

# White Paper

# Documenting your Processes

# in SAP Solution Manager:

# 10 Best Practices

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Theo has an IT education to bachelor level, and has obtained a master's degree in Business Administration.

He has worked for over 25 years on IT projects carrying out various roles from programmer to project manager.

In the last 15 years he has participated in various large SAP implementations. For the last 10 years he has been implementing SAP Solution Manager as a tool to support SAP Projects and SAP Application Management.

**SAP Solution Manager is a tool to be used on the IT side of a company, as part of Application Lifecycle Management. In several ways, the maintenance of your IT applications can be supported using that tool.**

**An important part of SAP Solution Manager is the Business Process Structure which is used amongst others as a backbone for documentation. This paper shows 10 Best Practices on documenting your processes.**

The Best Practices discussed in the paper are related to the areas below:

- Process Structure: IT structure vs. Business structure
- Source for Process Structure creation
- Identification of Process Structure elements
- Usage of SAP Solution Manager tabs
- Customizing and Development
- Test Cases and Test Scripts
- Customer Attributes usage
- User Interface: SAP transactions
- Interface Scenarios
- Document Management

These Best Practices are covered in more detail below one by one.

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## Best Practice #1) Process Structure: IT structure vs. Business structure

Many people struggle with what kind of processes to define in SAP Solution Manager: should this reflect an IT structure or only the real business process structure? As many organizations use a separate tool to model business process flows (tools that Orbus Software offer), it is advised to model the real **business process structure** in those tools only.

In SAP Solution Manager the **IT processes** are then modeled which can be re-used in the business process modeling tool to show the usage of IT elements.

The reason for this approach:

- SAP provides standard process structures which are more SAP **IT based**. When this data is re-used a lot of additional information is copied too. For example, configuration details, SAP transactions used, process descriptions etcetera. All this information helps in accelerating SAP implementations as it guides SAP consultants. But also these people can re-use certain information such as process descriptions for example.
- SAP Solution Manager is used mainly by IT employees, whereas business employees use the process modeling tool.

## Best Practice #2) Source for Process Structure creation

This Best Practice relates to the previous one. The IT structure created in SAP Solution Manager shows a process structure from an IT perspective. When creating a business process structure in a process modeling tool, it is wise to **re-use the IT structure** created in SAP Solution Manager.

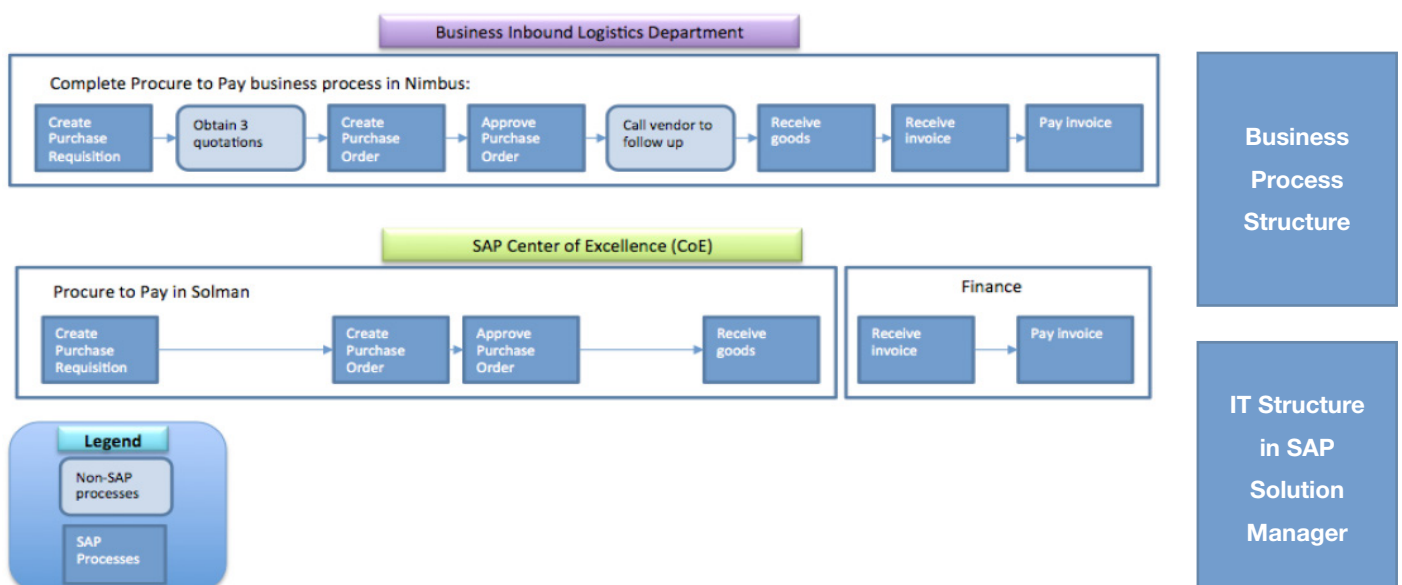


Figure 1 - Example of Business Process Structure re-using IT-structure

Why does it make sense to work in this way?

- Re-using the IT structure in the business process structure will bridge the gap between IT and business. Business can see what IT processes are used in a specific business process, and IT can see in SAP Solution Manager how these IT processes are developed and configured.
- Impact assessment from changes in business on IT - and vice versa
  - becomes easier, as business and IT are using common IT structure elements. For example, when software needs a change (part of an IT process) you can quickly detect which business processes are impacted using that software.

## Best Practice #3) Identification of Process Structure elements

In general it is very practical to identify a process structure element in an easy way (e.g. process 4.2.5), compared to using a long process name. This means it will be possible to easily refer to a short identification in discussions.

By standard SAP Solution Manager does not create a unique identifier for processes, which is visible by users. As a Best Practice two types of solutions are used:

- Start a process name with a unique identifier and add an additional character for lower process levels. See below example where the identifier is printed in bold:

- 1st level: **1** Sales Order Management
- 2nd level: **1.1** Sales Order Registration
- 3rd level: **1.1.1** Create Sales Order

- Generate a unique identifier automatically for processes via an enhancement of the software (custom development)

The first alternative is easier to implement, and cheaper. But the disadvantage is that the unique identifier becomes part of the process name while consuming space from the process name. Also in this case we cannot filter on the unique identifier separately from the name.

## Best Practice #4) Usage of SAP Solution Manager tabs

For every process element, tabs can be populated within SAP Solution Manager. Below are a few examples which are used frequently:

- **Transactions:** shows the SAP transactions applicable for a process (end-user interface)
- **Configuration:** customizing objects applicable to implement the process and related documentation

- **Development:** custom development objects applicable to implement the process and related documentation
- **Test Cases:** test scripts or test objects / programs used during (Automatic) Test Execution

It is advised to use these tabs, as defined by SAP. Why? This will create a common understanding towards the SAP organization (practical when SAP needs to support your company) but also when using external resources and external parties for software implementation and support. There is a good chance that they know this approach already as it is used within other companies.

The tabs mentioned in the list above will be discussed in more detail one by one.

## Best Practice #5) Customizing and Development

The applicable tabs to document **customizing and development** are already described in the previous Best Practice. What is the difference between these two tabs?

- **Customizing:** relates to configuration and parameterizing of SAP software to implement a process. In this case SAP software can be used as provided by standard (no custom development needed)
- **Development:** relates to modifications of SAP software needed to implement a process. In this case SAP software **cannot** be used as provided by standard (custom development needed)

Populating these two tabs with both the technical objects and related documentation gives people a quick insight into customizing / development carried out to implement a specific process. Figure 2 below shows an example of the 'Configuration' tab showing the customization of documents and objects.

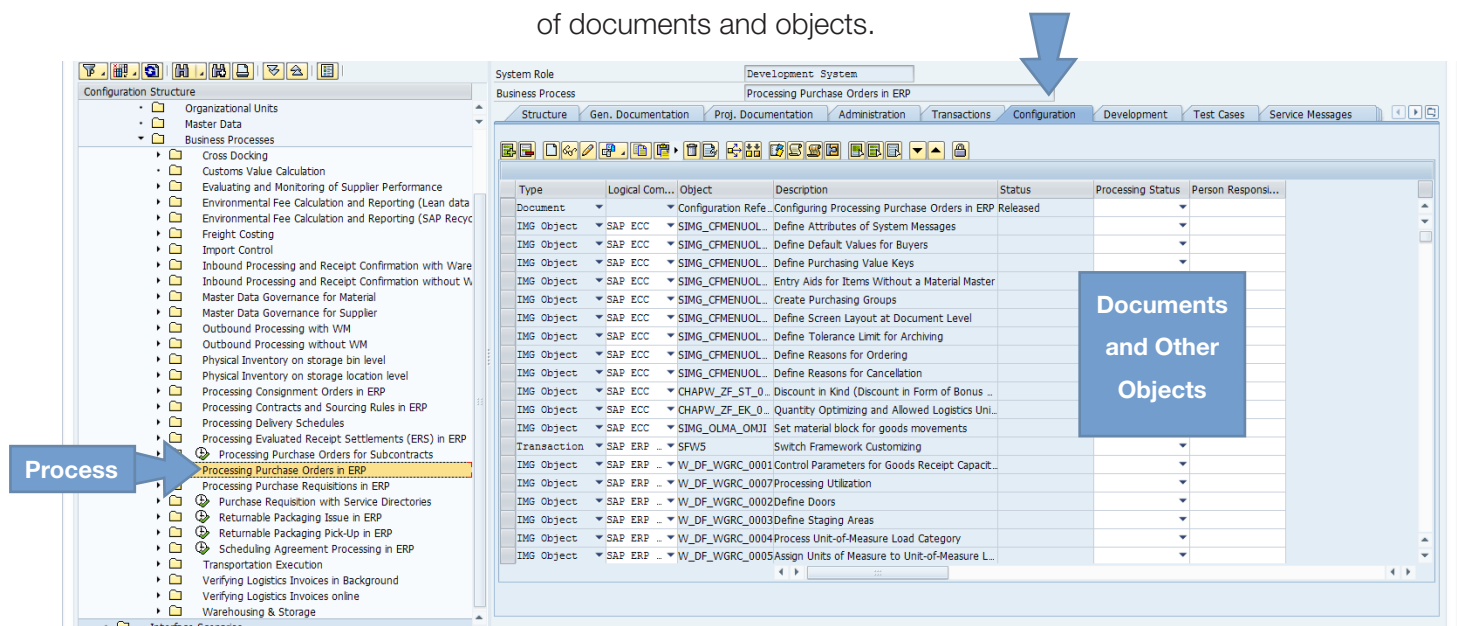


Figure 2 - Example of Customizing documentation

## Best Practice #6) Test Cases and Test Scripts

The Test Cases tab to document test objects is already described shortly in Best Practice #4. Possible Test Objects are Test Scripts, but also programs to run automated tests.

When populating the Test Cases tab people can easily find the test objects available to test a specific process.

A very important additional benefit is that these test objects can be re-used in the Test Management module of SAP Solution Manager. Test Scripts can be re-used and enriched with test results, and stored separately. Automated test objects can be re-used and invoked as part of a specific test.

## Best Practice #7) Customer Attributes usage

By standard SAP provides a number of attributes to store metadata on a document or other object (for example SAP transaction, automated test script, etcetera). Additionally it is possible to define your own keywords to label every document and object. When using Customer Attributes it is possible to label elements as part of an own defined hierarchy.

Example of 'labels' frequently used are: country, region, object owner, risk and priority.

Next to documents and other objects - stored to a process - the labels can also be added to process element. Figure 3 below shows an example of Document Customer Attributes.

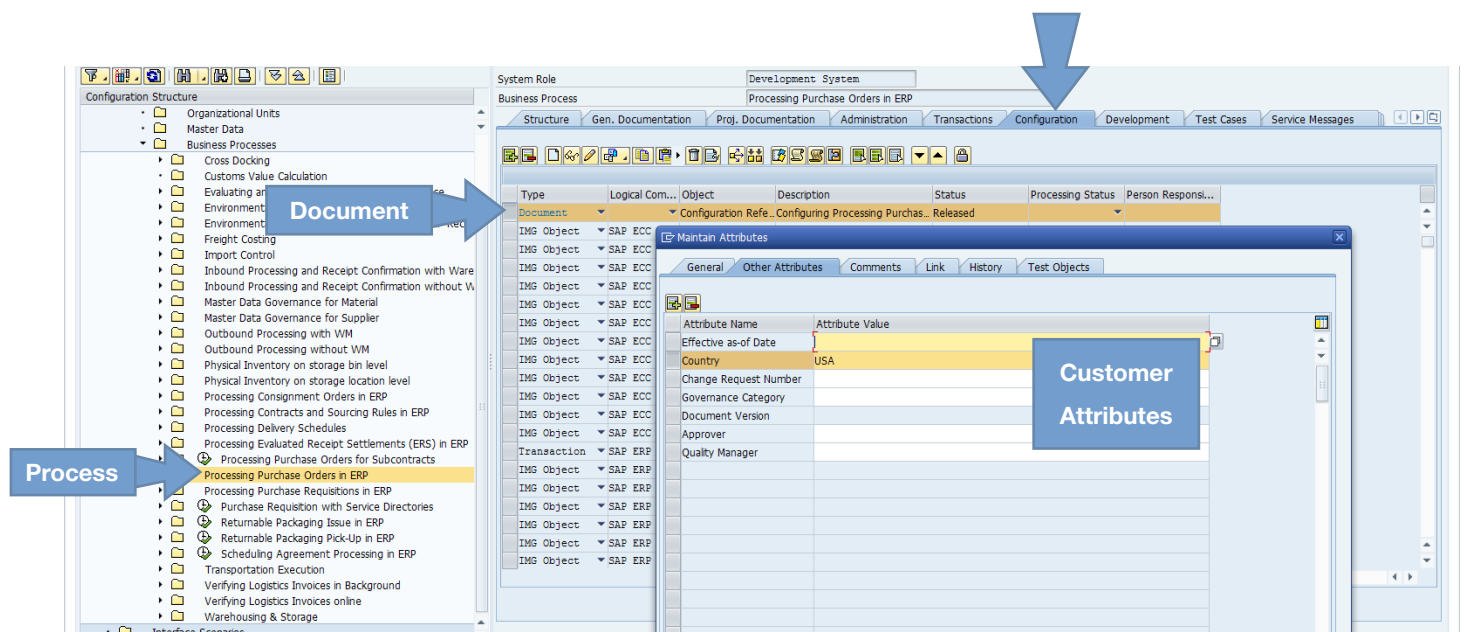


Figure 3 - Example of Document Customer Attributes

## Best Practice #8) User Interface: SAP transactions

The Transactions tab which is used to document the end-user interface is already described briefly in Best Practice #4. The end-user interface concerns SAP transactions ('screens') several times, but can also be related to other types like batch jobs and Web-related user interface objects.

When populating the Transactions tab, people can easily find the end-user interface objects applicable to support or execute a specific process.

A very important additional benefit is that these objects can be re-used in the Test Management module of SAP Solution Manager. Transactions can be re-used and invoked as part of a specific test.

## Best Practice #9) Interface Scenarios

SAP Solution Manager uses a separate area to maintain data on interfaces. When using this area, additional data can be maintained on interfaces compared to what is available in the process area. Also it is possible to get an easy overview on interfaces quickly.

Moreover, the interfaces registered can be assigned to process elements (separate area).

In the 'Component' tab the process structure is shown, including the interfaces assigned. See figure 4 for an example where sub-processes are shown for a specific process. Also interfaces are shown between sub-processes where applicable.

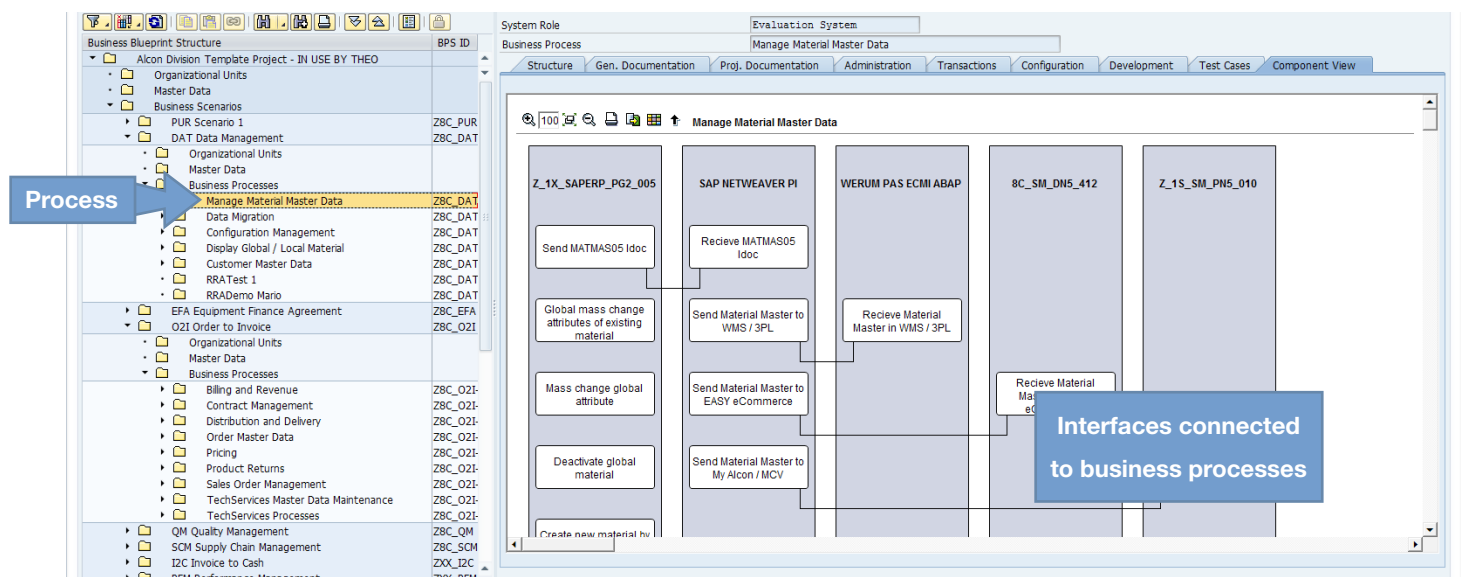


Figure 4 – Interfaces connected to processes

As an additional benefit, this process overview and assigned interfaces can be re-used in Business Process Monitoring set-up in SAP Solution Manager. In that module interfaces can also be monitored and in case of an error the interfaces will show 'in red' in the process overview.

# Best Practice #10) Document Management

For Document Management you can find a number of elements below. All the usages are seen as a Best Practice here.

- **Documentation Types:** standardizes the document types to be used and register these in SAP Solution Manager. When people register a new document it can only be one of the registered types. This standard includes usage of a Template document per document type so people automatically use the template after document type selection.
- **Document Status values:** standardizes the status values a document can have, for example 'Work In Process', 'To Be Approved', 'Approved' etcetera.
- **Document Status scheme:** sets up a sequence status values need to follow. When a document has a status 'Work In Process' the status can only be changed to 'To Be Approved'.
- **Digital signatures:** people change the status of a document and by providing their password they digitally sign that document.
- **Link documents:** documents that are interrelated are linked to each other. This means people can easily find the related or linked document.



# Conclusions

An important part of SAP Solution Manager is the Business Process Structure, which is used amongst others as a backbone for documentation. This paper shows 10 Best Practices on documenting your processes.

Ten Best Practices are discussed in this paper. The described Best Practices collectively form a Software Configuration Management database. This database consists of an IT process hierarchy on the one hand, and per process element it shows the relevant documents and objects on the other hand. The documents and objects relate to different areas, for example, end-user interface, software configuration and development, and testing.

Several examples are used in this paper, to show the relationship between IT process elements and documents or other objects.

Next to forming a Software Configuration Management database all this data is re-used in other SAP Solution Manager modules such as Test Workbench and Business Process Monitoring.

So maintaining the data as described in this paper will not only result in a powerful Software Configuration Management database but also leverage usage of other SAP Solution Manager functionality. Hence the double advantages gained from using the Best Practices mentioned.

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