

Change Request Management (ChaRM) SAP Solution Manager 7.2

End User Training

advisory | digital | managed services

GYANSYS

- What's is SAP ChaRM

- ChaRM Scope

- As IS / To BE Process

- Process Flow

- ChaRM User Roles

- ChaRM Document Types

- Fiori Launchpad Tiles

- ChaRM CRM_UI Overview

-  Processing Normal Change

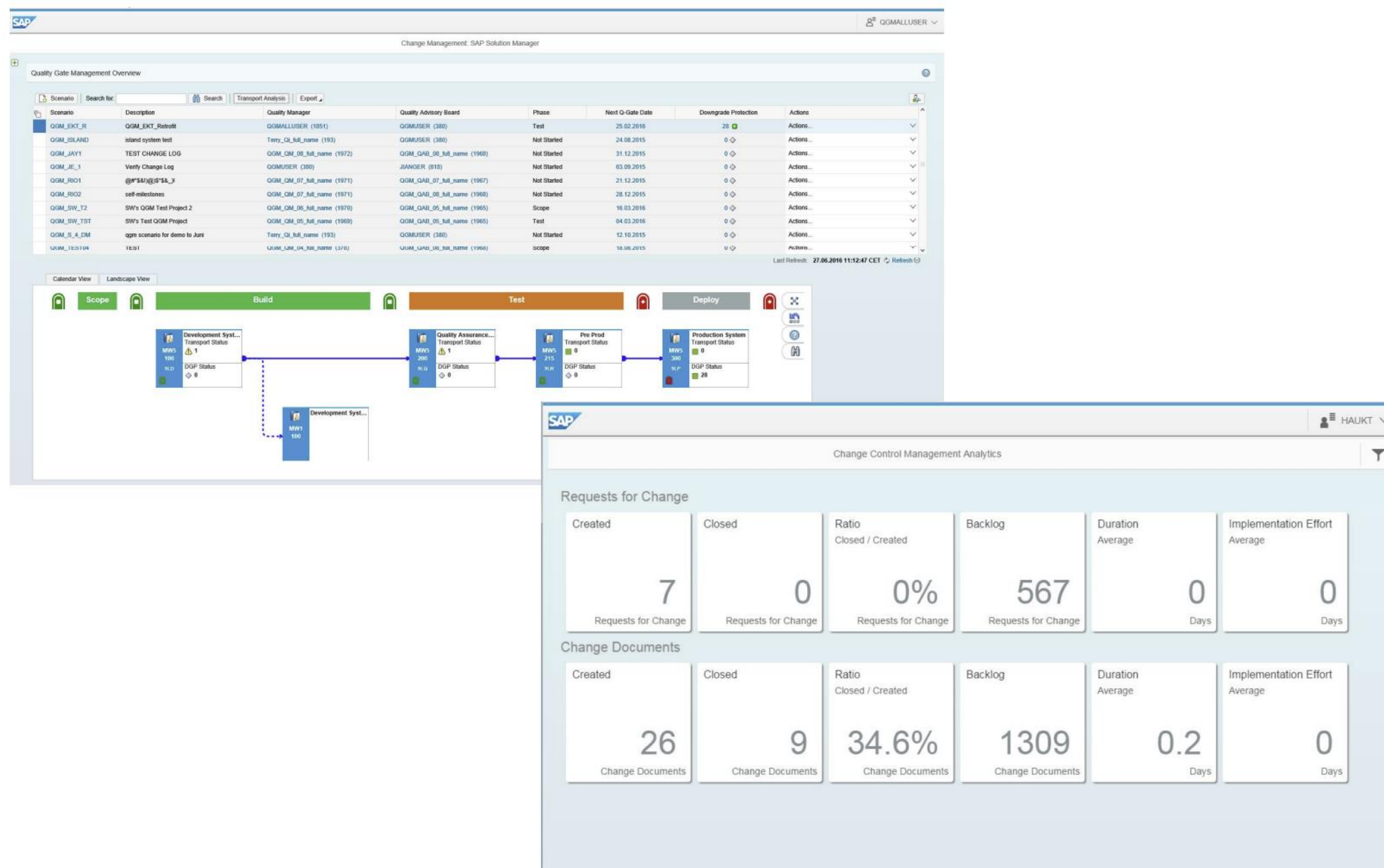
-  Processing Normal Change Preliminary Import

-  Processing Urgent Change

-  Reporting / Search

- What's Change Request Management (ChaRM) ?

With SAP Solution Manager Change Control Management standardized processes, methods and tools will ensure high transparency and continuous quality of the change process during the entire application life cycle.



Main Benefits of ChaRM:

- Improve efficiency and transparency of change management processes.
- Minimize business disruptions.
- Store documentation of implemented changes.
- Track and monitor changes.
- Improve audit process.
- Reduce the risk of correction and project failures.

Landscapes in Scope for ChaRM – Development Track

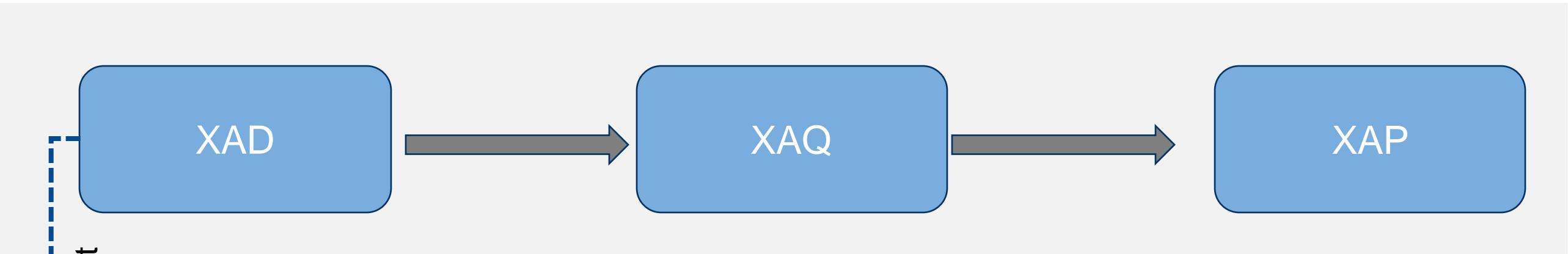
SAP Solution Manager ChaRM

GRC

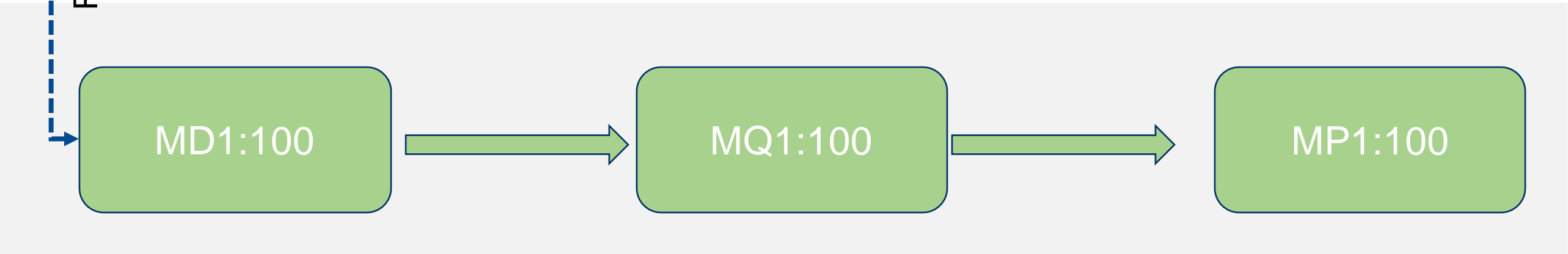


S/4

Changes will be copied over from XAD into MD1 via ChaRM retrofit process.



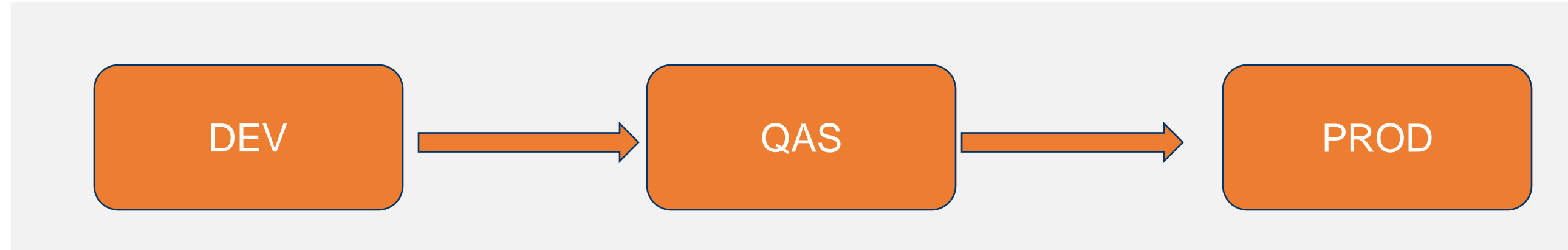
MDG



Retrofit

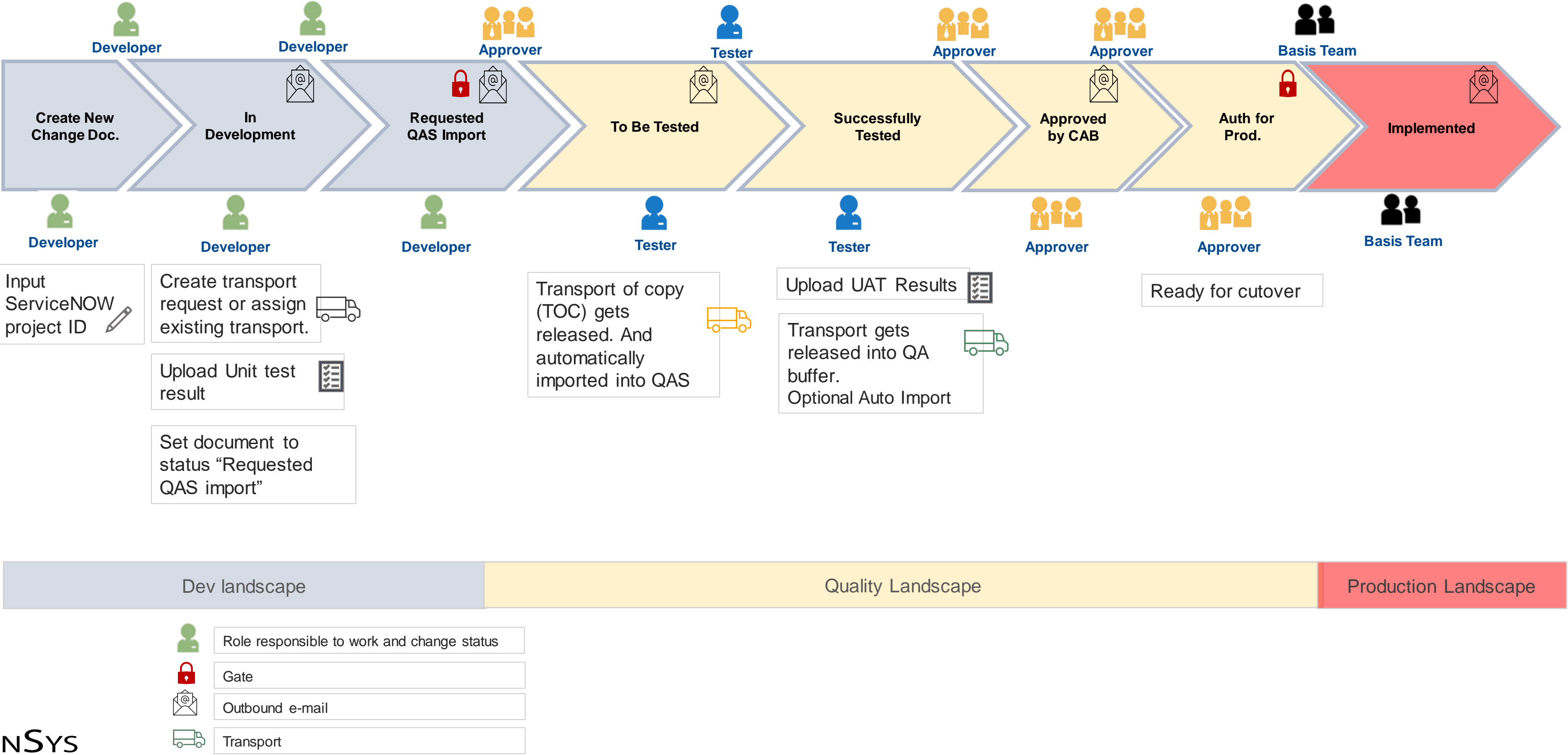
AS IS Process

GRC
S/4
MD1



1. Developer manually creates Transports in DEV system
2. Saves Changes in the Transport
3. Release Transport Request (Main and TRs and Tasks)
4. Upon approval Basis manually import transport into QAS

TO BE Process ➡ Development Track - Process Overview



Below are user role types to required operate ChaRM end-to-end.

+Developer

- +Create Change Request Document in ChaRM
- +Create/Assign/Delete Transports in ChaRM Change Document
- +Perform development work/Unit Testing
- +Request Import of Changes to QAS

+Tester

- +Reset change document back to “In Development” during testing phase
- +Create/Assign/Delete Transports in ChaRM Change Document
- +Pass change to “Successfully Tested” status

+(Approver) Release Manager

- +Approve Change documents to QAS and Production
- +Pass Change to Testing systems as ToC (Transport of Copies)
- +Bundle approved Change documents into a Release
- +Update change cycles status as per project release phase
- +Create new change cycles
- +Reject/Withdraw Change Documents

+Basis Team

- +Import and Schedule Changes to Quality and Production Systems

+ChaRM Admin

- +Trouble Shooting/How To's
- +Assist Release Manager with system preparation for creating Projects/Create/Close Cycles
- +Schedule QAS and Production import jobs
- +End User Training as needed
- +Monitor Solution Manager ChaRM
- +ChaRM Support
- +Maintain ChaRM Config.

To support Panasonic Change Management process via ChaRM we have enabled 3 different type of changes:

- Normal Change Project
- Normal Change Maintenance
- Urgent Change

Normal Change - Project

- Enhancements / Project
 - Major Changes
 - Enhancements
 - Should go as part of a release

Approved changes move to Production system as per release calendar.



Normal Change - Maintenance

- Support Maintenance Landscape:
 - Break Fixes
 - Minor Changes
 - Master Data

Approved changes moves to Production system weekly on Thursday at 6PM



Urgent Change

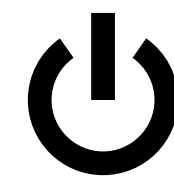
- Emergency Changes
 - Production outage
 - Critical business process affected
- Optimized for fast processing (Exclude CAB Approval)

Ability to move to production independently of the change cycle import calendar.



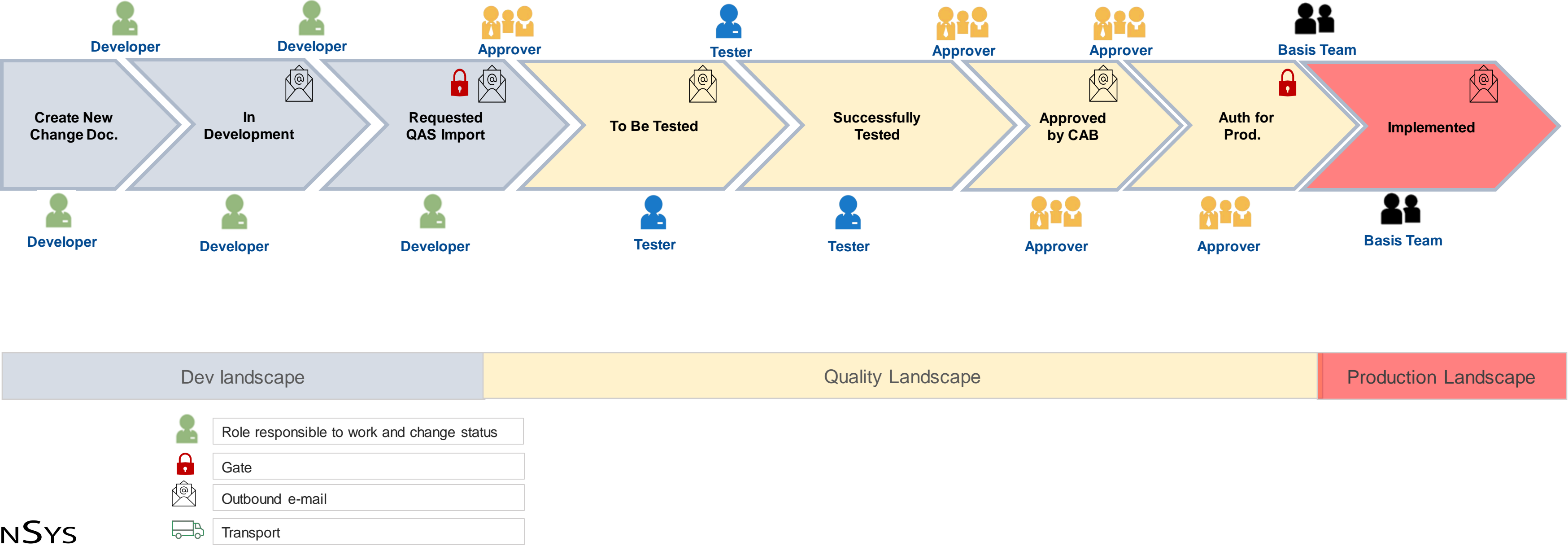


Role Developer

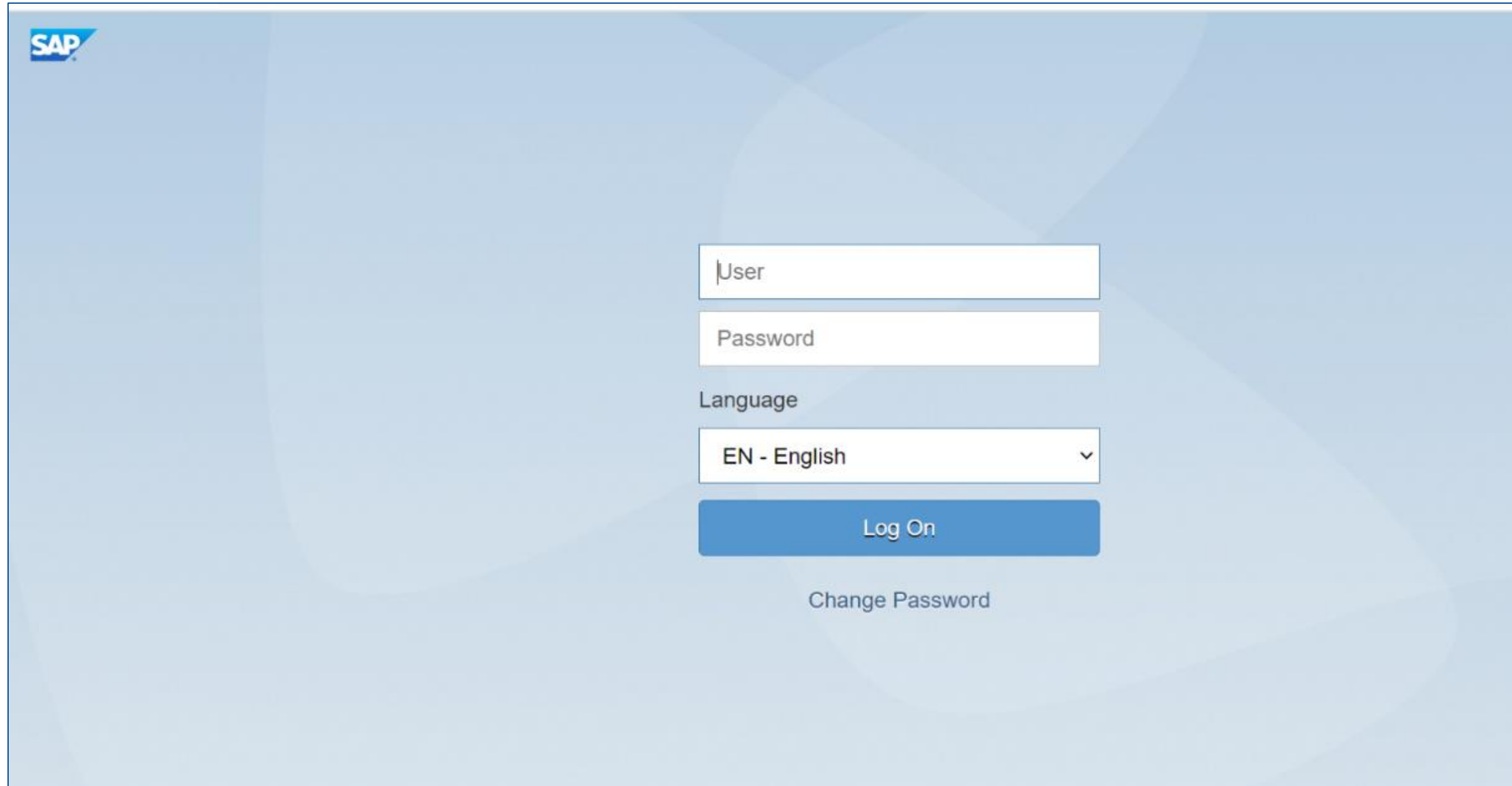


Login to Solution Manager as Developer

Use this change type to make normal changes in your maintenance landscape and to implement features in your development landscape.



Login to ChaRM as DEVELOPER



The screenshot shows the SAP login interface for ChaRM as a Developer. It features a light blue background with a SAP logo in the top left corner. The login form is centered and includes the following elements:

- User**: A text input field.
- Password**: A text input field.
- Language**: A dropdown menu currently set to "EN - English".
- Log On**: A blue button.
- Change Password**: A link below the Log On button.

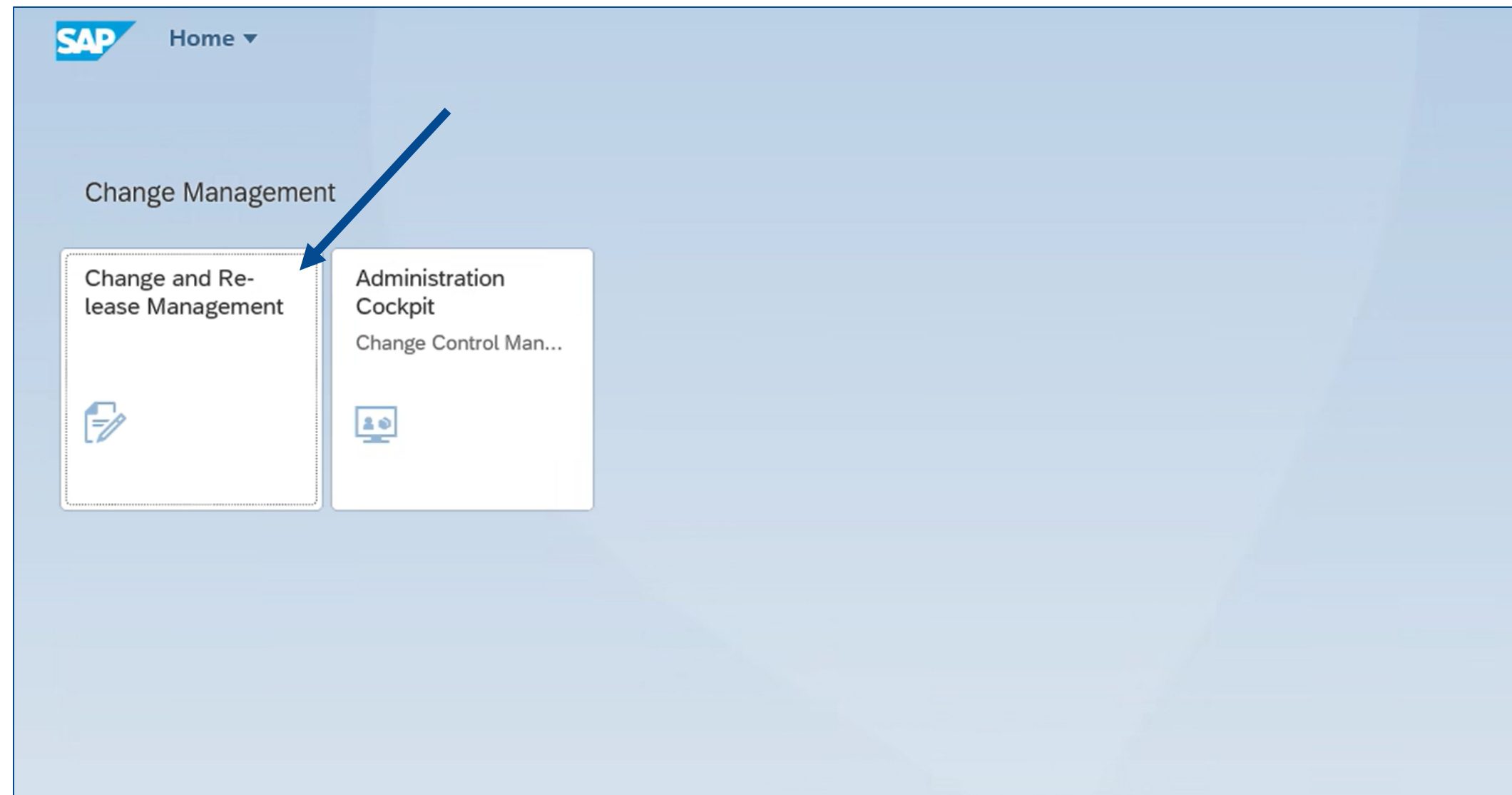
1. Open the URL:
<https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN>
2. Enter your user and password
 - **USER: CH_DEV<XX>**
 - **PASSWORD:**
3. Click on “Log On” button

Link to Test ID spreadsheet:
[Test_IDS.xlsx](#)

Fiori Launchpad Change Management

Fiori launchpad contains two tiles as part of the Change Management module in SAP Solution Manager:

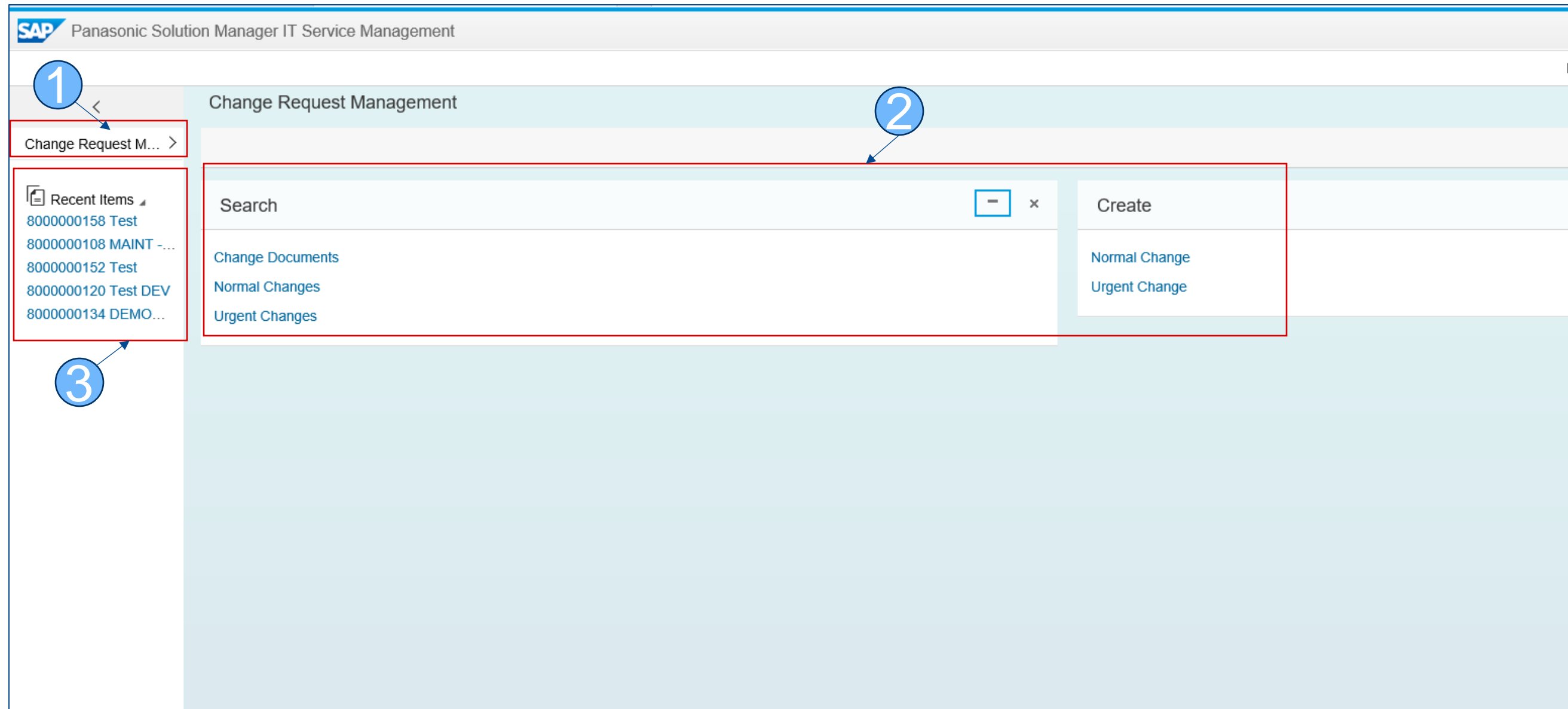
- Change Request Management -> Provides access to CRM_UI for all users ChaRM related activities.
- Admin. Cockpit -> Provide ChaRM Admin user and Release Managers access to configuration areas and advanced reporting.



Open CRM_UI

- Click on Change and Release Management Tile” to open the CRM_UI
- The CRM_UI it's where ChaRM users will be able to:
 - Create new change documents
 - Process change documents
 - Search for change documents

CRM_UI Overview



1 - Main Menu

Menu items that drive the content of the main window:

- **Change Request Management -** Takes you to the change request management (Search and Create) submenu items.

2 – Main Window

Where all content is displayed and sub links:

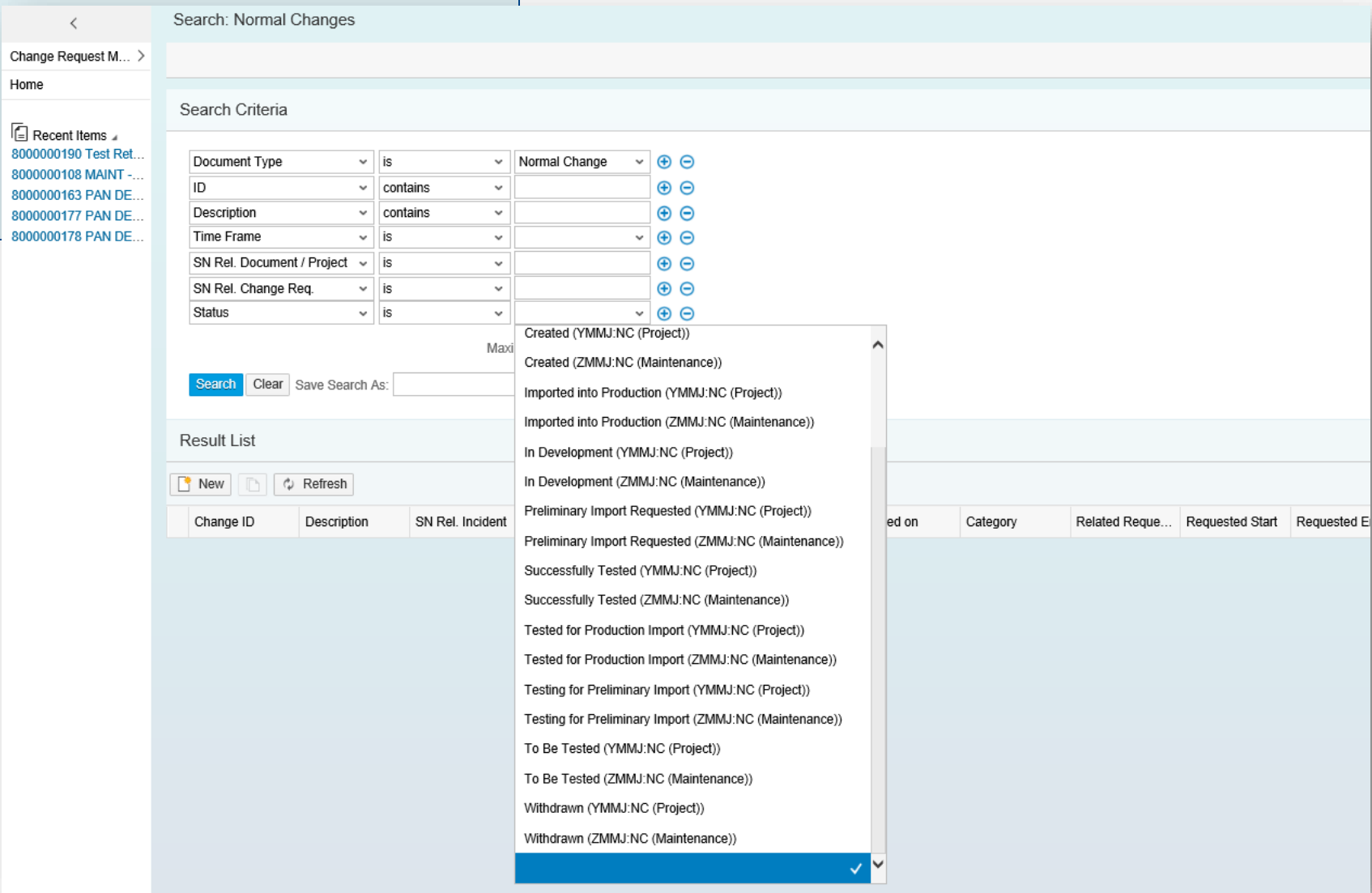
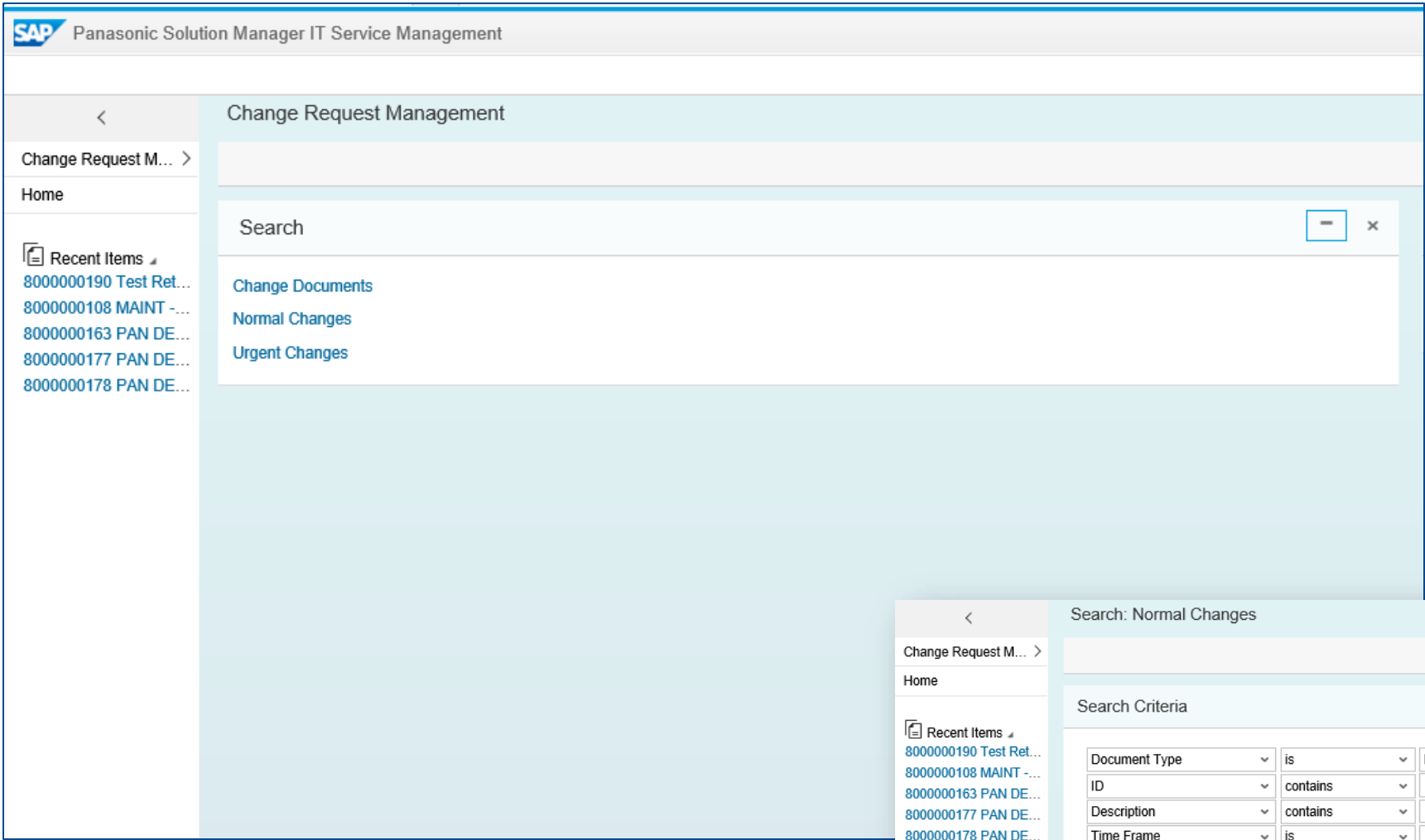
Search: Search for Change Document

Create: Create Change Document

3 – Recent Items

Shows the most recent documents worked by the user giving them the option to open it as quick alternative to get back to the document.

Search Change Document



Search Document

CRM_UI “Search” provides several different criteria to search for the “One” or “Multiple” change documents as needed.

1. Select the criteria required to find the change document(s)
e.g., “Status” = “Successfully Tested”, the criteria will change based who is person processing the change document.
2. Click on “Search”
3. Open change document from result list

More details on how to use the search capabilities will be explained later on in this training.

Create Change Document

The screenshot shows the SAP Change Request Management (ChaRM) interface. Step 1 points to the 'Change Request Management' menu item in the left sidebar. Step 2 points to the 'Normal Change' option under the 'Create' button in the main area. Step 3 points to the 'YMMJ' transaction type in the 'Select Transaction Type' popup window.

Select Transaction Type - Internet Explorer

Transaction Type	Transaction Type Description
ZMMJ	NC (Maintenance)
YMMJ	NC (Project)

Create Change Doc.

1. Click on left menu “Change Request Management”
2. Under Create section -> Click on “Normal Change”
3. Select from popup window “NC Project”

For training we will use NC Project. For ChaRM Production please check the change management policy to determine which change type.

NC (Maintenance): 8000000164, New

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Status Overview

1

2

3

4

5

6

7

8

9

10

11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Text

Transport Management

Landscape

Solution Documentation

Application Log

Attachments

Assignment Blocks

Status Overview

- Show the current status of the change document

Details

- Header of the change document

Text

- Input area for new information
- Text logs from the change history

Transport Management

- Contains transport information

Landscape

- Shows all the systems in scope associated change cycle selected

Solution Documentation

- Once integrated with SolDoc show associated elements

Application Logs

- Show all system logs for the change document, It helps the for debugging issues

Attachments

- Area for documents attachments

Create Change Document

NC (Project): 5000000024, Test

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Status Overview

1

2

3

4

5

6

7

8

9

10

11

12

Created

In Development

QAS Import Requested

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

ID: 5000000024

Description: Test

Developer: Namita Nayak

Tester: Srinivas Kollabathula

Approver: Krishna Mada

Current Processor: WP70478

Created By: WP70478

Implementation Data

Change Cycle / Phase: MAINT -> W

Type / ID: Continual C

Landscape / Branch: DEMO_PAN

Development Close:

Go-Live Date:

Configuration Item: 7100000003

Reference Objects

Processing Data

Status: In Development

Priority: 4: Low

Dates

Creation Time: 01.12.2022 14:14

Last changed: 01.12.2022 14:14


Due By: 15.12.2022 14:14:20

General Data

1. **ID:** Change document number - auto generated
2. **Description:** Enter the description of the Change Document

Select / Enter:

1. **Developer / Dev. Group**
2. **Tester / Test Group**
3. **Approver**

a) You can search by clicking on 

b) Or Entering First and Last Name

c) Or User ID

4. **Current Processor:** Shows most recent user working on the document
5. **Created by:** User that created the Change Document

NOTE : Partner functions Developer, Tester and Approver are required to be populated for emails to be triggered during the workflow.

Create Change Document

NC (Maintenance): 8000000164, New

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

1

2

3

4

5

6

7

8

9

10

11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

ID: 8000000164

Description:

Developer:

Tester:

Current Processor:

Created By: WP70478

Processing Data

Status: Created

Priority: 4: Low

Dates

Creation Time:

00:00

Last changed:

00:00

Due By:

16:38:16

16:38:16

Relationships

SN Rel. Change Req.:

SN Rel. Ticket:

Implementation Data

Change Cycle / Phase:

Type / ID:

Landscape / Branch:

Development Close:

Go-Live Date:

Reference Objects

Configuration Item:

Implementation Data

1. Select which change cycle (Release) this change will be part of.

For training ChaRM system Select any Cycle that contains “MAINT -> Weekly Change Cycle” in the Description”

In the **Productive ChaRM** system please check with your Project Manager or IT Manager for information on which Cycle (Release) your changes should be associated with.

Reference Objects

1. Configuration Item (Productive system) which the change will be implemented

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Create Change Document

NC (Maintenance): 8000000164, New

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

1

2

3

4

5

6

7

8

9

10

11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

Implementation Data

Reference Objects

ID: 8000000164

Description:

Developer:

Tester:

Current Processor:

Created By: WP70478

Change Cycle / Phase:

Type / ID:

Landscape / Branch:

Development Close:

Go-Live Date:

Configuration Item:

Processing Data

Dates

Relationships

Status: Created

Priority: 4: Low

Creation Time:

Last changed:

Due By:

SN Rel. Change Req.:

SN Rel. Ticket:

Processing Data

- Priority:** Select the priority of the change document
Default 4 (Low)

Dates

- Due By:** Enter the deadline date for the delivery of the BRD, if applicable

Relationships

- SN Rel. Change Request
Prior getting your Change document approved to Production a ServiceNow Change Request is required. Please enter the **Change Request number** as soon as it available.
- SN Related Document
It's mandatory to provide ServiceNow Project or SN Related Document as part of the change being made.

Create Change Document

NC (Maintenance): 8000000163, PAN DEMO

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Transaction 8000000163 saved

Text

Add Text

Insert Text Template

Maintain Text Templates

Text Editor

Description of Change:

< Enter the description of the change>

Text Log

Language: All entries

Maximum Lines: 30

General Note

10.11.2022 10:26:46 Developer ChaRM

The status was set to the value 'Created'

Text

1. Scroll down to the Text assignment block
2. **Description of Change:**
Enter a longer description of the change.

Create Change Document

NC (Maintenance): 8000000163, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Text Log Language: All entries Maximum Lines: 100

Description of Change
10.11.2022 10:27:49 Developer ChaRM
< Enter the description of the change >

General Note
10.11.2022 10:26:46 Developer ChaRM
The status was set to the value 'Created'

Transport Management

Transport-Related Checks

Landscape

Solution Documentation

Related Transactions

Application Log

Attachments Attachment URL With Template Download Advanced

No result found

Upload Document From Local Hard Disk: No file chosen. Browse Upload

2

Upload Document From Local Hard Disk

Name:

Description:

Authorization Scope:

Upload Document From Local Hard Disk: No file chosen. Browse

Attach Cancel

Attachment

1) Scroll down to the attachment assignment block

Users can attach files to the change document:

- 2) Click on “Attachment” button
- Enter the file name
 - Description
 - And choose the file from your computer
 - Click on “Attach” button

Create Change Document

1

NC (Maintenance): 8000000163, PAN DEMO.

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

2

Transaction 8000000163 saved

Status Overview

1

2

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4

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11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

ID:

8000000163

Description:

PAN DEMO.

Developer:

Developer ChaRM

Tester:

ChaRM Tester

IT Operator:

Change Manager:

Current Processor:

Developer ChaRM

Implementation Date:

Category

Processing Data

Status:

Created

Priority:

4: Low

Save

- Once the user has provided all details
- On top menu bar, Click on “Save” button
- Message confirming that the change has been saved appears on the top of the screen

Change Document -> Set In Development

NC (Maintenance): 8000000173, PAN DEMO

3 Save | Display | Cancel | 1 Edit | Create Follow-Up | Actions | Send E-Mail | Print Preview | Print

Display Object Relationships | More ▾

Set to "In Development"

✓ Transaction 8000000173 saved

Status Overview

← 1 2 3 4 5 6 7 8 9

Created In Development To Be Tested Successfully Tested Preliminary Import Requested Testing for Preliminary Import Tested for Production Import Approved by CAB Authorized Import

Details Edit

General Data

ID: 8000000173

* Description: PAN DEMO

Developer: []

Implementation Data

Change Cycle / Phase: PEXNA -> Enhancement...

Type / ID: Continual ... ▾

Location / Branch: DEMO, PANASONIC S

Set In Development

1. Click on "Edit" button
2. Click on "Actions" -> Select "Set to In Development"
3. Click on "Save" button

Change Document -> Create Transports

NC (Maintenance): 8000000163, PAN DEMO.

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

The status was set to the value 'In Development'

Description of Change
10.11.2022 10:27:49 Developer ChaRM

< Enter the description of the change >

General Note
10.11.2022 10:26:46 Developer ChaRM

The status was set to the value 'Created'

Transport Management Transport Request Task T

No result found

Tasks

Task ID

No result found

Transport-Related Checks

Landscape

Solution Documentation

Create Transport(s)

1. Navigate to Transport Management assignment block and Click on “Transport Request” button
2. **Short Description:** It comes with the same description of the Change Document. Developer can change the description as needed.
3. **System and Client:** Select which system and client to create the transport request
4. **Request Type:** Checkbox which transport types will be required for the work, if not sure you can leave both marked and system will delete the unused one.
5. **Request Owner:** By default, the current user creating the transport, you can change if needed.
6. **Tasks:** By default, it will create one tasks with the with the user creating the transport, Developer can add additional tasks if needed.
7. Click on “Create” button

Note: Different from today's process where the Developer creates the transport request directly in the development system, The new process enforces the Developer to create the transport request first in ChaRM before they can start making modifications in the development system. Developers won't have permission to create transports directly in the Development system anymore. **(Every transport request must be initiated via ChaRM process).**

Change Document -> Assign Existing Transports

Assign Existing Transport

Developers can assign existing "Modifiable" transports from managed systems into ChaRM Change Document.

Under Transport Management assignment block:

1. Click on More -> Select Assign Transport Request
 1. Search for Transport Request using the different criteria options, once results are listed.
 2. Select the Transport(s) request
 3. Click on "Assign Transport Request" button
- Transports will be assigned to the Change Document

Decouple Transport from ChaRM Document

User can also decouple "Modifiable" transport(s) from change document. Under the same assignment block:

- Select Transport Request
- Click on "More" button -> Select "Decouple Transport Request"
- Confirm Action

NC (Maintenance): 8000000163, PAN DEMO.

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Text Log Language: All entries

General Note
10.11.2022 10:31:28 Developer ChaRM
The status was set to the value 'In Development'

Description of Change
10.11.2022 10:27:49 Developer ChaRM
< Enter the description of the change>

General Note
10.11.2022 10:26:46 Developer ChaRM
The status was set to the value 'Created'

Transport Management Transport Request Task Transport of Copies Refresh More

Assign Transport Request
Decouple Transport Request
Process Critical Object
Start Retrofit

No result found

Tasks

Task ID Task Type

No result found

NC (Maintenance): 8000000163, PAN DEMO.

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Text Log

General Note
10.11.2022 10:31:28 Developer ChaRM
The status was set to the value 'In Development'

Description of Change
10.11.2022 10:27:49 Developer ChaRM
< Enter the description of the change>

General Note
10.11.2022 10:26:46 Developer ChaRM
The status was set to the value 'Created'

Transport Management Transport Request Task Transport of Copies Refresh More

Assign Transport Request - Internet Explorer

Details Tips for transport request assignment

Search Criteria Hide Search Fields

Text	is		
Transport Request	is		
User Name	is		
Source System	is		
Status	is		
Type	is		

Maximum Number of Results: 100

Search Clear

Result List: 1 entry found

Transport Request	User	Status	Source System	Type	Text
GD4K900148	WP70478	Changeable	GD4	Customizing Requ...	DEMO PAN TR

Assign Transport Request Filter:

Task ID Task Type

No result found

Landscape

Solution Documentation

Change Document -> Transport Management

NC (Maintenance): 8000000173, PAN DEMO

Back

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print

Display Object Relationships More

Current phase of cycle: Active
Action to be checked: Normal Change: Create Transport Request
Trying to establish RFC connection SM_GD4CLNT801_TMW

14.11.2022 18:11:57 Developer ChaRM

The status was set to the value 'Created'

Transport Management Transport Request Task Transport of Copies Refresh More

Actions	Transport ID	Request De...	Request Type	Transport of...	Tasks	Owner	Status	Critical Object	Import Status
	GD4K900121	S 80000001...	Workbench ...	0	1	CH_DEVEL...	Changeable		
	GD4K900123	S 80000001...	Customizin...	0	1	CH_DEVEL...	Changeable		

Transports Management

- Transport ID:** Transport number
- Request Type:** Shows the type of the request
- Transport of Copies:** Shows associated transport copies
- Tasks:** Shows how many tasks it's in the transport , user can click to check the details the task
- Owner:** Owner of the transport request
- Status:** Shows if transport is Modifiable or Released
- Critical Object :** ChaRM can be configured to flag an object as "Critical" based on predefine list, objects flagged as critical will require an additional approval to move.
- Import Status:** System will show the status the last transport imported into target system(s)

Change Document -> Create Additional Task

General Data

Transport ... GD4K900121

Description: S 8000000173: PAN ...

New Tasks

Insert (3) Filter: []

Employee	
CH_DEVELOPER (4)	[]
	[]
	[]
	[]

Create (5) Cancel

Transport Management

Actions	Transport ID	Request De...	Request Type	Transport of...	Tasks	Owner	Status	Critical Object	Import Status
(1)	GD4K900121	S 80000001...	Workbench ...	0	1	CH_DEVEL...	Changeable	■	◇
	GD4K900123	S 80000001...	Customizin...	0	1	CH_DEVEL...	Changeable	■	◇

Tasks of GD4K900121

Adding New task

If Developer would like to add an additional tasks to the existing transport :

1. Select the transport
2. Click on "Task" button
3. On the new window -> Click on "Insert" button
4. Enter the developer in the employee list
5. Click on "Create" button

Change Document -> Login to Managed System

NC (Maintenance): 8000000173, PAN DEMO

Save | Display | Cancel | Edit | Create Follow-Up | Actions | Send E-Mail | Print Preview | Print

Display Object Relationships | More

GD4K900123 S 80000001... Customizin... 0 1 CH_DEVEL... Changeable

Tasks of GD4K900121

Filter:

Task ID	Task Type	Task Owner	Status Text
GD4K900122	Unclassified Task	CH_DEVELOPER	Modifiable

1

Landscape | Display all Systems | Refresh


Filter:

Actions	Relevant for L...	System	System Type	Transport Status	Risk Status	Transport Risks	Next Schedul...
G	✓	GD4~ABAP/801	Development ...	Modifiable			

4

Login to Managed System (Dev System)

ChaRM give the option for Developers to login to managed system directly from the change document:

1. Navigate to “Landscape Assignment Block”
2. Click on  of the Development System
3. Click on “Open” on the next popup window
4. Click on “Allow” on the second popup window

3

Do you want to open or save **ags_work_appln.sap** (790 bytes) from **swado5ci.swacorp.com**?

Open | Save | Cancel

4

The SAP shortcut file

http://swado5ci.swacorp.com:52400/sap/bc/ags_workcenter/ags_work_appln

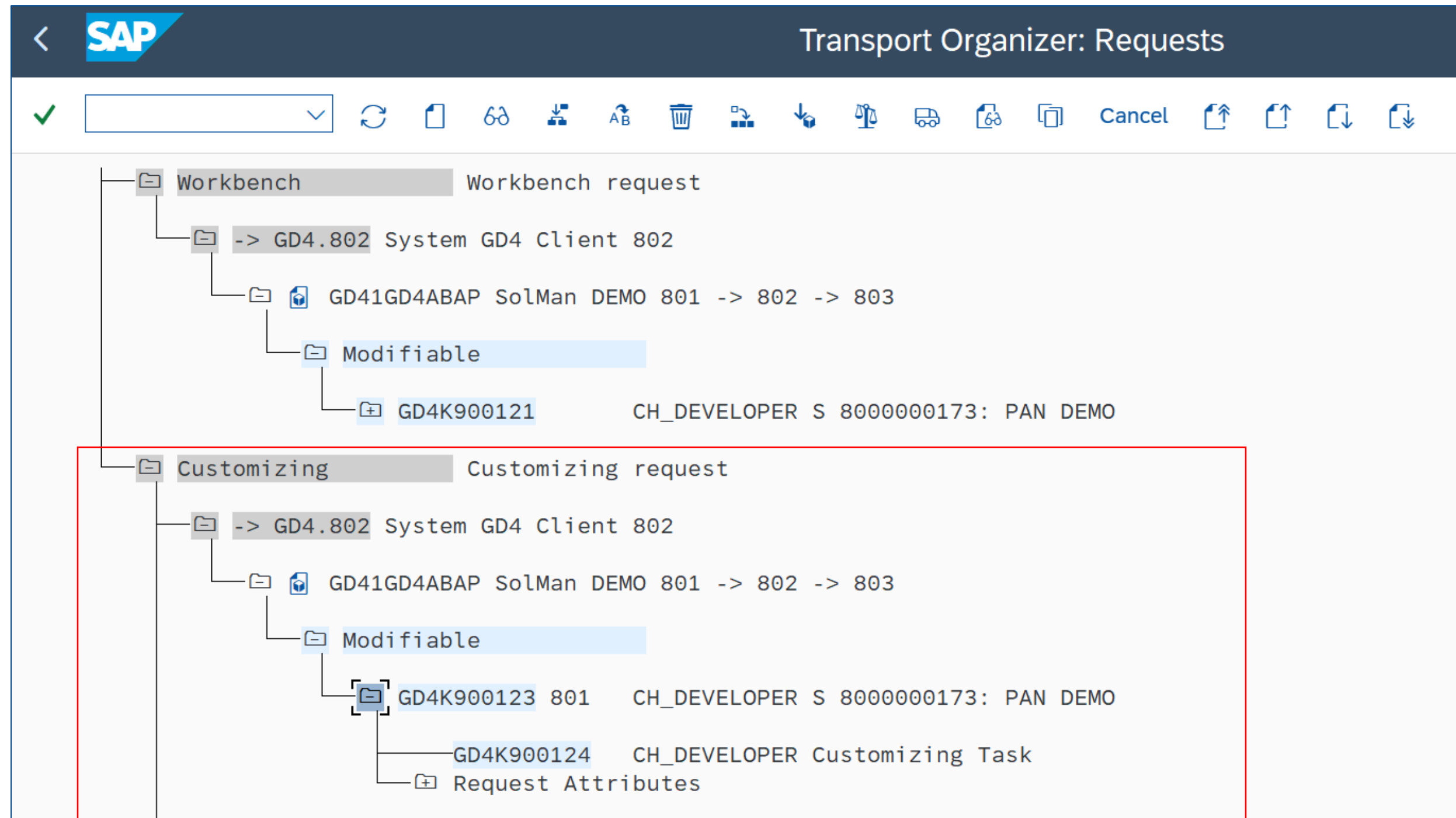
is being executed. The SAP shortcut connection data is:

System: DOS
Client: 001
OK code: /n*AGS_WORK_LAUNCHER

☐ Remember My D

Allow | Deny | Help

Change Document -> Release Task



Release Task

Once changes have been saved to the transport request(s) Developers will then release the transport task:

1. Go Tcode SE09
2. Find the Transport Request created previously
3. For this training example -> Select the Customizing Request
4. Expand the main transport node -> select the Task
5. Release the **task ONLY**

Note

The main transport will be released by ChaRM via the workflow.

Change Document -> Request Import to QAS

NC (Project): 5000000024, Test

SaveDisplayCancelEditCreate Follow-Up

ActionsSend E-MailPrint PreviewPrintDisplay Object RelationshipsMore

Current phase of cycle: Active

Action to be checked: Normal Change: Create Transport Request

Trying to establish RFC connection SM_GD4CLNT801_TMW

Status Overview

12

CreatedIn DevelopmentQAS Import RequestedTo Be TestedSuccessfully TestedPreliminary Import RequestedTesting for Preliminary ImportTested for Production ImportApproved by CABAuthorized for ImportImported into ProductionWithdrawn

DetailsEdit

General Data

ID:5000000024

Description:Test

Developer:WP70478

Tester:

Approver:

Current Processor:WP70478

Created By:WP70478

Implementation Data

Change Cycle / Phase:MAINT -> Weekly Ch

Type / ID:Continual Cycle

Landscape / Branch:DEMO_PANASONIC

Development Close:

Go-Live Date:

Reference Objects

Configuration Item:7100000003

Processing Data

Status:In Development

Priority:4: Low

Dates

Creation Time:01.12.202214:14

Request Import to QAS

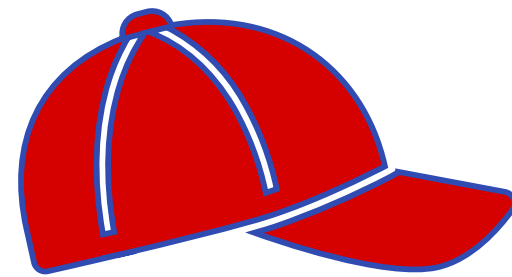
Once all tasks are released and Unit Test documentation uploaded to ChaRM Document, Developer can request import of the changes to QAS system:

- Open Change Document
- Click on "Edit"
- Click on -> Actions
- Select Request Import into QAS
- Save It

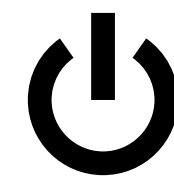
Change Document will change status to **"QAS Import Requested"**

Approver will get notified via email about the requested import.

GYANSYS

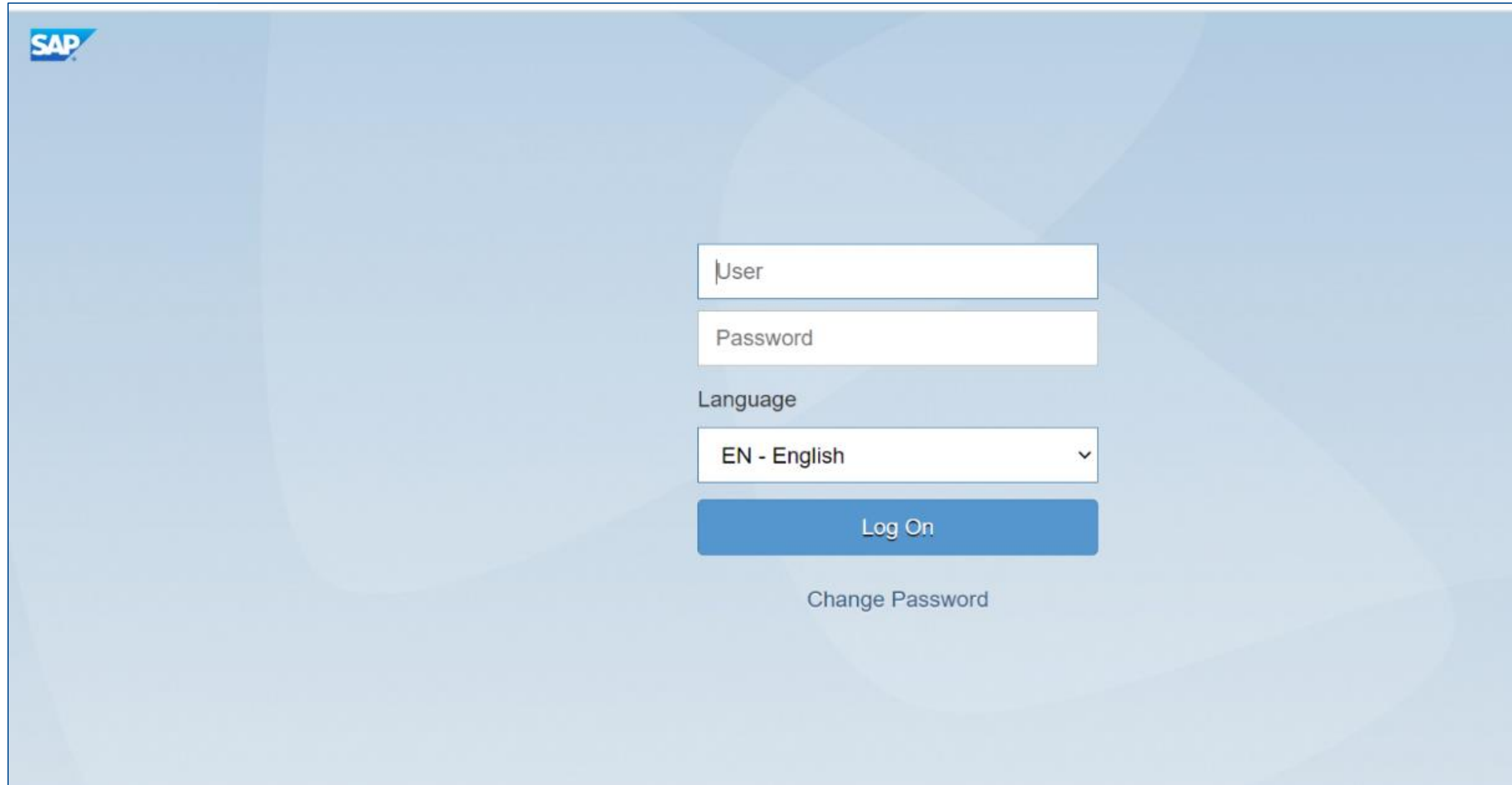


Approver



Login to Solution Manager as Approver

Login to ChaRM as APPROVER



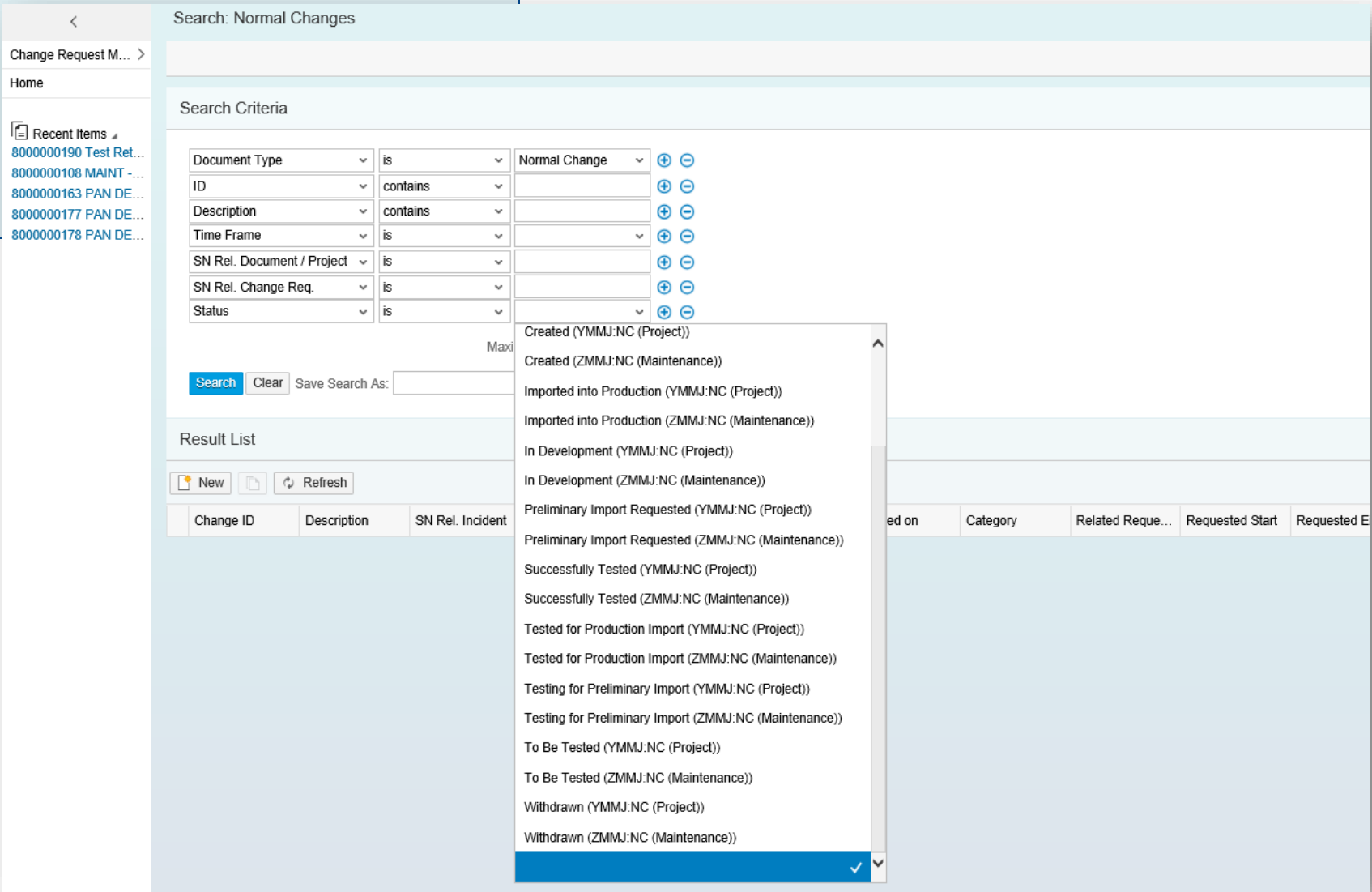
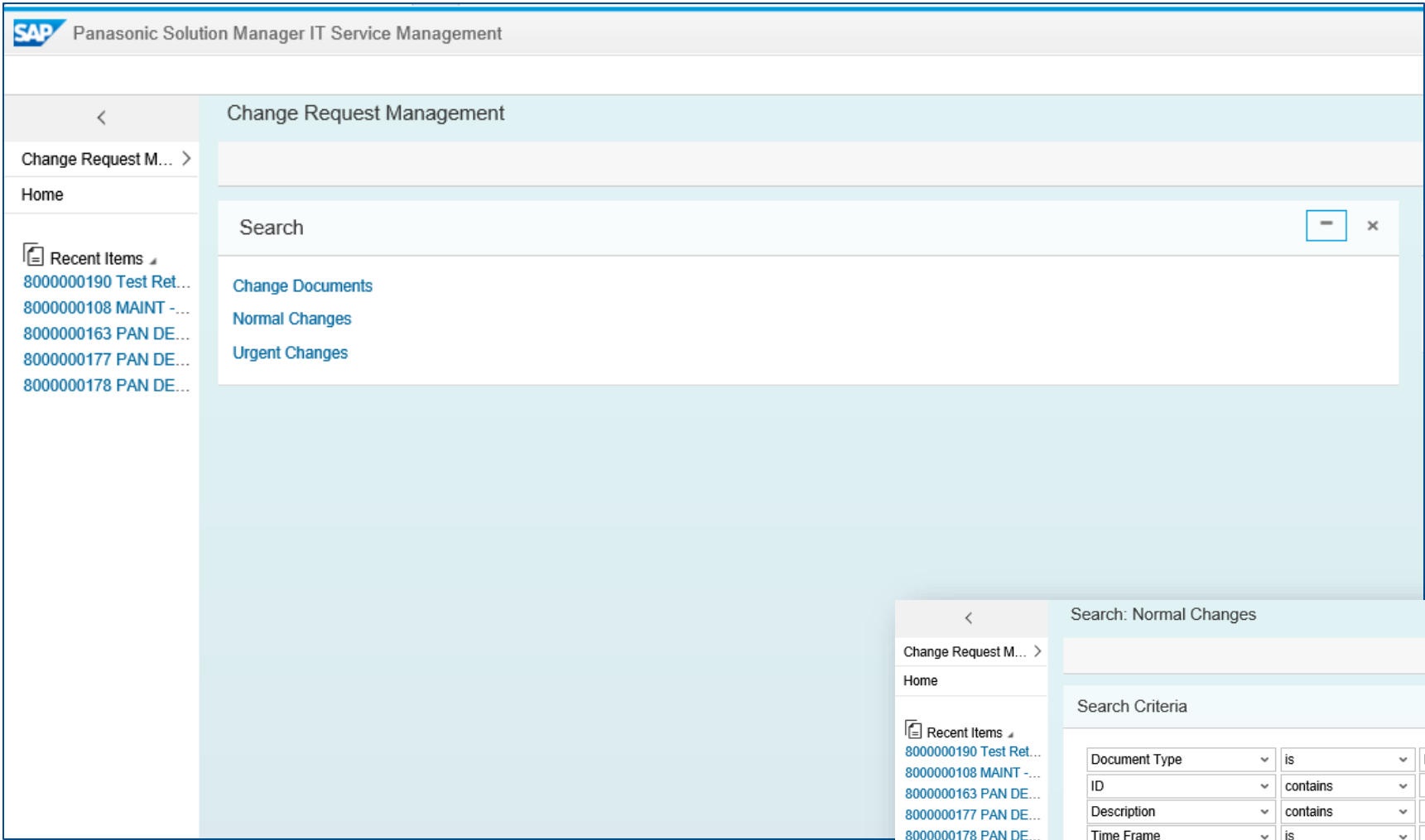
The image shows the SAP login interface for ChaRM as APPROVER. It features a light blue background with a SAP logo in the top left corner. The login form is centered and consists of the following elements:

- A text input field labeled "User".
- A text input field labeled "Password".
- A dropdown menu labeled "Language" with "EN - English" selected.
- A blue "Log On" button.
- A link labeled "Change Password" below the "Log On" button.

1. Open the URL:
<https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN>
2. Enter your user and password
 - **USER: CH_APR<XX>**
 - **PASSWORD:**
3. Click on "Log On" button

Link to Test ID spreadsheet:
[Test_IDS.xlsx](#)

Search Change Document



Search Document

1. On Fiori Launchpad -> Open Change Request Management tile
2. On CRM_UI -> Click on Change Request Management from left menu
3. On Main window -> Search Area
4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ QAS Import Requested ”

5. Click on “Search”
6. Open change document from result list

ChaRM Document -> Pass to QAS

NC (Maintenance): 8000000173, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Pass Normal Change to Test

Status view

1 Created 2 In Development 3 To Be Tested 4 Successfully Tested 5 Preliminary Import Requested 6 Testing for Preliminary Import 7 Tested for Production Import 8 Approved by CAB 9 Authorized for Import 10 Imported into Production 11 Withdrawn

Details Edit

General Data

ID: 8000000173

Description: PAN DEMO

Developer: Developer ChaRM

Tester:

Current Processor: Developer ChaRM

Created By: Developer ChaRM

Implementation Data

Change Cycle / Phase: PEXNA -> Enhanceme

Type / ID: Continual Cycle

Landscape / Branch: DEMO_PANASONIC_S

Development Close:

Go-Live Date:

Reference Objects

Configuration Item: 7100000003

Processing Data

Status: In Development

Priority: 4: Low

Dates

Creation Time: 14.11.2022 18:11

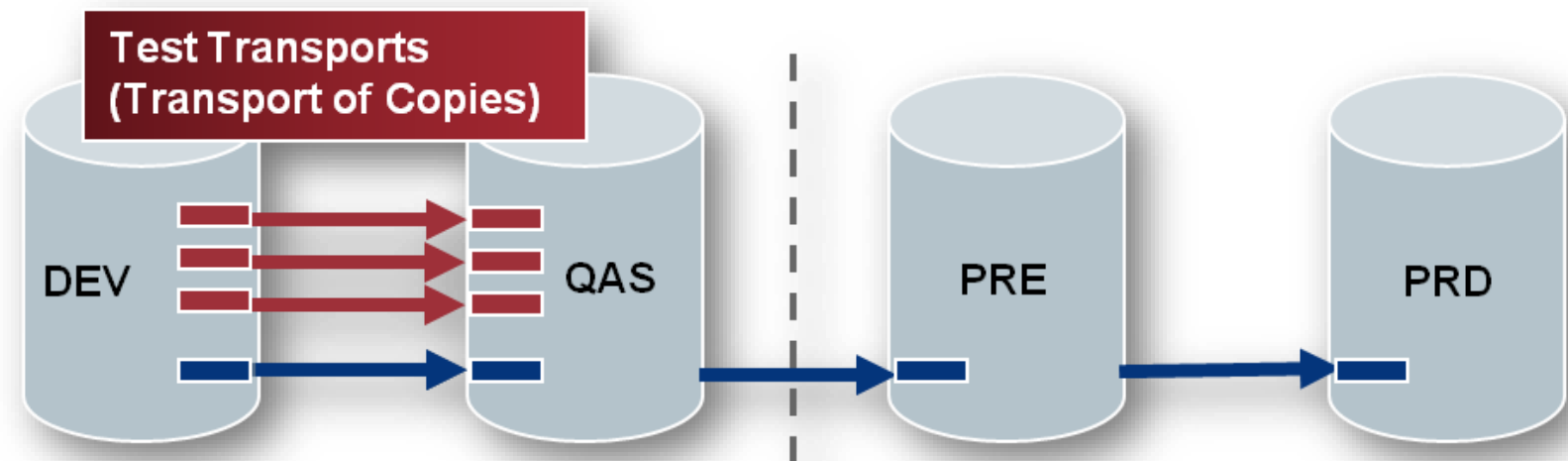
Last changed: 14.11.2022 19:48

Due By: 28.11.2022 18:11:56 18:09:05 18:09:05

Move Transport to Quality System

Developer now has completed the unit testing in DEV system and requested change to move to QAS system.

1. Open the Change Document
 2. Click on “Edit” Button
 3. Click on “Actions” -> Select “Pass Normal Change to Test”
 4. Click on “Save” button
 5. Click on “Display” button
- **System will create a “ToC” and import into QAS automatically** (Check next slide for details)
 - **Tester will be notified via email** about change is ready for testing



Transports of copies only applicable from DEV to QA system.

Advantages:

- Repository objects are locked as long as possible in the development system
- The number of transports in production is reduced
- Transports of copies are periodically imported into the QA system but do not follow the transport routes into follow-on systems
- Only the original transports can reach production

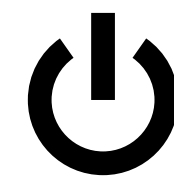
ToC Process Overview

Once ChaRM document reaches status “**To Be Tested**”

1. System creates a transport of copy from the main transport
2. System automatically import ToC into the quality system
3. Tester can perform testing in QAS:
 - a) if something missing or defect found, Tester can send change back to “In Development”
 - b) Otherwise, Tester, “Confirm Successful Test”
4. If Change is sent back to “In Development”:
 - a) Developer can create new transport or task under the original transport request
 - b) Developer make necessary correction
 - c) Release the task
 - d) Set the change “To Be Tested”
 - e) New ToC will be created containing the latest task
 - f) ToC gets imported automatically into QAS
 - g) Tester can test changes in QAS

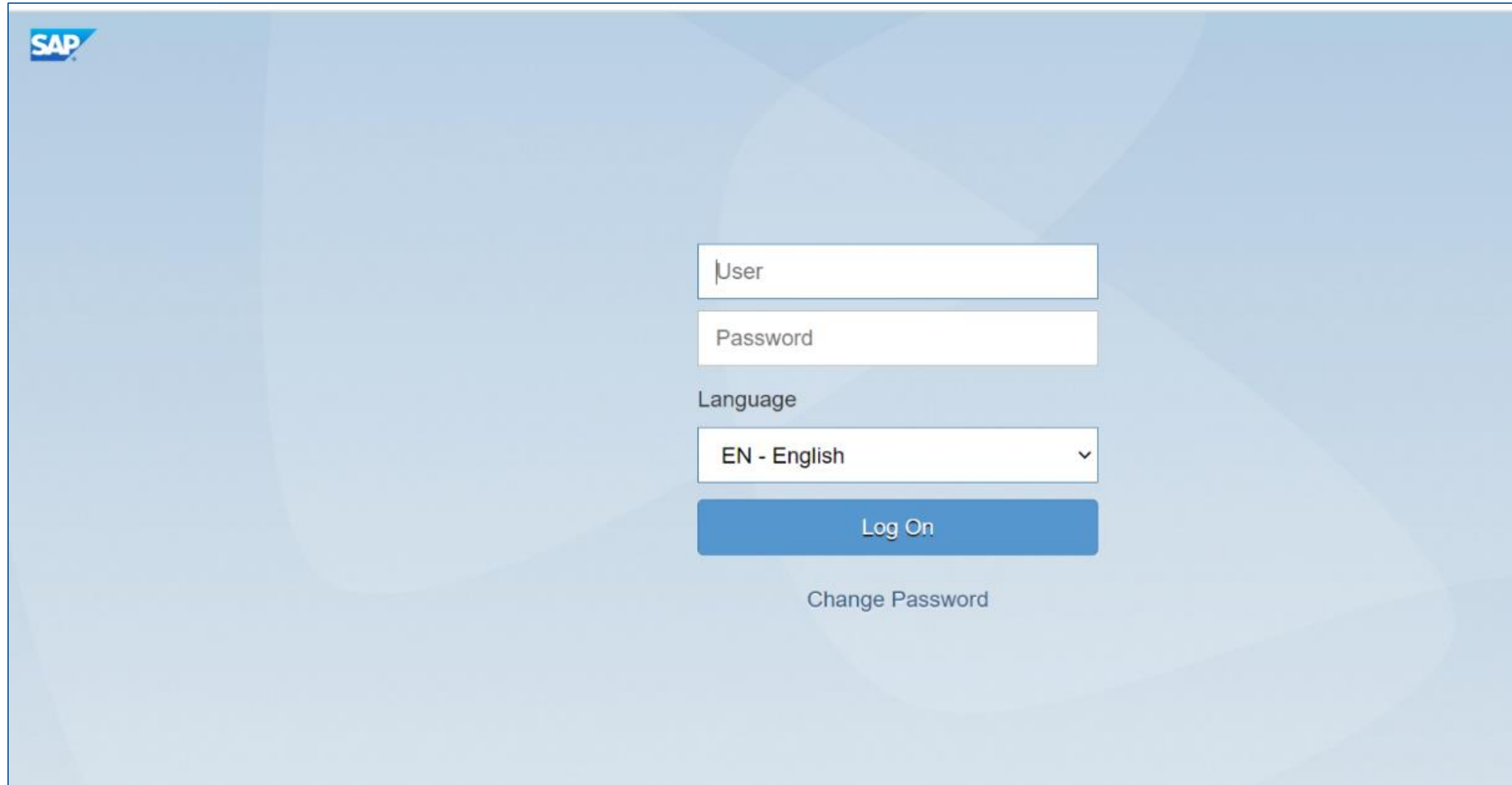


Role Tester



Login to Solution Manager as Tester

Login to ChaRM as TESTER



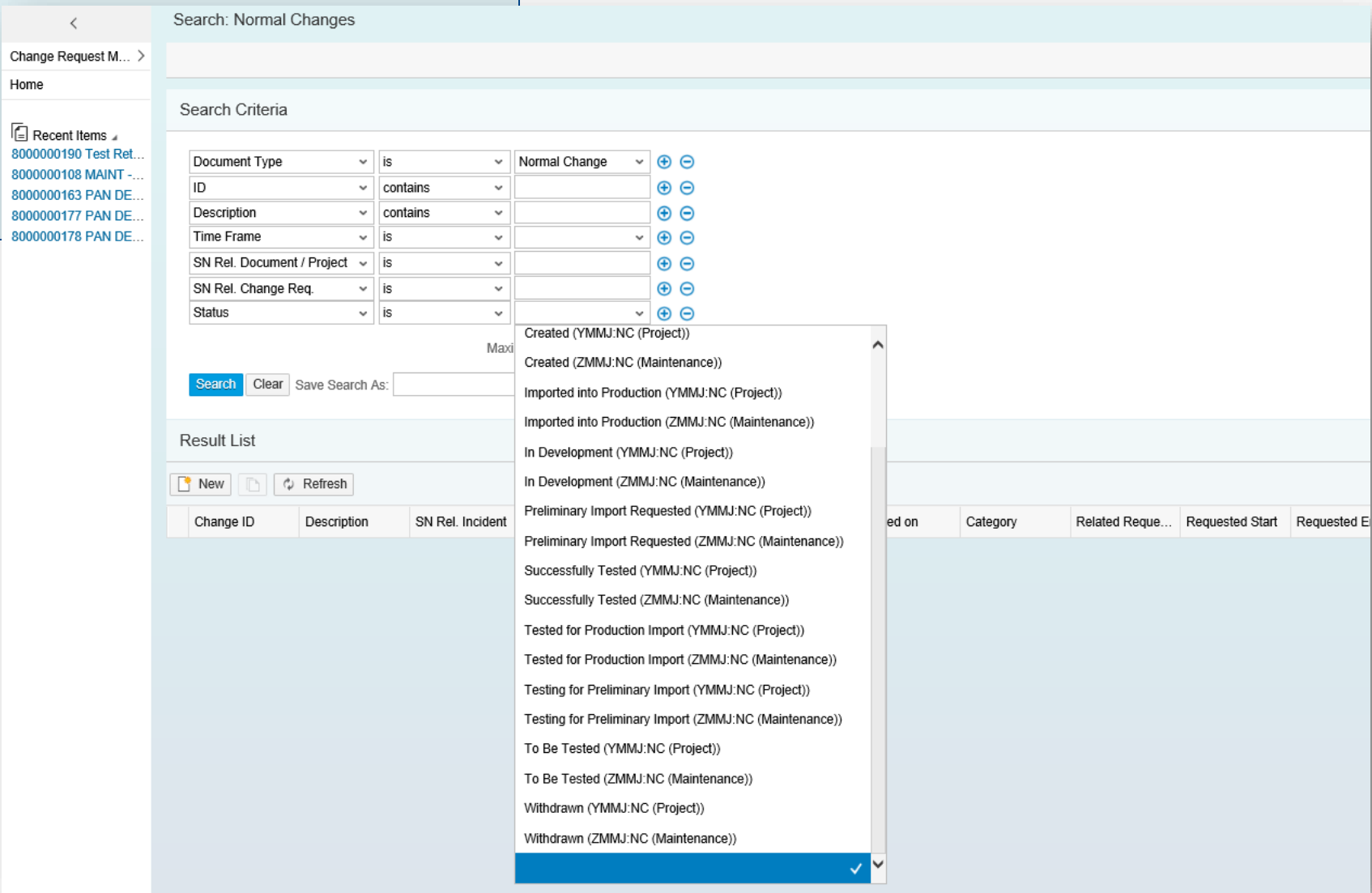
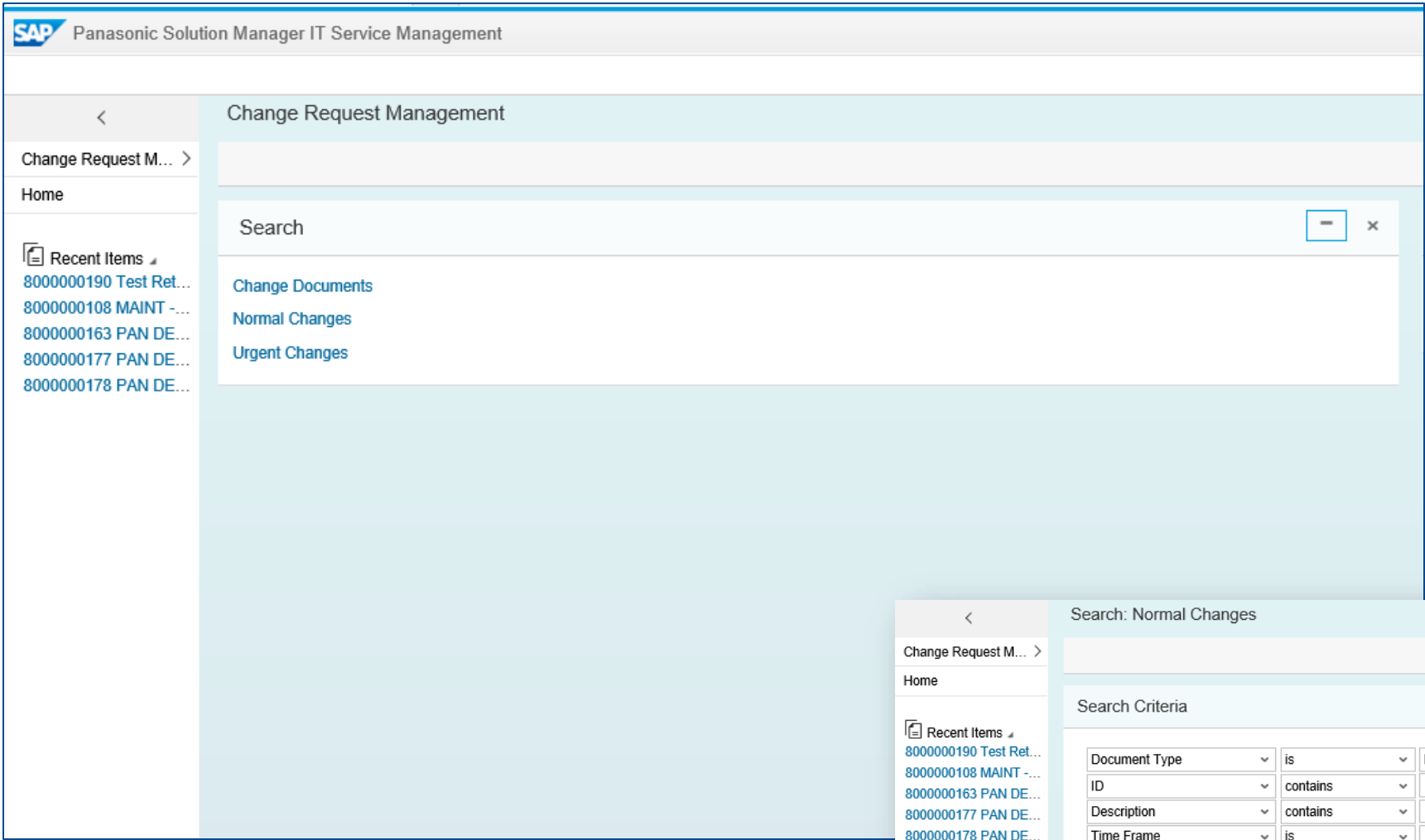
The image shows the SAP login interface for ChaRM as TESTER. It features a light blue background with a SAP logo in the top left corner. The login form is centered and consists of the following elements:

- A text input field labeled "User".
- A text input field labeled "Password".
- A dropdown menu labeled "Language" with "EN - English" selected.
- A blue "Log On" button.
- A link labeled "Change Password" below the "Log On" button.

1. Open the URL:
<https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN>
2. Enter your user and password
 - **USER: CH_TESTER<XX>**
 - **PASSWORD:**
3. Click on "Log On" button

Link to Test ID spreadsheet:
[Test_IDS.xlsx](#)

Search Change Document



Search Document

1. On Fiori Launchpad -> Open Change Request Management tile
2. On CRM_UI -> Click on Change Request Management from left menu
3. On Main window -> Search Area
4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ To Be Tested”

5. Click on “Search”
6. Open change document from result list

ChaRM Document – Testing

NC (Maintenance): 8000000173, PAN DEMO

3

Save

4

Display

Cancel

1

Edit

Create Follow-Up

2

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

▼

Status

view

1

Created

2

In Development

3

To Be Tested

4

Successfully Tested

5

Preliminary Import Requested

6

Testing for Preliminary Import

7

Tested for Production Import

8

Approved by CAB

9

Authorized for Import

10

Imported into Production

11

Withdrawn

▼

Details

Edit

General Data

ID:

8000000173

Description:

PAN DEMO

Developer:

Developer ChaRM

Tester:

Current Processor:

ChaRM Tester

Created By:

Developer ChaRM

Implementation Data

Change Cycle /

Typical

Landscape /

Development

Go-Live

Reference Objects

Configuratio

Processing Data

Status:

To Be Tested

Priority:

4: Low

Dates

Creation Time:

14.11.2022

18:11

Last changed:

14.11.2022

20:13

“Confirm Successful Test”

Developer verified that changes moved QA successfully and “Confirm Successful Test”:

- Click on “Edit” Button
- Click on “Actions” -> Select “Confirm Successful Test”
- Click on “Save” button
- Click on “Display” button

OR

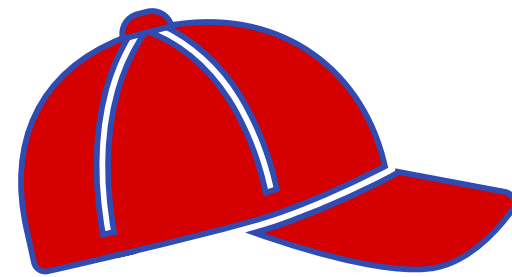
Reset status to “In Development”

Developer found some issue or requires additional work; In this case they can send change document back to “In Development” to create additional transports/tasks:

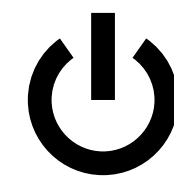
- Click on “Edit” Button
- Click on “Actions” -> Select “Reset Status to “In Development”
- Click on “Save” button
- Click on “Display” button

Note: Once the change document reaches status “Successfully Tested” the main transport request gets released by ChaRM and automatically imported into QAS every 15min via auto import job.

GYANSYS

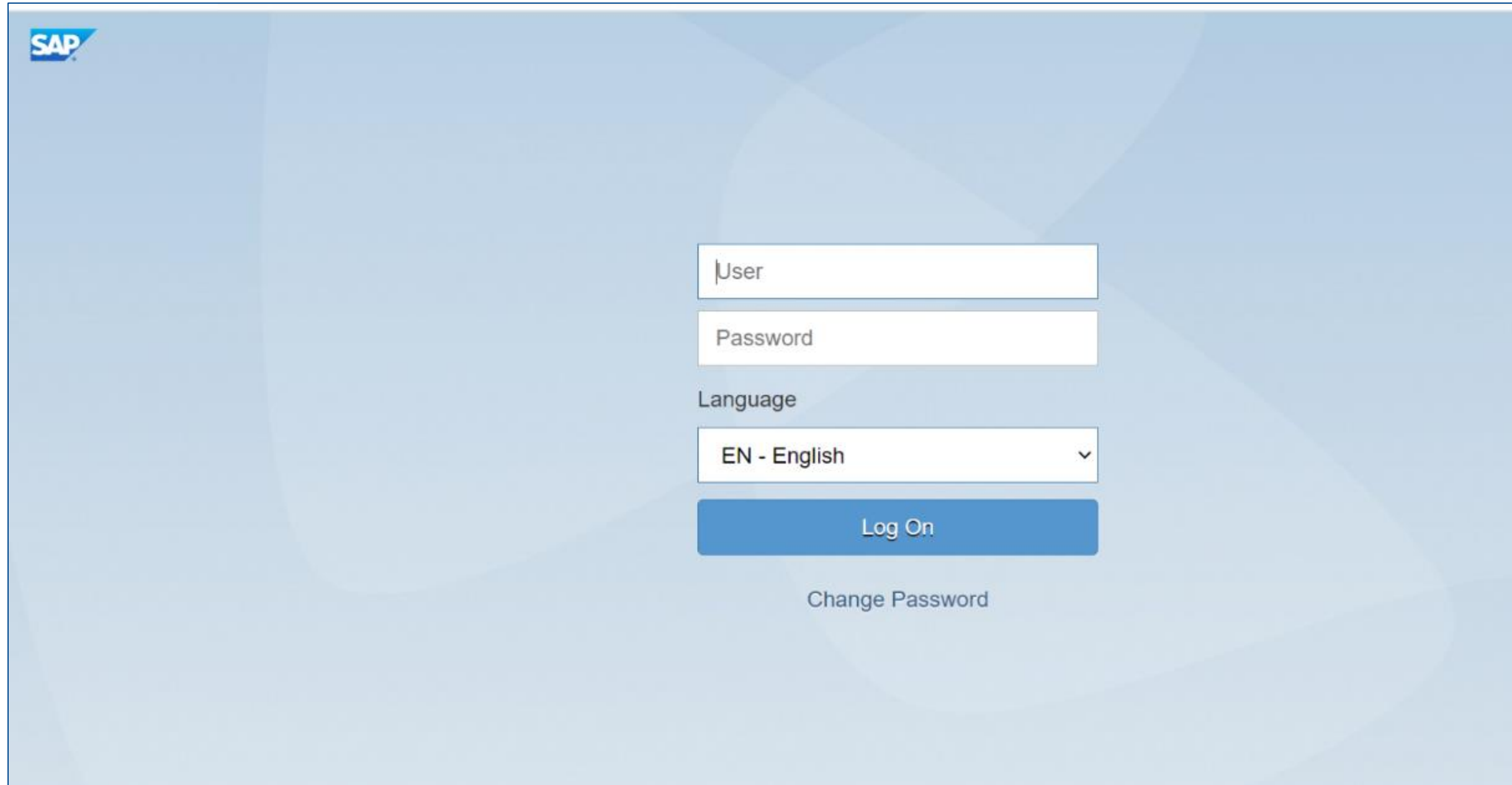


Approver



Login to Solution Manager as Approver

Login to ChaRM as APPROVER



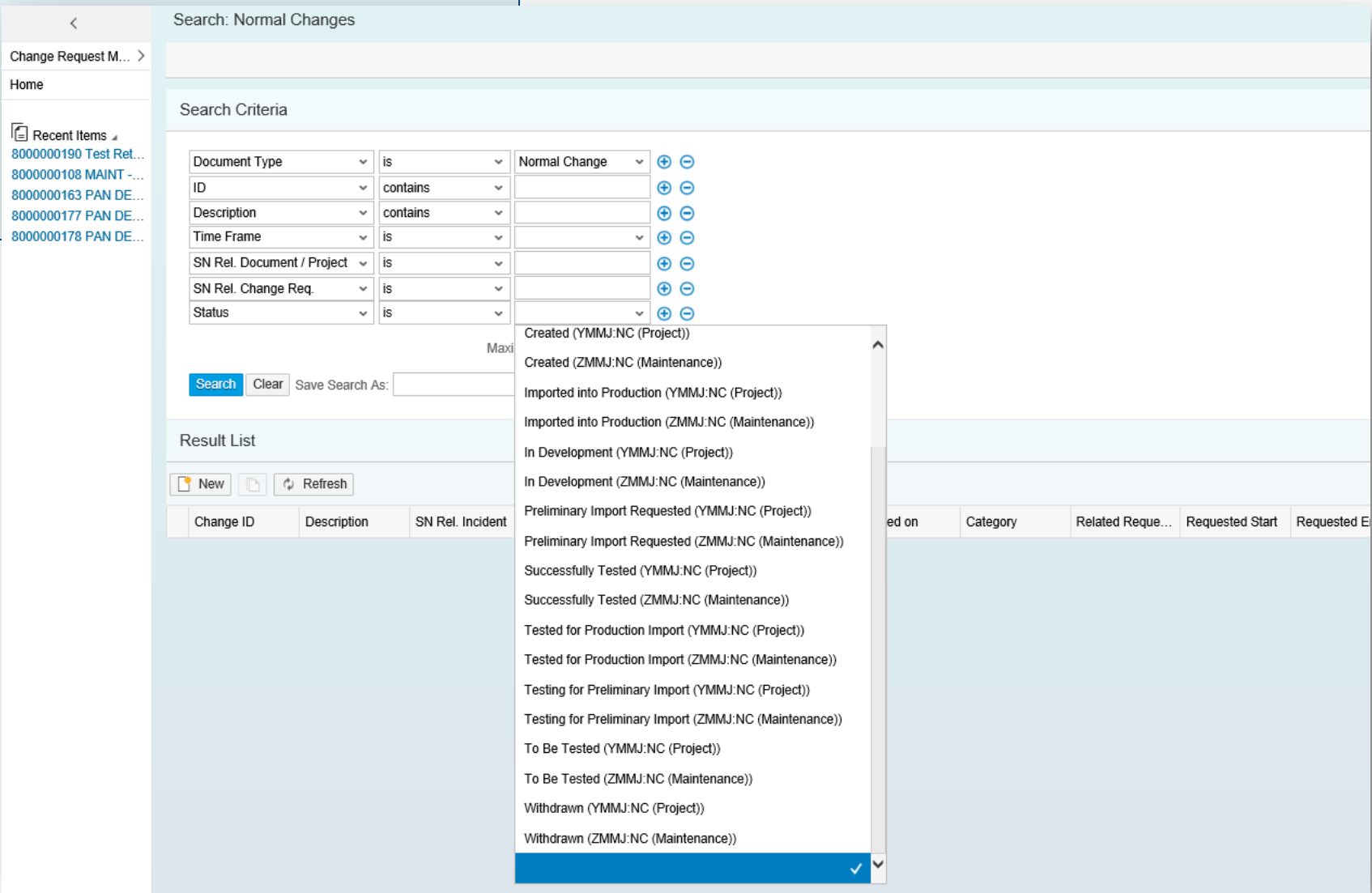
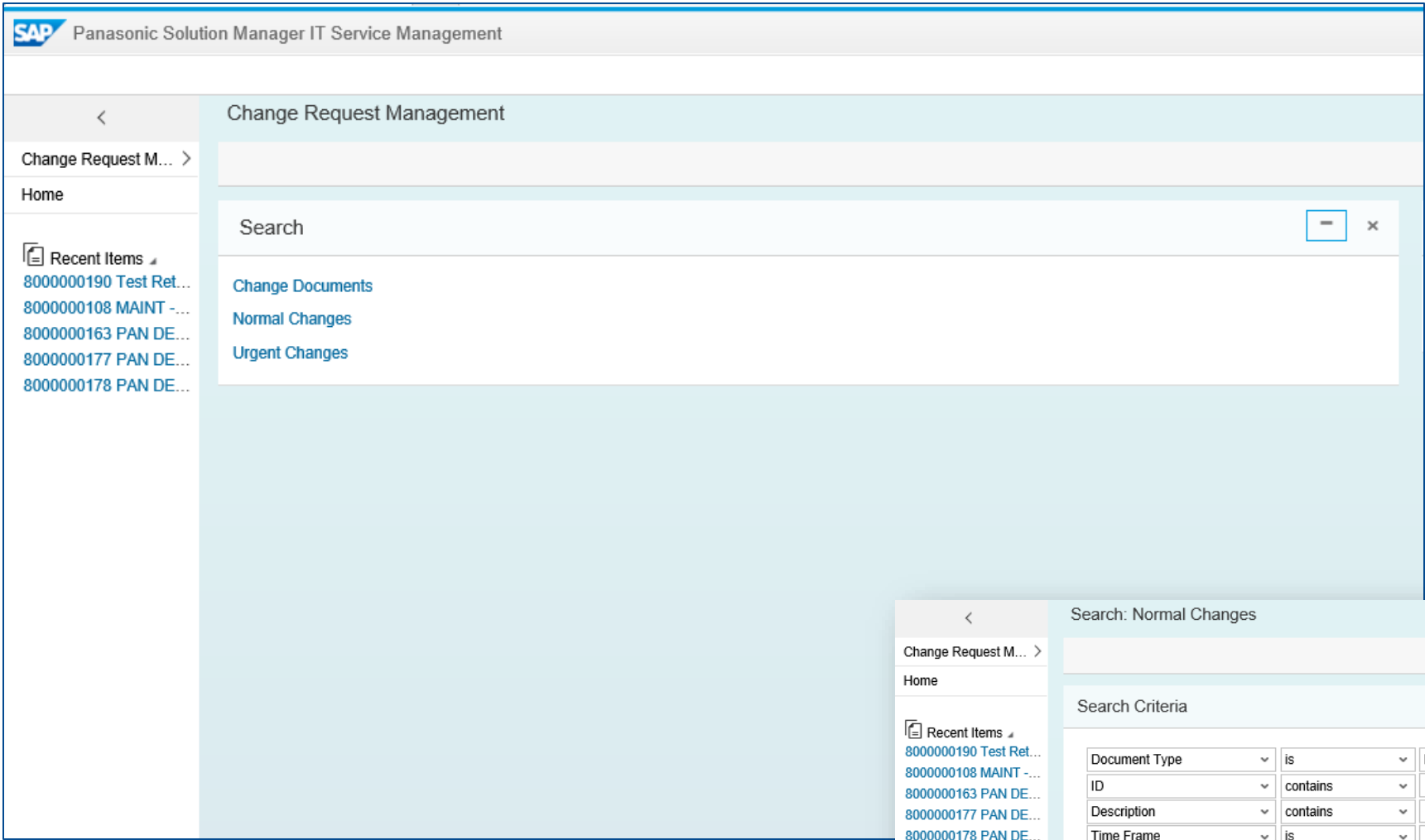
The image shows the SAP login interface for ChaRM as APPROVER. It features a light blue background with a SAP logo in the top left corner. The login form is centered and consists of the following elements:

- A text input field labeled "User".
- A text input field labeled "Password".
- A dropdown menu labeled "Language" with "EN - English" selected.
- A blue "Log On" button.
- A link labeled "Change Password" below the "Log On" button.

1. Open the URL:
<https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN>
2. Enter your user and password
 - **USER: CH_APR<XX>**
 - **PASSWORD:**
3. Click on "Log On" button

Link to Test ID spreadsheet:
[Test_IDS.xlsx](#)

Search Change Document



Search Document

1. On Fiori Launchpad -> Open Change Request Management tile
2. On CRM_UI -> Click on Change Request Management from left menu
3. On Main window -> Search Area
4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Approver:

Status = “ZMMJ Successfully Tested”

5. Click on “Search”
6. Open change document from result list

ChaRM Document – Approved by CAB

NC (Maintenance): 8000000173, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Transaction 8000000173 saved

Status Overview

1 Created 2 In Development 3 To Be Tested 4 Successfully Tested 5 Preliminary Import Requested 6 Testing for Preliminary Import 7 Tested for Production Import 8 Approved by CAB 9 Authorized for Import 10 Imported into Production 11 Withdrawn

Details Edit

General Data

ID: 8000000173

Description: PAN DEMO

Developer: Developer ChaRM

Tester: WP70478

Current Processor: WP70478

Created By: Developer ChaRM

Implementation Data

Change Cycle / Phase: PEXNA -> Enhanc

Type / ID: Continual Cycle

Landscape / Branch: DEMO_PANASOI

Development Close:

Go-Live Date:

Reference Objects

Configuration Item: 7100000003

Processing Data

Status: Successfully Tested

Priority: 4: Low

Dates

Creation Time: 14.11.2022 18:11

“Approve by CAB”

CAB review changes in status “Successfully Tested”, if all required details and documents have provided as per Panasonic “Change Management Policy”, CAB then can approve the change document by:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Authorized by CAB”
3. Click on “Save” button
4. Click on “Display” button

Once Change document is “Approved by CAB” <XXX User> will create a ServiceNow Change Request and pursue approval to move it to production.

ChaRM Document – Authorize for Import

3

NC (Maintenance): 8000000173, PAN DEMO

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

4

Transaction 8000000173 saved

1

Status Overview

2

Authorize for Import

1

2

3

4

5

6

7

8

9

10

11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

ID:

8000000173

Description:

PAN DEMO

Developer:

Developer ChaRM

Tester:

WP70478

Current Processor:

WP70478

Created By:

Developer ChaRM

Implementation Data

Change Cycle / Phase:

PEXNA -> Enhance

Type / ID:

Continual Cycle

Landscape / Branch:

DEMO_PANASONI

Development Close:

Go-Live Date:

Reference Objects

Configuration Item:

7100000003

Processing Data

Status:

Approved by CAB

Priority:

4: Low

Dates

Creation Time:

14.11.2022

18:11

Last changed:

14.11.2022

22:03

“Authorize for Import”

Release Manager review changes in status “Authorized by CAB” and check if the associated ServiceNow change request is approved, if yes then:

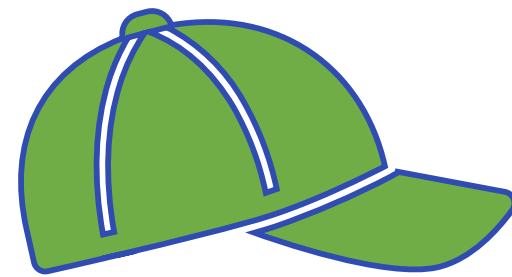
1.

Click on “Edit” Button
2.

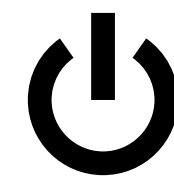
Click on “Actions” -> Select “Authorized for Import”
3.

Click on “Save” button
4.

Click on “Display” button

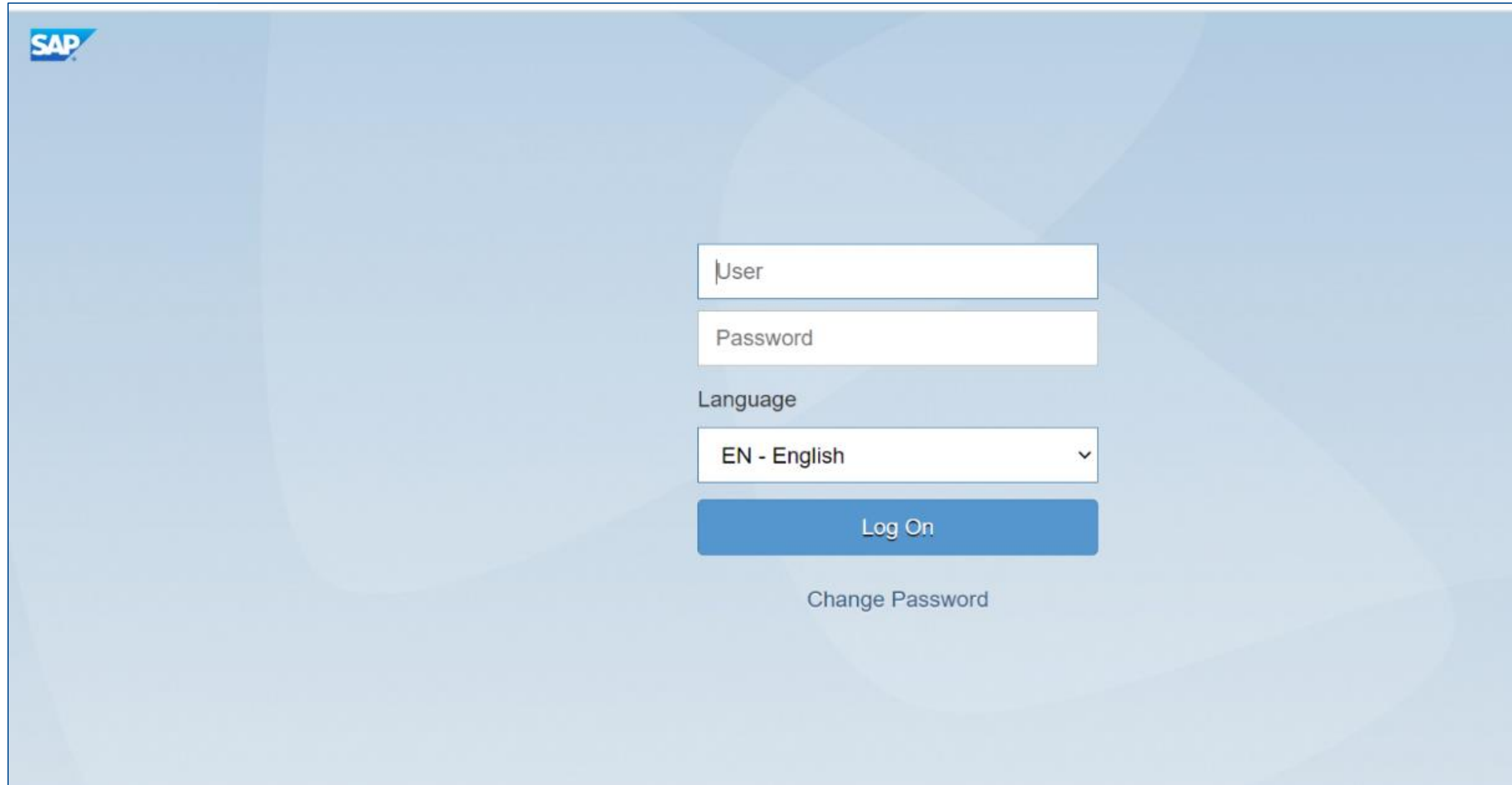


Basis Team



Login to Solution Manager as Basis Team

Login to ChaRM as BASIS



The image shows the SAP login interface for ChaRM as BASIS. It features a light blue background with a SAP logo in the top left corner. The login form is centered and includes the following elements:

- A text input field labeled "User".
- A text input field labeled "Password".
- A dropdown menu labeled "Language" with "EN - English" selected.
- A blue "Log On" button.
- A link labeled "Change Password" below the "Log On" button.

1. Open the URL:
<https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN>
2. Enter your user and password
 - **USER: CH_BASIS<XX>**
 - **PASSWORD:**
3. Click on "Log On" button

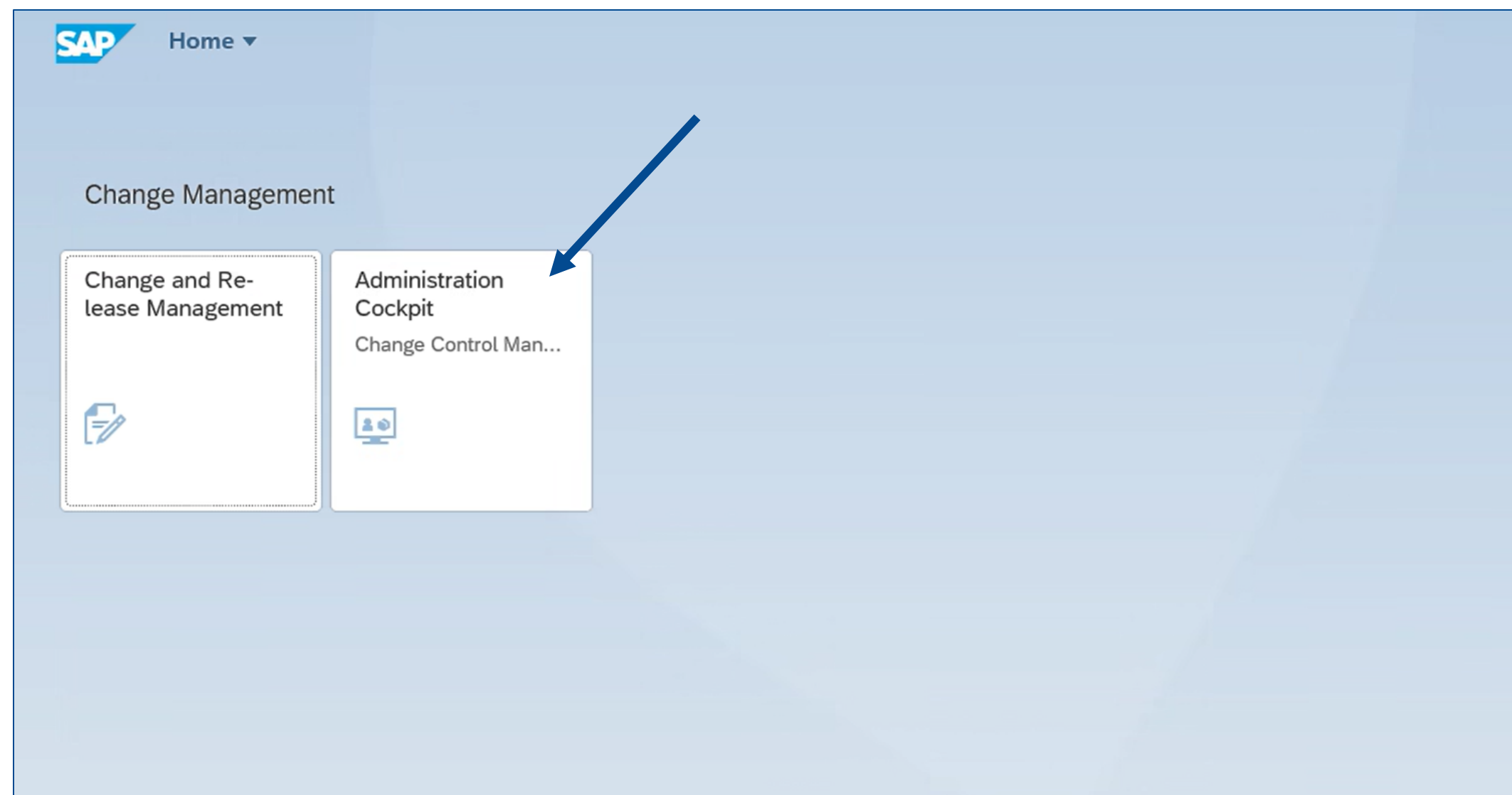
Link to Test ID spreadsheet:
[Test_IDS.xlsx](#)



Fiori Launchpad Change Management

Fiori launchpad contains two tiles as part of the Change Management module in SAP Solution Manager:

- Admin. Cockpit -> Provide ChaRM Admin, Basis Team user and Release Managers access to configuration areas, task list and advanced reporting.



Open Admin Cockpit

- As Basis user we will use “Administration Cockpit” tile to perform the import task

Admin Cockpit – Import Change to Production

1 Click on "Continual Cycles"

2 Select the Change Cycle from the list

3 Expand the Production system node

4 Click on "Schedule Import Job for Transport Requests"

“Import Change into Production”

In the Admin cockpit Basis user will select the respective Change Cycle.

For this training we will select continual cycle “MAINT -> Weekly Change Cycle”

For ChaRM Production please check with Release Management team which to perform import.

To import transport via ChaRM:

1. Click on “Continual Cycles”
2. Select the Change Cycle from the list
3. Expand the Production system node
4. Click on “Schedule Import Job for Transport Request”

Next Slide

ChaRM Document – Import Change to Production

Import Transport Requests

☐ Standard Change Only
 ☐ Disable Transport-Related Checks

Source System:
GD4~ABAP/801
Target System:
GD4~ABAP/803 (Production System)

Sorting or filtering does not affect the order in which the transport requests are imported.

Select All
Deselect All
Export

	Change ID	Transport	Owner	Description	Type	Change Document Status
<input checked="" type="checkbox"/>	8000000173			PAN DEMO	NC (Maintenance)	Authorized for Import
<input checked="" type="checkbox"/>		GD4K900123	CH_DEVELOPER	S 8000000173: PAN DEMO	Customizing Request	

Date
Execution
Options

Import Date

☒ Immediately
 ☐ At Start Time

Planned Start
00:00:00

No Start After
00:00:00

Period
None

Background User

NC (Maintenance): 8000000173, PAN DEMO

Save
Display
Cancel
Edit
Create Follow-Up
Actions
Send E-Mail
Print Preview
Print
Display Object Relationships
More

Status Overview

1
2
3
4
5
6
7
8
9
10
11

Created
In Development
To Be Tested
Successfully Tested
Preliminary Import Requested
Testing for Preliminary Import
Tested for Production Import
Approved by CAB
Authorized for Import
Imported into Production
Withdrawn

Details
Edit

General Data
Implementation Data
Reference Objects
Processing Data
Dates

ID: 8000000173
Description: PAN DEMO
Developer: Developer ChaRM
Tester: WP70478
Current Processor: WP70478
Created By: Developer ChaRM

Change Cycle / Phase:
Type / ID:
Landscape / Branch:
Development Close:
Go-Live Date:
Configuration Item:

Status: Imported into Production
Priority: 4 Low

Creation Time: 14.11.2022 18:11
Last changed: 14.11.2022 22:40

“Import Change into Production”

Popup window will list all change documents that has transport request in the Production buffer “Waiting for Import”

Basis user can only select the change documents in status “Authorized for Import”, this will prevent from moving unauthorized changes into the production system.

Basis user can initiate import into Production:

- Immediately, Or
- Schedule the import using the parameters on the window

Click OK to confirm and import will execute based on values selected.

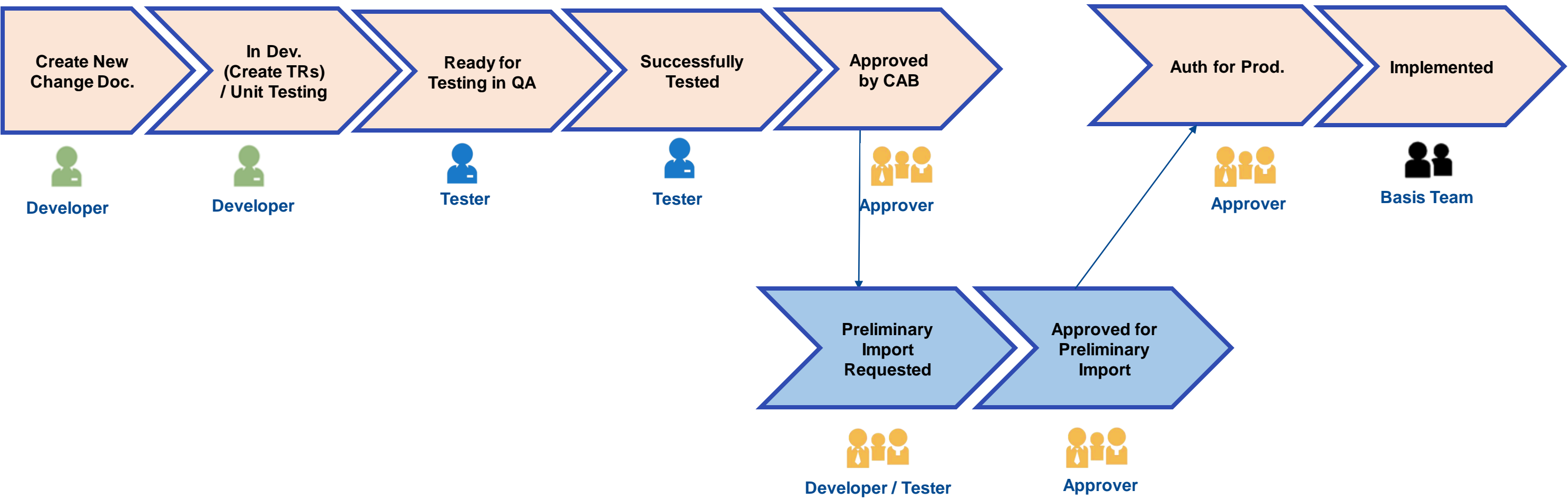
Once imported is complete ChaRM automatically will set the change document in status “Imported into Production”

More details on import options will be provided in the Admin Guide.

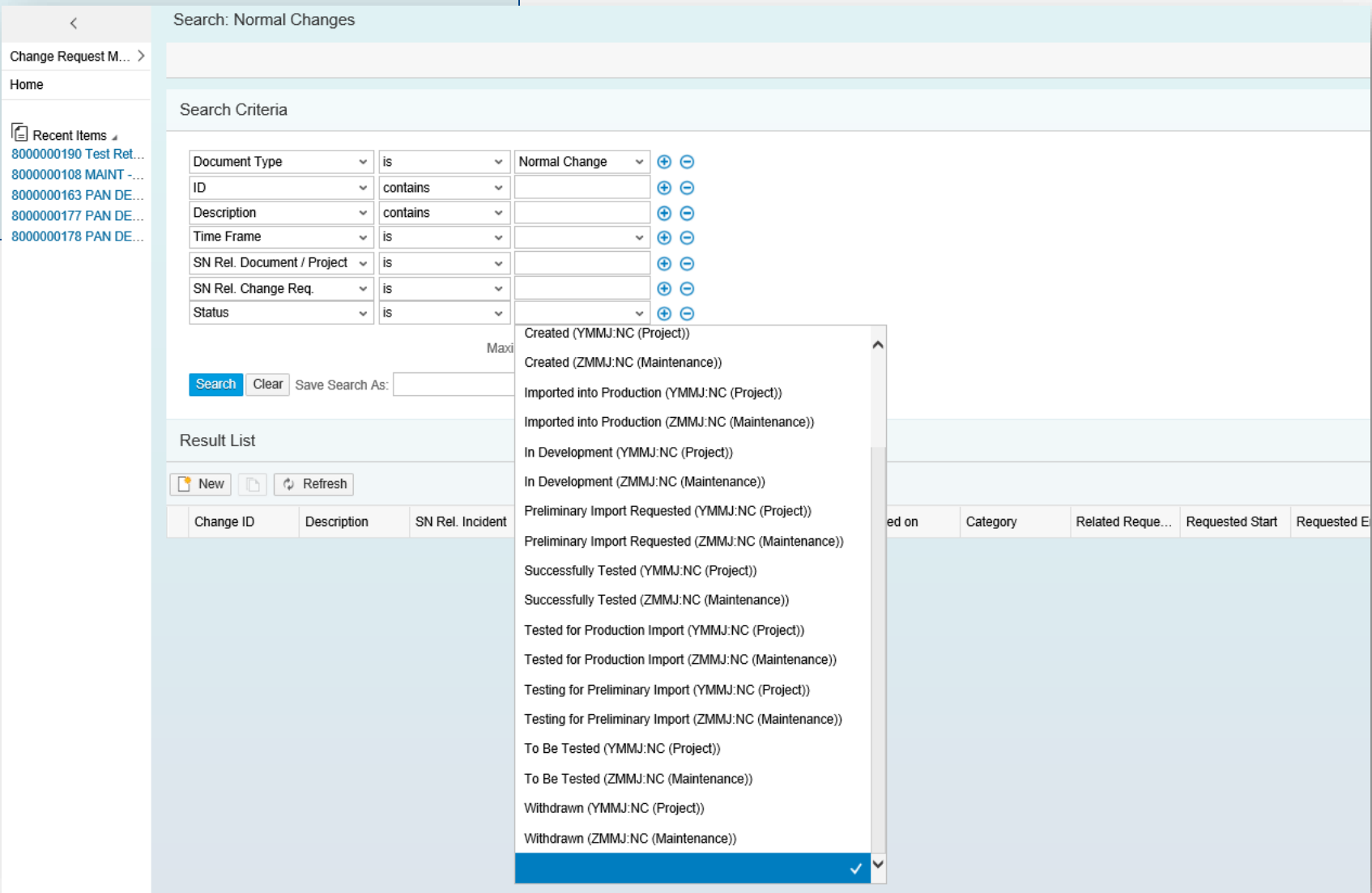
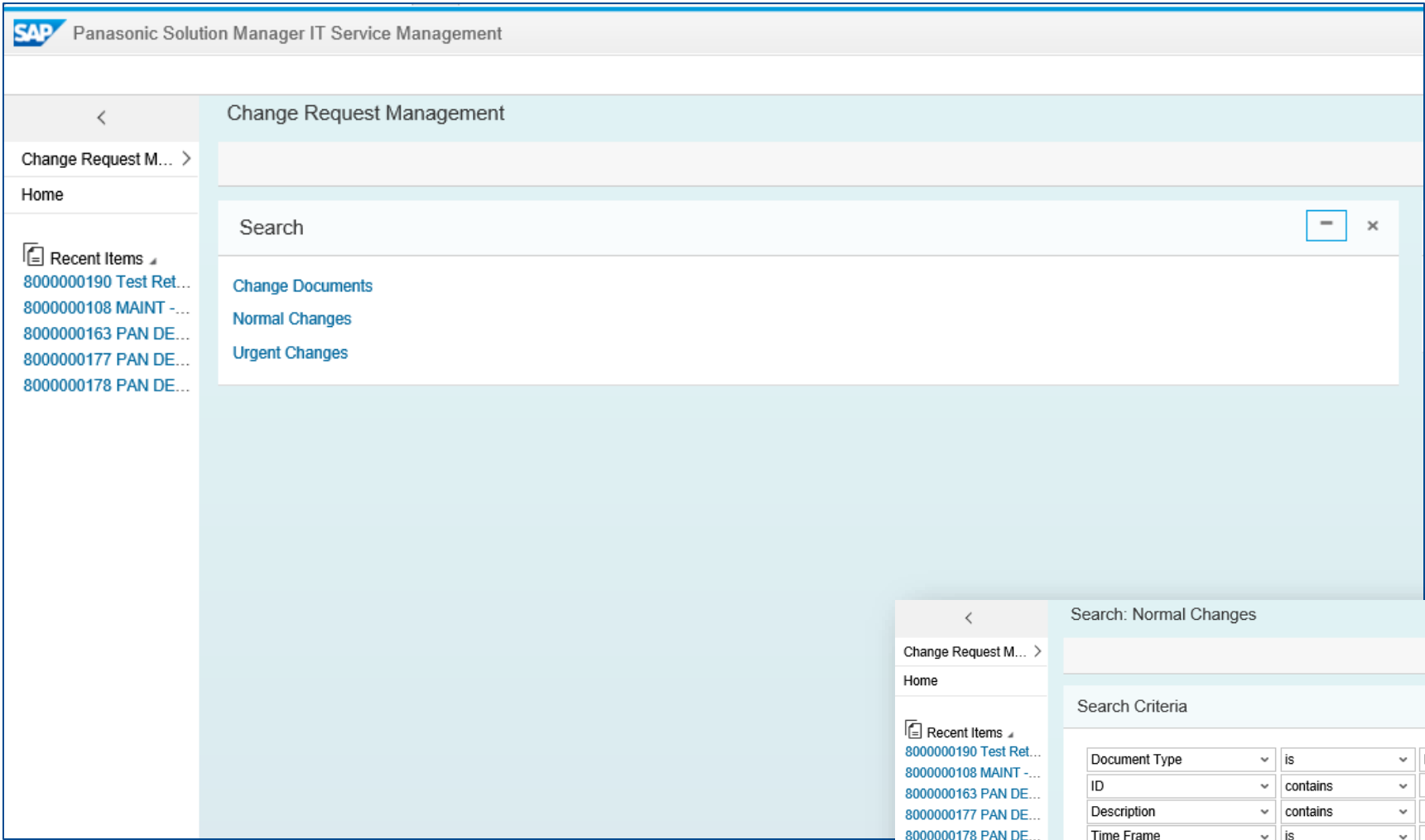
GYANSYS

To accelerate the import process for normal changes, you can request the preliminary import of a normal change into a follow-on system. This means that the import of the transport requests associated with the normal change is carried out at once, independent of any mass import into the follow-on system.

Normal Change Preliminary Import Workflow



Search Change Document



Search Document

1. On Fiori Launchpad -> Open Change Request Management tile
2. On CRM_UI -> Click on Change Request Management from left menu
3. On Main window -> Search Area
4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ Approved by CAB”

5. Click on “Search”
6. Open change document from result list

Preliminary Import

Developer
Tester



NC (Maintenance): 8000000178, PAN DEMO

3

4

1

2

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Transaction 8000000178 saved

Status Overview

1

2

3

4

5

6

7

8

9

10

11

Created

In Development

To Be Tested

Successfully Tested

Preliminary Import Requested

Testing for Preliminary Import

Tested for Production Import

Approved by CAB

Authorized for Import

Imported into Production

Withdrawn

Details

Edit

General Data

Implementation Data

Reference Objects

ID:

8000000178

Description:

PAN DEMO

Developer:

WP70478

Tester:

WP70478

Current Processor:

Developer ChaRM

Created By:

WP70478

Status:

Approved by CAB

Priority:

4: Low

Creation Time:

15.11.2022

17:22

“Request Preliminary Import”

Developer or Tester can request preliminary approval once Change Document reaches status “Approved by CAB”.

Search for respective document using CRM_UI -> Open change document:

- Click on “Edit” Button
- Click on “Actions” -> Select “Request Preliminary Import”
- Click on “Save” button
- Click on “Display” button

Preliminary Import

NC (Maintenance): 8000000178, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Transaction 8000000178 saved

Status Overview

1 Created 2 In Development 3 To Be Tested 4 Successfully Tested 5 Preliminary Import Requested 6 Testing for Preliminary Import 7 Tested for Production Import 8 Approved by CAB 9 Authorized for Import 10 Imported into Production 11 Withdrawn

Details Edit

General Data

ID: 8000000178

Description: PAN DEMO

Developer: WP70478

Tester: WP70478

Current Processor: Developer ChaRM

Created By: WP70478

Implementation Data

Change Cycle / Phase: MAI

Type / ID: Con

Landscape / Branch: DEN

Development Close:

Go-Live Date:

Reference Objects

Configuration Item: 710

Processing Data

Status: Preliminary Import Requested

Priority: 4: Low

Dates

Creation Time: 15.11.2022 17:22

“Approve Preliminary Import”

Approver is required to approve any preliminary import request.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Approve Preliminary Import”
3. Click on “Save” button
4. Click on “Display” button

The transport request for the normal change is automatically imported into the assigned follow-on system when applicable.

If the import was successful, the status of the normal change proceeds to **Testing for Preliminary Import**.

Preliminary Import

3

NC (Maintenance): 8000000178, PAN DEMO

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

4

Transaction 8000000178 saved

1

Status Overview

2

Confirm Successful Test

Reset Status to "In Development"

Cancel Preliminary Import

1

Created

2

In Development

3

To Be Tested

4

Successfully Tested

5

Preliminary Import Requested

6

Testing for Preliminary Import

7

Tested for Production Import

8

Approved by CAB

9

Authorized for Import

10

Imported into Production

11

Withdrawn

Details

Edit

General Data

ID:

8000000178

Description:

PAN DEMO

Developer:

WP70478

Tester:

WP70478

Current Processor:

Developer ChaRM

Created By:

WP70478

Implementation Data

Change Cycle / Phase:

MAINT -> Weekly Chan

Type / ID:

Continual Cycle

Landscape / Branch:

DEMO_PANASONIC_S

Development Close:

Go-Live Date:

Reference Objects

Configuration Item:

7100000003

Processing Data

Status:

Testing for Preliminary Import

Priority:

4: Low

Dates

Creation Time:

15.11.2022

17:22

“Confirm Tested Preliminary Import”

After successful testing, the tester confirms successful test.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button

2. Click on “Actions” -> Select “Confirms Successful Testing”

3. Click on “Save” button

4. Click on “Display” button







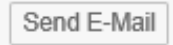
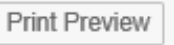


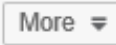
The transport request of the normal change is automatically imported into the next system in the landscape if applicable.

When the transport request is in the import queue of the production system, the normal change proceeds to status **Tested for Production Import**. Otherwise, it keeps status **Testing for Preliminary Import**.

GYANSYS

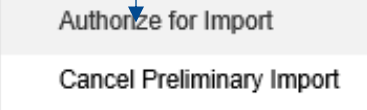
Preliminary Import

NC (Maintenance): 8000000178, PAN DEMO

3           

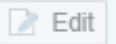
4 Transaction 8000000178 saved

1 Status Overview

2 

1 2 3 4 5 6 7 8 9 10 11

Created In Development To Be Tested Successfully Tested Preliminary Import Requested Testing for Preliminary Import **Tested for Production Import** Approved by CAB Authorized for Import Imported into Production Withdrawn

Details 

General Data

ID: 8000000178

* Description: PAN DEMO

Developer: WP70478

Tester: WP70478

Current Processor: Developer ChaRM

Created By: WP70478

Implementation Data

Change Cycle / Phase:

Type / ID:

Landscape / Branch:

Development Close:

Go-Live Date:

Reference Objects

Configuration Item:

Processing Data

Status: Tested for Production Import

Priority: 4: Low

Dates

Creation Time: 15.11.2022 17:33

“Authorize Preliminary Import”

When the normal change is in status **Tested for Production Import**, the Approver can authorize the transport request for import to production.

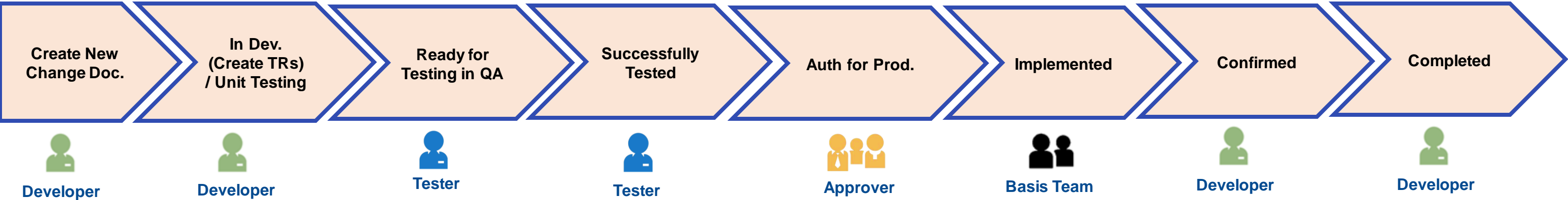
Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Authorized by CAB”
3. Click on “Save” button
4. Click on “Display” button

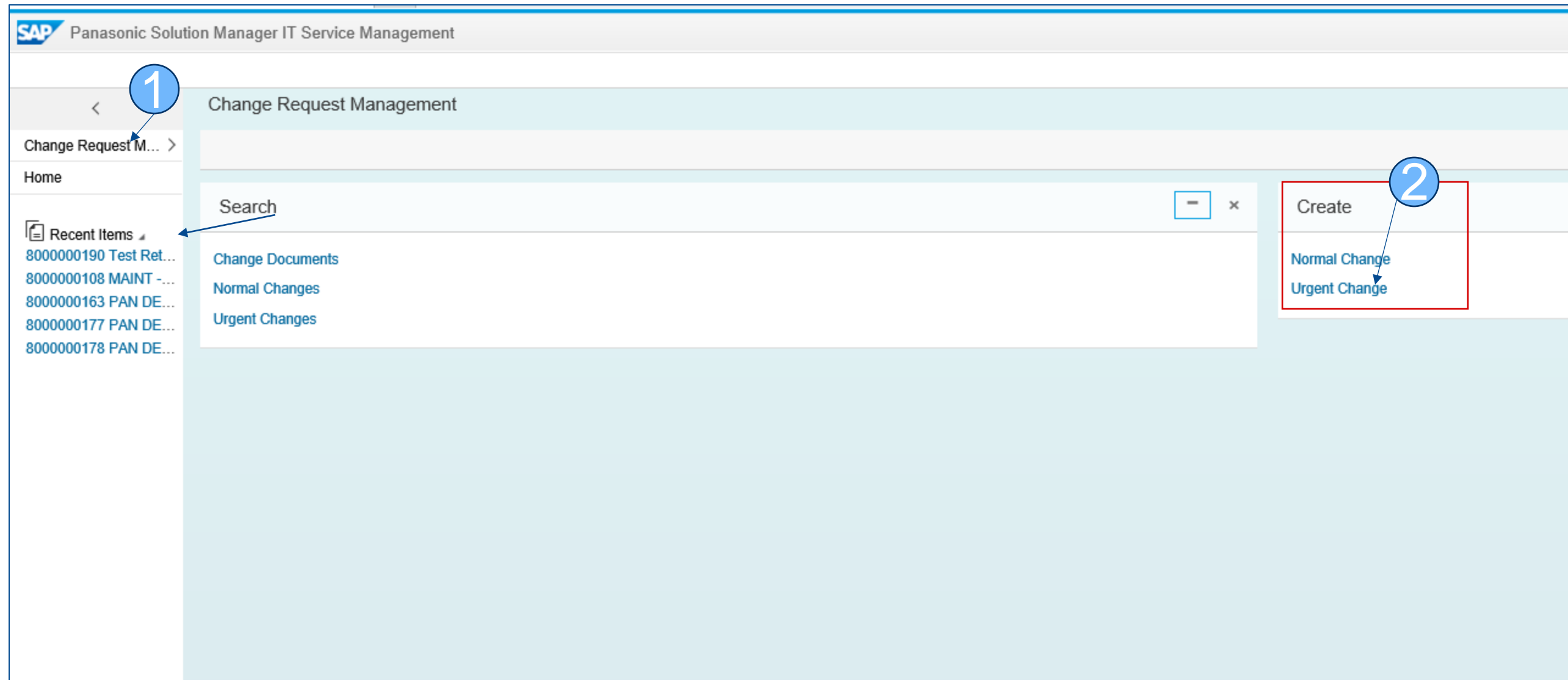
The status proceeds to **Authorized for Import**.

Urgent Changes are used for example, to fix an error in existing functionality that could jeopardize a production environment. The change is transported into the production system faster than a normal change.

Urgent Change Workflow



Create Change Document



Create Change Doc.

1. Click on left menu “Change Request Management”
2. Under Create section -> Click on “Urgent Change”.

ChaRM Document – Urgent

Urgent Change: 3000000011, PAN DEMO

3 Save | 4 Display | Cancel | Edit | Create Follow-Up | 2 Actions | Send E-Mail | Print Preview

Display Object Relationships | More ▾

1

✓ Transaction 3000000011 saved

Requested Start:	16.11.2022	14:19:58
Requested End:	19.11.2022	14:19:58
Due By:	30.11.2022	14:20:25

Relationships

SN Rel. Change Req.:

* SN Rel. Incident: DEMO

Text | Add Text ▾ | Insert Text Template | Maintain Text Templates

Text Editor

Description of Change:

“Set In Development”

Developer creates an Urgent Change and fill out all the fields as same as explained for Normal Change.

Once urgent change document is created Developer can set to “In Development”

1. Click on “Edit” Button
2. Click on “Actions” -> Select “In Development”
3. Click on “Save” button
4. Click on “Display” button

A popup window will appear, check next slide for details.

ChaRM Document – Urgent

tion Manager IT Service Management

SharePersonalizeSystem News

Urgent Change: 3000000011, PAN D

SaveDisplayCancel

Display Object RelationshipsMore

Action Set to "In Development" will be perfo

Requested Start: 16.11.2022

Requested End: 19.11.2022

Due By: 30.11.2022

Relationships

SN Rel. Change Req.:

* SN Rel. Incident: DEMO

TextAdd TextInsert Text

Text Editor

Description of Change:

Create transport request - Google Chrome

Not secure | https://pn7azlsmgd4.us.panasonic.com:50001/sap(bD1lbiZjPTAwMSZkPW1pbG==)/bc/bs

General Data

* Short Description:

S 3000000011: PAN DEMO

* System and Client:

GD4~ABAP/801

Request Type:

☒ Workbench Request

☒ Customizing Request

* Request Owner:

WP70478

Tasks

Insert

Filter:

User
WP70478

Create

Cancel

Create Transport(s)

1. **Short Description:** It comes with the same description of the Change Document. Developer can change the description as needed.

2. **System and Client:** Select which system and client to create the transport request

3. **Request Type:** Checkbox which transport types will be required for the work, if not sure you can leave both marked and system will delete the unused one.

4. **Request Owner:** By default, the current user creating the transport, you can change if needed.

5. **Tasks:** By default, it will create one tasks with the with the user creating the transport, Developer can add additional tasks if needed.

6. Click on “Create” button

Urgent Change -> Create Additional Task

Urgent Change: 3000000011, PAN DEMO

Save Display Cancel Edit Create Follow-Up More

Task list H000000012 created for urgent change

Transport Management Transport Request Task

Actions	Transport ID	Request Descri...	Request Type	T
	GD4K900142	S 3000000011:...	Workbench Re...	0
	GD4K900144	S 3000000011:...	Customizing R...	0

Tasks of GD4K900142

Task ID	Task Type
GD4K900143	Unclassified Task

General Data

* Short Descripti... S 3000000011: PAN DEMO

* System and Cli... GD4~ABAP/801

Request Type: ☒ Workbench Requ... ☒ Customizing Req...

* Request Owner: WP70478

Tasks

Insert Filter:

User
WP70478

Create Cancel

Landscape

Solution Documentation

Adding New task

If Developer would like to add an additional tasks to the existing transport :

1. Select the transport
2. Click on “Task” button
3. On the new window -> Click on “Insert” button
4. Enter the developer in the employee list
5. Click on “Create” button

Urgent Change-> Login to Managed System

Urgent Change: 3000000011, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Re

Transport Management Transport Request Task Release Transport Request Refresh More

Actions	Transport ID	Request Descri...	Request Type	Transport of C...	Tasks	Owner	Status
	GD4K900142	S 3000000011:...	Workbench Re...	0	1	WP70478	Changeable
	GD4K900144	S 3000000011:...	Customizing R...	0	1	WP70478	Changeable

Tasks of GD4K900142

Task ID	Task Type	Task Owner
GD4K900143	Unclassified Task	WP70478

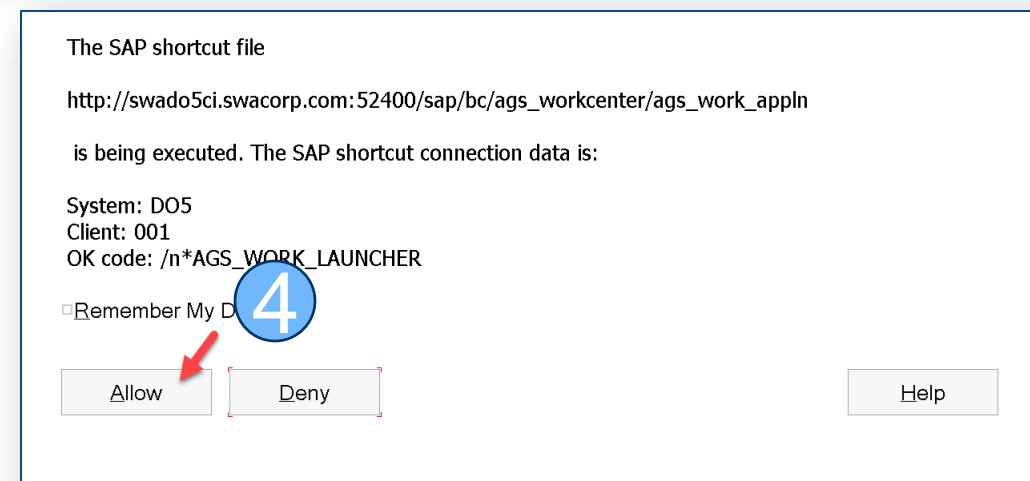
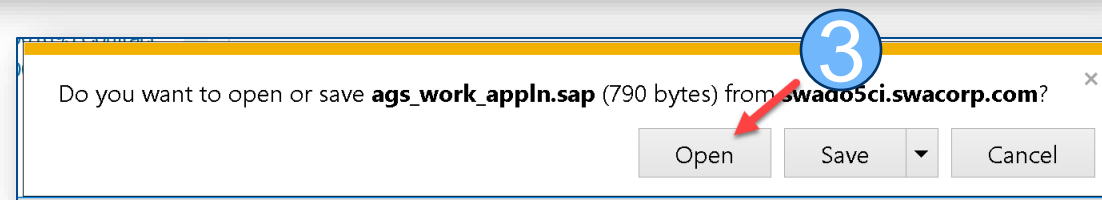
Landscape Display all Systems Refresh

Actions	Relevant for Logon	System	System Type	Transport Status	Risk Status
	✓	GD4~ABAP/801	Development System	Modifiable	

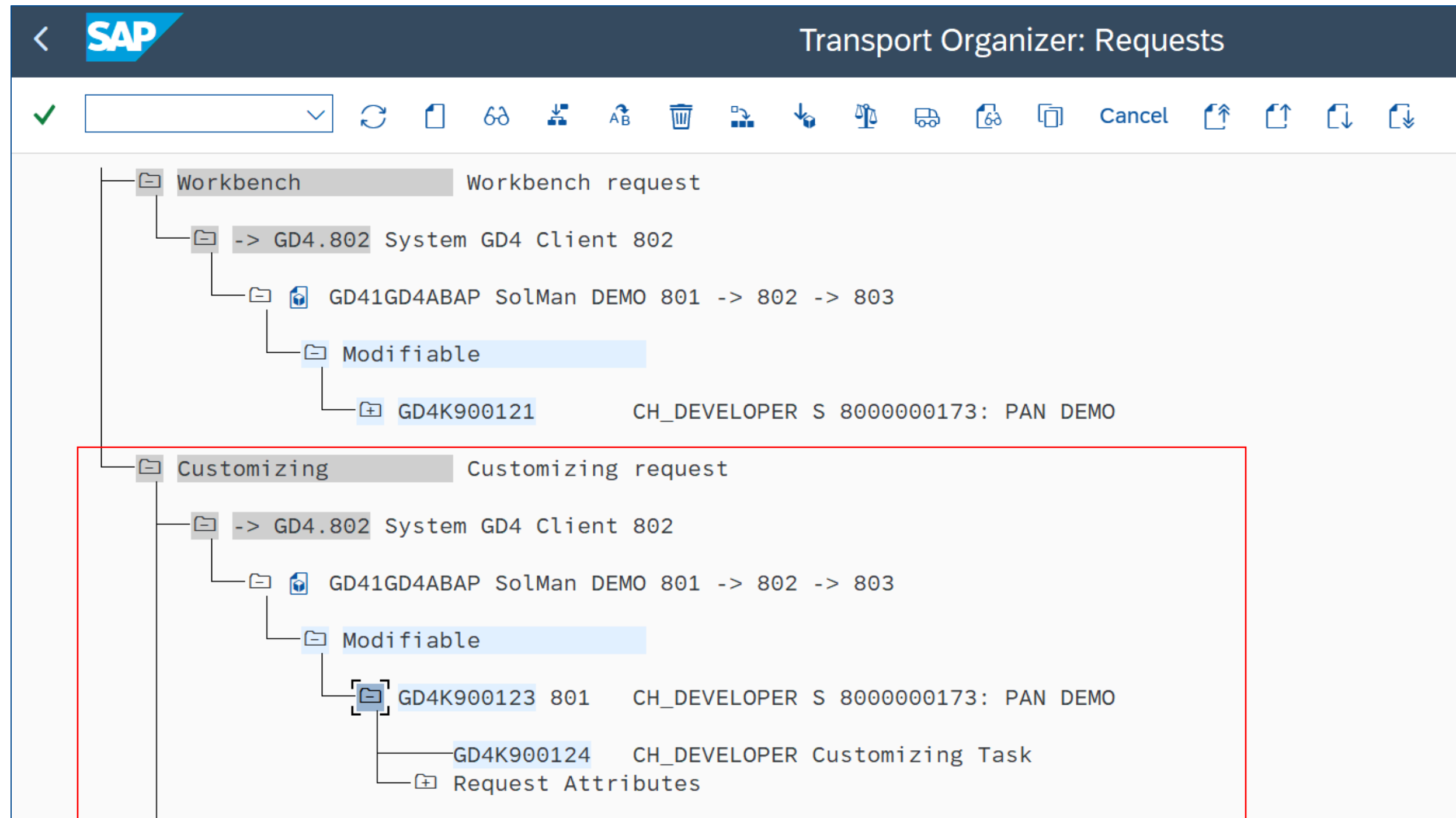
Login to Managed System (Dev System)

ChaRM give the option for Developers to login to managed system directly from the change document:

1. Navigate to “Landscape Assignment Block”
2. Click on of the Development System
3. Click on “Open” on the next popup window
4. Click on “Allow” on the second popup window



Urgent Change -> Release Task



Release Task

Once changes have been saved to the transport request(s) Developers will then release the transport task:

1. Go Tcode SE09
2. Find the Transport Request created previously
3. For this training example -> Select the Customizing Request
4. Expand the main transport node -> select the Task
5. Release the **task ONLY**

Note

The main transport will be released by ChaRM via the workflow.

Urgent ChaRM -> Pass to QAS

Urgent Change: 3000000011, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Transaction 300011 saved

Status Overview

1 Created 2 In Development 3 To Be Tested 4 Successfully Tested 5 Authorized for Production 6 Imported into Production 7 Confirmed 8 Completed 9 Withdrawn

Details Edit

General Data

ID: 3000000011

Description: PAN DEMO

Developer: WP70478

Tester:

IT Operator:

Change Manager:

Current Processor: WP70478

Processing Data

Status: In Development

Priority: 4: Low

Dates

Creation Time: 16.11.2022 14:20

Last changed: 17.11.2022 16:02

Requested Start: 16.11.2022 14:10:50

Implementation D

Category

Reference Object

Pass Urgent Change to Test

Withdraw Urgent Change

Move Transport to Quality System

Developer now has completed the unit testing in DEV system and is ready to submit the change for testing in QAS:

Open the Change Document

- Click on "Edit" Button
 - Click on "Actions" -> Select "Pass Normal Change to Test"
 - Click on "Save" button
 - Click on "Display" button
- Main Transport request(s) gets released and imported in QAS system.**
 - Tester will be notified via email about change is ready for testing**

Urgent Change – Testing

Urgent Change: 3000000011, PAN DEMO

3

4

1

2

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Transaction 3000000011 saved

Status Overview

1

2

3

4

5

6

7

8

9

Created

In Development

To Be Tested

Successfully Tested

Authorized for Production

Imported into Production

Confirmed

Completed

Withdrawn

Details

Edit

General Data

Implementation Data

Category

Reference Objects

ID:

3000000011

Change Cycle / Phase:

Description:

PAN DEMO

Type / ID:

Developer:

WP70478

Landscape / Branch:

Tester:

Development Close:

IT Operator:

Go-Live Date:

Change Manager:

Category 1:

Current Processor:

WP70478

Category 2:

Status:

To Be Tested

Category 3:

Priority:

4: Low

Category 4:

Dates

Reference Objects

Creation Time:

16.11.2022

14:20

Configuration Item:

“Confirm Successful Test”

Teste check that all changes in QAS system are successfully and then “Confirm Successful Test”.

Search for respective document using CRM_UI -> Open change document:

1.

Click on “Edit” Button
2.

Click on “Actions” -> Select “Confirm Successful Test”
3.

Click on “Save” button
4.

Click on “Display” button

OR

Reset status to “In Development”

Tester found some issue or requires additional work; In this case they can send change document back to “In Development” to create additional transports/tasks:

1.

Click on “Edit” Button
2.

Click on “Actions” -> Select “Reset Status to “In Development”
3.

Click on “Save” button
4.

Click on “Display” button

ChaRM Document – Urgent

Urgent Change: 3000000011, PAN DEMO

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

The tester role cannot be identical to the developer

Transaction 3000000011 saved

Status Overview

1

2

3

4

5

6

7

8

9

Created

In Development

To Be Tested

Successfully Tested

Authorized for Production

Imported into Production

Confirmed

Completed

Withdrawn

Details

Edit

General Data

ID: 3000000011

Description: PAN DEMO

Developer: WP70478

Tester: WP70478

IT Operator:

Change Manager:

Current Processor: WP70478

Processing Data

Status: Successfully Tested

Priority: 4: Low

Dates

Creation Time: 16.11.2022 14:20

Implementation Data

Change Cycle / Phase: MA

Type / ID: Co

Landscape / Branch: DE

Development Close:

Go-Live Date:

Category

Category 1:

Category 2:

Category 3:

Category 4:

Reference Objects

Configuration Item: 71

“Authorize for Production”

After successful testing, the Approver approves the urgent change for import into the production system.

Search for respective document using CRM_UI -> Open change document:

- Click on “Edit” Button
- Click on “Actions” -> Select “Authorized by CAB”
- Click on “Save” button
- Click on “Display” button

A ServiceNow Change Request is required before to move any changes to production system.

Urgent Change – Import

Urgent Change: 3000000011, PAN DEMO

Save Display Cancel Edit Create Follow-Up Actions Send E-Mail Print Preview Print Display Object Relationships More

Transaction 3000000011 saved

Status Overview

1 Created 2 In Development 3 To Be Tested 4 Successfully Tested 5 Authorized for Production 6 Imported into Production 7 Confirmed 8 Completed 9 Withdrawn

Details Edit

General Data

ID: 3000000011

Description: PAN DEMO

Developer: WP70478

Tester: WP70478

IT Operator:

Change Manager:

Current Processor: WP70478

Processing Data

Status: Authorized for Production

Priority: 4: Low

Dates

Creation Time: 16.11.2022 14:20

Last changed: 17.11.2022 16:36

Implementation Data

Change Cycle / Type

Landscape / Development

Go-Live

Category

Category

Category

Category

Reference Objects

Configuration

“Import into Production”

The Basis team opens the change document and starts the import of the urgent change into the production system.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Import Urgent Change to Production”
3. Click on “Save” button
4. Click on “Display” button

The urgent change proceeds to status **Imported into Production**.

Urgent Change – Confirm

Urgent Change: 3000000010, PAN DEMO URGENT CHANGE

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Transaction 3000000010 saved

Status Overview

1

2

3

4

5

6

7

8

9

Created

In Development

To Be Tested

Successfully Tested

Authorized for Production

Imported into Production

Confirmed

Completed

Withdrawn

Details

Edit

General Data

Implementation Data

Category

Processing Data

ID: 3000000010

Description: PAN DEMO URGENT CHANGE

Developer: WP70478

Tester: WP70478

IT Operator:

Change Manager:

Current Processor: WP70478

Status: Imported into Production

Priority: 4: Low

Change Cycle / Phase: MAIN

Type / ID: Contir

Landscape / Branch: DEMO

Development Close:

Go-Live Date:

Category 1:

Category 2:

Category 3:

Category 4:

“Confirm Urgent Change”

The developer confirms that the change has been made as desired.

Search for respective document using CRM_UI -> Open change document:

- Click on “Edit” Button
- Click on “Actions” -> Select “Confirm Urgent Change”
- Click on “Save” button
- Click on “Display” button

The urgent change proceeds to status Confirmed.

Urgent Change - Complete

Urgent Change: 3000000010, PAN DEMO URGENT CHANGE

Save

Display

Cancel

Edit

Create Follow-Up

Actions

Send E-Mail

Print Preview

Print

Display Object Relationships

More

Transaction 3000000010 saved

Status Overview

1

2

3

4

5

6

7

8

9

Created

In Development

To Be Tested

Successfully Tested

Authorized for Production

Imported into Production

Confirmed

Completed

Withdrawn

Details

Edit

General Data

Implementation Data

Category

ID:

3000000010

Description:

PAN DEMO URGENT CHANGE

Developer:

WP70478

Tester:

WP70478

IT Operator:

Change Manager:

Current Processor:

WP70478

Processing Data

Status:

Confirmed

Priority:

4: Low

“Complete Urgent Change”

To lock the urgent change for editing, the approver must set the change document to final status Completed.

Search for respective document using CRM_UI -> Open change document:

- Click on “Edit” Button
- Click on “Actions” -> Select “Complete Urgent Change”
- Click on “Save” button
- Click on “Display” button

Note

After the transport request of an urgent change is imported into the test and production systems, the transport request remains in the import buffer. This makes sure that the changes are not overwritten by other transport requests in the normal change cycle.



You can all transactions using the **Search** screen of the Web Client UI. The result of your search is displayed in the result list. A series of search operators is available for the search. Input help or search help in certain fields also assists you in your search.

Change Request Management

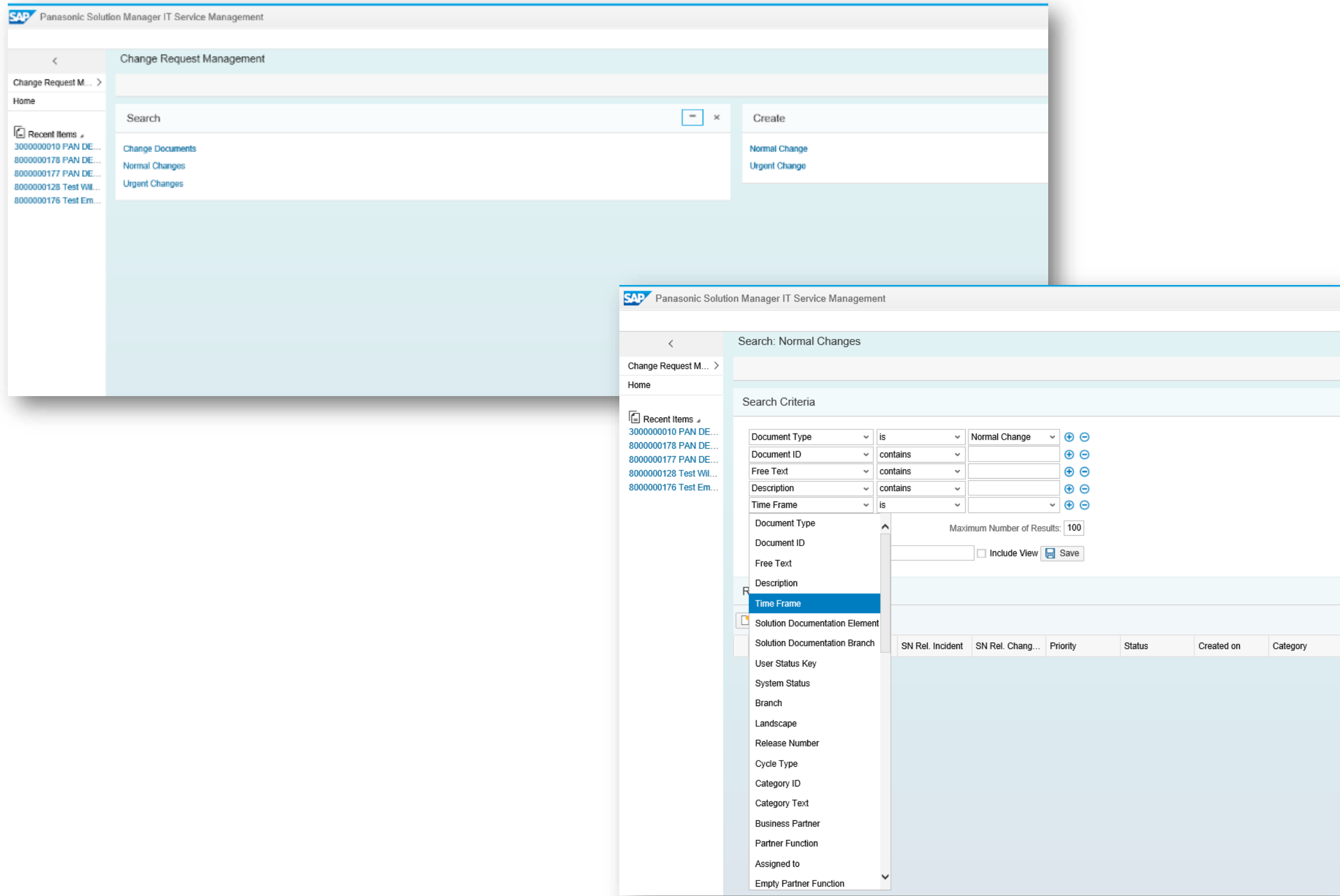
Search

Change Documents

Normal Changes

Urgent Changes

Search for Change Documents



1. In the CRM_UI user can search for:
 - **Change Documents** (Wide open critical to search all change document types)
 - **Normal Change** (Predefined criteria to search only for Normal Documents)
 - **Urgent Change** (Predefined criteria to search only for Urgent Change Documents)

2. Select one the search hyperlinks e.g., **Normal Change**

3. Different criteria is available by clicking on first column drop down field

Search Change Document



Search: Normal Changes

When using operator type "Contains" you can type part of the string or number and it will search as wild card "*"

Search Criteria

Document Type

is

Normal Change

Document ID

contains

17

Free Text

contains

Description

contains

Time Frame

is

Maximum Number of Results:

100

Search

Clear

Save Search As:

☐ Include View

Save

Result List: 5 Normal Changes Found

New

Refresh

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Related Reque...	Requested Start	Requested End	Due
8000000175	Test	Test		4: Low	In Development	15.11.2022			15.11.2022	18.11.2022	29.1
8000000176	Test Email	Test		4: Low	In Development	15.11.2022			15.11.2022	18.11.2022	29.1
8000000177	PAN DEMO	Test		4: Low	Imported into P...	15.11.2022			15.11.2022	18.11.2022	29.1
8000000178	PAN DEMO	Test		4: Low	Imported into P...	15.11.2022			15.11.2022	18.11.2022	29.1
8000000173	PAN DEMO	0000000001		4: Low	Imported into P...	14.11.2022			14.11.2022	17.11.2022	28.1

E.g.: User would like to search a Change Document using the document number:

1. Select criteria: Change Document ID
1. Type Document number
2. Click on Search button
3. If a matching record exists, it will appear in the results list
4. User can open the CD by clicking on the CD ID hyperlink from results list

GYANSYS

Search Change Document



Search Criteria

Document Type

is

Normal Change

Document ID

contains

17

Document ID

contains

16

Free Text

contains

Description

contains

TEST

Time Frame

is

Maximum Number of Results:

100

Search

Clear

Save Search As:

☐ Include View

Save

Result List: 3 Normal Changes Found

New

Refresh

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Related Reque...	Requested Start	Requested En
8000000175	Test	Test		4: Low	In Development	15.11.2022			15.11.2022	18.11.2022
8000000176	Test Email	Test		4: Low	In Development	15.11.2022			15.11.2022	18.11.2022
8000000116	tEST	tEST		4: Low	In Development	20.10.2022			20.10.2022	23.10.2022

If you add mutiple times the same criteria it will operate using 'OR' within that one criteria, as the example below , the query will search any records that contains one of the 3 values

When using mutiple different criteria , the system behaves as an "AND" operator , it must meet the values of each criteria type

"AND" / "OR"

E.g.: User would like to search for Change Documents that has any of the following document IDs in the number:

- 17
- 16

AND

- Description containing TEST

1. Click on Search button
2. If a matching record exists, it will appear in the results list
3. User can open the Change Document by clicking on the Change Document ID hyperlink from results list

Save Search

User may use the same criteria often. In this case, they can save the search for re-use:

- 1. Fill out at least one criteria
- 2. **Save Search As:** Enter the name of your search with something that makes it easy to identify the criteria defined in the query.
- 3. Click on Save

Search: Normal Changes

Search Criteria

Document Type

is

Normal Change

+

-

Document ID

contains

+

-

Free Text

contains

+

-

Description

contains

+

-

User Status Key

is

Approved by CA...

+

-

Maximum Number of Results:

100

Search

Clear

Save Search As: Approved by CAB

☐ Include View

Save

Result List: 1 Normal Change Found

New

Refresh

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Relate
8000000128	Test William	Test		4: Low	Approved by C...	25.10.2022		

Save Search



Saved SearchesApproved by CABGo

Search: Normal Changes

Search 'Approved by CAB' has been saved

Search Criteria

Document Type

is

Normal Change

+

-

Document ID

contains

+

-

Free Text

contains

+

-

Description

contains

+

-

User Status Key

is

Approved by CA...

+

-

Maximum Number of Results: 100

Search

Clear

Save Search As:

☐ Include View

Save

Result List: 1 Normal Change Found

New

Refresh

Filter:

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Related Reque...	Requested Start	Requested End	Due by	Last Changed on	Last Changed by	Transaction Type	Branch
8000000128	Test William	Test		4: Low	Approved by C...	25.10.2022			25.10.2022	28.10.2022	08.11.2022 11:...	15.11.2022	William Perez	ZMMJ	Maintenance

Once a search has been saved it will appear under Saved Searches field (Right top corner).

To re-use it:

1. Click on Saved Searches drop down field
2. Select one of the available searches and click on “Go” button

Display/Edit Save Search

Search: Normal Changes

Result List: 1 Normal Change Found

New Refresh

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Related Reque...	Requested Start	Requested End	Due by	Last Changed on	Last Changed by	Transaction Type	Branch	Landscape
8000000128	Test William	Test		4: Low	Approved by C...	25.10.2022			25.10.2022	28.10.2022	08.11.2022 11:...	15.11.2022	William Perez	ZMMJ	Maintenance	DEMO_PANA...

To see the current search criteria:

- click on “Show Search Fields”, You can add or remove any criteria from the existing query if needed

Search: Normal Changes

Search Criteria

Document Type is Normal Change + -

User Status Key is Approved by CA... + -

Time Frame is This week + -

Maximum Number of Results: 100

Search Clear Save Search As Approved by CAB Include View Save

Result List: 1 Normal Change Found

New Refresh

Change ID	Description	SN Rel. Incident	SN Rel. Chang...	Priority	Status	Created on	Category	Related Reque...	Requested Start	Requested End	Due by
8000000128	Test William	Test		4: Low	Approved by C...	25.10.2022			25.10.2022	28.10.2022	08.11.2022

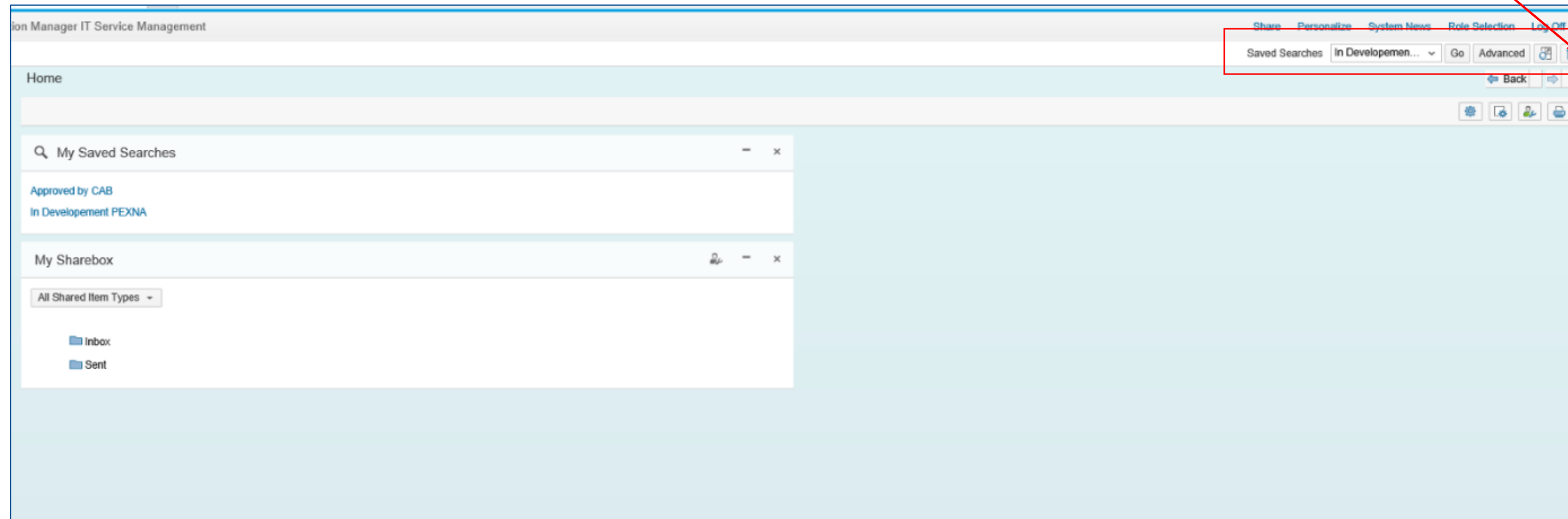
If you decide to modify the criteria:

1. Click On Save (Overwrites the current saved search)

Or

1. You can change the name and it will save as separate saved search.

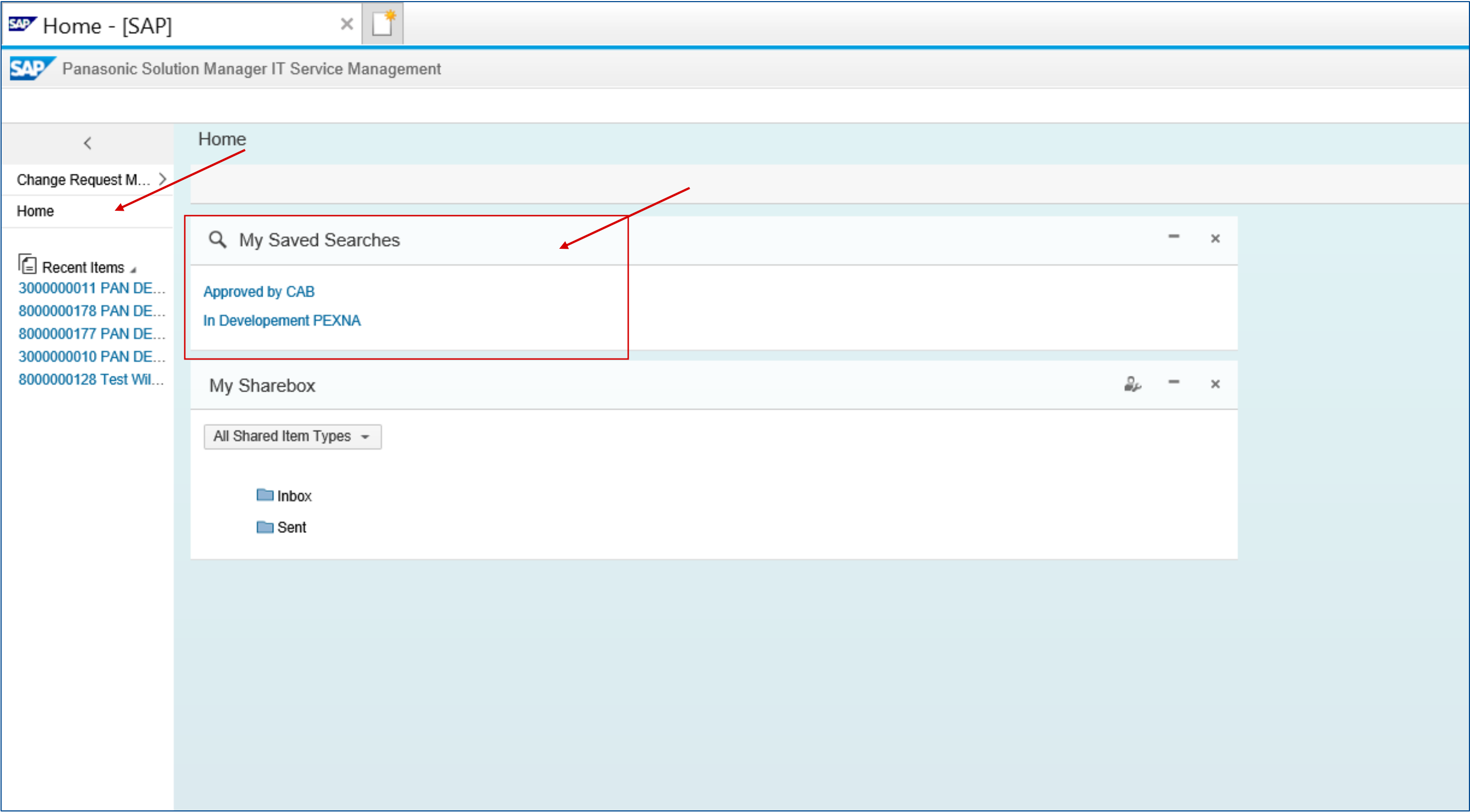
Delete Saves Searches



To delete a saved search

1. Select the saved search from the top left corner
2. Click on “Trash Can” icon
3. Confirm Deletion

Home - Searches



All Saved Searches will be available from HOME screen

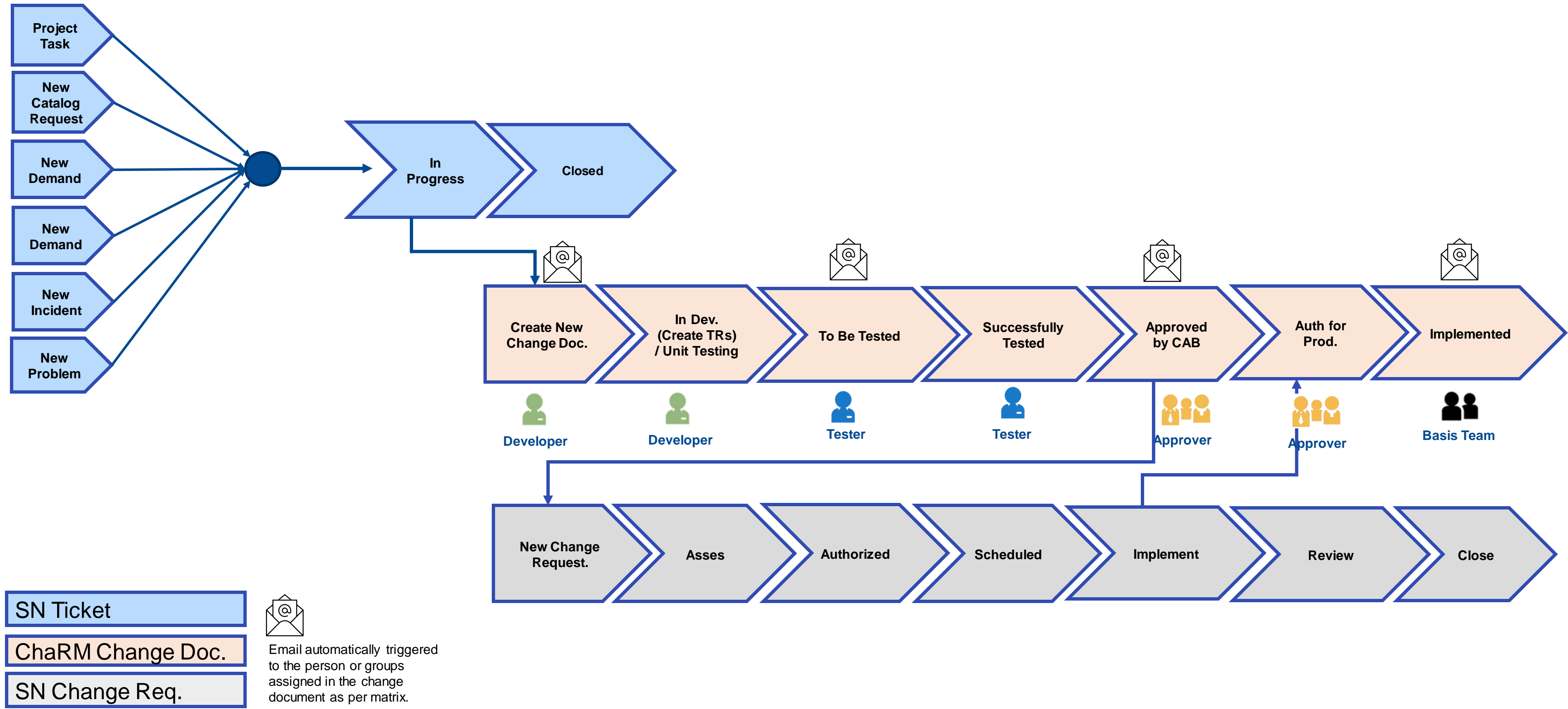
Users can click and execute the queries directly from there

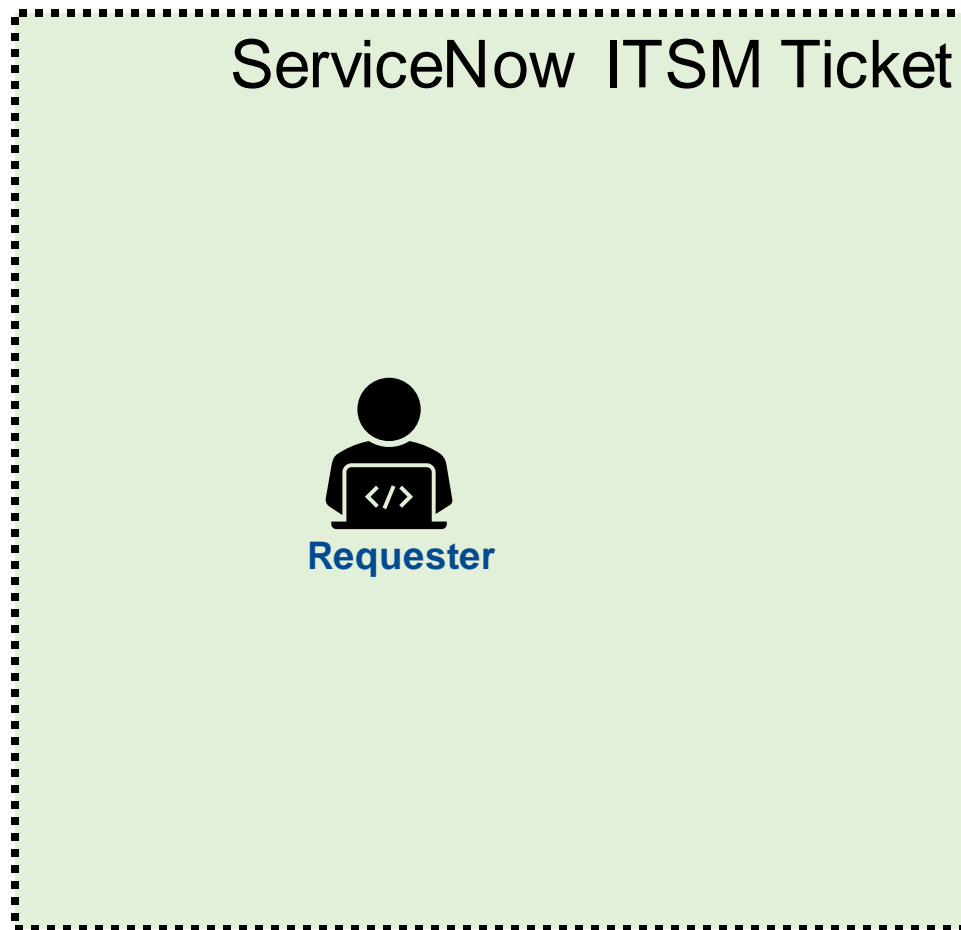
Q&A

Support

Login Issues to ChaRM ?

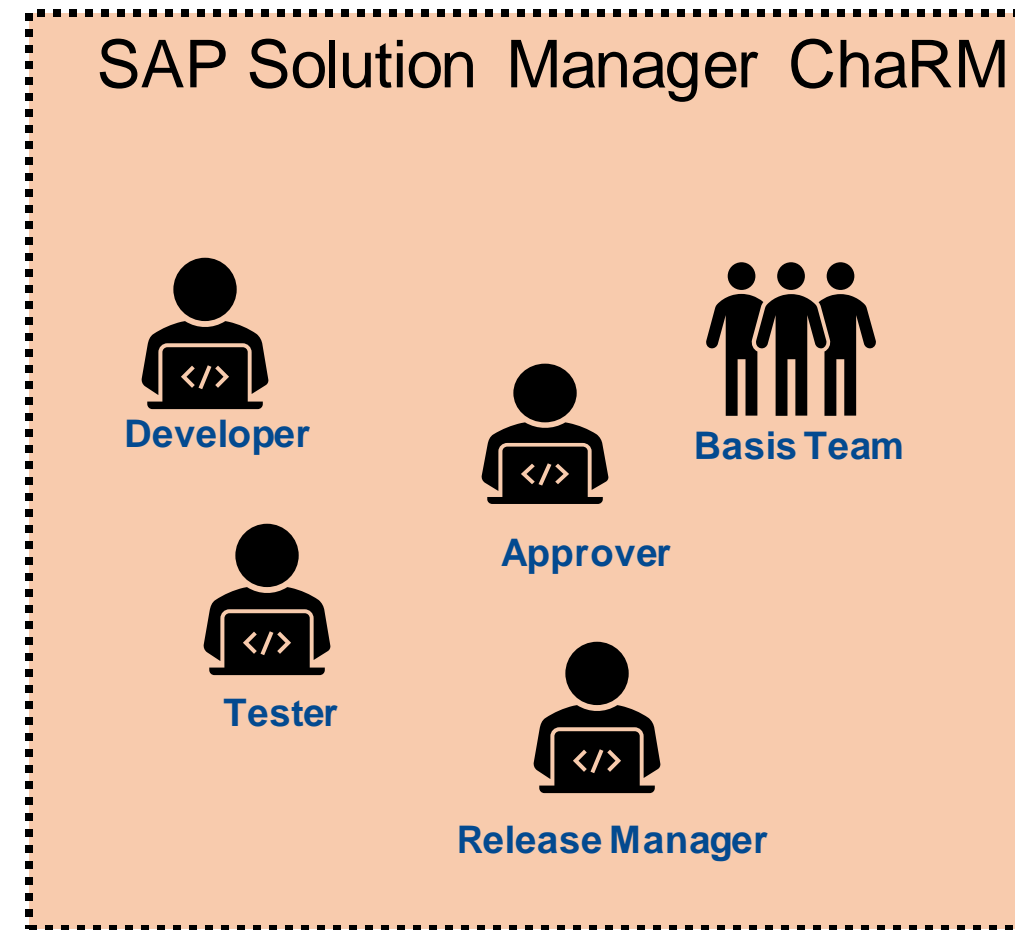
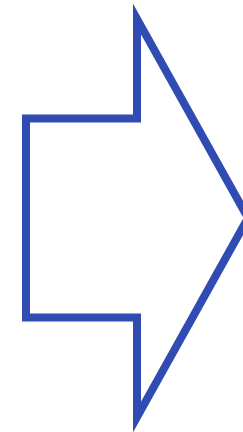
Need assistance with ChaRM ?



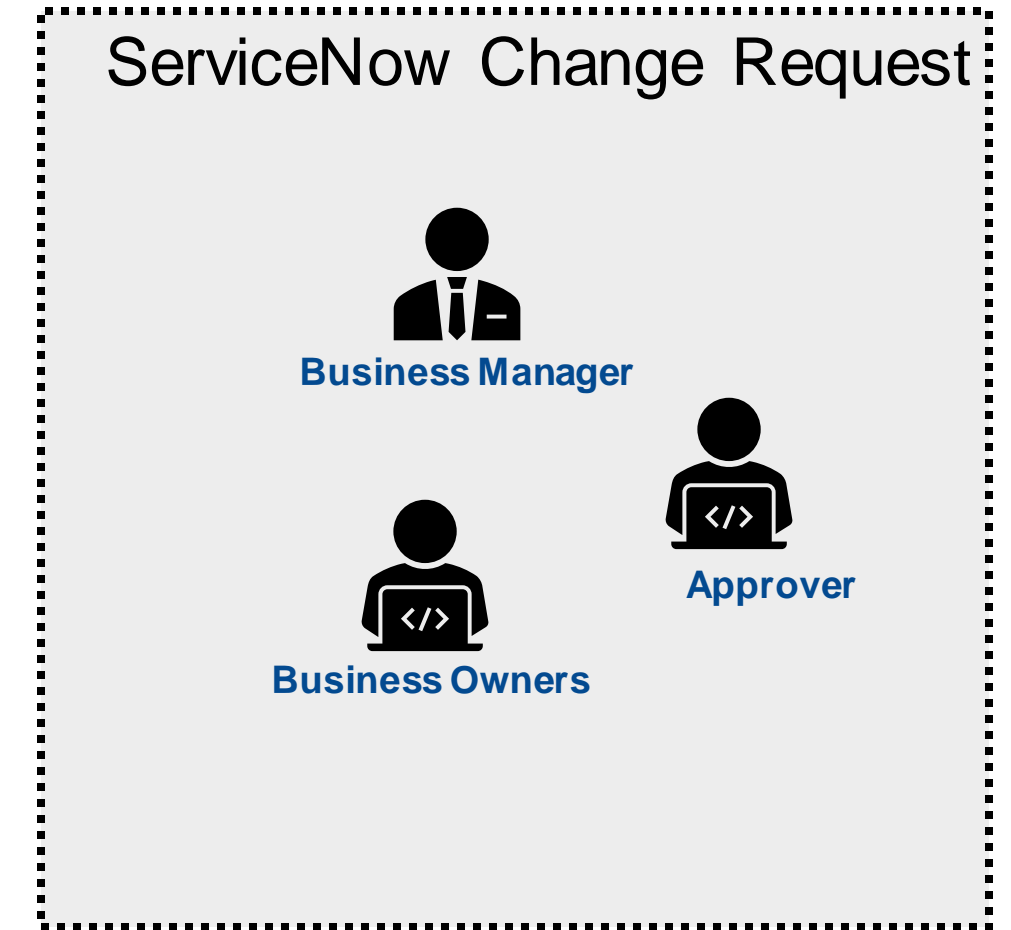


End User:

- Create ServiceNow Ticket (ChaRM Change Required)



- Developer:
 - Create new change document
 - Create Transport Request
 - Unit Test
 - Release Transport into QAS
- Tester
 - Confirm Test in QAS
- Approver
 - Authorize changes into Production
- Basis
 - Import Authorized CDs into Production



- Change Owner
 - Creates ServiceNow Change Request
 - Pursue approval to move the related Change Documents into Production

Q&A

