and approach.

4.1. Template rollout and branch concepts

This concept provides a capability of cooperation between two or more solutions. The source solution (deployment ‘authoring solution’) is a global content provider while the other solution(s) (operational solutions) are playing the role of a global content consumer.

![Figure 4.1: Template rollout in multiple ‘solutions’](image)

4.1.1. Deployment ‘authoring solution’

The branch setup in the global deployment ‘authoring solution’ can differ depending on the rollout content strategy for the organization.

The simplest branch setup contains just two branches:
- Production: in this branch the “ready to export” content is stored. No direct changes to this content are allowed. Out of this branch, the deployment files will be generated and published.
- Maintenance: this branch is used to further develop the global content. Organized in releases, the content changes can be released to the production branch.

By this method, the Deployment file is available in just one release/version which is coming directly from the production branch of the deployment ‘authoring solution’.
However, if more than one release version of the deployment file needs to be worked on at the same time, you can add development & design branches into the deployment ‘authoring solution’. With this extension, it will be possible to create deployment files out of the production branch (release N) and in parallel additional deployment file from development branch (release N+1).

The design branch is used to document corrections and further global content development for release N+1 (see figure 4.1).

After a defined time, the content from Development branch (release N+1) will be released into the production branch. Once stored in production branch, it can be corrected in maintenance branch. All released changes will be immediately reflected in all other child branches.

While this, the development / design branch gives again the possibility to developing the new N+1 release documentation.

4.1.2. Operational solution(s)

The ‘operational solution’ shall contain at least three branches:
- Import/design branch: this branch is used to import the deployment file as well as designing local processes.
- Development: the branch in which the implementation of the global and local content is documented and tested.
- Production: represents documentation of productively used business processes and all library elements.

After the first rollout, there may be necessity to create additional branches like maintenance or operational.

4.2. Global content creation

The procedure of global content creation does not differ to that in section 3.1.1 described activities.

However, before creation of the content, you need to agree on the common structuring in the solutions. Within these structures the future content will be exchanged between the authoring and the ‘operational solution’. Please refer in this context to the chapter 2.2 Content organization.

To make the source of the content visible and reportable a customer attribute “Source” can be created. This attribute (of type drop down) lists solution names (e.g. referencing the name of the ‘authoring’ or ‘operational’ solution).

The assignment of the attribute value documents where the content is coming from. This is important for local processes which has been adopted into the global/authoring solution.
4.3. Initial Rollout

After the definition of the global content in the ‘authoring solution’, you must decide which **Scope** has to be rolled out. This scope can include separate functional areas and/or end to end integrational processes as well as corresponding library folders and elements.

So, for example, you can build separate solution documentation **Scope** for:

- Warehouse Management
- Quality Management
- Sales and distribution
- Finance
- ...

and roll out them independently from each other as a deployment file.

Based on the scope, the deployment file can be created by using export functionality. For the creation of such a file please follow the steps:

- Go to solution administration
- Select from the menu “Export”
- Define from which branch (Production ➔ Template version N or Development ➔ Template version N+1) and which scope shall be used to create the deployment file
- Activate Flags for
  - KW documents: to include all global documents like business process descriptions, specifications, test case descriptions into the retrofit file.
  - TBOMs to include global TBOM recordings
  - Test Configuration: to include automated test scripts
  - Monitoring objects: to transfer the global defined alerts
  - “Mapp deployment to origin”: to map possibly used global process steps or other objects which are coming from the ‘authoring solution’

After the deployment file has been created, you can rename the files in respect to their content (e.g. “Global Logistic content”).

Next activity is to import the deployment into the import branch of the ‘operational solution’.

There are two possibilities to proceed:

- Import the deployment file with the default option **“Update master”**. This option means that the default deployment of a solution is the master. The master deployment covers the entire solution and does not create any additional copies of imported content. In other words, the imported content will map the system landscape from the ‘authoring
solution’ in relation 1:1. Process steps run on a global Logical Component Group “A” will be represented by exactly one process step in the ‘operational solution’, running local Logical Component Group “B”. This mapping is kept in background and cannot be changed afterwards for future imports.

- In case you need the same content to be multiplied for several system landscapes where it has to be used, you shall use the option “New deployment”. This would be the case when the local system landscape is using several Logistic systems running the same processes. This option will multiply the content as often as many deployments you create during all imports. Here the relation between the system landscapes is 1: N. One global Logical Component Group is mapped into several local Logical Component Groups. One global process step will have several representatives (for each local landscape), however they will be bundled by the global source. The system landscape mapping between the deployment file and operational deployments will be stored and is not changeable after the import has been performed. So, the content for one global ERP system can be used several times for different local ERP system landscapes in the same SAP Solution Manager system.

The import of the deployment file creates the content including the hierarchical folder structure in process and library areas replicating the order from ‘authoring solution’.

This structure influences authorization in the ‘operational solution’. The implementation team has full access to the global process information as well as to all necessary and previously globally defined developments, executables, process steps and interfaces. The changeability of the global content can and shall be controlled for the local implementation team by authorization setup based mainly on Authorization area (please refer to the chapter “5. Authorizations in template documentation”).

After the definition of content to be implemented or updated, the decision to release it to the design/development branch can be made. The local folders can be pre-filled by local process or contact variants in the design branch. Afterwards the global and local processes (including all respective library elements) will be hand over to project and moved/released to development branch.

For these activities you can follow the Focused Build method or use the standard activities to represent and document requirements, architectural and development/documentation activities depending if the project uses agile or waterfall approach. Please refer to the section 2.3.2 Initial rollout to read more about additional documentation activities in rollout situation.
4.4. Template update

While on the operating solution side the implementation of current template documentation is executed, new version of the same template can be modified/created in the ‘authoring solution’.

The new template version can include new content like new business processes including new diagrams, documents, technical object assignments as well as changes on already rolled out content.

Deletions on already rolled out content will not be included when importing the deployment file into the ‘operational solution’. Instead of deleting content in the ‘authoring solution’, please use attributes or name conventions highlighting that the content is obsolete (where it can then be deleted in the ‘operational solution’).

For the creation of new content, storage rules shall be considered. This means that global processes shall be stored under global scenarios, steps under appropriate process step folder in the step library.

Once a new version of the template documentation has been reached in the ‘authoring solution’, a new deployment file can be created.

It is strongly recommended to use the same scopes to generate a new version of the deployment file.

The new version of the deployment file containing global processes can be imported into the import branch of the ‘operational solution’ with the option “Update Master” or “Update Deployment” (depending on chosen option during the first initial import). After the import has been performed, the detection of changes can begin.

First, it is recommended to detect all conflicts in imported content. These conflicts can just appear when the previous global content release has been moved or adopted (new attributes, renaming of processes or assignments). In case the conflicts are detected, and you intend to keep the previously performed changes please discard the conflicting changes by using list view and right mouse menu.

After the conflicts has been discarded, the focus should be linked to the changes and new created content. Impacts on the already available content shall be reviewed and the decision shall be made if the changes will be taken over or discarded.

The degree of decision of what can be adjusted, discarded or released from the global content in the ‘operational solution’ is connected to the general template concept. This includes authorization aspects, content organization as well as decisions about document handling.
All changes on the global processes and their library elements should be released to the development branch. In addition, the impact of the changes on global library elements shall be reviewed regarding their use in local or localized processes (mainly by “Where used” functionality available as context menu for the library elements). This content shall be considered as scope for the template version adoption project and especially in its test phase.

It is recommended to distribute the activities regarding the organizational ownership. Local owner of e.g. Warehouse processes is taking care on the global and local Warehouse content detecting changes and impacts and planning adaptation activities.

Later, after successful internalization of global content, adoption on local documentation and positive test, the changes on documentation can be released to the production branch.

For more information about conflict handling and detection of changes in new content version please refer to the ink in the SAP Solution Manager WIKI.

4.5. Requesting changes on global content

In case the global contact is not reflecting all local requirements, changes on the content can be initiated by the local organization. For this procedure the Requirement Management functionality in the ‘authoring solution’ can be used.

By publishing the link to the Business Requirement creation, you can open a channel to request documentation changes on global processes. The requester can specify the title and specify the business process expert who will be in charge to approve/reject the request.

In the description area the requested changes can be detailed described and solution proposed.

In the solution documentation assignment block, the affected business process, process steps, interfaces or library elements can be assigned to link to the appropriate documentation objects.

Figure 4.2: Requesting changes on global content
These requirements can be later processed (approved or rejected) by the global process or area owner. The changes to the documentation or process design can then be directly included in the next version of the deployment/template. In addition, the further processing on the global authoring content can be supported by the creation of further ChaRM documents (IT request, change documents) and distribute the requested changes to the persons responsible.

This requirement functionality can be fully customized with customer specific ChaRM transaction types or alternatively you can make use of predefined ‘Business Requirement’ transaction records in standard or ‘Requirements’ in Focused Build with SAP Solution Manager 7.2.
4.6. Retrofitting of local processes into global content

Once the template documentation has been rolled out and the local implementation has started, a diversity of local specific processes will be created. These processes can be then used for several rollouts inside of the ‘operational solution’.

However, if such local content includes high potential of simplification for the global processes, it can be retrofitted into the ‘authoring solution’ to relaunch them to the operational solutions with the next version of Template deployment.

For this purpose, a retrofit scope can be created in the ‘operational solution’, which will include relevant process content or the entire local process area.

![Figure 4.3: Retrofit into global content](image)

Based on the retrofit scope, the retrofit file can be created. The creation of such a file is identical with the creation of a deployment file:

- Go to solution administration
- Select from the menu “Export”
- Define from which branch (Production) and which scope (retrofit scope) shall be used to create the retrofit file
- Activate Flags for
  - KW documents: to include also all documents like business process descriptions, specifications, test case descriptions into the retrofit file.
  - TBOMs to include local specific TBOM recordings
  - Test Configuration: to include automated test scripts
  - Monitoring objects: to transfer also the locally defined alerts
  - “Mapp deployment to origin”: is available if the solution contains deployments with previous imports with possibility to select a deployment. For more information please relate to the SAP help.

Afterwards, the retrofit file can be imported into the Import/Design branch of the ‘authoring solution’.
From here, you have two options on how to proceed with the local processes:

- Keeping the local processes in the local process folder in the ‘authoring solution’: the next template deployment file will distribute the content to all operational solutions under the local folder in business process area. For that the deployment scope must be adopted to include also the local process/library content.

- Move the local processes into the global process folder: this procedure will create a new global process which will be distributed as such to all operational solutions. Please ensure that all new process steps and interfaces used in the retrofitted processes will be moved to appropriate global folder structures in the libraries. All used local documentation types shall be replaced by their global counterparts.

Such created deployment file version can be imported into the ‘operational solution’ as template update, where the new global/previous local processes will get implemented and documented.

If the retrofitted processes were distributed in the local process area, the ‘operational solution’ will have the possibility to change the content corresponding to the authorization concept in the ‘operational solution’. In case the retrofitted processes were moved to the global strictures, direct local changes are not possible.
5. Document management in global template documentation

Independent of chosen template documentation approach (one or multiple ‘solutions’) you can distinguish three general concepts in how to handle and proceed with global documentation provided through global processes and process steps:

**Option 1: Extension of original global documents with ‘operational solution’**
- Setup of common document types for global template and local rollout.
- Global group provides global process definition and documentation.
- Local rollout team may adjust document types and make changes on the originals by including localization specifics.
- Approval of document changes by document owner

**Advantage:**
+ Small document administration and authorization effort
+ Accumulation of information in a central document (one specification for all countries and regions)

**Disadvantage:**
- Rollout team has the possibility to change global documentation

**Option 2: Additional local documentation**
- Setup of dedicated document types for rollout
- Global group provides global process definition and documentation not changeable for local/rollout team.
- Local rollout team creates local documents describing the local aspects of the implementation.
- Approval of document changes by process owner

**Example:** country specific test cases
Template documentation in SAP Solution Manager 7.2

Advantage:
+ clear separation of content

Disadvantage:
- Significant document administration and authorization effort
- No connection to the original global document for the local documents

Option 3: Mixed behaviour
- Setup of additional document types for rollout
- Global group provides global process definition and documentation.
- Local rollout team creates local documents describing aspects of the implementation and editing global documents of specific type.
- Approval of document changes by process owner

Example: country specific test cases and adjustments on global specifications

Advantage:
+ flexible document handling

Disadvantage:
- Significant document administration and authorization effort

While in the “single solution template documentation” the global and local document types must be defined under one Document type administration, in the several solution model the definition will be separated by solution.

The “multiple solutions” approach gives in this context more flexibility on who can create and administrate new or local document types. The setup of local document types status schema, digital signatures is easier where the authoring and ‘operational solution’ are separated (up to the SAP Solution Manager system separation).

Another aspect to consider is the maintenance of the content ownership. This includes ownership of the global and local content like processes, library elements, documents.

Where the approach includes multiple ‘solutions’ there is more need for harmonized authorization concepts. The definition who can maintain which document types combined with the process area where the adjustments can be done leads to the last chapter: “authorization concept”
6. Authorizations in template documentation

In general, in our template documentation concepts we can distinguish 3 group of users:

- **Administrators**: the main role, is to take care on the realization of the Process Management concept. They ensure the availability of basic solution documentation objects like solution, branches, document types, templates for documentation types, system landscape documentation (Logical component Groups) and so on. An Administrator can be responsible for the ‘authoring solution’ and/or ‘operational solution’ (especially when they are in the same SAP Solution Manager system). You can also assign the administrative activities to different resources as per solution.

- **Global team**: this team is acting exclusively in the ‘authoring solution’, creating folder structures for processes and libraries. They can also prepare standardized folders for local content documenting globally used IT objects like transactions, developments and describing the functional and integrational aspects.

- **Local team**: mainly acting in the ‘operational solution’, implementing the global processes, developing local process variants in predefined folders. The local specifics will be documented in local document types or having permissions to edit global documentation by changing the global documents.

To satisfy the authorization requirements for the three groups of users, SAP Solution Manager comes with three main authorization objects:

- **Solution Administration SMS_DOCADM**: this authorization allows you to manage aspects like:
  
  - Create/delete a solution
  - Create/delete a branch
  - Maintain a view or a scope
  - Change solution properties
  - Maintain the system landscape
  - Create/delete/change logical component groups
  - Generate the libraries
  - Scope (assign) document types
  - Maintain sites
  - Maintain content languages
  - Importing SAP Best Practices Packages
  - Exporting solution documentation
- Creation of Documentation Types
- Saving public (not personal) layouts in list view
- Maintaining reports

The authorization object can also restrict authorizations regarding solution and branch.

- Solution Documentation **SM_SDOC**: within this authorization object you can focus on two main authorization elements:

  - **Authorization area** defines where you would like to restrict e.g.:
    - Specific library folder
    - Specific folders in process areas

  - **Authorization group** defines what you would like to restrict e.g.:
    - Specific library
    - Specific element types of a library
    - Specific attribute types

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**Figure 6.1: Authorization for solution administration**

**Figure 6.2: Authorization for solution documentation**
Documentation Management S_SMDDOC: which finally focuses on the attached documents, giving the possibility to restrict access and changeability regarding:
- Document type
- Status
- Sensitivity

Figure 6.3: Authorization for solution documentation

All three authorization objects can be combined in an authorization role with specific activity levels to define the system user access roles to ‘process management’

Figure 6.4: Authorization role for process management

The first level of authorization restriction in process management area can be the solution. Especially in the multiple solution approach the restriction at this level is very essential. While the global team is authorized to work and document global processes in the authoring solution, the local team(s) may just have a possibility to display the content of the solution or request new functionality / documentation by using requirement functionality.
The local team(s) however, will have authorization to enter their local solution(s) and document their implementation activities.
The next abstraction level from authorization perspective is the branch. You can decide who may have access to which branch and which branches are forbidden for a certain group of people.

Once you have authorization to access a branch, you can restrict changeability to specific areas in it. E.g. employees responsible for Warehouse Management content can get unrestricted access to their business processes and library elements, while other content can just be displayed by them without possibility to edit it or create new data in this area.

In the authorized area you can in addition also restrict changeability for specific attributes or documents. Especially for the documentation activities you can specifically authorizations to group of people who may just create e.g. Functional specifications but not training materials or the other way around.

As the authorization topics are very much customer specific, mirroring the organizational aspects, it is recommended to become familiar with the documentation of Process Management authorizations – this is available in a central document called Security Guide and also in specific descriptions available in SOLMAN_SETUP under Activity ”8.1 Define Detailed Authorization concept”.