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1. INTRODUCTION

A Service Request is defined according to ITIL as a request from a user for:

- Information
- Advice
- Standard Change
- Access to an IT Service

This section gives an overview about the concept of SAP Solution Manager’s Service Request Management & Service Request Fulfillment representing a part of the IT Service Management platform.

1.1 IT Service Management Overview

The SAP Solution Manager IT Service Management (ITSM) represents an ITIL compliant and certified management tool supporting the business processes that enable you to run every aspect of your service desk operations – from managing service requests, incidents and problems based on service level agreements, to properly implementing infrastructure changes to eliminate any negative user impact.

The ITSM platform is integrated in all Application Lifecycle Management processes of SAP Solution Manager, in any SAP Business Suite solution and could be connected to a non-SAP Help Desk application. Furthermore, it includes follow up activities like Change Management and Root Cause Analysis.
1.2 Service Request Management Overview

The Service Request Management is off the shelf integrated within the SAP Solution Manager IT Service Management and is available after successfully performed system preparation, basic configuration and ITSM basic setup configuration. It interacts directly with the ITSM Incident Management representing a comprehensive service point which enables a centralized incident and issue message processing in multiple organization levels. The ITSM offers a communication channel with all relevant stakeholders of a Service Request, such as business user, SAP Service & Support and Partner Support employees.

The Service Request Management provides you the possibility to create specific Service Requests which can be assigned in general to the responsible support team or support employees. Within an organization, Service Requests describe clearly defined IT services or standard processes, which are often used and requested by the employees, such as resetting a password or assignment of new work equipment. Usually, Service Requests are handled by a service desk, and do not require a Request for Change (RFC) to be submitted.

The creation of Service Requests is completely integrated within the IT Service Management. Thus, the end user is able to create all the Service Requests within the Web Self Service UI. A guided procedure is offered for a quick and user friendly creation of new Service Requests.

In general, Service Requests are defined as specific multilevel categories. The top 5 commonly used Service Request Categories can be placed as quick buttons at the first step of this procedure. All others are reachable by a simple selection of the related multilevel category.

For every Service Request Category, it is possible to create an individual data input tab. Thus, you ensure that all required information would be entered by the Service Requester. For example, the time picker can be added to a Service Request Category which helps you to enter the execution time.

Furthermore, you are able to configure pre-defined templates according to your needs. The templates can be assigned to a specific Service Request Category. All the values entered in a template are transferred automatically to the newly created Service Request. For example, a predefined priority or description prefix of a template can be assigned automatically when the Service Request is created.

1.3 Service Request Fulfillment Overview

The integrated Service Request Fulfillment functionality is used for post processing activities of created Service Requests. This functionality is
realized by the “Checklists”. In a Checklist, you define all specific tasks (steps) that are required to fulfill a Service Request. The tasks contain, for example, information about the task details, the responsible support team or support employee as well as the current task status of execution. Different Checklists can be defined for specific Service Request Categories.

A processor can manually assign a Checklist to a Service Request. Checklist Determination provides advanced functionality: It is used for the automatic determination of the correct Checklist for a related Service Request Category when a new Service Request of this category is created.

If a Checklist is assigned to a Service Request, the processor is able to manually select the responsible partners for the various Checklist Steps. Checklist Step Partner Determination provides advanced functionality: It is used for the automatic determination of the correct Partners for the single Checklist activities when a new Service Request is created.

Furthermore, you can enable the SAP Business Workflow for Checklist processing so that users can be notified about the Checklist Steps for which they are responsible.

This guide contains the fundamental configuration of Service Request Management & Service Request Fulfillment, consisting of several steps. The following topics are handled by this document:

- Creation of Service Requests
- Usage of the Service Request Guided Procedure
- Creation of Service Request Categories
- Adjustment of Service Request UI Parameter
- Definition of Service Request Templates
- Definition of Service Request Checklists
- Configuration of Checklist and Checklist Step Partner Determination
- Definition of workflow settings for Checklists
Functionalities of Service Request Management & Service Request Fulfillment

1.4 Additional Information

For detailed guides about ITSM configuration, see:

- Service Marketplace: http://service.sap.com/instguides

  SAP Components  SAP Solution Manager  Release 7.1  6 Additional Guides

Additional installation guides for Solution Manager 7.1 at SAP Service Marketplace

- SAP Community Network Wiki: http://wiki.sdn.sap.com/wiki/display/SAPITSM/ITSM%20Homepage

  SAP IT Service Management on SAP Solution Manager  ITSM Homepage Information for Administrators
Configuration and Administration of ITSM

Information for Administrators

Overview

- How to Guides
- Configuration Guides

How to Guides

- Configuration Guide - Change Request Management
- Configuration Guide - Application Incident Management
- How to Guide - Multi-level Categorization
- How to Guide - FullText Search with T-Rect
- How to Guide - Team determination
- How to Guide - Business Roles and Authorizations
- How to Guide - interactive Reporting
- How to Guide - Service Level agreements

Additional installation guides for Solution Manager 7.1 at SAP Community Network Wiki
2. PREREQUISITES

This section describes all the prerequisites that have to be performed before the Service Request Management can be executed properly.

All the prerequisites can be performed within the SAP Solution Manager Configuration. To start SAP Solution Manager Configuration, call transaction SOLMAN_SETUP and perform the steps described in this section. Check all the steps again if they were performed already during general system setup.

2.1 Activate Piece Lists

The piece lists contain the default configuration for IT Service Management and other scenarios. The SAP default customizing is copied from client 000 to your logon client and overwrites only SAP customizing. This activity has no effect on customer configuration and has to be run after each Support Package import.

Activities

1. Call transaction SOLMAN_SETUP.
2. From the navigation, choose “Basic Configuration”.
3. Navigate to step “Configure Automatically”.
4. Choose “Edit”.
5. Execute the “Activate Piece Lists” activity.
6. Check the log for errors.

For more information, see the related documentation (link in the “Documentation” column).

2.2 Copy Transaction Type – SMRQ & SMRT

It is recommended to copy the preconfigured transaction types into the customer namespace to prevent that customer configurations will be overwritten during update or upgrade procedures. The following transaction types are required for the proper operation of the Service Request Management and have to be copied to your customer namespace:

- SMRQ  Service Request
- SMRT  Service Request Template
Activities

1. Call transaction SOLMAN_SETUP.
2. From the navigation, choose "IT Service Management".
3. Select checkbox "Incident, Problem & Request Management".
4. Navigate to step "Configure Manually".
5. Choose "Edit".
6. Execute the "Copy Transaction Type" activity to start the Copy Transaction Tool.

7. Copy transaction types SMRQ and SMRT to your customer namespace (for example, ZMRQ and ZMRT)

For more information, see the related documentation (link in the “Documentation” column).
2.3 Maintain Transaction Type

In this configuration step, you define the number ranges that are used in transactions.

Activities

1. Call transaction SOLMAN_SETUP.
2. From the navigation, choose "IT Service Management".
3. Select checkbox "Incident, Problem & Request Management".
4. Navigate to step "Maintain Transaction Types".
5. Choose "Edit"
For more information, see the related documentation (link in the “Documentation” column).

6. Navigate to section “Service Requests”.

7. Add your copied transaction type (for example, ZMRQ).

8. Choose “Maintain Number Ranges”.

9. Choose “Edit Intervals”.

10. Select: “Interval” for creating new number ranges.

   - Define your required number range interval (from number to number).
   - Define your current number (new Service Requests are incremented from this number).
In this table, you define all number ranges for all your transaction types. You can assign a number range to a transaction type by simply choosing the required one from the dropdown list (see step 12).

11. Save your entries.

12. Assign the number range to your transaction type (for example, ZMRQ) by choosing the required one from the dropdown list "Number Range".

13. Assign also the number range for the Service Request Template.

### 2.4 Enable Switches for Service Request Fulfillment

The Service Request Fulfillment requires the “Checklists” functionality. To use this feature, enable the following CRM switches:

- CRM_IC_CEBP
- CRM_SHSVC
1. Call transaction SOLMAN_SETUP.
2. Form the navigation, choose: “IT Service Management”.
3. Select checkbox “Incident, Problem & Request Management”.
4. Navigate to step “Configure Manually”.
5. Choose “Edit”.

For more information, see the related documentation (link in the “Documentation” column).

The authorization for transaction SFW5 is required. Add the relevant authorization to your role, if it is missing.

6. Execute the “Enable Switches for ITSM” activity.
7. Select the following switches and choose “Activate Changes”.
   - CRM_IC_CEBP
   - CRM_SHSVC

2.5 Creation of Service Request User

A Service Requester can be created in SAP Solution Manager Configuration. All required single roles are copied to the Z* namespace and are
automatically assigned to the user.

SAP Solution Manager 7.1 SP 5 contains “SOLMANREQU”, a new business role for end users.

This role provides the following features:

- Minimized menu structure dedicated for Service Requesters
- Display and manage own Incidents and Service Requests via Widgets on the home screen
- Quick and user friendly creation of Incidents and Service Requests using guided procedures
- Enable search for known solutions (access to Knowledge Database)
- Interact with IT Help Desk
- Set own data (my objects, password, contact data)

Activities

1. Call transaction SOLMAN_SETUP.
2. From the navigation, choose: “IT Service Management”.
3. Select checkbox “Incident, Problem & Request Management.”
4. Navigate to step “Create Template Users”.
5. Select user “IM_CREAT_TAS”.
6. Choose “Edit”.

For more information, see the related documentation (link in the “Documentation” column).

You can also perform all these steps manually.

You can create the user by using transaction SU01 and assign the composite role “SAP_SUPPDESK_CREATE” (recommendation: copy this role previously to your customer namespace via transaction PFCG). Do not forget to generate all the profiles for every single role of the composite role.

You can also adopt the SOLMANREQU business role according to your needs by using transaction SM34 (recommendation: copy this role also to your customer namespace in case of any changes).

7. Enter the user name and the specific password.
8. Choose “Execute”.
For more information about the roles, see the related description (link in the “Role Description” column).

10. Choose “Execute”.
11. Check the log for errors.

3. WEB SELF SERVICE PORTAL

SAP Solution Manager 7.1 SP 5 contains “SOLMANREQU”, a new business role for end users.

This business role provides access to the Web Self Service Portal and contains specific functions just for Service Requesters.

The role provides the following features:

- Minimized menu structure dedicated for Service Requesters
- Display and manage own Incidents and Service Requests by using Widgets on the home screen:

  Result list of all Service Requests and Incidents that I reported according to the current status.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Posting Date</th>
<th>Priority</th>
<th>Transaction Type</th>
<th>User Status</th>
<th>Transaction Type</th>
<th>Message Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000000007</td>
<td>Create User</td>
<td>17.07.2012</td>
<td>3</td>
<td>ZMFG</td>
<td>Proposed Solution</td>
<td>ZService</td>
<td></td>
</tr>
<tr>
<td>2000000005</td>
<td>Password expired</td>
<td>17.07.2012</td>
<td>3</td>
<td>ZMFG</td>
<td>New</td>
<td>ZService</td>
<td></td>
</tr>
<tr>
<td>2000000003</td>
<td>Equipment Move</td>
<td>12.07.2012</td>
<td>1</td>
<td>ZMFG</td>
<td>Customer Action</td>
<td>ZService</td>
<td></td>
</tr>
</tbody>
</table>

Result list of all Service Requests and Incidents which require an action by me.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Posting Date</th>
<th>Priority</th>
<th>Transaction Type</th>
<th>User Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000000007</td>
<td>Create User</td>
<td>17.07.2012</td>
<td>3</td>
<td>ZMFG</td>
<td>Proposed Solution</td>
</tr>
<tr>
<td>2000000003</td>
<td>Equipment Move</td>
<td>12.07.2012</td>
<td>1</td>
<td>ZMFG</td>
<td>Customer Action</td>
</tr>
</tbody>
</table>

- Quick and user friendly creation of Incidents and Service Requests by using guided procedures
  - Fast selection of the Top 5 Service Requests
  - Possibility to select other existing Service Request Categories
  - Per Service Request Category, one predefined assignment block with specific UI input parameter can be defined
Create Service Request

- Enable search for known solutions
- Access to published Knowledge Articles

Search: Knowledge Articles

- Interact with IT Help Desk
  - Add information & attachments
  - Confirm solutions
  - Send replies
Set own data

- Personal Data (General Information & Communication Information)
- Change Password
- My Objects
4. SETUP OF SERVICE REQUEST MANAGEMENT

This section contains all required configuration steps for setting up Service Request Management.

4.1 Service Desk Customizing

Call transaction DNO_CUST04 to start “Service Desk Customizing” and perform the following configuration steps.

4.1.1 Transaction Types

In this step, you configure which transaction types are available in IT Service Management.

Customizing Activities:

1. Call transaction DNO_CUST04.
2. Switch to “Edit Mode”.
3. Choose “New Entries”.
4. Add the following field names and values to the list:

- SERVICE_REQUEST_TYPE followed by your required transaction type (for example, ZMRQ)
  The field name represents all Service Requests.
- SERVICE_REQUEST_TEMPL followed by your required transaction type (for example, ZMRT)
  The field name represents all Service Request Templates.
4.1.2 Top 5 Service Request Categories

In this step, you define which Top 5 Service Request Categories are available as quick buttons within step 1 of the guided procedure.

Customizing Activities:

1. Call transaction DNO_CUST04.
2. Switch to “Edit Mode”.
3. Choose “New Entries”.
4. Add the following field names and values to the list:
   - TOP_SERVICE_REQUEST_CATEGORY followed by the ID of the multilevel category.
4.1.3 Default Service Request Category

In this step, you define Category 1 of the multilevel categorization that is used for Service Requests. This category is preselected when starting the guided procedure for Service Request creation. Thus, the Service Requester is only allowed to select subsequent Service Request Categories.

Customizing Activities:

1. Call transaction DNO_CUST04.
2. Switch to “Edit Mode”.
3. Choose “New Entries”.
4. Add the following field names and values to the list:
   - DEFAULT_SERVICE_REQUEST_CATEGORY followed by ID of the Multilevel Category

See section 4.2 Multilevel Categorization.
4.2 Multilevel Categorization & Service Request Categories

In a multilevel categorization, you define all your Service Request Categories. A default categorization schema is delivered by performing the SAP Solution Manager Configuration. This guide describes how the Service Request Management is set up by using the default schema.

The categorization schema delivered by SAP is just considered as an example for demonstration purposes. It should just give you a hint of how it can be used and does not cover all possible use cases. It is strongly recommended to create your own multilevel categorization according to your specific business needs.

Customizing Activities:

1. To start the WebClient UI, call transaction SM_CRM.
2. From the navigation, choose “Service Operations”.
3. Search for your existing “Categorization Schema”.

4. Open your used “Categorization Schema” (in general, it is in status “Active”)
5. Choose “Version” for creating a new version of this schema.

6. To create new Service Request Categories (optional):
   - Select the top level category of your Service Requests (e.g. AIC_CAT02).
This defined category has to be entered as default Service Request Category in the Service Desk Customizing, see section 4.1.3 Default Service Request Category.

- Drill down in the hierarchy to the node for which you want to create new sub categories or Service Request Categories.
- To create categories, choose “New”.
- Perform the above steps to build your specific Service Request hierarchy.

See the multilevel categorization guide for a detailed description of how to create a categorization schema. See the SAP Service Marketplace for this guide.

8. Navigate to assignment block “Application Areas”.

9. Create the following new entries:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application ID</td>
<td>Service Request Incident</td>
</tr>
<tr>
<td>Parameter</td>
<td>Transaction type / Catalog Category</td>
</tr>
<tr>
<td>Value</td>
<td>&lt;your specified Service Request transaction type&gt; (e.g. ZMRQ)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application ID</td>
<td>Service Request Incident</td>
</tr>
<tr>
<td>Parameter</td>
<td>Transaction type / Catalog Category</td>
</tr>
<tr>
<td>Value</td>
<td>&lt;your specified Service Request Template transaction type&gt; (e.g. ZMRT)</td>
</tr>
</tbody>
</table>
It is recommended to switch on the presentation of keys within dropdown lists. Go to “Personalize Settings” and activate checkbox “Show keys in dropdown lists”. Thus, it is much easier to select the correct transaction types in the dropdown list of column “Value”.

9. In assignment block “General Data”, change “Valid-From Date” and “Valid-From Time” according to your needs.

The date is automatically set to the next day. When you want to activate the newly created version immediately after saving, you have to manually adjust the “Valid-From Date” to your current day and the “Valid-From Time” to a time in the future (+ some minutes from your current time).

10. Change the status to “Released” and save your entries.

### 4.3 Service Request Category Dependent UI Customizing

In this step, you can define the dependent UI input parameter for your specific Service Request Category.

**Customizing Activities:**

1. To start the WebClient UI, call transaction **SM_CRM**.
2. Start the guided procedure by creating a new Service Request.
3. Select your Service Request Category for which you want to define the specific UI input parameter.
4. Choose “Next”.
In step 2 of the guided procedure, you can define your specific UI input parameter in the assignment block “Service Request Data”.

If no UI profile for this category has been created before, the default configuration of this assignment block is used (see figure above).

5. Define a UI input parameter for a Service Request Category:
   - Choose “Show Configurable Areas”.
   - Mark the screen area “General Data” in the assignment block “Service Request Data”.


Switch to “Edit Mode”.
Copy the existing configuration to your customer configuration and enter following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Config Key</td>
<td>&quot;&lt;DEFAULT&gt;&quot;</td>
</tr>
<tr>
<td>Component Usage</td>
<td>&quot;&lt;DEFAULT&gt;&quot;</td>
</tr>
<tr>
<td>Object Type</td>
<td>“AIC_OB_SRVREQ” (already selected)</td>
</tr>
<tr>
<td>Object Subtype</td>
<td>your Service Request Category (already selected)</td>
</tr>
</tbody>
</table>

Create your copy by choosing “Continue”.

In the assignment block “View”, choose “Show Available Fields”.
From the “Available Fields” list, select your required input fields and add it to your configuration by choosing the plus icon.
Select an input field and define its field properties by "Show Field Properties". For example, you are able to define the field label or if the data input should be mandatory for the Service Requester.

Finally, you add captions and lines and can change the order of the fields using drag & drop.

6. Save your UI configuration and check the result.
4.4 Service Request Templates

This section describes how a Service Request Template can be created. In a Service Request Template, you are able to predefine all the values that should be applied to a newly created Service Request. To achieve this, a template has to be assigned previously to the specific Service Request Category.

Customizing Activities:

1. To start the WebClient UI, call transaction SM_CRM.
2. From the navigation, choose “Incident Management”.
3. Create a new “Service Request Template”.
4. Select the category to which the template should be applied.

- The specific UI input parameters are displayed in the assignment block: “Service Request Data” (see section “4.3 Service Request Category Dependent UI Customizing”).
- Specify all your entries that should be applied to a newly created Service Request.
5. Assign the Service Request Template to the related Service Request Category.

- From the navigation, choose “Service Operations”.
- Search for your existing “Categorization Schema”.

- Open your used “Categorization Schema” (in general, it is in status “Active”).
- Choose “Edit”.

- Choose “Edit”.

- Choose “Edit”. 
5. SETUP OF SERVICE REQUEST FULFILLMENT

The integrated Service Request Fulfillment functionality is used for post processing activities of created Service Requests. This functionality is realized by the "Checklists". In a Checklist, you define all specific tasks (steps) that are required to fulfill a Service Request. The tasks contain, for example, information about the task details, the responsible support team or support employee as well as the current task status of execution. Different Checklists can be defined for specific Service Request Categories.

This section contains all configuration steps that are required for setting up Service Request Fulfillment.

The Checklists provide the following functionalities:

- Sequential and parallel processing of tasks
- Visualization via task list and graphical process flow diagram
- Determination of Checklists and Checklist Processors via rules
- SAP Workflow integration to inform responsible Processors of assigned steps
- Work instructions, action processing, long text available in step details

• Select the Service Request Category to which the created template should be assigned.

• Navigate to assignment block “Service Request Template”.
• To assign the Service Request Template to the Service Request Category, choose “New”.

• Save your entries.
- Checklist specific search criteria in search pages and IC inbox
- Availability for Service Requests / Incidents / Problems / Requests for Change / Service Orders

### 5.1 Creation of Checklists

This section describes in detail all the steps that have to be performed for creating a Checklist with related task activities (steps). At first, a Checklist has to be created that is afterwards assigned to a main Checklist Profile for Service Requests. After this, all the required Checklist Steps have to be defined as well as their Checklist Step Options, if needed. Finally, all the Checklist Steps are assigned to the related Checklist and the kind of processing (sequential or parallel processing) is specified.

**Customizing Activities:**

1. Call transaction **SPRO** and navigate to the following IMG activity:

   SAP Solution Manager Implementation Guide à SAP Solution Manager à Capabilities (Optional) à IT Service Management à Checklists à Define Checklist Profiles
2. To create a new Checklist:

- Navigate to “Define Checklists”.
- To create a new Checklist, choose “New Entries”.
- Define a Checklist ID and a Description.
- Choose your Lock Profile.

This profile defines when the Checklist will be locked.

The following options are available:

- Lock Checklist After Initial Save
- Lock Checklist After First Step is Executed

3. Create a new Checklist Profile or choose an exiting one which is delivered by default.

- Navigate to “Define Checklist Profiles”.
- To create a new Checklist Profile, choose “New Entries”.
- Select Rule Modeler Profile “SRQM_CHKLST_ID”.
4. Assign the previously created Checklist to the Checklist Profile for Service Requests:
   - Navigate to “Define Checklist Profiles”.
   - Select the profile and double-click “Assign Checklists”.
   - To assign the created Checklist, choose “New Entries”.

5. Define Checklist Steps:
   - Navigate to “Define Steps”.
   - To create new steps that are required for your specific Checklist, choose “New Entries”.
   - Enter following the parameter:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ItemCatUse</td>
<td>CKCU (Chklist Itm Cat Usage)</td>
</tr>
<tr>
<td>CommentTextType</td>
<td>0003 (Item note)</td>
</tr>
<tr>
<td>Work Instruction TextType</td>
<td>0002 (Item text)</td>
</tr>
</tbody>
</table>

   - Assign Step Options to a Step according to your needs. The Step Options have to be created similar to the main Checklist Steps (for the creation of the Step Options, navigate to “Define Options” in the dialog structure).
6. Assign all the created Checklist Steps to the related Checklist:
   - Navigate to “Define Checklist”.
   - Select the Checklist and double-click “Assign Steps”.
   - To assign all Steps to the Checklist, choose “New Entries”.
   - Enter following the parameter:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory</td>
<td>Check / Uncheck (optional)</td>
</tr>
<tr>
<td>Partner Function</td>
<td>00000014 (Employee Responsible)</td>
</tr>
<tr>
<td>Rule Modeler Profile</td>
<td>SRQM_CHKLIST_BP</td>
</tr>
</tbody>
</table>

7. Define Next Steps
   In this configuration step, you define the processing order of all Steps from start to end as well as if they should be processed sequentially or in parallel.
   - Select a Checklist Step from the above mentioned Checklist and double-click “Assign Next Steps”.
   - Insert the Steps that have to be processed after the selected one
     - 1 Step means sequential processing
     - More than 1 Step means parallel processing
Check the result that is presented in step 9 for a better understanding of sequential and parallel processing.

8. Assign the Checklist Profile to the Transaction Types:
   - Navigate to “Assign Checklist Profiles to Trans. Types”.
   - Select your Transaction Types and enter the Checklist Profile for Service Requests.
   - Save your entries.

9. Finally, check the created Checklist with its related Steps in the WebClient UI by using “Checklist Selection”:
   - Open a created Service Request and navigate to the assignment block “Checklist”.
   - Select the created Checklist and check if all steps are available in the action list.
   - Open the process flow diagram to see the dependencies between the various tasks (parallel and sequential processing).
Assignment block “Checklist” – Related tasks visualized in task list and process flow diagram

⚠️ If the assignment block "Checklists" is not available by default then perform following actions:

1.) "Personalize" functionality for adding it to the Service Request

2.) "Configure Page" functionality if it is not available in the list of available assignment blocks of the "Personalize" functionality:

- For enabling the configuration mode press "Personalize"

- Within the personalize form navigate to section "Settings" and click at "Personalize Settings"

- Activate checkbox “Enable configuration mode”
Configuration Mode

Enable the configuration of pages and views directly from the user interface

- Click the icon for "Configure Page" in the menu bar of a Service Request

Service Request: New

- Move component "BTCHKLST" from section of "Available Assignment Blocks" to the section of displayed ones
- Enter the title "Checklists"
- Save your settings

5.2 Checklist Determination

A processor can manually assign a Checklist to a Service Request. Checklist Determination provides advanced functionality: It is used for the automatic determination of the correct Checklist for a related Service Request Category when a new Service Request of this category is created.

This section describes the setup of the Checklist Determination.
Customizing Activities:

1. Perform the previously described activities to adjust assignment block “Application Areas” in your categorization schema.
   - See section “4.2 Multilevel Categorization & Service Request Categories”.
   - Create the following entry:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application ID</td>
<td>Rule Modeler</td>
</tr>
<tr>
<td>Parameter</td>
<td>Context</td>
</tr>
<tr>
<td>Value</td>
<td>Checklist Determination</td>
</tr>
</tbody>
</table>

2. From the navigation, choose “Service Operations”.

3. Create “Rule Policy”.
   - Define a Service Request Rule Policy with following context settings:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>Checklist Determination</td>
</tr>
</tbody>
</table>
4. Define “Conditions” and related “Actions”:

   If Order Category Contains <Service Request Category> then Set Checklist ID <Checklist ID>.

To activate the Rule Policy, choose “More” “Release Draft Rules”.

5. Define Service Manager Profiles

In this activity, you define the Service Manager Profiles. Service Manager Profiles determine which services and related properties are executed or performed and in what sequence when called by the service manager.

- Start the following customizing activity:
  - SAP Solution Manager Implementation Guide
  - SAP Customizing Implementation Guide
  - Customer Relationship Management
  - E-Mail Response Management System
  - Define Service Manager Profiles.

- Select “SRQMCHKLST_ID” and double-click “Directly Called Services”.

Double-click “Properties”. Enter the created Rule Policy.

Save your entries.

**5.3 Checklist Step Partner Determination**

If a Checklist is assigned to a Service Request, the processor is able to manually select the responsible partners for the various Checklist Steps. Checklist Step Partner Determination provides advanced functionality: It is used for the automatic determination of the correct Partners for the single Checklist activities when a new Service Request is created.

This section describes the setup of the Checklist Step Partner Determination.

**Customizing Activities:**

1. The configuration of the Checklist Step Partner Determination is similar to the Checklist Determination.
See section “5.2 Checklist Determination”.
Create following new entry for assignment block: “Application Areas” in your categorization schema:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application ID</td>
<td>Rule Modeler</td>
</tr>
<tr>
<td>Parameter</td>
<td>Context</td>
</tr>
<tr>
<td>Value</td>
<td>Checklist Step Partner Determination</td>
</tr>
</tbody>
</table>

Define a Service Request Rule Policy:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>Checklist Step Partner Determination</td>
</tr>
</tbody>
</table>

Define “Conditions” and related “Actions” for all your Checklist Steps as follows:

Assign your Rule Policy to the “Service Manager Profile” “SRQM_CHKLIST_BP”.

5.4 Define Workflow Settings for Checklist

You can enable SAP Business Workflow for checklist processing so that users can be notified about the checklist steps for which they are responsible.

Requirements

You have enabled the standard settings for SAP Business Workflow (transaction: SWU3):
1. To configure the workflow template, do the following:

- Launch the Workflow Builder tool (transaction SWDD).
- Search for the workflow template "CHKLST_BTXXX", where XXX stands for the last three digits of the relevant business object number.
- For example, for workflow integration with a Checklist for a Service Request or Incident, the business object number is "BUS2000223", and the workflow template is "CHKLST_BT223".
In the toolbar, choose the “Basic Data” icon.
Choose “Start Events”.
Make sure that the “CHKLSTSTEPSTARTED” event is active.

In the “Navigation area”, choose the workflow step “Process Checklist Step”.
Display the task.
Choose “Additional Data à Agent Assignment à Maintain”.
Select the task “Process Checklist Step” for the relevant business object number, and choose “Attributes”.
Ensure that “General Task” is selected, and choose “Transfer” to confirm the selection.
2. To ensure that all business partners receive e-mails and work items sent by workflow, make the following settings in the “Maintain Business Partner” tool (transaction BP):

- Search for a business partner.
- In “Change in BP Role”, choose “Employee”.
- Choose “Identification”.
- In the “Employee Data” section, ensure that a valid user name is entered.
3. To enable workflow integration with a Checklist, go to “Define Checklist Profiles”, and in view “Define Checklist Profiles”, select the “Enable Workflow” checkbox for the relevant profile.