Definition of General Concepts

Use

The Solution Manager Service Desk is based on CRM 5.0.

The IMG activities to configure the Service Desk, service provider, system house and software partner are a STANDARD configuration.

The service provider and system house settings are enhancements to the standard Service Desk, and their configurations are interdependent. The enhancements differ primarily in the values of the attributes of transaction type SLFN:

STANDARD SERVICE DESK = Service Desk

+ SERVICE PROVIDER (delta) = Service Desk for service provider

+ SYSTEMHAUS (delta) = System house

Use the following customer descriptions to decide which configuration to perform:

1. Service Desk user
   You use the Service Desk and have an SAP customer number. Configure the Service Desk (standard).
   *Note:* You can be a software partner as well as a Service Desk user. You have your own software components from your own product developments. SAP performs your first and second level support. If SAP cannot solve problems, you take the service messages from SAP and perform third level support. Configure the Service Desk and the software partner.

2. Corporation
   You manage several SAP customer numbers or you are CCC. Configure the Service Desk and service provider.
   *Note:* You can be a software partner as well as a corporation. You have your own software components from your own product developments. SAP performs your first and second level support. If SAP cannot solve problems, you take the service messages from SAP and perform third level support. Configure the Service Desk and the software partner.

3. System house
   You process your customers' service messages. You have several SAP customer numbers. Configure the Service Desk, service provider and system house.
   *Note:* You can be a software partner as well as a system house. You have your own software components from your own product developments. SAP performs your first and second level support. If SAP cannot solve problems, you take the service messages from SAP and perform third level support. Configure the Service Desk and the software partner.

Default Settings

Basic customizing concepts

- **Transaction type**

  The transaction type SLFN determines the business context in which a transaction type (e.g. Service) can be used. One transaction type is the "main" transaction type, and has no hierarchical relationship to other transaction types.

- **Text schema**
The text schema is a repository for text types (for example system data) which are assigned to text objects (CRM_ORDERH). The text schema is assigned to the transaction type. This ensures that the text types can be shown in documents.

- **Partner schema**

  The partner schema determines which partners the business process involves, for example partner function 00000001 (sold-to party), etc. Partners are determined separately for each partner function.

  - The *Sold-to Party* is determined by the installation component (iBase).
  
  - The *Key User* is determined by the user (SU01) who created the message in the system.
  
  - The *Message Processor* is determined by the user who processes the message, automatically when the message is saved.
  
  - The *Support Team* is determined by the rule 13200137 CRM_DNO_1, which is applied when the document is saved.

- **Action profile**

  The communication between CRM service transactions and the following basis message is controlled in both directions by action profiles.

- **Organizational model**

  The model maps the functional organizational structure of the firm.

### Information and Configuration Prerequisites

**Use**

The Service Desk Online Documentation (Help -> Application Help) contains a complete process and application description.

The Master Guide in the Service Marketplace -> SAPComponents -> SAP Solution Manager 4.0. contains a detailed scenario description.

You must configure the basic settings before scenario-specific configuration.

When you have made scenario-specific settings, check all standard settings in the IMG activity:


### Troubleshooting: Standard Service Desk Configuration

**Use**

This information helps to analyze problems in Standard Service Desk customizing. The checklist checks the required settings.
Activities

A) Check the entire standard customizing:

Basic IMG settings, especially:

1. Business Partner
2. iBase
3. Number Range

Attributes of transaction type SLFN

Choose the transaction type SLFN by double-click in the Transaction Type Definition, and check the settings.

4. General
   - Business transaction type: BUS2000116 Service transaction

5. Product Determination
   - Always check Product ID: Selected

6. Profiles
   - Text schema: SLFN0001
   - Partner schema: SLFN0001
   - Status schema: SLFN0001
   - Partner function ORG: 0001 Ordering party
   - Deadline profile: SLFN_HEADER
   - Action profile: SLFN0001_ADVANCED

7. Transaction numbering
   - No.rnge object: CRM_SERVIC (service transaction CRM)
   - No.rnge no. int.: 01
   - No.rnge no. ext.: 02
   - early no. assgnmnt is selected

B) Run the customizing check report in the transaction SA38

Enter the report name AI_SDK_CUSTOMIZING_LISTING.

8. Run the report.
   The report tells you about existing basic customizing
Generate Business Partner Screen

Use

This IMG activity makes the necessary preparations to create Business Partners. Business partners avoid having to create a separate user in the SAP Solution Manager system for every user who creates Service Desk Messages, Issues, or Change Requests/Documents.

Activities

Enter the following parameters in the current client:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>&lt;Client in which the business partner will be created&gt;</td>
</tr>
<tr>
<td>Application object</td>
<td>&lt;empty&gt;</td>
</tr>
<tr>
<td>Screen</td>
<td>*</td>
</tr>
<tr>
<td>Generate all screens or only selected screens</td>
<td>All screens</td>
</tr>
<tr>
<td>Delete Subscreen Containers</td>
<td>&lt;empty&gt;</td>
</tr>
</tbody>
</table>

Create Key Users

Use

This IMG activity creates a business partner type (key user) in the SAP Solution Manager system for users who only have accounts in component systems. The system reads the user data through an RFC connection and creates a corresponding business partner.

In particular, the Standard Service Desk and the Preconfiguration for Service Providers scenarios use key users. For system houses, it is not absolutely necessary to create key users at this point, but you should do so to you have a functioning test scenario.

You can check the business partner in transaction BP. You can create the business partners for the key users either automatically or manually.

Requirements

To automatically create key users You have created RFC destinations from the Solution Manager system to the component systems.

Default Settings

If you create key users with the same system user names as various satellite systems, in the SAP Solution Manager system, automatically, they are only created ONCE as business partners, with several IDs, in the Solution Manager. You can create the business partners for the key users automatically or manually, and check them in the transaction BP (ID tab).

Activities

Create Key Users Automatically

You can create the business partners based on the user master data from the connected component systems (cross-solution and solution-specific):

1. Choose the transaction.
• cross-solution (transaction BP_GEN)
  a) Continue from item 2.

• solution-specific (transaction SOLUTION_MANAGER)
  a) Open your solution in transaction SOLUTION_MANAGER.
  b) Choose Operations.
  c) Choose Edit -> Create Business Partners.
     A new screen is displayed that shows the systems in the current landscape and their users.
  2. To add additional systems, choose User list -> Add system.
  3. Select a system from which you want to create business partners.
  4. Select users.
     You can select individual users or several users at a time using the Shift or Ctrl key on your keyboard. You can
     select non-contiguous users using the Ctrl key.
     You can filter users by date by choosing Date Selection. For example, enter 02.10.2004 to display all users that
     were created or changed after October 2, 2004. You can maintain the number of days which are to be
     subtracted from the current date, in the field BP_GEN_DAYS in the transaction DNO_CUST04.
     To display all users, delete all date specifications.
  5. Choose Edit -> Create Business Partner.
  6. A dialog box is displayed.
  7. Confirm your entries.
     Business partners are created for the selected users.

To get/check existing business partners:
1. Check for ID SMD 0120021077 200 HEINZE
2. Check whether there is another ID for the user HEINZE
3. Is there a bp as central person with ID HEINZE
4. search for a bp by email address
5. search for a bp by first and last name, and R/3 user name

Create Key Users Manually
8. Use transaction BP (Maintain Business Partners).
9. Choose Business Partner -> Create -> Person.
10. Choose role Business Partner (General).
11. Choose the Address tab and enter the address data for the key user.
12. Choose the Identification tab and go to the Identification Numbers section.
13. Select ID type CRM001 (External System ID).
14. Specify the user in the following format in the Identification Number field:
15. "<System ID><space><installation number><space><client><space><user>"
16. Repeat the steps as often as required.
    Repeat the steps for every combination of system ID/installation number/client/user ID for the same business
    partner in the central SAP Solution Manager system. This data allows the system to determine the business
    partner by matching the system user to the business partner data.
17. Save your entries.

Create Message Processor

Use

This IMG activity creates a message processor for:
Service Desk messages

Issues, Tasks und Top Issues in Issue Management

Positions in the organizational units of the organization model in the SAP Solution Manager system (transaction PPOMA_CRM) must be assigned to the users who are identified as message processors. This makes it possible to assign messages by automatic partner determination.

Requirements

The processor has to have a user in the SAP Solution Manager system (SAPNETUSID with valid S number) to be able to send messages to SAP.

Default Settings

You can create the business partners for employees automatically or manually, and check them in the transaction BP (Identification tab). The system creates the business partner roles Key User and Employee for the local system (Solution Manager) automatically at the same time (transaction BP_GEN).

Activities

The message processor must have the following business partner roles:

Business Partner (General)

Proceed as described in Create Key User.

Employee

Create Employee Automatically

You can only create employees for system users in the local system (Solution Manager) automatically.

1. To display the local system, choose User List -> Add System.
2. Choose the local system:
   - System <Solution Manager SID>
   - Destination <NONE>
3. Choose the user.
   You can select one or more users with the Shift and Ctrl keys. Ctrl selects non-consecutive users.
   You can filter users by date in the date selection. For example, enter 02.10.2004, to show all users created or changed after the 2nd October 2004. You can put the number of days to be subtracted from the current date, in the field BP_GEN_DAYS in the transaction DNO_CUST04
   To show all users, delete all dates.
5. A dialog box appears.
6. Confirm your entries.
   Business partners are created for the selected users.

Create Employee Manually

Proceed as follows:

7. Choose Business Partner -> Create -> Person, or edit an existing Business Partner of type Person in transaction Maintain Business Partners (BP).
8. Choose the role Employee.
9. Choose the Address tab and enter the address data for the message processor.
10. Choose the Identification tab and go to the Employee Data section.
11. Enter the user ID of the message processor in the User field.
12. Save.
   If an error message from program CRM_MKTBP_ZCAL_UPDATE_30 is displayed, see SAP note 450640.
13. Repeat the steps to create additional users.

Create the Component Systems and Assign as iBase Components

Use

To be able to use the Service Desk and Change Request scenarios in SAP Solution Manager, you must define the Installed Base (iBase). An iBase component has to be created for each satellite system from which Service Desk messages will be sent to the SAP Solution Manager system.

The iBase components for the iBase structure SOL_MAN_DATA_REP (installation 1) can be created and assigned either automatically or manually. You can generate the IBase either solution-specifically or cross-solution.

If you create new systems or change existing ones in the System Landscape Maintenance (transaction SMSY), the system automatically creates the IBase components. Make the settings under C).

Requirements

You have defined your system landscape in the Solution Manager System Landscape (transaction SMSY).

Activities

A) Solution-specific

1. Choose a solution in the solution overview.
2. Choose Edit -> Initial Data Transfer for iBase.

   The IBase components are automatically assigned to installation SOL_MAN_DATA_REP (external ID).

B) Cross-solution

1. Choose the system(e) from the list, and confirm.
   The data is fetched automatically in the System Landscape Maintenance (transaction SMSY). The system creates an IBase component for each entry. They are assigned to installation SOL_MAN_DATA_REP (external ID) automatically.

Assign Business Partners to iBase Components

Use

You need to assign business partners to the new iBase components.

Activities
1. In transaction Change iBase (IB52), enter in field Installed Base ‘1’
2. Select the relevant system or system/client
3. Choose Goto -> Partner
4. Assign business partners with the following functions to the new iBase component systems:
   - Administrator
   - Key User
   - Sold-to Party
5. Transfer and Save.
6. Repeat these steps for each relevant iBase component.

**Assign Number Range for ABA notifications**

**Use**

In this IMG activity, you assign the internal number range for ABA notifications to notification type SLF1.

To ensure that the ABA notification and the corresponding Solution Manager Service Desk message have the same number, the internal number range for the ABA notification must correspond to the external number range of the Solution Manager Service Desk message.

**Activities**

1. In transaction Change view "Message category": Overview (DNO_CUST01), select notification type SLF1.
2. Select in the menu Goto -> Details.
3. Assign the internal number range 01.

**Check number range for Service Desk Message**

**Use**

In this IMG activity, you check the internal and external number ranges to the Service Desk.

**Activities**

1. Select the transaction type SLFN.
2. Choose Goto -> Details.
3. Check the internal number range 01 and the external number range 02 under Transaction / Numbering.
4. Save your changes.

**Configure ABA Message**

**Activities**

1. In View "Notification Type" (transaction DNO_CUST01), select notification type SLF1.
2. Select Goto -> Details.
3. Check whether action profile SLFN0001_STANDARD_DNO is assigned, if not assign it.
4. Save.
5. In View "Message Type" (transaction DNO_CUST04), select Field Name NO_USER_CHECK.
6. Choose Goto -> Details.
7. Enter 'X' in Field Value.
With this, the system will not check if the creator of the message exists in the Solution Manager system.
8. Save.