SAP Solution Manager 7.1 for Channel Partners

Overview
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Agenda

• What’s new in SAP Solution Manager 7.1 Application Incident Management
• Upgrade Roadmap 7.0 to 7.1
• Application Incident Management Highlights
• Sources to Knowledge
Orchestrate Your Solution with SAP Solution Manager

Run SAP like a Factory

Application Lifecycle Management

Incident, Problem & Request Management
Portfolio & Project Management

Business Process Operations
Solution Documentation & Implementation

Application Operations
Change, Test & Release Management

Integration Validation
Maintenance Optimization & Security

Single Source of Truth

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Integrated IT Service Management and Application Lifecycle Management

SAP Solution Manager integrates Application Lifecycle Management and IT Service Management processes on a single platform.
New Features in Application Incident Management

- New web user interface and improved usability
- Introduction of problem management to setup an ITIL-verified process
- Extensibility with SAP CRM 7.0 Service or SAP ERP functions
- Enhanced search capabilities (incl. full text search) and improved knowledge management
- Template Support
- Improved SLA functionalities (e.g. escalation functionalities)
- Additional inbound channels (interaction center, e-mail)
- New reporting capabilities (interactive reports, ITSM predefined BI queries, ITSM dashboard)
- SAP collaboration support – guided procedure / wizard
- Additional ALM integration to test management, business processes of projects or solutions
- Web Services
- Usage rights extended to customer solution* and full scalability beyond customer solution
  IT-wide usage enablement through multilevel categorization (not limited to SAP components)
Highly configurable web-client user interface
Personalizing the User Interface

General Settings
• Date and time format
• Enabling the UI Configuration
• Enable Favorites
• Dropdown Listbox settings

Personalize Layout
• Navigation Bar (Direct Link Groups)
• Layout (Skin, Text Size)

Home Page Set-up
• Application Links
• Widgets
• Web Links

Personalize User Data
• Password settings
• User Information
Application Incident Management
New Features in the Processor UI

You can create an incident 'from scratch' or from a template. You can copy an existing incident. You can create follow-up transactions from the incident, for example, a problem or a change request.

In the Incident (Service Request) Details you can document:
- who has reported the issue and who is responsible for it
- the processing status SLA dates
- the impact, urgency, priority and multiple categories
- textual descriptions of diverse text types
- which objects are affected
- whether the incident is assigned to a problem, request for change, or knowledge article

In the incident you have access to:
- Dispatch
- Auto Complete
- Find Related Problems
- Find Knowledge Articles
- Unlock
- Send E-Mail
- Print / Print Preview
Application Incident Management
Text Management

- Better overview about text log history
- Use text templates (personnel or system templates)
- Maintain own text templates (personnel or system templates)
- Use filter to focus on specific text types
- Activate / Deactivate the display of the system context
- Increase / Decrease the text area
- Activate / Deactivate the Rich text formatting
Application Incident Management

Problem Overview

A problem is an incident to which one or more incidents are assigned and locked. When many incidents are locked to a problem, users process only that problem rather than processing multiple incidents individually.

Nearly all functions as described for the Incident also apply to the problem. Not included in the problem are:
- Unlock
- Find Related Problem
- Process Flow of Service Request

In addition to incident functions, the problem offers:
- Related Incidents assignment block to bundle incidents
- Pricing, shipping and billing assignment blocks
To help process the Incident, the processor can search for knowledge articles in the Incident:

- Knowledge Articles assignment block: Search for relevant knowledge articles via F4 help
- Find knowledge articles (from the “More“ button on header level): Proposes knowledge articles which have the same categorization as the Incident
- Suggest knowledge articles (from the Knowledge Articles assignment block): Proposes knowledge articles which are assigned to a category in the categorization schema

<table>
<thead>
<tr>
<th>Related Knowledge Articles</th>
<th>Edit List</th>
<th>Suggest Knowledge Articles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>ID</td>
<td>Description</td>
</tr>
<tr>
<td>![Icon]</td>
<td>21</td>
<td>Blue Screen</td>
</tr>
<tr>
<td>![Icon]</td>
<td>31</td>
<td>Blue Screen</td>
</tr>
<tr>
<td>![Icon]</td>
<td>32</td>
<td>Blue Screen 0x00000008E</td>
</tr>
<tr>
<td>![Icon]</td>
<td>21</td>
<td>Blue Screen</td>
</tr>
<tr>
<td>![Icon]</td>
<td>32</td>
<td>Blue Screen 0x00000008E</td>
</tr>
</tbody>
</table>
Application Incident Management
SLA Alerts & Escalation

- Definition of Service times
- Definition of IRT and MPT times based on priorities
- Maintain SLA relevant Status
- Automatic Recalculation of IRT/ MPT in case of Status- or Priority changes
- Percentage of left over time of reaction and processing time
- Definition of percentage level which is setting an additional escalation status
- Escalation triggers notification to a Business Partner
### Application Incident Management

#### Related Transactions

In the Related Transactions assignment block,

- the system automatically updates links to transactions which are related to the Incident processing, e.g. the Interaction Record, a service contract, or a knowledge article which was created as follow-up of the Incident.
- you can manually add any further transactions which are relevant for the Incident to refer to them.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Transaction ID</th>
<th>Transaction</th>
<th>Description</th>
<th>Transaction Type</th>
<th>Status</th>
<th>Priority</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>36642</td>
<td>36642</td>
<td></td>
<td>Interaction Record</td>
<td>Open</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>8000002178</td>
<td>8000002178</td>
<td>New_incident_6August</td>
<td>Incident (IT Service Mgmt.)</td>
<td>New</td>
<td>Very high</td>
</tr>
<tr>
<td></td>
<td>5006482</td>
<td>5006482</td>
<td>Service contract</td>
<td>Service Contract</td>
<td>Released</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9000003800</td>
<td>9000003800</td>
<td>Exchange DVD drive</td>
<td>Service Completion Conf...</td>
<td>Open</td>
<td>Medium</td>
</tr>
</tbody>
</table>
**Application Incident Management**

**Time Recording**

- **Time Recording** enables fast and easy entry of time spent working on a **incident or problem**:
  
  Time record details can contain: Actual duration, employee responsible, service product quantity, service type, valuation type, etc.

- Typically the user only needs to enter the actual duration and start time.

- If you have SAP CRM Service Confirmation Management activated, the system automatically creates a service confirmation item per entered time record.

<table>
<thead>
<tr>
<th>Action</th>
<th>Product ID</th>
<th>Actual Duration</th>
<th>Time Unit</th>
<th>Start Date</th>
<th>Start Time</th>
<th>Employee Responsible</th>
<th>Created At</th>
<th>Confirmation ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>INVESTIGATION</td>
<td></td>
<td>30 min.</td>
<td></td>
<td>28.05.2009</td>
<td>08:00</td>
<td>Bettina Giese</td>
<td>28.05.2009 10:29:36</td>
<td>9000001713</td>
</tr>
<tr>
<td>INVESTIGATION</td>
<td></td>
<td>60 min.</td>
<td></td>
<td>28.05.2009</td>
<td>09:00</td>
<td>Mr. Lou Windham</td>
<td>28.05.2009 10:29:36</td>
<td>9000001713</td>
</tr>
</tbody>
</table>
The processing log provides a consolidated audit trail of changes made to a transaction

- Various log types are available for selection
- One type can be defaulted for viewing
- Changes to fields can be logged selectively

<table>
<thead>
<tr>
<th>Log Type</th>
<th>Log Action</th>
<th>New Value</th>
<th>Old Value</th>
<th>Updated On</th>
<th>Updated At</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executed Actions</td>
<td>IT_RFC_APPROVAL_WORKF...</td>
<td>Processed</td>
<td></td>
<td>27.09.2008</td>
<td>11:54</td>
</tr>
<tr>
<td>Executed Actions</td>
<td>IT_RFC_APPROVAL_WORKF...</td>
<td>Processed</td>
<td></td>
<td>27.05.2008</td>
<td>11:47</td>
</tr>
<tr>
<td>Status History</td>
<td>User Status Changed</td>
<td>Implementation</td>
<td>Approved</td>
<td>27.09.2008</td>
<td>11:44</td>
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<tr>
<td>Executed Actions</td>
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<td>Processed</td>
<td></td>
<td>27.09.2008</td>
<td>11:44</td>
</tr>
<tr>
<td>Changed Fields</td>
<td>Total Duration of Service Transaction</td>
<td>2MINUTE</td>
<td>0MINUTE</td>
<td>27.09.2008</td>
<td>11:44</td>
</tr>
<tr>
<td>Status History</td>
<td>User Status Entered</td>
<td>Approved</td>
<td></td>
<td>27.09.2008</td>
<td>11:42</td>
</tr>
<tr>
<td>Executed Actions</td>
<td>IT_RFC_APPROVAL_WORKF...</td>
<td>Processed</td>
<td></td>
<td>27.09.2008</td>
<td>11:42</td>
</tr>
<tr>
<td>Transaction History</td>
<td>Incident</td>
<td></td>
<td></td>
<td>27.09.2008</td>
<td>11:54</td>
</tr>
<tr>
<td>Transaction History</td>
<td>Service Contract</td>
<td></td>
<td></td>
<td>27.09.2008</td>
<td>11:54</td>
</tr>
<tr>
<td>Transaction History</td>
<td>Confirmation</td>
<td></td>
<td></td>
<td>27.09.2008</td>
<td>11:47</td>
</tr>
</tbody>
</table>
The Assignment Block “SAP Collaboration” is used to create SAP support messages. It guides the user through several steps where at the end the incident / problem will create a corresponding message in SAP Support Backbone. All the further communication with SAP can be done here. Before sending a message to SAP we recommend to search in the SAP xSearch, which is search over all known SAP sources, such as SAP notes, SAP library, SAP SDN, etc.
The incident / problem can be categorized on multiple levels with several categorization blocks.

- To **"auto complete"** an Incident, the processor needs to select a categorization and then the system can find and copy a template which was assigned to this categorization.

- **Problems** with the same categorization as entered in the Incident can be proposed by the system when choosing **"Find Related Problems"**

- **Knowledge articles** with the same categorization as entered in the Incident can be proposed by the system when choosing **"Find Knowledge Articles"**
New Application Incident Management functionality

Dispatch

- Dispatching allows to assign a incident / problem to another employee or service team based on flexibly definable rules, for example if a help-desk agent cannot solve an issue remotely and wants to dispatch the incident to the 2nd level support.
- Rules for dispatching are set up in the Rule Modeler.
New Application Incident Management functionality
Interaction Center for IT Service Desk Agents *

SAP CRM Interaction Center provides IT service desk agents with a multifunctional framework including all of the tools they need for their jobs:

- Role-based access
- Account identification with object and installation identification
- Interaction History
- Incident, Problem, Request for Change Management
- Agent Inbox
- Knowledge Article Search
- E-Mail Response Management System
- Scripting, Alerts and Messages
- Transaction Launcher
- Optional integration with SAP Business Communication Management or 3rd party telephony system

*Pricelist component
New Application Incident Management functionality
E-Mail inbound in Interaction Center*

Incidents and problems are now enabled for E-Mail Response Management System in Interaction Center environments, allowing:

- Automatic creation of Incidents and problems based on ERMS processed inbound e-mails
- Automatic linking of reply e-mails to the original Incident / problem
- Routing of a generated service request / problem to a specific service team or employee responsible

Dear helpdesk,
I am not able to access your support page.
Please advise.
Best regards,
Joe Smith

*Pricelist component
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Upgrading to new IT Service Management
What to take into consideration…

Impact on incident and change request management in SAP Solution Manager 7.1

- UIs are upgraded from SAP GUI to SAP CRM Web UI
- New transaction types in 7.1 replace the 7.0 transaction types
- New functions in 7.1 are only available in the SAP CRM Web UI with new transaction types
- There is no automatic migration from 7.0 transaction types, but large parts of 7.0 customizing can be reused

To minimize the impact of these changes for customer projects, **SAP offers a transition phase**

- You can process existing tickets based on 7.0 transaction types within the Work Center UI or SAP GUI, until they are closed
- You create new tickets with the 7.1 object types and process them with the SAP CRM Web UI
- The SAP **Solution Manager Work Centers** are still available for all other ALM processes.
New Transaction Types for Application Incident Management

- As of SAP Solution Manager 7.1 completely new transaction types are available for Application Incident Management
- New transaction types can only be created and processed via the new Web UI
- All new functionalities and features are only available for new transaction types

**Process Types**

- Incident (SMIN)
- Problem (SMPR)
- Test Case Error (SMDT)
- Incident VAR (SMIV)
- Incident Template (SMIT)
- Problem Template (SMPT)
SAP Solution Manager Work Centers
Additional Information

The Incident Management and Change Control Work Center of SAP Solution Manager are still existing in 7.1

The Work Center can display old and new transaction types. Depending on the transaction type the related UI will be opened for processing.

Incident Management: WebDynpro UI, SAP GUI (expert mode) or Web UI

Change Request Management: SAP GUI or Web UI
Customers beginning to use Application Incident Management and ChaRM after the upgrade have to go through the standard operation procedure recommended by SAP.

Customers who already have used the processes in 7.0 can reuse parts of existing configuration.
• New Transaction Type for VARs: SIVA (SLFN) → SMIV (SMIN) used for new CRM UI

• Copy SMIV to ZMIV

• For Key Users disallow creating messages with old SIVA, only allow ZMIV: new messages created for new CRM UI

• Key Users as well as Processors will be able to edit old SIVA messages until they are finished

⇒ Note 1567003 - FAQ: ST710 Incident Management Frequently Asked Questions
Implementation Guide (IMG) Changes

Display IMG

7.0

7.1

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Incident & Service Request Management

Increase efficiency of responding to user requests

Incident & Service Request Management

Capture, document, and track all user requests from creation to resolution

Highlights

- Related searches based on Categorization
- Multiple inbound channels through ALM integration
- Flexible UI enhancements
- (Auto) Dispatch to Teams based on end user data or system data or categorization
Problem Management
Investigate and resolve issues in the IT infrastructure

Problem Management
Investigate, resolve, and document issues in the IT as well as workarounds or solutions to them.

Problem: 8000000219, JE problem SMPR ohne prio

Highlights
- Combine multiple incidents with same cause & lock related incidents
- Deep investigation of issues with Impact & Root Cause Analysis
- Forward problem messages to SAP
- Create Tasks, Knowledge Articles or Request for change as follow-up.
Knowledge Management

Leverage organizational knowledge to meet user’s needs

Knowledge Management

Document solutions and share information, documents and FAQs within your company.

Highlights

- Multi-language, Approval concept
- Publish knowledge to 1st Level support & end users
- Use integration in Service Desk, incidents and problems
Service Level Management
Optimize service delivery and provide transparency

Service Level Management
Define and manage all IT services and their related service level agreements

Highlights
- Escalation procedure based on IRT & MPT
- Define SLAs on object, Business Partner or contract level
- SLA determination on priority and service times
- Ignore SLA irrelevant status for duration calculations
New ITIL compliant Incident & Problem Management process

**Incident Management**
- **Business User**
  - Create Incident message
- **IT Support 1st Level**
  - Search solutions & Dispatch
- **IT Support 2nd Level**
  - Analysis
  - Handover to Problem Management
- **Multiple inbound channels**
  - Create notifications

**Problem Management**
- **IT Experts**
  - Create Problem message
  - Lock related incidents
  - Deep issue investigation
  - Provide solution & Update Incident(s)
  - Handover to Change Mgmt.
- **Create Request for Change**
  - Create tasks
  - Create Knowledge Article

**Business User**
- Create Incident message

**IT Support 1st Level**
- Search solutions & Dispatch

**IT Support 2nd Level**
- Analysis
  - Handover to Problem Management
ITSM usage rights on SAP Solution Manager 7.1

Scope
- SAP Solution Manager is part of the **support contract**. The scope of the usage rights depends on the maintenance agreement. The usage rights are release-independent.
- **SAP Standard Support** covers Incident & Change Management processes for **SAP components** only.
- **SAP Enterprise Support** covers IT Service Management processes for **all IT related assets, applications and infrastructure** which customers use in conjunction with any SAP Enterprise Support solution (=“customer solution” Details see SAP ES agreement).
  - If **one IT asset type** (e.g. printer) is part of customers solution, then **all IT assets** from this type are included.
  - **Usage beyond this scope** in SAP Solution Manager might need **additional SAP CRM licenses**. ➔ for details contact your Account Executive

Functionality
- The **SAP ITSM functionalities** which can be used by SAP Enterprise Support customers are **synonymous** with the SAP CRM **license package** „IT Service Desk Operations“
  - “IT Service Desk Operations” covers **typical IT Service Management processes**, e.g. Incident-; Problem-; Change- Management; Knowledge Management, SLA Management; etc.
  - Usage of ITSM CRM WebClient Business Roles is included in SAP ES, but **not** IC WebClient Business Roles (e.g. Call Center)
  - Any CRM Master data (BP, Org. data, ibase objects, products, etc.) and its synchronization with CRM middleware is included
- **Named user licenses** for ITSM processing must be at minimum "Limited professional application user". All Web **Self Service users would not need an additional SAP user license**.
  - **Any CRM functionality beyond IT Service Desk Operations** scope can be configured on SAP Solution Manager, but might need **additional CRM licenses**. ➔ for details contact your Account Executive
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IT Service Management on SAP Solution Manager
10 steps to make yourself an expert

1. SAP Solution Manager Book (release in Q4/2011)
2. Expert Guided Implementation - Service
3. SAP Whitepapers
4. Overview, Demos & Guides
http://service.sap.com/ALM-Processes

5. SAP Help Portal –
http://help.sap.com

6. Self Learning Maps
http://service.sap.com/RKT-SOLMAN

7. SAP Training “SM 200”
8. SAP Whitepapers
Overview, Demos & Guides
http://service.sap.com/ALM

10. Developer Network Forum - Wiki, Forum& Blogs-
THANK YOU!