Template Management
Using Templates in Global Rollout

Solution Management
Application Lifecycle Management
Template Management

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

Template Creation and Update

- See Innovation Management
- Project Administration
- Business Blueprint
- Business Process Configuration
- Project Reporting
- GlobalASAP Template Roadmap
- Requirement rollback & template update*
- Comparison and Adjustment

Template Implementation

- Project Administration
- Business Blueprint
- Business Process Configuration
- E-Learning Management
- Test Management capabilities
- Details see Test Management
- Solution Directory
- Solution Documentation Assistant
- Solution Documentation
- Project Reporting
- GlobalASAP Rollout Roadmap
- Rollout of updated template

* Tool support as of SAP Solution Manager 7.0 EHP2
# Challenges in Managing Global Templates

… And How SAP Solution Manager Can Support You

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

1. Create global template

   HEADQUARTERS – Template Project
   
   Enterprise Requirements – Template Projects
   
   T1V1

2. Roll out global template

   SUBSIDIARY A – Impl. Project
   
   T1V1

   SUBSIDIARY B – Impl. Project
   
   T1V1

   SUBSIDIARY C – Impl. Project
   
   T1V1

3. Implement global template

   Local Systems Requirements finalized in Local Implementation Projects

   Solution Directory – Solution
   
   Implemented project state reflected in operative solution(s)
   
   T1V1  T1V1  T1V1

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Local Systems Requirements finalized in Local Implementation Projects

Solution Directory – Solution
Implemented project state reflected in operative solution(s)

SUBSIDIARY A – Impl. Project
SUBSIDIARY B – Impl. Project
SUBSIDIARY C – Impl. Project

HEADQUARTERS – Template Project
Enterprise Requirements – Template Projects

Create new template version
Roll in template requirements
Roll out new template version
Implement new template version (compare & adjust)
Definition Global Template ("Template")

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

Setup global project framework

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

Global Rollout Functionality
Controls the use of global attributes

Visibility
Controls template use
- Open for public use
- Closed for public use, template „under construction“
Define global processes and requirements

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

The Global Attribute
Changes to business scenarios, processes, and process steps allowed? If so, to what extent?
The Global Attribute defines the scope of changes allowed in local rollout projects.

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

Global elements - no changes allowed -

Local elements - full authorization for changes -
Prepare reference template with preconfiguration

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

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

Legend:
IMG → SAP Implementation Guide
BC Set → Business Configuration Set
CATT → Computer Aided Test Tool
Prepare reference template with preconfiguration

- Assign related IMG activities, create and assign BC Sets
- Assign global customer-specific developments (programs, transactions etc.)
- Record sample / master data as CATTs
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Note:
Re-use of existing configuration possible. Translation or process structure can be triggered using SAP standard translation tools.
Template Packaging

Template Project

1 Assign scenarios to template

2 Release templates for
   - current SAP Solution Manager system
   - another SAP Solution Manager system (transport), if applicable

3 Collect templates into transport request

Change visibility before rollout

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Initial Template Implementation
Process Overview – Local Rollout Project

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

Scope & enhance global template
- Implement global processes
- Adapt harmonized and local processes to local requirements
- Document local requirements of harmonized/local processes
- Sign off business blueprint
Local Business Blueprint
Template Copy into Implementation Project

Template Project

- TEMPLATE ZBANK
  - S1 Accounting

Template is copied into implementation project

Implementation Project

- TEMPLATE ZBANK'
  - S1 Accounting - COPY

- TEMPLATE ZHR
  - S2 MSS
  - S3 LSO

Template content with pre-configuration is basis for local configuration

Template original ZBANK and copy ZBANK’ are detached, yet reference to predecessor data is stored
Implement and test global & local requirements

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

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

-> see process: Test Management
Create and change training for different parties involved (e.g., end users)

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

- Prepare solution for operations
- Prerequisite for SAP Solution Manager processes including:
  - Business Process Operations
  - Maintenance of SAP Solutions
Global Rollout in Different Stages

Rollout stage 1: pilots

Rollout stage 2: mass roll-out

Versioning concept to control/track changes in templates

Pilot feedback
Enhancements

Subsidiary 1

Subsidiary 2

Subsidiary 3
Rollback and Template Update
Process Overview – Template Projects

Feedback from local sites for improving and enhancing templates

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

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

Scope and enhance global template

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

Rollout to local implementations projects for template adjustment
Goal
Transfer process and pre-configuration changes from new template version into current implementation project

Updated Template

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

Template in Current Impl. Project

- Selected Business Scenarios
  - Internet Sales: B2C
    - Business Processes
      - B2C
        - Register in Web Shop
        - Select Product
        - Update Shopping Basket

How to retrieve template differences?
GlobalASAP Methodology

Overview

Description

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

GlobalASAP provides two roadmaps:
- GlobalASAP Template Roadmap
- GlobalASAP Rollout Roadmap

More info

http://service.sap.com/roadmaps
AES Improves Efficiency with SAP® Solution Manager

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

Challenges and Opportunities

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

Benefits

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

Objectives

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

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

Lakshman Charanjiva
Vice-President, Global Business Solutions
AES Corporation
Further Reading and Training

General information on SAP Solution Manager:
- [http://service.sap.com/solutionmanager](http://service.sap.com/solutionmanager)
- [http://service.sap.com/rkt-solman](http://service.sap.com/rkt-solman) - SAP Solution Manager Learning Map

Template Management Training:
- SM510 Global Rollout (eLearning)
- SMI310 Implementation Tools in Detail (Classroom training)
  Both courses can be booked under: [http://www.sap.com/services/education](http://www.sap.com/services/education)

Online Help:
  Topics “Compare and Adjust with Template Source” and “Global Rollout with a Template”.

GlobalASAP Methodology
- [http://service.sap.com/roadmaps](http://service.sap.com/roadmaps)

Tips and Tricks on Working with Templates
Thank you!