Template Management

Using Templates in Global Rollout

Solution Management
Application Lifecycle Management

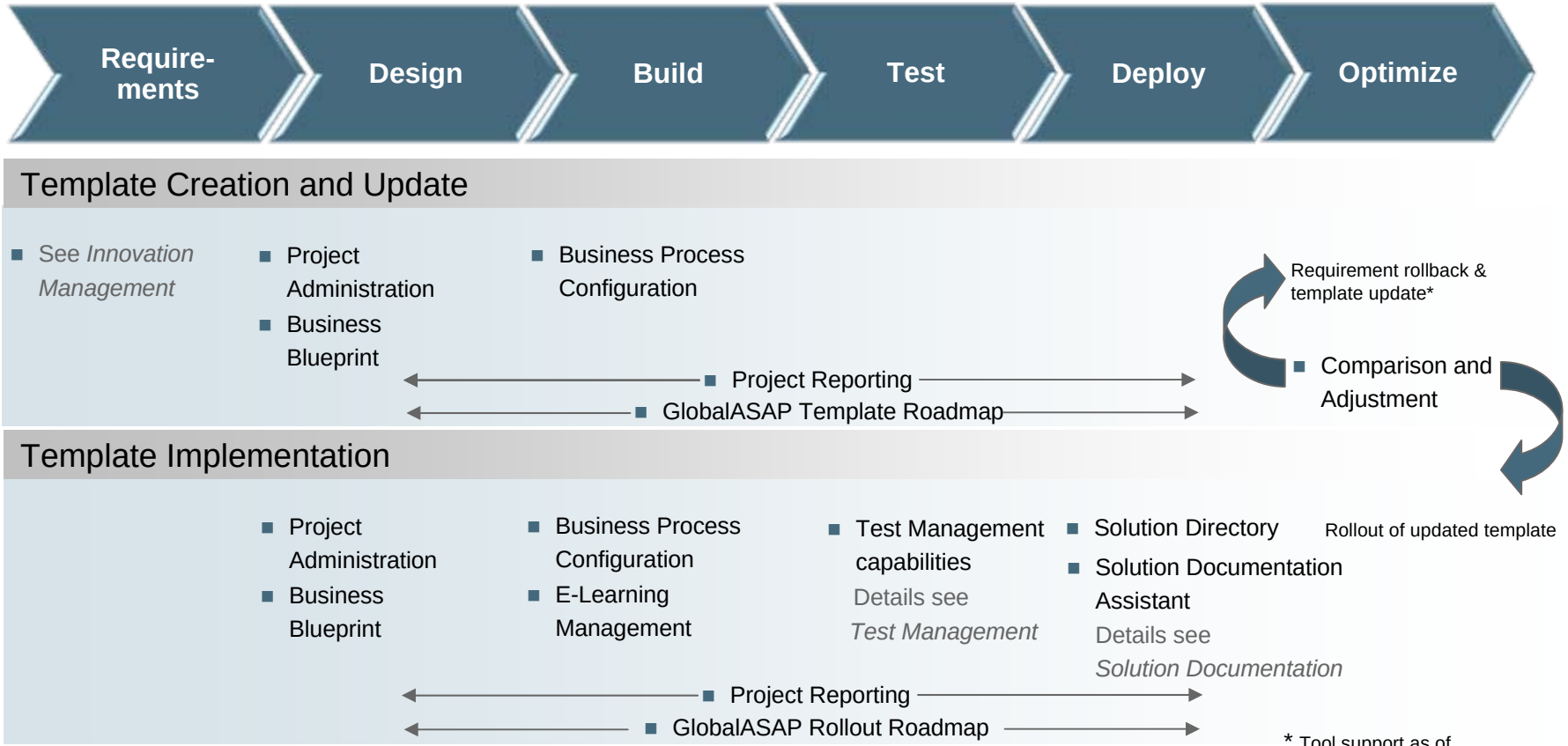
THE BEST-RUN BUSINESSES RUN SAP™

Template Management

Process Overview Involving ALM listing capabilities

Template Management

The template management approach allows customers with multi-site SAP installations to efficiently manage their business processes across geographical distances – from initial template definition to template implementation and template optimization, such as part of a global rollout approach.



* Tool support as of SAP Solution Manager 7.0 EHP2

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Challenges in Managing Global Templates

… And How SAP Solution Manager Can Support You

Customer Challenge	SAP offering
Unstandardized business processes across scattered business landscapes	Compliance with global standard business processes *-> SAP implementation content, blueprinting functionality, Global Attribute*
Different implementation approaches and strategies	Allow transfer of leading practices across all lines of business *-> GlobalASAP methodology*
Reduce time to benefit	Drive quick, repeatable project implementations *-> Centralized template definition and rollout*
Allow flexible template adjustments	Rollback of desired and required changes into template *-> Enhanced support as of SAP Solution Manager 7.0 EHP2*
Minimize costs	Minimize investment in redundant process development *-> Re-use of templates and related contents in various rollout implementations*

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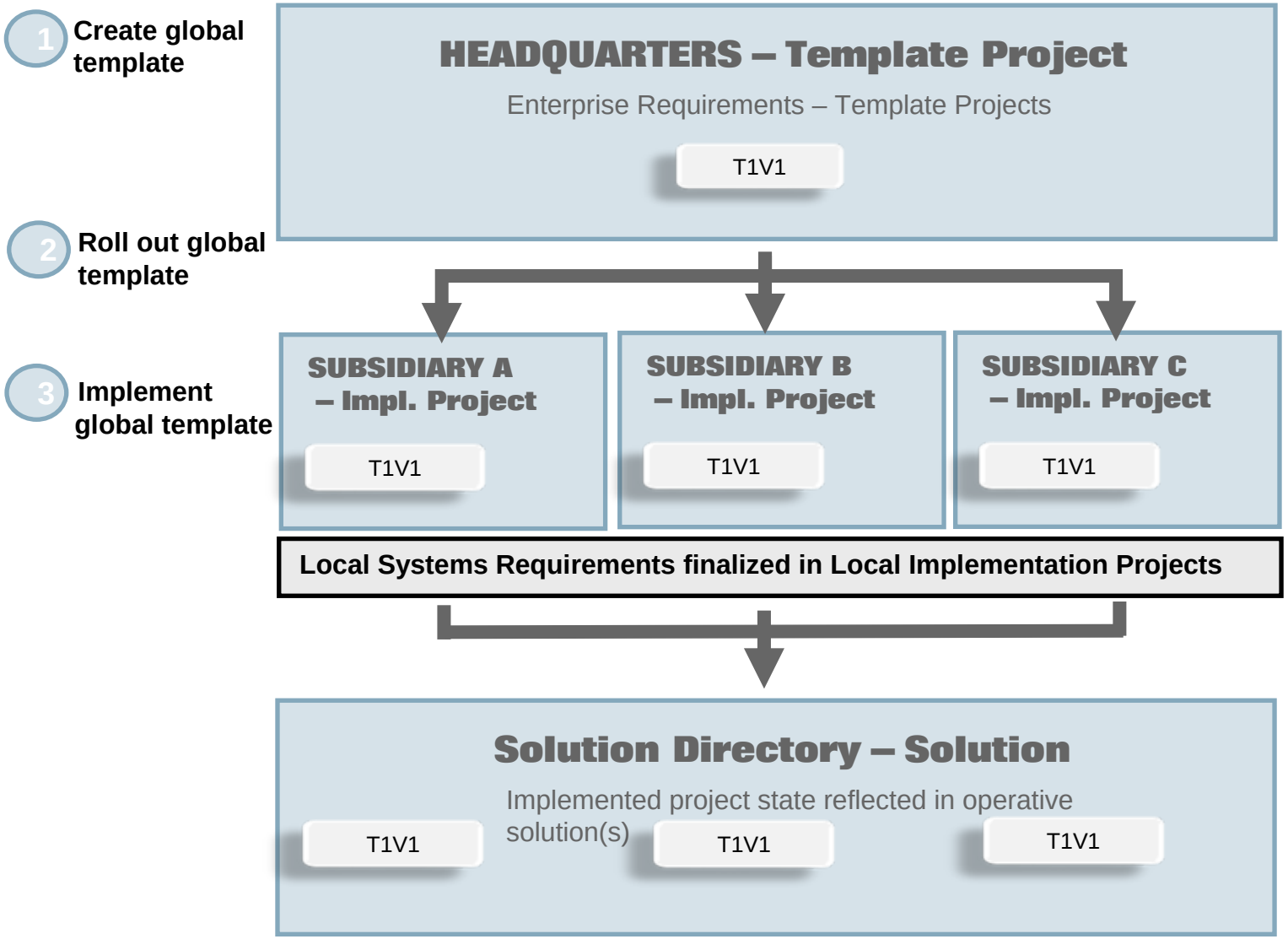
Template Management Supporting Global Rollout – Process Overview (I)



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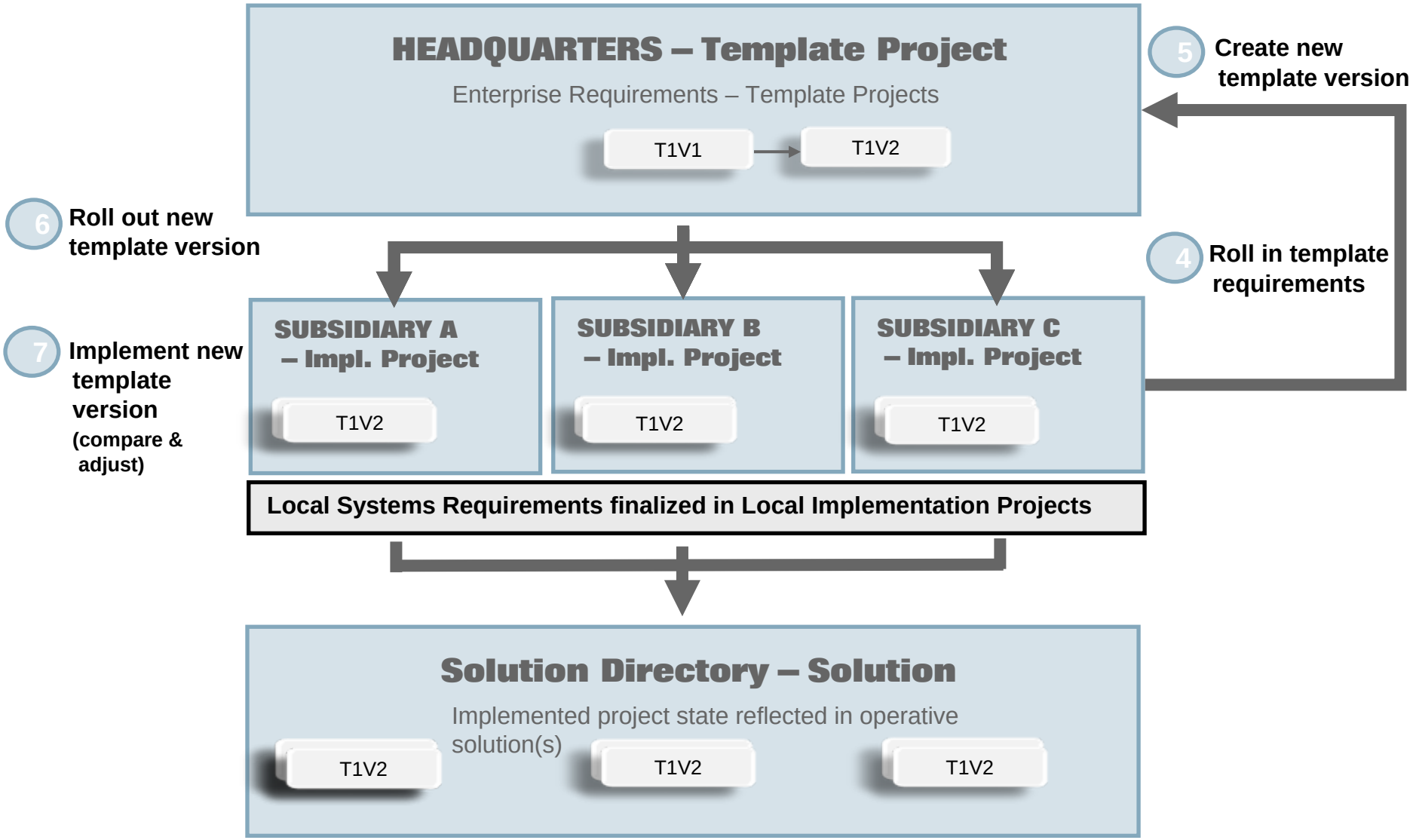
Template Management Supporting Global Rollout – Process Overview (II)



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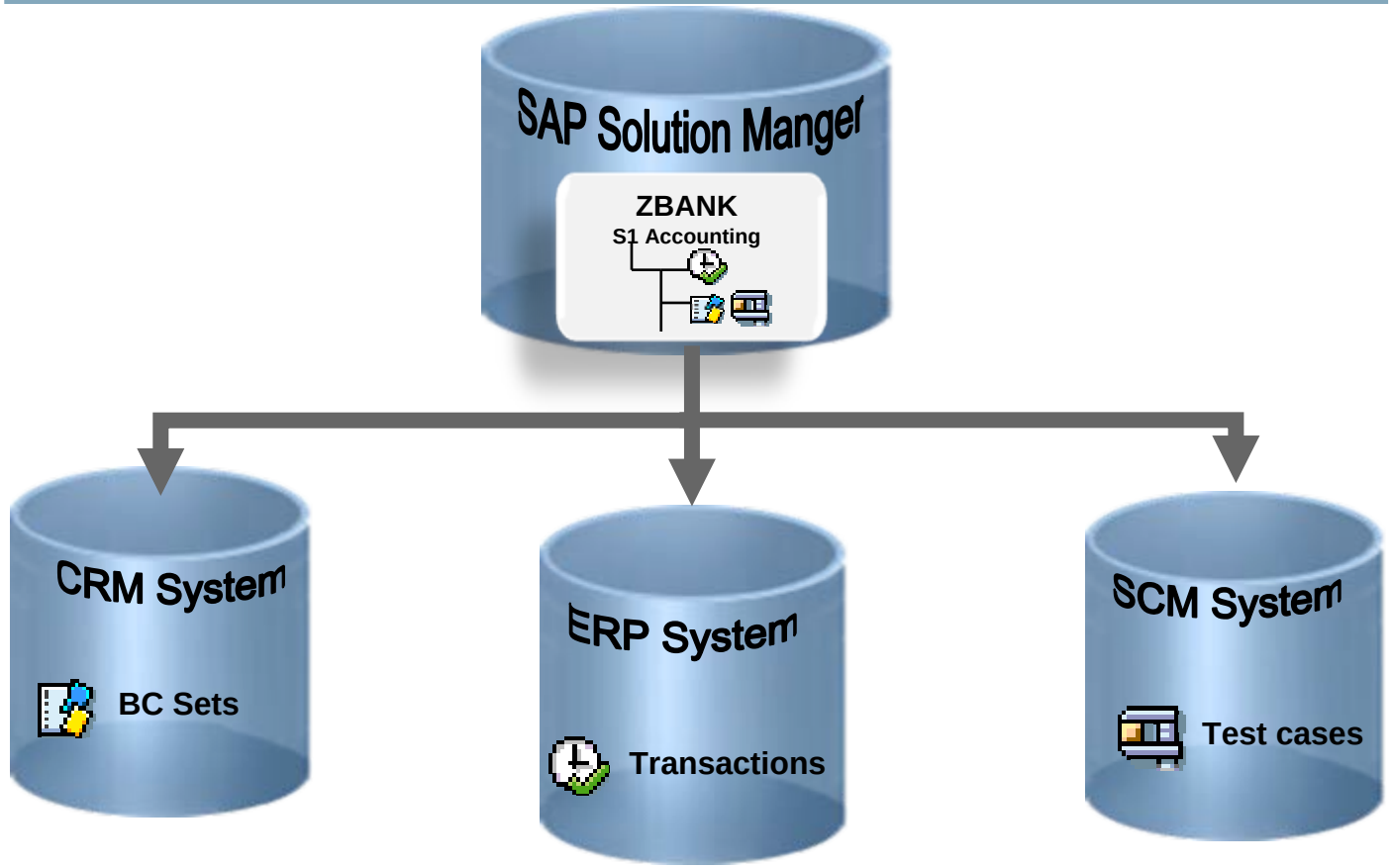
Definition Global Template ("Template")

Reference System

Managed Systems

Template

- Is a container that bundles business processes which are standardized to a certain extent
- Links to process-specific developments, configuration, and test data
- Can be used for rollout to other company locations



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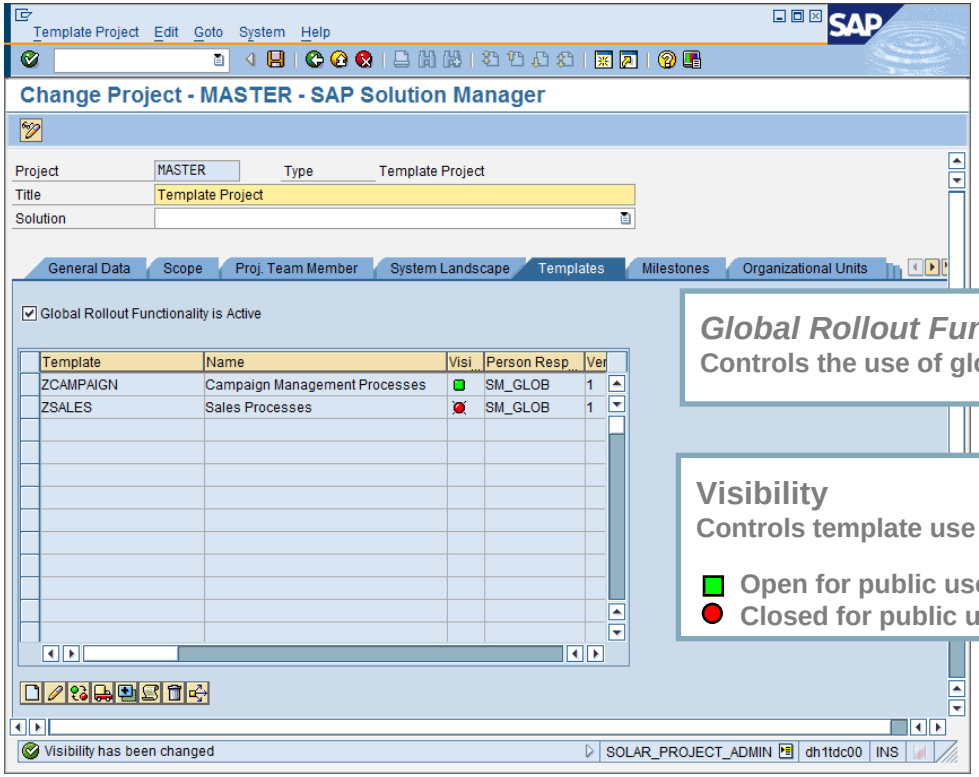
Template Creation

Template Project Preparation → Template Business Blueprint → Template Configuration → Template Packaging & Roll-out

Setup global project framework

- Create a template project
- Assign project team members, roles, and responsibilities
- Create required number of templates
- Select standard scenarios from other templates (if applicable)



Global Rollout Functionality
Controls the use of global attributes

Visibility
Controls template use

- Open for public use
- Closed for public use, template „under construction“

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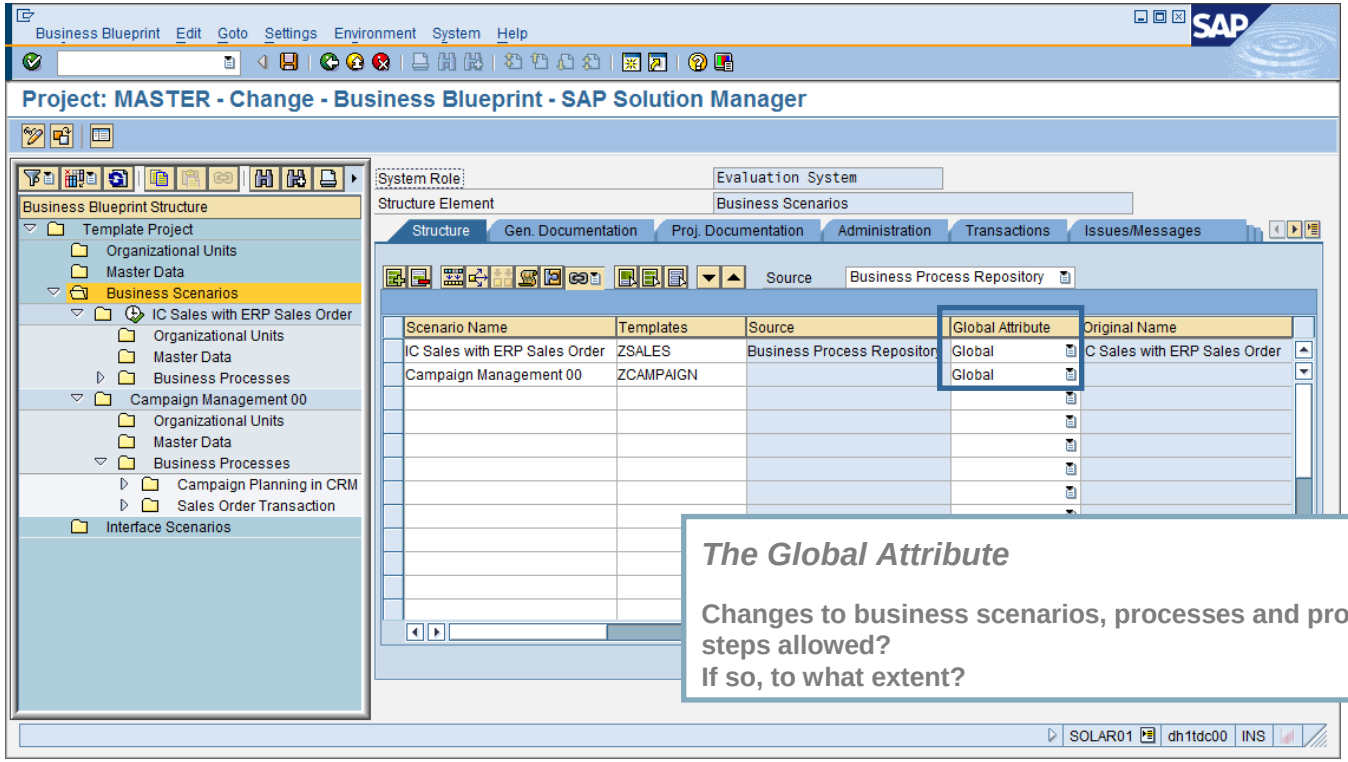
Template Creation

Template Project Preparation | **Template Business Blueprint** | Template Configuration | Template Packaging & Roll-out

Define global processes and requirements

- Select SAP predefined implementation content
- Refine template process structure, e.g., by making of use short cuts
- Assign template(s) to process structure
- Set global attributes to determine scope of process changes in local roll-out projects
- Document global business and technical requirements



The Global Attribute

Changes to business scenarios, processes and process steps allowed?
If so, to what extent?

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Template Creation

The Global Attribute

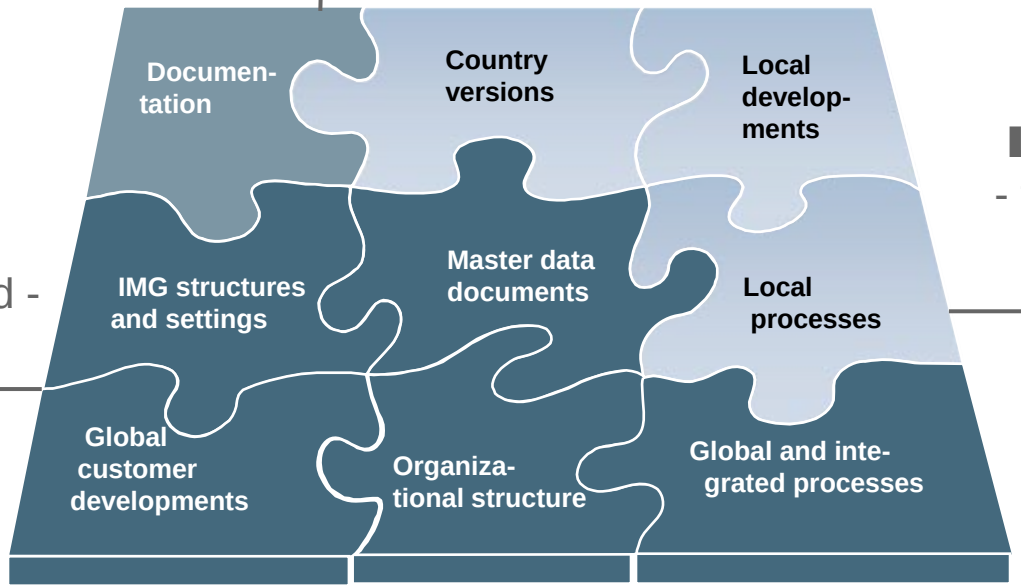
Template Project Preparation | **Template Business Blueprint** | Template Configuration | Template Packaging & Roll-out

The Global Attribute
defines the scope of changes allowed in local rollout projects

Harmonized elements
(standard complete / standard partial / harmonized)
- some changes allowed -

Global elements
- no changes allowed -

Local elements
- full authorization for changes -



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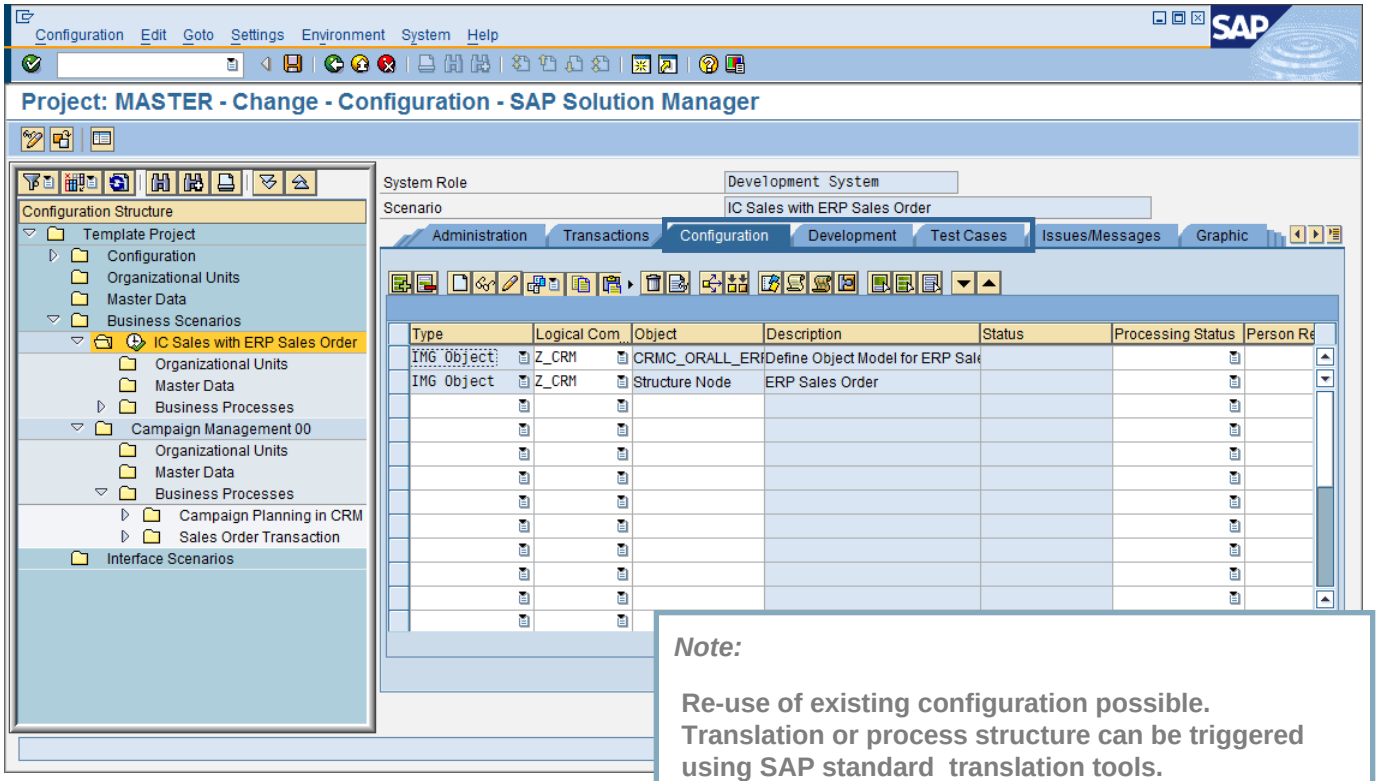
Template Creation

Template Project Preparation → Template Business Blueprint → **Template Configuration** → Template Packaging & Roll-out

Prepare reference template with preconfiguration

- Assign related IMG activities, create and assign BC Sets
- Assign global customer-specific developments (programs, transactions etc.)
- Record sample / master data as CATTs
- Create standard test cases (manual test cases, CATTs, eCATTs)



Note:

Re-use of existing configuration possible. Translation or process structure can be triggered using SAP standard translation tools.

Legend:

IMG –> SAP Implementation Guide

BC Set -> Business Configuration Set

CATT -> Computer Aided Test Tool

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Template Creation

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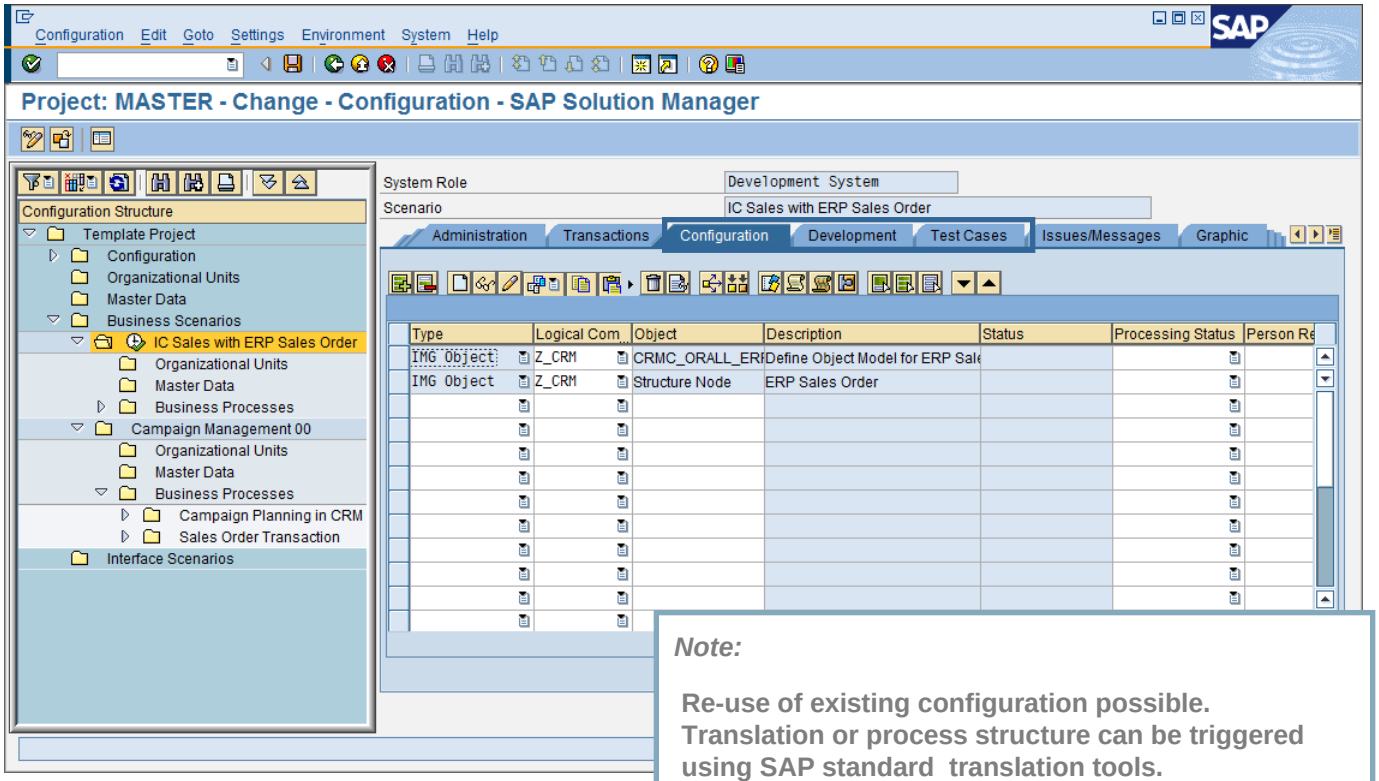

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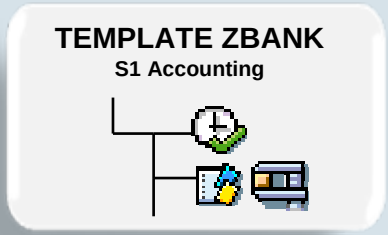
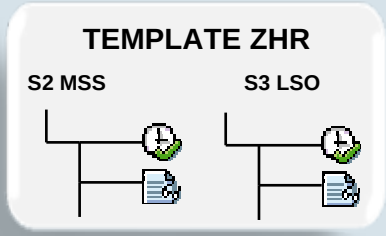
Template Packaging

Template Project Preparation → Template Business Blueprint → Template Configuration → **Template Packaging & Roll-out**

Template Project

1. Assign scenarios to template
2. Release templates for
   - current SAP Solution Manager system
   - another SAP Solution Manager system (transport), if applicable
3. Collect templates into transport request





Change visibility before rollout

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Initial Template Implementation

Process Overview – Local Rollout Project

Local Project Preparation | Local Business Blueprint | Local Configuration | Test Management | E-Learning Management | Solution Transfer

Setup roll-out project framework

- Create a local roll-out project (type: implementation)
- Assign project team members, roles & responsibilities
- Select one or multiple templates and related scenarios for implementation
- Define implementation standards

Local Project Preparation | **Local Business Blueprint** | Local Configuration | Test Management | E-Learning Management | Solution Transfer

Scope & enhance global template

- Implement global processes
- Adapt harmonized and local processes to local requirements
- Document local requirements of harmonized/local processes
- Sign off business blueprint

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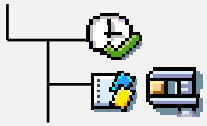
Local Business Blueprint

Template Copy into Implementation Project

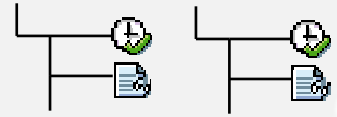
Template Project

TEMPLATE ZBANK
S1 Accounting



TEMPLATE ZHR

S2 MSS **S3 LSO**



Copy template

Implementation Project

TEMPLATE ZBANK‘
S1 Accounting - COPY

- Template is copied into implementation project
- Template content with pre-configuration is basis for local configuration
- Template original ZBANK and copy ZBANK’ are detached, yet reference to predecessor data is stored

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Initial Template Implementation

Process Overview – Local Rollout Project

Local Project Preparation | Local Business Blueprint | **Local Configuration** | Test Management | E-Learning Management | Solution Transfer

Implement and test global & local requirements

- Perform pre-configuration, e.g., by applying template-specific customizing for global template processes
  - such as BC Sets or
  - using Customizing Distribution
- Perform final configuration via IMG activities based on local requirements
- Apply global customer developments (such as reports), enhance with local customer developments
- Apply standard test cases to test standard processes, use as template to create local test cases or create new local test cases

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Initial Template Implementation

Process Overview – Local Rollout Project

Local Project Preparation | Local Business Blueprint | Local Configuration | **Test Management** | E-Learning Management | Solution Transfer

Test global & local requirements

- Set up test plan
- Compile test packages
- Assign testers
- Create test environment
- Perform tests
- Sign off tests

-> see process: ***Test Management***

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Initial Template Implementation

Process Overview – Local Rollout Project

Local Project Preparation | Local Business Blueprint | Local Configuration | Test Management | **E-Learning Management** | Solution Transfer

Create and change training for different parties involved (e.g., end users)

- Setup efficient end-user training strategy with e-learning
- Create e-learning materials
- Organize / categorize e-learning materials
- Prepare e-learning materials for specific user roles
- Distribute e-learning materials to end users
- Execute e-learning
- Analyze e-learning results & feedback

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Initial Template Implementation

Process Overview – Local Rollout Project

Local Project Preparation | Local Business Blueprint | Local Configuration | Test Management | E-Learning Management | **Solution Transfer**

Transfer implemented solution into Solution Directory

- Prepare solution for operations
- Prerequisite for SAP Solution Manager processes including:
  - Business Process Operations
  - Maintenance of SAP Solutions

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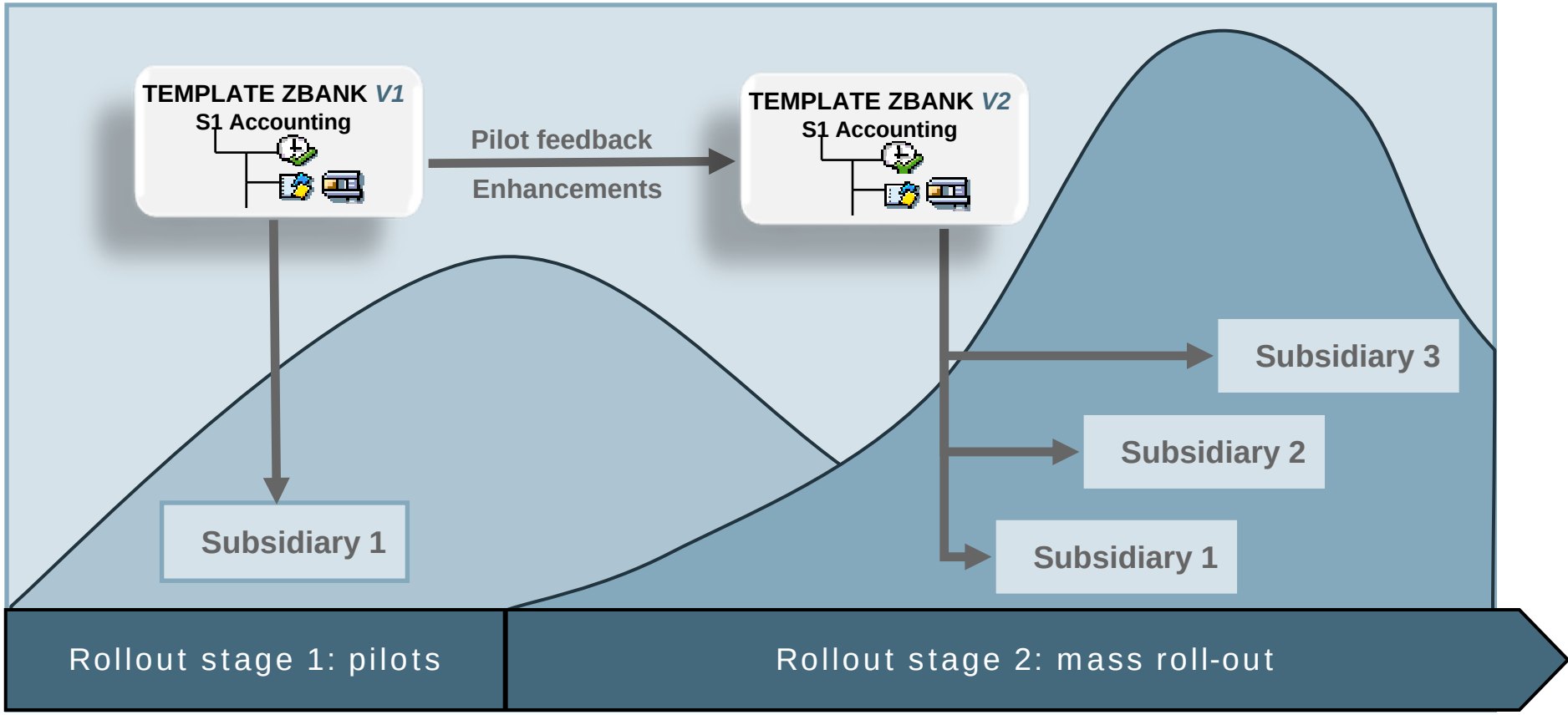
Global Rollout in Different Stages



Versioning concept to control/track changes in templates

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Rollback and Template Update

Process Overview – Template Projects

Roll in Template Requirements → Update Template → Roll out Updated Template

Feedback from local sites for improving and enhancing templates

- Local sites give feedback on:
  - Template improvements, e.g. customer-specific enhancements to be implemented
  - Template corrections

> ***Note:***
> ***As of SAP Solution Manager 7.0 EHP2 tool support for the template rollback and template update process is expected (using compare and adjust functionality).***

Roll in Template Requirements → **Update Template** → Roll out Updated Template

Scope and enhance global template

- Implement feedback from local sites
- Adapt template to new or updated SAP solutions (new building blocks from BPR) or new customer-specific processes
- All versions are automatically archived.

Roll in Template Requirements → Update Template → **Roll out Updated Template**

Rollout to local implementations projects for template adjustment

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Template Comparison and Adjustment

How to Update Templates in an Implementation Project

Goal

Transfer process and pre-configuration changes from new template version into current implementation project

Updated Template

- Selected Business Scenarios
  - Intenet Sales: B2C
    - Business Processes
      - B2C
        - Register in Web Shop
        - Select Product
        - Update Shopp. Basket
      - Order Processing
        - Create Order
        - Process Order

How to retrieve template differences?

Template in Current Impl. Project

- Selected Business Scenarios
  - Intenet Sales: B2C
    - Business Processes
      - B2C
        - Register in Web Shop
        - Select Product
        - Update Shopp. Basket

GlobalASAP Methodology

Overview

Leverage SAP Implementation experience

Description

GlobalASAP delivers a process-oriented, clear, and concise methodology, the GlobalASAP Roadmap, to provide step by-step direction throughout your global or multi-site SAP implementation.

GlobalASAP provides two roadmaps:

- **GlobalASAP Template Roadmap**
- **GlobalASAP Rollout Roadmap**

More info

http://service.sap.com/roadmaps

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AES Improves Efficiency with SAP® Solution Manager

QUICK FACTS

AES

- Headquarters: Arlington Virginia
- Industry: Utilities
- Products and Services: Independent power producer
- Revenue: US$11 billion
- Employees: 30,000
- Web Site: www.aes.com
- SAP® Solution and Services: SAP ® Active Global Support, SAP Solution Manager

"Solution Manager provided the necessary tools to manage our global template and rollout projects. It also drastically increased our ability to manage and monitor changes to configurations and effectively manage issues locally and globally. Solution Manager quickly became a valuable resource within our organization."

Lakshman Charanjiva
Vice-President, Global Business Solutions
AES Corporation

Challenges and Opportunities

- Manage global templates and multiple rollouts during a five-year implementation
- Ability to conduct global test scenarios with local details
- Visibility to issues while managing from different locations globally

Objectives

- Increase visibility to local business project documentation, configuration status
- Reduce cost and increase re-use of integration test benefits
- One major tool to manage many project tasks
- Re-circulate best-practices build at local projects to other projects

Benefits

- Improved overall documentation efficiency
- Improved communication between SAP and AES support teams
- Transparency for global project rollouts and issue management between the different locations
- Enhanced testing for integration

AES
the power of being global

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Further Reading and Training

General information on SAP Solution Manager:

- http://service.sap.com/solutionmanager
- http://service.sap.com/rkt-solman - SAP Solution Manager Learning Map

Template Management Training:

- SM510 Global Rollout (eLearning)
- SMI310 Implementation Tools in Detail (Classroom training)

Both courses can be booked under: http://www.sap.com/services/education

Online Help:

- Available on the SAP Help Portal – SAP Solution Manager 7.0.
  Topics “Compare and Adjust with Template Source” and “Global Rollout with a Template”.

GlobalASAP Methodology

- http://service.sap.com/roadmaps

Tips and Tricks on Working with Templates

- http://service.sap.com/solutionmanager -> Media Library -> Technical Papers -> Handling Templates in SAP Solution Manager

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Thank you!