Operations Handbook EP6.0 SP2

SAP

Course Structure

EP 6.0 Portal

- ▷ **Introduction**
- ▷ **Starting & Stopping J2EE and EP**
- ▷ **Monitoring, Logging & Tracing**
- ▷ **Support Desk**
- ▷ **Configuration Management**
- ▷ **Incident and Problem Management**
- ▷ **Change Control**
- ▷ **Software Change Management**
- ▷ **Backup & Recovery**
- ▶ **Operations Handbook**
- ▷ **Introduction to CCMS**
- ▷ **EP Monitoring Infrastructure**
- ▷ **Computing Center Management System**
- ▷ **Solution Manager**

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Overview: Operations Handbook

EP 6.0 Portal

Overview

▶ Operations handbook structure

▶ Regular Tasks
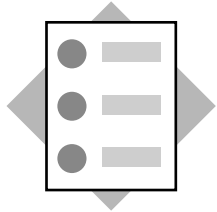
Operations Handbook

Contents

- **Topics for an operations handbook**
- **Content of an operations handbook**
- **Regular tasks**

Objectives

At the end of this unit, you will be able to:

- **Identify the themes which are relevant for an operations handbook**
- **Explain the content of an operational handbook**

Operation Standards

Information **T**echnology **I**nfrastructure Library (ITIL)

- **First developed by Central Computer and Telecommunications Agency (CCTA) in 1989**

- **Most widely accepted approach to IT Service Management**

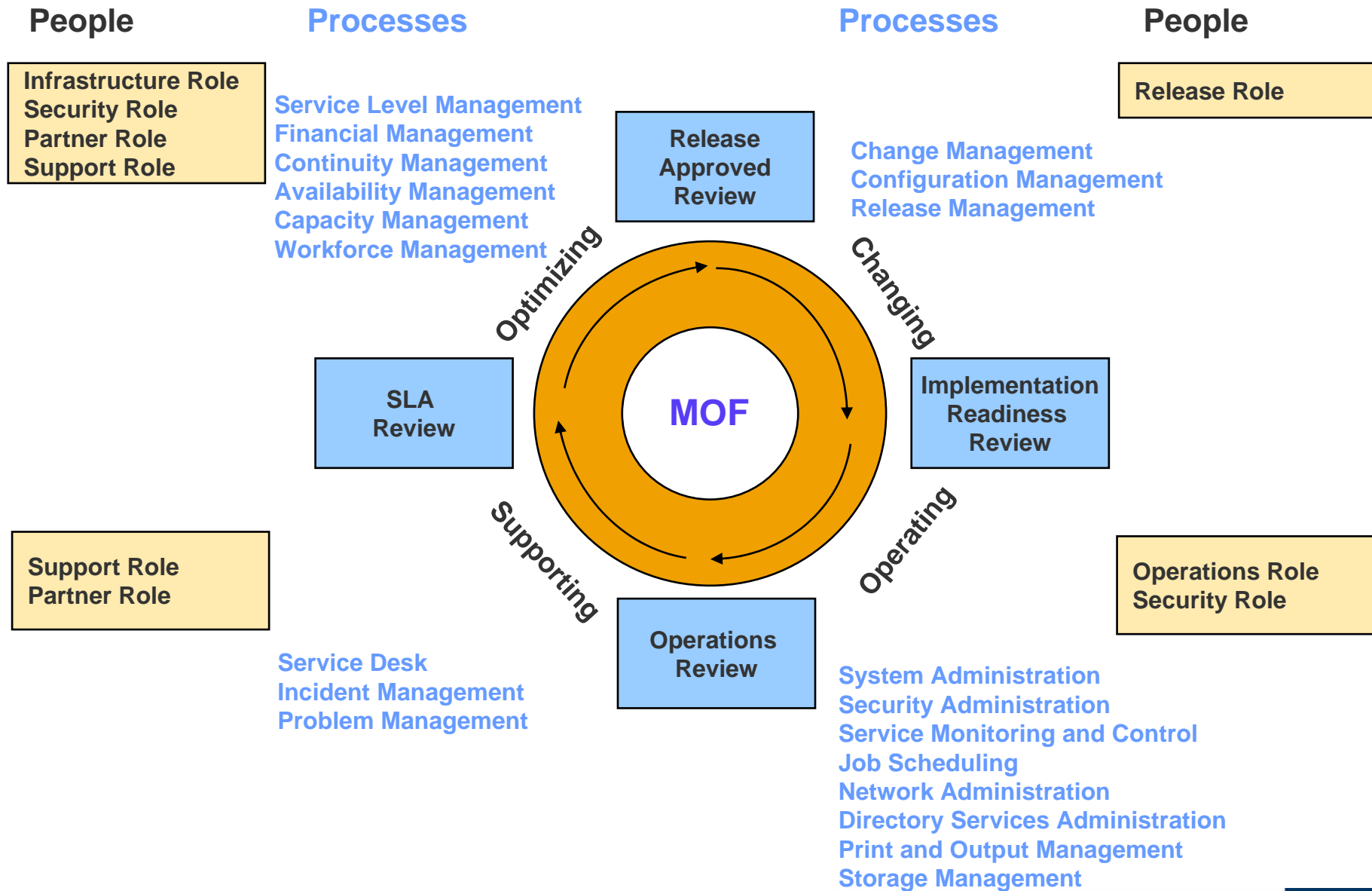- **Series of books giving best practice for Service Support and Delivery Processes**

www.itsmf.com

Microsoft **O**perations **F**ramework (MOF)

- **Best practices in IT Service Management based on Microsoft technology.**

- **Combines ITIL with specific guidelines for using Microsoft products and technologies**.

http://www.microsoft.com/technet/itsolutions/techguide/mof/default.mspx

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Microsoft Operations Framework

People　　　**Processes**　　　　　　　　**Processes**　　　**People**

Infrastructure Role
Security Role
Partner Role
Support Role

Service Level Management
Financial Management
Continuity Management
Availability Management
Capacity Management
Workforce Management

Release Role

Release Approved Review

Change Management
Configuration Management
Release Management

Optimizing　　*Changing*

MOF

SLA Review

Implementation Readiness Review

Supporting　　*Operating*

Support Role
Partner Role

Operations Role
Security Role

Service Desk
Incident Management
Problem Management

Operations Review

System Administration
Security Administration
Service Monitoring and Control
Job Scheduling
Network Administration
Directory Services Administration
Print and Output Management
Storage Management

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Information Technology Infrastructure Library Processes

Service Support	Service Delivery
(Service Desk)*	
Incident Management	Service Level Management
Problem Management	Financial Management for IT Services
Configuration Management	Capacity Management
Change Management	Continuity Management
Release Management	Availability Management

* Not a process but a function

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Summary of all Information which is necessary for the Operation of the Portal e.g. :

- **Project Description**

  - **System Landscape (incl. Backends & Authentification)**

- **Availability, responsibilities, SLAs and contact information**

  - **Maintainance Window**

  - **Release Strategy**

  - **Authorizations**

- **Organizational Approval Processes (in detail!)**

  - **Downtimes**

  - **Changes**

  - **Transports**

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EP 6.0: System Operation Manual (II)

Summary of all Information which is necessary for the Operation of the Portal e.g. :

- **Technical Validation Processes**

  - **Test Scenarios**

  - **Test Procedure**

  - **Test Documentation**

  - **Load Test**

- **Escalation Procedures**

  - **Who has to be informed when and how?**

  - **Who takes the decisions?**

  - **What should be tried and when is the time to restore a backup?**

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Summary of all Information which is necessary for the Operation of the Portal e.g. :

- **Standardized procedures for recurring tasks**

  - **Server Installation and Configuration**

  - **Backup/Restore (How much time is needed?)**

  - **Configuration Changes and Transports**

- **Documentation Requirements**

  - **What and how are things documented?**
    (All information in one place!)

  - **Who is responsible?**

  - **Who has access?**

  - **DB of customer-created Objects?**

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Portal Governance

Especially in corporate portal projects the number of parties involved is very high.
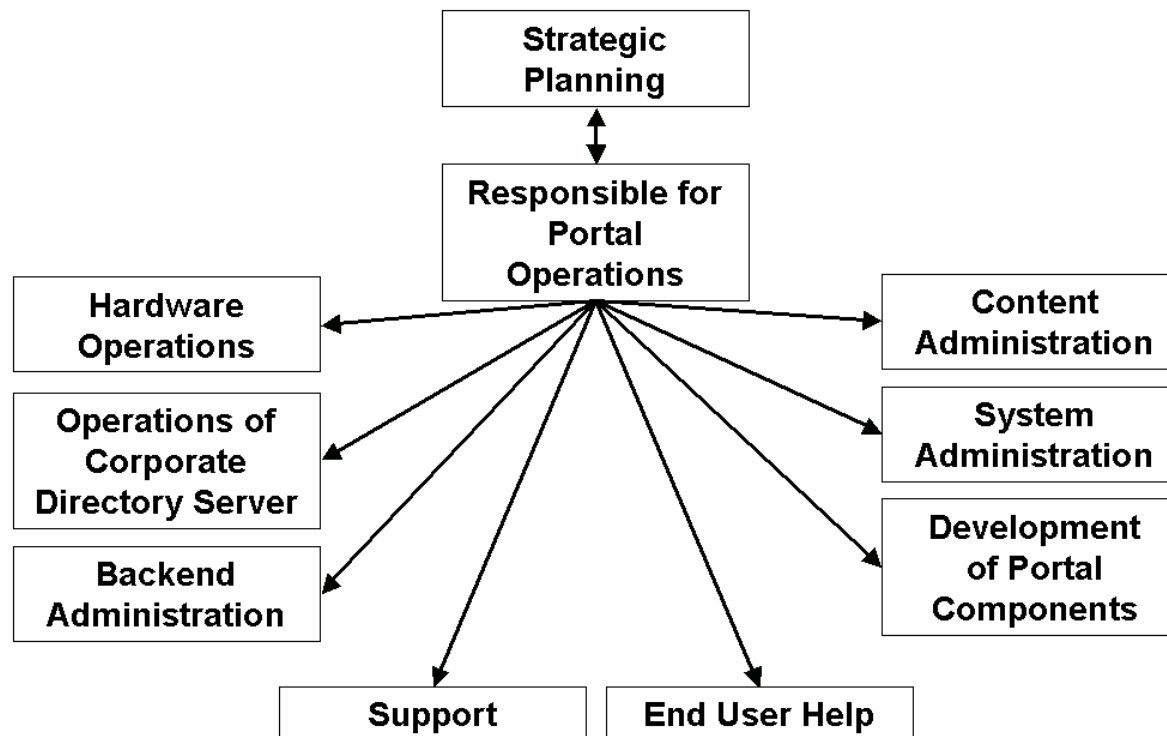
➔ **Governance is a key factor for a smooth operation and satisfied customers. Clear procedures and guidelines in all areas are essential.**

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Intention of an Operations Handbook

➔ **Summarizing all administrative and operational information on a portal project.**

An Operations Handbook includes:

- Information and documentation about the portal solution
- Organizational and administrative specifications including roles and responsibilities
- Procedure definitions

Target group: All people who are involved in the maintenance and operation of a Enterprise Portal installation:

- Solution owner
- Solution and service provider
- Administrator
- Consultants
- Internal and external customers

Project Description

Project <u>Targets</u>/Scope of the project

- **Target Group**

- **Integrated Applications/Functionality**

  - ◆ **Integrated Systems**

  - ◆ **Implementation of Business Packages**

  - ◆ **Usage of Portal Knowledge Management**

  - ◆ **Custom Development**

<u>Roll-out</u> Plan

- **Project phases and milestones**

  - ◆ **User ramp-up plan**

  - ◆ **Functional roll-out strategy**

  - ◆ **Availability of hardware**

  - ◆ **Portal Content completed**

  - ◆ **Performance Optimization completed**

  - ◆ **Final load test**

  - ◆ **Go Live date**

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Solution Landscape

Hardware

- **For test environment and productive environment**
  - ◆ **Vendor, Type and Details (CPUs, Memory, Disk capacity, ...)**
  - ◆ **Physical Location/Hosting Support**
  - ◆ **Which component runs on which server**
  - ◆ **Software Versions**
  - ◆ **Support Contract for Hardware**

Network Connections between all components

- **WAN-Connections/Network Bandwidth**
- **Load Balancing**
- **Firewalls/Proxies**
- **Internet Accessibility**
- **Server Security and Secure Communication**

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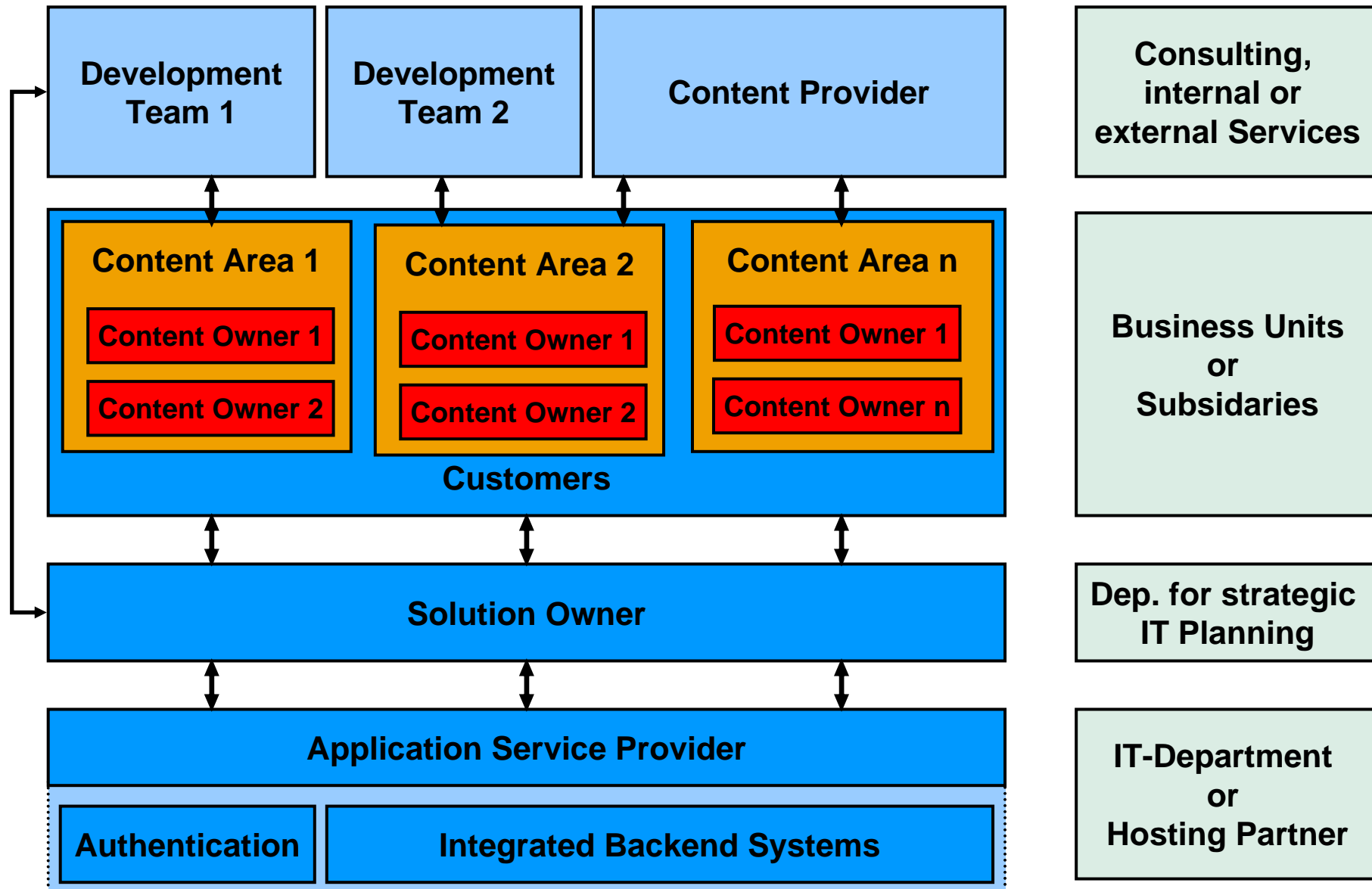# Project Roles and SLAs

An Operations Handbook has to define the <u>roles</u>, <u>authorizations</u> and <u>responsibilities</u> in the following main areas:

- **Portal Operations/System Administration**
- **Portal Content**
- **Portal development**
- **Backend Integration**
- **Strategies and plans**

<u>Service Level Agreements</u> result from these definitions. Typically the following areas should have negotiated SLAs:

- **Internal or external customers and solution owner**
- **Solution owner and solution provider**
- **Solution provider and service provider**
- **Content owner and content provider**

Typical Organization of Corporate Portal Project

Development Team 1	Development Team 2	Content Provider	Consulting, internal or external Services

Content Area 1
- Content Owner 1
- Content Owner 2

Content Area 2
- Content Owner 1
- Content Owner 2

Content Area n
- Content Owner 1
- Content Owner n

Customers

Business Units or Subsidaries

Solution Owner

Dep. for strategic IT Planning

Application Service Provider

Authentication | Integrated Backend Systems

IT-Department or Hosting Partner

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Communication

Since portals are a single point of entry and a GUI for a number of backend applications, the coordination and communication with all the parties involved is an important task.

Examples for coordination and communication tasks:

- Details and coordination about ongoing changes, e.g. updates, maintenance times...
- Information on problems and unplanned downtimes
- Information on changes in the portal content and content structure
- Implementation of new applications and business scenarios
- Roll-out plans for content updates, new applications and new user groups
- Changes in the IT infrastructure/solution landscape
- Modifications in defined processes
- Future plans and strategy

Service Level Agreements (SLAs)

Service Level Agreements should include:

- **Operating time and availability**

- **Support Levels and support times**

- **Fallback strategy**

- **Backup strategy**

- **Contact Information for all parties involved**

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Maintenance – User Management

Tasks about User Management are always security related.

➔ **Especially therefore the processes, workflows, authorizations and responsibilities around user management should be defined and communicated clearly.**

Examples for user management activities:

- **Management of user accounts:**
    - ◆ **Creation**
    - ◆ **Modification**
    - ◆ **Role assignment, ...**
- **Changes on the corporate directory server:**
    - ◆ **Directory structure**
    - ◆ **Modification on attributes**
    - ◆ **Creation and modification of groups**
- **Management of user groups and role to group assignment**

Maintenance - Portal Content

The main attention in of the internal and external customers of a portal project is the Portal Content.

Clear guidelines have to ensure that all user groups or business areas can be satisfied.

<u>Integration and updates on content and functionality of a portal are issues in various scales, e.g.:</u>

- User group integration
- Business process integration
- Application integration
- Component integration
- Content integration
- Redesign or corporate identity update

Maintenance - Portal Content

The following tasks result from requests for new or modified content or functionality and should have defined procedures:

- **Testing and technical validation**
- **Deployment of new or updated**
  - ◆ **Business packages**
  - ◆ **Applications**
  - ◆ **Services**
  - ◆ **Components**
  - ◆ **Content**
  - ◆ **Desktops/Designs**
- **Creation of repositories and structures in repositories**
- **Creation and modification of collaboration rooms**
- **Creation and modification of**
  - ◆ **Roles, Pages, iViews ...**
- **Creation and maintenance of indices and taxonomies**
- **Optimization of cache settings in the portal**

Maintenance – System Maintenance

Examples for tasks in System Maintenance where standardized procedures and guidelines should exist:

- **Integration of new backend systems (SSO, secure communication, usermapping, ACL)**
- **Changes in the setup of the portal or its backend systems**
- **Monitoring of the portal servers and their backend servers**
- **Installation of updates and patches ...**
    - **For the operating system**
    - **For the JVM**
    - **For the SAP J2EE-Engine**
    - **For the Portal Runtime**
    - **For the TREX, Unification Server**
    - **For supporting applications in the solution landscape:**
        - **Database**
        - **LDAP Server, Webserver, Fileserver**
- **Backup & Restore**

End User Support

An Operations Handbook should cover questions like...

- **Central Portal Helpdesk or handling via regular local helpdesk?**

- **How is the end user support trained and informed to handle portal related calls?**

- **How are the different kinds of problems routed in the organization?**

- **Who is in charge to solve client problems with the portal?**

- **If necessary, who is in charge to open OSS messages at SAP?**

Overview: Operations Handbook

EP 6.0 Portal

▶ **Overview**

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Checklist for Routine Operation

Is the portal available?

Were the portal servers started correctly?

Were all services of the server nodes started correctly?

Is sufficient hard disk capacity available on all portal servers?

Is the CPU load sufficient on all portal machines?

Are there error messages in the error or output log files?

Are all backend systems available?

Was the backup procedure successful?

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Entry points for checking

Check regularly!

Unit summary
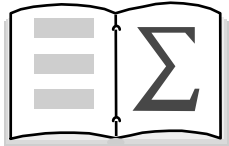
You are now able to:

- **Identify the themes which are relevant for an operations handbook**
- **Explain the content of an operational handbook**

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