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SAP for Utilities

# SAP Initial Data Transfer

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# INTRODUCTION

Welcome to the fascinating world of SAP. This book helps you crack the tricks of mastering SAP HANA Customization

## Initial Data Transfer

## Tools for Initial Data Transfer

The Data Transfer Workbench is a central transaction for transferring data from a legacy system to the SAP System automatically. It provides you with the necessary tools as well as with access to the standard programs to execute the data transfer.

You can find documentation on the Data Transfer Workbench via *Help -> Application Help* or in the SAP Library:

CA - Cross-Application Components

General Application Functions

It contains step-by-step instructions for transferring data and tells you about characteristics of specific objects.

# Open Information Warehouse ( OIW )

This Implementation Guide contains the information necessary to configure the Customizing settings for the Open Information Warehouse ( OIW ).

**Further notes**

Complete descriptions for all application functions in the Open Information Warehouse can be found in the R/3-Library under *CA - Cross-Application Components*.

## Maintain OIW Metadata

The Open Information Warehouse (OIW) contains data from the following information systems in the SAP R/3 System: - Controlling

- Financial Accounting
  The maintenance of the OIW metadata from General Ledger Accounting is described in **OSS Note 82836**.
- Logistics
- Personnel Management

In the OIW, you can obtain an overview of the info objects for these information systems. You can also make multiple queries by combining several info objects that are of particular interest to you.

The answers to your queries are based on information that is contained in the OIW information catalog. Basic data retrieval information, such as tables and programs, in the form of metadata (descriptive data) are stored in the OIW information catalog. The OIW contains links to the data collection in the R/3 information systems. However, the OIW does not have its own data tables.

In this step, you decide which metadata will be included in the OIW information catalog. The metadata that you choose will be used later as the data source for answers to future inquiries.

A **Data source** is a pool of info objects that can be combined for multiple queries. However, a query is only valid if at **least** one data source in the OIW contains **all** of the requested info objects. An info object can exist in several data sources.

The step includes the functions **Display OIW metadata** and **Delete OIW metadata** also.

In Logistics, you can restrict your selection of metadata by entering self-defined Information structures, that is, the selection version or by selecting the field *Standard info structures*

The selection of metadata can be restricted in Personnel Management also. The selection is carried out by using standard fields, such as Info types.

**Caution**

- If you select the field *Delete entry*, only metadata from the current application (Controlling, Logistics or Personnel Management) will be deleted.
- By using the push button *Delete*, metadata is deleted globally.

**Note**

The maintenance of the metadata is the central OIW activity and prerequisite for all other OIW Customizing functions and OIW tasks.

If you have not maintained the metadata and display the standard OIW information catalog, you will receive a message that the information catalog is inconsistent. This message means that the information catalog contains info objects that do **not** exist in the metadata. In this case, an empty information catalog will be displayed in Excel, the OIW browser.

When using the self-defined OIW information catalog, maintenance of the metadata is also a mandatory prerequisite. **Only one** self-defined information catalog can be created per company.

### Activities

1. In order to generate the OIW metadata, proceed as follows:
   a) Choose the OIW metadata for each application that you will need later for answers to future queries.
   b) Choose the menu options *Program -> Execute*.
2. In order to display the selected data, choose *Display OIW metadata*.
3. The following options can be used if you want to change your selection:
   a) You can delete a portion of the chosen metadata by selecting the field *Delete entries* and choosing the menu options *Program -> Execute*.
   b) You can delete the chosen data **completely** by choosing the push button *Delete OIW metadata*.

### Transport information

The transaction for maintaining the OIW metadata has no automatic transport.

Consequently, you must adjust the corresponding customizing settings in the live system also.

## Display Standard OIW Information Catalog

This step displays the standard OIW information catalog.

The catalog is only an example of the (hierarchical) structure of an information catalog. The catalog cannot be altered.
In another step, you are given the option of configuring the OIW information catalog to meet your user-specific requirements.

All metadata that are maintained in the OIW by using the function OIW Metadata Maintenance are stored in the information catalog.

## Maintain Self-Defined OIW Information Catalog

In this step, you can create an OIW information catalog that is configured to meet your own user-specific requirements. You can use the standard OIW information catalog under *OIW info catalog* as the basis for your configurations.

### Note

**Only one** self-defined information catalog can be created per company.

### Activities

To create the OIW information catalog, proceed as follows:

1. Create the nodes (under the option *Edit*)
2. Create the info objects for the nodes (under the option *Edit*) You now have the following options:

   a) If you choose the option *Create info objects for data source*, **all** info objects will be inserted in the data source in your information catalog.

   b) The option *Create selection version of OIW metadata* can be chosen only if the selection versions already exist.

   c) Under *General selection*, info objects are provided. You can also include single objects in your information catalog.

   You can determine a different colour setting for each info object. The colour key can be found under the menu option *Settings*.
   Colour settings enable easy recognition of inconsistent info objects. The inconsistent info objects can be deleted in *OIW info catalog*.

### Further Notes

The OIW information catalog is arranged hierarchically. The description of the Functions for Processing the Hierarchies can be found in the R/3 library under the menu options *LO - Logistics -> LO - Logistics General -> LO Information System -> General Hierarchies*.

## Authorization Management

In this chapter on "Authorization Management", you perform the following:

- define authorizations for the various authorization objects
- group together authorizations to make authorization profiles

## Maintain authorizations

This IMG activity shows which authorization objects are defined for the individual functions of the application in the SAP standard shipment. You can maintain authorizations for these objects in the SAP System.

You can display the fields belonging to each authorization object. The SAP System checks the contents of these fields in the authorization check. If the field content does not match the profile of the authorization object for the user, then it is not possible for the user to work with this object.

### Authorization objects

The following authorization objects are checked in the individual functions of the Open Information Warehouse ( OIW ).

| **Functions for ...** | **Authorization object** |
|---|---|
| OIW Metadata | M_OIW_META |

### Standard settings

In the standard shipment of the SAP System, authorizations are provided for all authorization objects in the application.

You can find maintenance authorizations and display authorizations for the authorization objects.

The authorizations provided in the system apply to all organizational units.

### Activities

1. Check whether the authorizations provided in the standard system are sufficient for your requirements.
   To do this, proceed as follows:

   a) Choose the object class of the application.
      For the Open Information Warehouse (OIW), this is the object class "Cross-application authorization objects".
      A list of the authorization objects appears.

   b) Choose one authorization object.
      A list of the authorizations for this object appears.

2. Create new authorizations in accordance with your requirements, where necessary.
   To do this, proceed as follows:

   a) Choose **Authorization -> Create**.

   b) Enter the authorization and a short text.

   c) Select a field to maintain the individual field values

   d) Save your settings.

   e) Activate the new authorization.

### Transport information

To transport authorizations, proceed as follows:

1. In the object list, select the function *Authorization -> Transport*.
   The system displays the list of authorizations that can be transported.

2. Select the authorizations that you would like to transport to the live system.

3. Confirm your entry using *ENTER*, and specify a correction number.

If the technical names of the individual authorization objects are also displayed in the object list, proceed as follows:

1. Choose an authorization object from the object list.
   You branch to the list of authorizations for the authorization object you have selected.

2. Select *Authorization -> Transport*.
   The system displays the list of authorizations that can be transported.
3. Select the authorizations that you would like to transport to the live system.
4. Confirm your entry using *ENTER*, and specify a correction number.

## Description of Authorization Objects

## Object: M_OIW_META OIW Metadata

## Definition

This authorization object allows you to restrict maintenance of the OIW metadata and the OIW information catalog.

## Defined fields

There are two possible values for the activity field:

- 03 display
- 23 maintain

## Maintain profiles

In this IMG activity you maintain the various authorization profiles that define the authorizations of the individual users.

A profile contains authorization objects with the appropriate authorizations for task areas with restricted access.

You assign the authorization profile for a user in his/her user master record.

### Standard settings

In the SAP standard system, the profile **M_OIW_ALL** (maintenance authorization for both the OIW metadata and the OIW information catalog) is preconfigured.

The SAP standard authorization profiles always apply to all organizational units.

### Activities

1. Check the standard profiles.
2. If the standard profiles are not sufficient, create new profiles as follows:
   a) Select "Generate work area".
   The system displays the profile list.
   b) Choose **Profile -> Create**.
   c) Enter the new profile with a short text.
   If you wish to allocate authorizations to the new profile, select "Single profiles".

If you want to allocate single profiles to the new profile, select "Composite profiles".

   d) Allocate authorizations / single profiles to the new profile.
   e) Save the new profile.
   f) Activate the new profile.

### Transport information

To transport profiles, proceed as follows:

1. In the profile list, select the function *Profile -> Transport*.
   The system displays the list of profiles that can be transported.
2. Select the profiles that you want to transport to the live system.
3. Confirm your entry using *ENTER*, and specify a correction number.

# Internet/Intranet Services

This section lists services that you can use in the Intranet.

## Internal Service Request

This section explains the steps required for creating an internal service request using the intranet.

## Definition of Scenarios with Specific Customizing

This section displays scenarios that require special settings, which differ from general Customizing for scenarios.

## Request for Master Data Change

In this activity, you make the settings needed for requesting changes to the following master data via the Intranet/Internet:

- Cost centers
- Internal orders
- G/L accounts
- Vendors
- Customers

In the so-called scenarios, you define the process of requesting a master data change. This process definition is technically based on messages.

You can find additional information in the "SAP Library" under *Financials -> Controlling (CO) -> Cost Center Accounting -> Master Data in Cost Center Accounting -> Processing Master Data -> Requesting Master Data Changes in the Internet/Intranet*.

## Define Own Scenarios for Request to Change Master Data

In this IMG activity, you define scenarios for the **request to change master data**.

### Standard settings

All the scenarios provided by SAP are in the *S** namespace.
For requests to change master data, the following notification types are provided in client 000:

- *Notification type 0* for requests for cost centers, orders, and G/L accounts.
- *Notification type 70* for requests for vendors and customers.

  **Note**

  To be able to use these notification types, you need to transfer the settings from client 000 using the QISR_SM29 transaction. Then you need to process number ranges for the notification types.

  The notification type contains information on whether the request must be approved, and if so, by whom. Note that you can use a notification type for more than one scenario.

### Requirements

SAP recommends that you use the scenarios provided for master data changes as a reference for creating your own scenarios, and then to adapt the copy as required.

### Activities

1. To copy a scenario, select is and choose *Copy*. To create a scenario, choose *New entries*.

2. Enter a key and a description for the scenario.

   **Caution**
   The scenario key must **not** be in the SAP (S*) namespace.

3. In the *general data*, make the required entries.
   Take this opportunity to store a long text for the scenario. This description is displayed as an explanation when you call up the form. You can also use this description to find a corresponding form in the intranet. When you enter the text, you do not have to enter key words as the search engine filters the text using not only the words, but also their conjugation or declination. Word groups are also used for the search. For more information on the search engine, see the *SAP Library* under *Financials ->*
   *Controlling -> Cost Center Accounting -> Information System -> Interactive Information System*, and then see *Report Documentation* under *Document Search Using The Retrieval System*.

4. Transfer the scenarios from notification type **0** or **70** accordingly.
   **Note** that you initially need to transfer the settings for the notification types from client 000 using the QISR_SM29 transaction. Then you need to process the number ranges for the notification types.

   **Note**
   Check whether the follow-up activities provided on the activities menu bar match your requirements. We recommend that you use the follow-up activities supplied by SAP.

5. Use *Entry with form* as the entry type.

6. You only need to specify an ITS service if you choose the *Entry with form* entry type. You use an HTML form specially designed for the scenario. You also need to assign an Internet service to the scenario that contains the required HTML templates, ITS ( Internet transaction server) and language-dependent resources. In addition, there is a choice of
   business add-ins (BADIs) that you can use, in which you can define specific requests. You can assign an Internet service to **maximum one** scenario. To create a new Internet service, choose *Generate*. You have two options:

   - *Generate internet service with reference*
     When you generate the Internet service, if you specify a scenario with an existing Internet service as a reference, the system copies it to the new Internet service name.

   - *Generate internet service without reference*
     If you do **not** specify a scenario with an existing Internet service as a reference, the system copies the default Internet service *SR00*. An internet service created in this way contains all settings required for immediate testing of the scenario definition. The system automatically inserts a *request data* area with corresponding entry fields, for the request-specific characteristics that were defined in the scenario.

     **Note**
     Before you can test the Internet service, you need to publish it manually. This takes you automatically to the Internet service processing in the development workbench, where you can publish the entire Internet service. Then you can test the ITS service from Customizing using *Test*.

7. To modify forms, choose *Business Add-Ins*. You can now change the implementation (create, change, delete and so on).
   If you require special initialization or checks on the request for the scenario, you can use a business add-in (BADI QISR1). For more information on BADIs, see *Basis -> Change and Transport System - Overview -> Transactions and Tools -> BC Changes to SAP Standards -> Business Add-Ins.*

**Caution**

SAP recommends that you use the F4 Help to transfer the corresponding *Business Add-In from the scenario* for requests to change master data. In this case, the existing interfaces to the SAP system are used automatically.

Each Business Add-In provided ensures that all of the fields defined in the SAP system (which you use on your request form) are integrated with the SAP system, for example, for the purpose of consistency checks. You can also copy and enhance the Business Add-In if necessary.

8. Do not activate the *Cost incurring* indicator.
   The scenarios for changing master data do **not** incur costs.

9. Choose *Transfer*.
   In the next dialog box, choose *Copy all*. The selection list now provides the scenario that you copied.

10. Flag your scenario and choose *Characteristics* in the selection area.

11. Enter the fields that you require for the request form.
    Next, select *Dictionary category* and transfer the structure for each request. All the fields are contained here that you can use for the form. You can carry out a search via structure name *ISR**.
    In the *basic data* you use *ITS* to determine which fields appear on the form, and in which order they should appear. You use a **Business Add-In** to control which fields are filled as default.

**Notes on field selection**

- In the cost center structures *ISR_COSTCENTER_CREATE* (for scenario **SRK1** create cost centers) and *ISR_COSTCENTER_CHANGE* for scenarios **SRK2** and **SRK3** ( change/lock cost centers) some of the fields appear twice, but you **need** to choose the following fields for the request form:

| | |
|---|---|
| *LOCK_IND_ACT_PRIM_COSTS* | *Lock indicator for primary actual postings* |
| *LOCK_IND_PL_SEC_COSTS* | *Lock indicator for secondary cost planning* |
| *NAME_CC* | *General description* |

- For a request to **create** a new cost center, the following are minimum requirements:
- Controlling area
- Cost center key
- Date valid from
- Date valid to
- Description
- Person responsible
- For a request to **change** a cost center, the following are the minimum requirements:
- Controlling area
- Cost center key
- Date valid from
- Date valid to

12. Choose *Tasks* in the selection area.
    You specify the processing procedure in the SAP System for the request to change master data by using the workflow or worklists.

13. Transfer a *task* for each scenario.

14. Enter a processor or a standard role.
    This data is automatically provided when you call up the request form.
    SAP provides you with standard roles for the various requests to change master data. It is recommended that you copy these and adapt the copy accordingly.

15. **Note**
    You can use the *partner role* to control whether a single processor (*task processor*) is defaulted in the request form, or a whole department (*department responsible*). For more information on the role, see the *SAP Library* under *Basis -> Business Management -> Organizational Management -> Integration Into The Workflow -> Role Breakdown -> Role Definition -> Define Responsibility Roles*.

    **Example**
    SAP provides the standard role *3100014* for requests to change cost center master data.

**Further notes**

More information on **master data adjustment requests** is available in the *SAP Library* under *Financials -> CO Controlling -> Cost Center Accounting -> Master Data in Cost Center Accounting -> Processing Master Data -> Master Data Adjustment Requests via Internet/Intranet*.

## Assign Own Scenarios for Requesting Master Data Changes

In this activity, you specify for cost centers the request forms that can be accessed from other applications. The assignment can be limited by a controlling area.

The following list contains the applications from which you can access the request forms for cost centers: center.

- Enterprise organization,
- Processing of Standard hierarchy,
- Cost centers master data report

**Example**

| Controlling area | scenario |
|---|---|
| *0001* | *SRK1 Request to create a cost center* |
| *0001* | *SRK2 Request to change a cost center* |
| *0001* | *SRK3 Request to lock a cost center* |

For controlling area 0001, the access is made available from the corresponding applications of cost center accounting (Enterprise organization, Processing standard hierarchy and cost center master data report) to the forms for creating, changing, and locking a cost center.

**Hinweis**

If you do not enter a *controlling area*, the assigned scenario is valid for **all** controlling areas.

**Activities**

1. Choose *New entries*.

2. Enter the controlling area for which the assignments are to be valid.
3. Enter the scenarios that are to be accessed from SAP applications.
   The system automatically adds this to the description of the scenario.
4. Save your entries.

## Request for Adjustment Posting

In this activity, you make the settings needed for requesting an adjustment posting via the Intranet.

The request form for the adjustment posting can be accessed from the line item reports in Controlling (CO) as well as from the document display in Controlling (CO) and in Financial Accounting ( FI ).
In scenarios, you define the request process. This process definition is technically based on messages.

You can find additional information in the "SAP Library" under *Financials -> Controlling (CO) -> Cost Center Accounting -> Manual Actual Postings -> Requesting Adjustment Postings in the Intranet*.

## Activate Test Scenario for Request for Adjustment Posting

The SAP standard system includes scenario **SR31** for the request of an adjustment posting.

Using this scenario, you can check the process of the request for an adjustment posting as a **test run**. To do so, activate the scenario for the applications listed: *CO-COST* and *FI-GL*.

### Activities

From the CO line item reports or the document displays in Controlling (CO) and Financial Accounting (FI), you can goto the request form for an adjustment posting. The data stored in scenario **SR31** controls the processing of the requests and defines the fields that are available on the request form.

### Further notes

To define your own scenarios, copy the scenario included in the standard system **SR31** and adapt the copy as needed. To do so, choose Define Scenarios for Requesting an Adjustment Posting.

You can find additional information on the process of requesting an adjustment posting in the SAP Library under *Financials -> Controlling (CO) -> Cost Center Accounting -> Manual Actual Postings -> Requesting an Adjustment Posting in the Intranet*.

## Define Scenarios for Request for Adjustment Posting

In this IMG activity, you define scenarios for the **request for an adjustment posting**.

### Standard settings

All scenarios provided by SAP are in the *S** namespace.

SAP provides notification type **60** in client 000.

**Note**

To be able to use this notification type, you need to transfer the settings from client 000 using the QISR_SM29 transaction. Then you need to process the number ranges for the notification types.

The notification type contains the information on whether the request must be approved, and if so, by whom. Note that you can use a notification type for more than one scenario.

### Requirements

SAP recommends that you copy the scenarios for master data changes as a reference for your own scenarios, and then to adapt the copy accordingly.

### Activities

1. To copy a scenario, select is and choose *Copy*. To create a scenario, choose *New entries*.
2. Enter a key and a description for the scenario.

   **Caution**

   The scenario key must **not** be in the SAP (S*) namespace.
3. In the *general data*, make the required entries.

   Take this opportunity to store a long text for the scenario. This description is displayed as an explanation when you call up the form. You can also use this description to find a corresponding form in the intranet. When you enter the text, you do not have to enter key words as the search engine filters the text using not only the words, but also their conjugation or declination. Word groups are also used for the search. For more information on the search engine, see the *SAP Library* under *Financials ->*

   *Controlling -> Cost Center Accounting -> Information System -> Interactive Information System*, and then see *Report Documentation* under *Document Search Using The Retrieval System*.
4. Transfer notification type **60** according to the scenario.

   **Note** that you initially need to transfer the settings for the notification type from client 000, using the QISR_SM29 transaction. Then you need to process the number ranges for the notification type.
5. Use *Entry with form* as the entry type.
6. You only need to specify an ITS service if you choose the *Entry with form* entry type.

   You use an HTML form specially designed for the scenario. You also need to assign an Internet service to the scenario that contains the required HTML templates, ITS ( Internet transaction server) and language-dependent resources. In addition, there is a choice of business add-ins (BADIs) that you can use, in which you can define specific requests. You can assign an Internet service to **maximum one** scenario. To create a new Internet service, choose *Generate*. You have two options:

   - *Generate internet service with reference*

     When you generate the Internet service, if you specify a scenario with an existing Internet service as a reference, the system copies it to the new Internet service name.

   - *Generate internet service without reference*

     If you do **not** specify a scenario with an existing Internet service as a reference, the system copies the default Internet service *SR00*. An internet service created in this way contains all settings required for immediate testing of the scenario definition. The system automatically inserts a *request data* area with corresponding entry fields, for the request-specific characteristics that were defined in the scenario.

**Note**

Before you can test the Internet service, you need to publish it manually. This takes you automatically to the Internet service processing in the development workbench, where you can publish the entire Internet service. Then you can test the ITS service from Customizing using *Test*.

7. To modify forms, choose *Business Add-Ins*. You can now change the implementation (create, change, delete and so on).

   If you require special initialization or checks on the request for the scenario, you can use a business add-in (BADI QISR1). For more information on BADIs, see *Basis -> Change and Transport System - Overview -> Transactions and Tools -> BC Changes to SAP Standards -> Business Add-Ins.*

   **Caution**

   SAP recommends that you use the F4 Help to transfer the corresponding *Business Add-In from the scenario* (SR31) for requests to make an adjustment posting. In this case, the existing interfaces to the SAP system are used automatically.

   If you want to use the fields provided in the *SR31* scenario for your request form, the **SR31 Business Add-In** ensures that the corresponding values are transferred from the SAP system for these fields. You can copy and extend the Business Add-In if required.

8. Do **not** activate the *Cost incurring* indicator.

   The scenario for an adjustment posting does **not** cause any costs.

9. Choose *Transfer*.

   In the next dialog box, choose *Copy all*. The selection list now includes the scenario that you copied.

10. Select your scenario and choose the *Characteristics* selection area.

    You select fields in characteristics that are to be provided in the request form.

    **Recommendation**

    Accept the structures suggested for the adjustment posting request. Fields are contained within the structures that you can use for the form. You can add further characteristics via *New entries*.

    In *Basic data*, you use *ITS* to determine which fields are provided on the form and in which order. You can use a *Business Add-In* to control which fields should be filled as default.

11. In the selection area choose *Tasks*.

    Using the workflow or worklists, specify the processing procedure for the adjustment posting request in the SAP System.

12. Give each task in the processing procedure a *description*.

13. If you want to use tasks for evaluation, store a *key*.

    *Follow-up actions* are filled automatically according to the choice of key. A follow-up action is carried out automatically when the form is sent. Thus, with the adjustment posting request, update occurs in the footer between the incorrect document for which the correction was requested and the message generated when the form was sent.

14. Enter a processor or a standard role.

    The system automatically provides this information when you call up the request form. SAP supplies the standard role *20000102* for the adjustment posting request. It is recommended that you copy this, and adapt the copy accordingly.

    **Note**

    The *partner role* is used to control whether an individual processor (*task processor)* or an entire department is put forward in the request form (*responsible department*). You can find more information on roles in the *SAP Library* under *Basis Components -> Business Management ->*

*Organizational Management -> Integration with SAP Business Workflow -> Role Resolution -> Role Definition -> Define Roles using Responsibilities*.

### Further notes

For more information on **adjustment posting requests**, see the *SAP Library*, for example, under *Financials -> CO Controlling -> Cost Center Accounting -> Manual Actual Postings -> Request for Adjustment Posting in the Internet*.

## Assign Own Scenarios for Request for Adjustment Posting

In this activity, you assign your scenarios to one or more use of requests.

### Requirements

You have to define your own scenario for the request for an adjustment posting. To do so, choose Define Scenarios for the Request for an Adjustment Posting.

### Activities

1. Choose *New entries*.
2. Via the possible entries, select a *use*.
   If you want to assign multiple uses to your scenario, you have to maintain multiple entries.
3. Enter your *scenario*.
4. *Activate* the scenario.
5. *Save* your entries.

## Assign Adjustment Postings to Scenarios

In this activity, you assign the adjustment postings to a scenario. The adjustment postings should be available to the processor of the request.

### Activities

1. Choose *New entries*.

2. Enter the *scenario*, to which you want to assign the adjustment postings.
3. Enter the *transaction code* for the posting transaction that the processor needs to have available. If you want to assign multiple posting transactions, you have to make multiple entries.
4. Select the *Active* indicator.
5. *Save* your entries.

## Scenario Definition

In this section, you define scenarios for recurrent internal service requests, in which the appearance of the form in the Intranet and the processing of the requested tasks is specified.

## Prepare General Notification

This section explains the steps required for creating and processing a general notification.
The general notification is used to create a scenario for an internal service request.

Once you have processed this section, you can start the scenario definitions.

**Requirements**

To define scenarios, you need notification types, a large number being provided by SAP. To be able to use these, you need to transfer the settings from client 000 using the **QISR_SM29 transaction**. Then you need to process **number ranges for the notification types**. Alternatively you can create your own notification types.

## Notification Creation

In this section, you define notification types. You define the screen structure and the basic data that you require in the notification for each notification type.

The basic data includes the following:

- The catalogs used in the catalog profile to define the subject matter, defect characteristics and tasks.

You can find general instructions for implementing catalogs in the section *Quality Management -> Quality Planning -> Basic Data* under Catalogs. The information below therefore only relates to the additional steps that are required for notifications.

- Partners Involved in a Notification

You can use various partner types in notifications, such as, vendors, customers, administrative office, and system user. This means that you access master data from other applications.

The notification can relate to one or more objects that appear as master or movement data in Logistics.

- Master Data:
- Vendor/manufacturer, customer

- Material/plant
- Batch
- Equipment and functional locations only for maintenance notifications
- Project and WBS element only in notification category 'Claim'
- Movement data
- Inspection lot
- Purchasing document/material document
- Manufacturing order
- Sales order/delivery

Notification items can reference bill of material items (assemblies).
**Note**
You can define a special default for the use of bills of material in the settings at client level.

You require different basic data and reference objects, together with different screens, depending on the origin of the notification. You define various notification types to serve this purpose.

You can define notification types for the following origins:

- Maintenance Notification
- Maintenance request
- Malfunction report
- Activity report
- Quality Notification
- Customer complaint
- Complaint against vendor
- Internal problem notification
- Claim
- Claim on customer or vendor
- Claim by customer or vendor
- General Notification
- General notification

## Notification type

In this step, you define the notification types and their basic functions.

## Define Notification Types

In this step, you define notification types.

Each notification type references a notification category and an origin. Notifications have the category predefined on the basis of the origin.

You can define notification types for the following origins:

- Maintenance Notification
- General maintenance notification
- Malfunction report
- Activity report
- Quality Notification
- Customer complaint
- Complaint against vendor
- Internal problem notification
- Claim
- Claim on customer or vendor
- Claim by customer or vendor
- General Notification
- General notification

The origin requires a suitable screen control in the notification transactions.

Comprehensive controls are linked to the notification type. Due to the wide range of functions that are covered by these controls, they are dealt with in separate sections of the Implementation Guide.

### Standard Settings

You use the notification type to define the use for the notification. Certain notification types are preset in the standard system.

### Recommendation

If you want to define your own notification types, start with the preset notification types contained in the standard system as templates.

Identify the criteria according to which you want to differentiate your notification types. The following are a guide:

- Origin
  This differentiation allows appropriate screen controls and is therefore required.
- Organizational units, departments or process steps, in which the notification originated, or to which the notification relates.
- Control parameters that are assigned to the notification type.

This additional differentiation allows different scenarios in notification processing and is therefore advisable.

### Activities

Identify which notification types are to be used in your company and define their parameters:

- Origin
- Catalog profile
  (You can also define the catalog profile in the view "Catalogs and Catalog Profiles for the Notification Type")

You also define:

- Whether the notification number is to be displayed immediately.

## Define Number Ranges

In this step, you define number ranges for the notifications. Each notification type must be assigned to a number range. You can assign several notification types to a single number range (a group).

### Activities

1. Define which notification types or groups of notification types can be distinguished on the basis of the number ranges. Define the group titles.
2. Reserve the number ranges for the notifications and assign the corresponding notification types to these number ranges.

### Further notes for Maintaining Number Ranges

To add a new group (number range) and to assign a notification type, proceed as follows:

1. Access the maintenance function. The screen "Number Range: Notification" appears 2. Choose Group -> Maintain (F6). The screen "Maintain Number Range Groups" appears.

3. Choose Group -> Insert (F6). The screen "Insert Group" appears.
4. On this screen, make the following entries:
   a) Description for group
   b) Number range interval and identification for internal/external number assignment
   c) For internal number assignment, the current status of the number (lower limit for the number interval)
5. Exit the "Insert Group" screen and return to the "Maintain Number Range Groups" screen. The new group you have inserted now appears in the overview.

At the bottom of the list, all notification types appear that have not been assigned to a group.

6. Select a group (such as, the one you added)
7. Select one of the unassigned notification types and choose Edit -> Assign element to a group (F).

The notification type has now been assigned to a group.

### Further notes for Transporting the Number Ranges

The number range objects can be transported as follows:
On the initial screen, select "Interval -> Transport."
All intervals for the selected number range object are first deleted in the target system, so that only the exported intervals will be present after the import. The number ranges are imported with the value they have at the time of the export.

The group texts are also included in the transport.
The groups themselves do not need to be individually transported, because each notification type has a group (number range) specified. This is defined when the notification type is assigned to the group. The grouping is therefore transported with the notification types and is available without having to take further action.

If you make settings in your test client as described in the section Setting Up Clients in Customizing for notifications, you must copy both the number ranges (using transaction QCCN) and the basic settings (for example, for quality notifications using transaction QCCM) from client 000, to preserve the group formations. See SAP note 2390 for more details.

## Notification Contents

In this section, you use catalogs and catalog profiles to define the range of values for the qualitative information contained in the notification. You then assign catalogs and catalog profiles to the notification type.

## Maintain Catalogs

In this step, you structure the content of the notifications based on the following definition of catalog profiles. This means:

- You define the structural elements of the notification that are to be used and the information these elements are to contain.
- You organize and maintain the catalogs that are used in the notifications and when defects are recorded.

### Example

Depending on the scope of your catalog profile, you need catalogs, for example for:

- Subject matter (coding) at notification header level - Defect attributes at notification item level
- Defect type
- Defect location
- Defect cause
- Tasks, activities

You can define tasks and activities at the following levels of a notification:

- Notification header (immediate tasks, immediate activities)
- Notification item (corrective tasks, corrective activities)

### Activities

1. First, decide on the notification elements that are to contain the information you require.
   This information is represented using catalogs of terms. This decision depends on:

   - The scope of documentation required
   - The evaluations required

   The decision can also depend on the cause and the purpose of the notification. You can therefore subsequently define different notification types according to these criteria, with each one having its own catalog profile.

2. Organize the catalogs you require, once you have made your decision.

   a) Define the catalogs in a catalog index.
   You then use these predefined catalogs to structure the catalog profiles for the individual notification types.

   b) Maintain the catalog content.

   You can find detailed instructions on how to organize catalogs in the section Planning -> Basic Data -> Catalogs.

### Further notes

The system copies the keywords that have been maintained for the relevant catalog types into the fields 'defect type' and 'defect location' as field descriptions. The field descriptions are fixed in the defect data records.

The catalog has a manual transport link. When you call up this transport link, you can select individual code groups or codes and include these in an transport request. Long texts are not transported in this request.
SAP recommends that you treat catalogs as master data and only maintain them in the productive system.

## Define Catalog Profiles

In this step, you define the catalog profiles for notifications. You define:

- Which catalogs and code groups from the individual catalogs are to be accessed by the system for notifications.
  You can make a selection of code groups from the catalog by entering a generic key for these code groups.
  To do this, you can use the special characters '+' and '*'. If you enter **'+A*'** in the code group field, the system only selects code groups, whose key has the second letter 'A'.
- Which class of class type 01 is to be proposed for the classification of the notification items.
  You can use classes to freely define additional general problem attributes, if you cannot adequately describe the problem attributes contained in the data structure (defect type, defect location, defect cause) using the existing catalogs and texts.

If, for example, you maintain the class 'Problems in production', together with the class characteristic 'Initiating object', you can then enter the cause of production problems as characteristic values.

- The type of system message that is to appear, if the catalog profile is not followed.

### Requirements

- The catalogs that are to be used for the notifications have already been defined.

### Recommendation

- Define that the system displays a warning (type W) if the catalog profile is not followed.

### Activities

1. Define the code groups required for each catalog that is contained in the catalog profile.

   a) Discuss the structure of the eight-digit, mnemonic keys for the code groups with all other users of the catalogs; take the option of generic selection into consideration. You can for example define that separate code groups are formed for each notification type or for each plant and that the initial digits in the code group key are the same as those in the notification type or plant.

   b) Maintain the code groups. Codes can also be maintained retroactively.

2. Determine whether you require a classification of the notification items. If necessary, create the classes in Classification System and assign them to the catalog profile. You should define and maintain the class characteristics at the same time. Class type 01 is reserved for classifying the notification items. If required, when processing classed notification items, you can enter the class characteristic values on a subscreen.

## Catalogs and Catalog Profiles for Notification Type

### Activities

1. Define the information that is to be entered for the notification item and choose the most appropriate catalog.
2. Define the catalog profile for the notification type, if this did not already take place when the notification type was created.
3. Activate the Classification of the notification items, if you want to use class characteristics to store additional information for the notification item.

## Partner

In this section, you define the partners who are involved in the notifications.

Depending on the notification type, different partners may be involved in a notification. These partners can play various roles.

When you define the partner functions, proceed as follows:

- Define partner determination procedures that contain the relevant partner functions.
  Define the appropriate partner type for each partner function.
  Assign the partner determination procedure to the notification type. The possible partner types are predefined in the system.
- For each partner type, define the fields displayed in the partner lists.

## Define Partner Determination Procedures

In this step, you define the partners for processing notifications.

Several partners are usually involved in processing a notification - internal and external partners. The types of partners and their functions can be different for each notification type. To define the functions, proceed as follows:

- Certain partners have been predefined in the system; for example, the following partners apply to notifications:
- Customer (customer number)
- Vendor (vendor number)
- Person (personnel number)
- System user (SAP user)
- Organizational unit
- You can centrally define partner functions for all logistics applications. You must assign a partner type to the partner function; for example, you can assign the partner type "Customer" (with customer master and customer number) to the partner function "Complainant." You can also define a higher-level function for a partner function; for example, you can assign the higher-level function "Customer purchasing department" to the partner function "Customer purchasing agent."
- Next, define the partner determination procedures. In each partner determination procedure, you define which partner functions are allowed. In doing so, you can specify whether a partner function in a notification can be changed or whether it is a mandatory function.
- Each notification type is assigned a group of partners; for example, author, processed by, person responsible. For this reason, you must assign an appropriate partner determination procedure to each notification type. For each notification type, you must also assign the partner functions that will appear in the notification header. All other partner functions can be maintained in the notification itself, on the partner overview screen.

### Standard settings

The internal partner functions (for example, author, coordinator, person responsible) exist for both the partner types 'system user' and 'HR master record.' The partner type 'system user' was selected for internal

partner functions. If you are also using the HR module and you want to work with personnel numbers, you only have to exchange the following partner functions:

- In the view 'Assign Partner Functions to the Notification Type'
- Author A0 -> AU
- Coordinator KU -> KO
- In the view 'Define notification types'
- Person responsible (person processing the notification) VU -> VW

### Recommendation

Use the notification types and their assigned partner determination procedures, as defined in the standard system, unless you want to use your own partner determination procedures. If your business organization is currently using the SAP application components HR Org. or SD, it may be advantageous to select the partner type "employee" for internal partners, in place of the partner type "system user", as defined in the standard system. Make sure all other applications are in agreement!
If you want to use your own partner determination procedures you can adapt the predefined SAP notification types and partner determination procedures to your own requirements.

### Activities

1. Define the partner functions and the partner determination procedures.
   a) Define the partner functions.
      If required, assign multilingual keys to the partner functions
   b) Define the partner determination procedure and determine which functions are contained in each procedure.
2. Assign a partner determination procedure to each notification type.
3. Specify the appropriate partner function in the notification header for each notification type.

### Further notes

**Multilingual Capability**
You can use mnemonic keys for partner functions. The system supports this by assigning multilingual keys to these functions. You can find this function when maintaining the partner functions in the section Environment/ New Key Assignment for Functions. Such multilingual keys are displayed if you log on in a language other than the original language. However, only the original key has an effect in the technical sense, for example, in SE16 or in the transport system.

**Partner Objects**
Similar partner determination procedures are also used in other applications (for example, for quality certificates)and in the Implementation Guide for the Sales and Distribution component

## Notification Processing

In this section, you define a number of controls that will be needed to process notifications. This includes:

- Additional controls that pertain to the notification type; for example:
- Priority of the notification
- Response monitoring
- Print control
- Miscellaneous controls

## Response Control

In this section, you define the response to a notification:

- With a priority (this means how quickly you respond)
- According to which response profile that is you can define the timescale and the proposals for tasks).

## Define Priorities

In this step, you define the priorities for the notifications.
You can define different priority types and assign a priority type to each notification type. For each priority type, you define:

- Which priority (rank) a notification warrants
- Which start date and finish date (based on the creation date) the notifications should have

### Recommendation

Modify the parameters for the priority types after you have collected enough values based on experience.

### Activities

Determine which priorities and target basic dates will be valid for the notification types used in your company.

1. First define the different priority types.
2. For each priority type, define its priority (rank) and basic dates.
3. Assign a suitable priority type to each notification type.

### Further notes

The system finds the basic dates for the notification header with the help of the priority; the system automatically suggests tasks to be included in the notification header using the response profile and specifies the processing deadlines. These two scheduling functions work independently of one another.

If you choose the unit "day" for the relative start and end time of the notification, the system takes the factory calendar into account. If you choose other units, for example, "hour" or "week", non-working hours are not considered.

## Define Response Monitoring

In this step, you define the response time monitoring functions for notifications. For this purpose, you must first define response profiles and service profiles.

You must then assign these profiles to the quality notification types.

In the response profile, you define a sequence of standard tasks (based on the priority of the notification) that can be proposed in the notification and which must be carried out within a predefined period of time.

When the system processes a notification, it always assigns the tasks that have been selected on the basis of a response profile to the notification header.

The service profile defines the times during each work day when a notification is processed. You can also specify several time periods for each weekday and you can assign a separate response profile to each of these periods.

### Requirements

- You have maintained the task catalog.

### Activities

1. Define the response profiles your company needs to process the notifications. The field for the hierarchy level applies to the service notifications only; it serves no purpose for other notifications, since only one response profile can be assigned to each notification type.
2. Define valid service profiles for your company. If necessary, specify corresponding response profiles for these service profiles.
3. Identify the notification types for which response profiles or service profiles are to be predefined and maintain these assignments.

   Note that when you defined your service profiles, you may already have assigned a response profile to each service profile. This response profile overrides any response profile that you assign to the notification type. The response profile for the notification type only takes effect, if the notification is created outside of the service window.

### Further notes

**Service Windows**

The processing times defined in the service profile are only valid for the tasks defined in these profiles that the system suggests for the notification header. The resulting processing deadlines take precedence over the basic dates that come from the notification priority.

## Task Definition

In this section, you define additional functions that you can call up when processing notifications.

SAP delivers some examples of these functions with the standard system; users can also add their own functions.

## Define Action Box

In this step, you define additional functions, known as actions that can be performed during the processing of a notification. You define these functions using a key and an identifier and assign them to a notification type. The functions appear as actions in a separate screen section ( action box) in the header, when you process notifications or tasks.

You can control the **structure of the action box** in the following way:

- To call the function, you can define an icon with a descriptive quick info in addition to the identifier.
- You use the sort number to define the order of the functions as they are to appear in the action box.
- In addition to the notification type, you can enter a scenario. If you do this, the function only appears in the action box if this scenario is also assigned to the notification.
- You define the transactions in which the function is to appear in the action box by choosing an activity type.
- The usage defines whether the function is available at notification level or at task level.

You can control the **execution of the function** in the following way:

- You can document the processing of the function using a task or activity for the notification or notification item.

  Note: When you display the notification, the system only offers the functions that were defined with the attribute "No documentation". The assigned function module cannot make any changes to the notification.
- You can enter a user-defined function module for each function. This module is processed when the function is called. You can also program a dialog box to be used with this function module.
- If you link a business transaction to the function, it will only be triggered if the respective status of the transaction in the quality notification allows this. (The system checks the user authorization for this transaction.)
- If the function is generated for a task, there are two statuses for this task: either released or completed. Additionally, you can define a workflow task that is activated when the notification is saved. You can also enter a function module that changes the workflow container when the notification is saved.

For each function, you can also define several **dependent functions** (dependent follow-up functions). The system offers these dependent follow-up functions for selection in the action box after the higher-level function has been executed. In this way, you can ensure adherence to certain sequences during processing. For more information about setting up these sequences, see the documentation for the function module QM07_MERGE_ACTIONBOX.

### Standard settings

To simplify the programming of your own function modules, the standard system contains **non-operational** examples for tasks, activities, and change workflow containers. You can choose the interface that supports your own function modules from these examples.

The standard system contains various sample functions that you can use as sources and copy templates for your own definitions. You can find the relevant function modules using the following generic entries:

- QM06_FA* Function modules for activities
- QM06_FM* Function modules for tasks

The data relating to these examples (table settings and corresponding catalog entries) is contained in client 000 in the standard system and must be transferred to the current client if required.

### Recommendation

Note that with each release, there may be additional useful examples contained in the standard system. Transfer these examples if required into the current client.

### Activities

1. Determine which recurring functions you can define, dependent on the notification type.
2. Define these functions. Perform any programming necessary for the function modules you require. Proceed as follows:
   a) Assign the function to the notification type. On the detail screen:
   b) Define the key and description for the function.
      If a function can be used for an item, you can make this clear in the description.
   c) Define the controls for the function.
   d) Enter a function module with the required flow logic ( optional ).
   e) Define icon and quick info.
      In the quick info, you can also indicate whether a function can be selected for an item.
   f) Enter code group and code for the task or activity from the catalog that is assigned to the notification type, if the function is to be documented as a task or activity. You must enter a status for the task that is to be included in the notification.
3. Determine if tasks are to be supplemented by a workflow and define the workflow tasks as required. If the assigned function module has a container for the workflow task, the container must also have an entry.
4. Determine whether the functions are to be triggered in a particular sequence and if so, define the dependent follow-up functions.

### Further notes

In the notification header, only those functions appear for which the user has authorization. Tip: For tasks and activities, use the authorization for use of certain code groups.

## Define Follow-Up Actions for Tasks

In this step, you can define follow-up actions for tasks.

You can define a series of follow-up actions that the system will carry out sequentially.

For each follow-up action, you must define:

- the level at which the follow-up action will be effective
  (Only the task level is relevant.) You
can also define:

- how the update will be processed

- when the follow-up action will be triggered; that is, with which business transaction will the follow-up action be carried out.
  (The system will check whether the user has authorization for this transaction.)

### Requirements

The task catalog must be set up to allow the assignment of follow-up actions.

The task catalog should be maintained to such an extent that you should only have to supplement the task codes with the names of the follow-up actions, once you complete this step.

### Standard settings

To make it easier for users to program their own follow-up actions, the standard system contains a **non-executable** example of a function module for follow-up actions. You can copy the interface in this example and use it in your own function modules.

### Recommendation

- Provide a detailed description of the follow-up actions for a task in the long text for the task code. Make a distinction between follow-up actions that:
- must be carried out manually by a partner
- are carried out automatically by the system
- Do not change the function modules that have been provided as examples. Instead, make copies of these function modules and save them under different names.

### Activities

1. Determine which follow-up actions for tasks are needed in your company and which should be automated.
2. For automatic follow-up actions, define:
   a) the series of function modules and their update form
   b) the business transactions for the follow-up actions (provided the function module is to be linked to the status management function for the task)
3. Maintain the table of follow-up actions.
4. Create the corresponding function modules.

### Further notes

- The system allows you to implement automatic follow-up actions in the form of function modules. If a follow-up action consists of a series of individual actions, these actions must be numbered in the sequence they are to be carried out and each action must be linked to a function module.
- If you want to assign a business transaction from the general status management function to a follow-up action, the transaction must be supported for the object type "Task for Quality Notification." The F4-help for the "Transaction" field shows you which transactions you can use.

Business transactions are pertinent to the status management of tasks. Refer to the chapter Basic settings, Central functions, Status management for additional information. Also refer to the item Status profile for notification type.

To be able to select an appropriate transaction for a follow-up action, you can display the definitions of the business transactions for follow-up actions for tasks. You cannot, however, change these definitions yourself. To select a transaction, proceed as follows:

- Display the list of business transactions. Select the transactions used for notification tasks by entering 'QN9*'; then select the desired transaction.
- Select the 'Where-used list' function (not the 'Follow-up action' function). In the resulting display, you can see:
- that this transaction supports the object type 'task'
- which task status this transaction sets and deletes
- which statuses influence this transaction
- The follow-up actions for tasks use the same techniques as the follow-up actions for the usage decision.

## Activate Workflow Template and Assign Processor

In this step, you activate the Workflow template that is to run in notification processing.

### Further notes

For a detailed description, see section Environment / Central Functions / Activate Workflow.

## Overview of Notification Type

This step gives you an overview of:

- The notification types that are available in the system.
  **All** notification types for all notification categories and notification origins are listed.
- The settings of a particular notification type
  You can display all assignments of notification parameters for **one** notification type.

### Requirements

The notification types and the parameters assigned to the notification must have been assigned for you to be able to use the overview function described in this step.

### Recommendation

Think of this function as a tool for the expert, who wants to gain an overview of Customizing for the notification type.

### Activities

When implementing notifications, first work through the sections Notification Creation and Notification Processing. These provide an ideal basis for using this function.

## ISR Wizard

## Define Scenario with ISR Wizard

### Use

In this IMG activity, you can define an *Internal Service Request (ISR)* scenario using the *ISR wizard* step by step. The wizard settings are initially only temporarily saved, even if you complete a subwizard. Only when you **activate** the scenario are the settings defined in the corresponding Customizing tables as a usable scenario.

The ISR wizard is divided into several subwizards for different topic areas. The individual subwizards are in part dependent on each other. A dependent subwizard can only be called up providing all the other required wizards have been completed. Until all of the previously required subwizards have been processed, the dependent subwizard is indicated with a lock symbol.

You can choose from the following subwizards:

1. Form Definition: you define the essential elements of the form (can be executed independently of the other subwizards)
2. Partners Involved: you determine the partners involved in the business process for the service request, and assign users (is independent)
3. Form Layout: you determine the rough layout of the form and generate a preliminary version (is dependent on wizard 1).
4. Worklist: you determine how the partners involved find their service request (is dependent on wizard 2)
5. Notification Processing: you determine the transaction functions for processing the service request in the back end.
6. Log Notification Actions (Optional): you specify how and whether activities for notification processing in the notification are documented (is dependent on wizard 2 and wizard )
7. Service Costs (Optional): you can monitor the costs of a service request (is independent)

If a subwizard has not yet been processed, it has the status *Open* . If a subwizard has been partly processed but not yet completed, it has the status *In Process*. Once is it completed, it receives the status *Processed*. Once all subwizards that are not optional have been completely processed, you are able to activate the scenario.

Following activation, you are no longer able to process the scenario in the wizard, but only in the actual IMG activities for the ISR. Which wizard steps correspond to which IMG activities is described in the

*Task List*, that the system creates for every scenario created and activated in the wizard. This list also contains a description of the steps that you have to carry out manually **after** the activation of the scenario.

You can find an overview of all ISR scenarios created in the wizard in the IMG activity Overview of the Scenarios Created in the ISR Wizard or by choosing *Overview*.

### Activities

1. Create the scenario in the wizard.
2. Process all of the subwizards until the whole scenario has the status *Processed*.
3. Activate the scenario.
4. Execute the additional activities, and also any changes required in the IMG activities that are described in the task list.

## Overview of Scenarios Created in ISR Wizard

### Use

In this IMG activity you gain an overview of all scenarios created in the ISR Wizard, divided into *Open Scenarios* and *Activated Scenarios*.

You can display a *Task List* for all scenarios. This is where you have an overview of all of the required settings for a scenario, plus information on which settings have already been made.

For activated scenarios, you can also branch to Define Scenarios in ISR Basic Customizing (transaction QISRSCENARIO). There you can see which settings the system has entered in the ISR Customizing tables when the scenario was activated in the wizard, and change them if you need to.

### Activities

You can create new scenarios in this overview, and change or delete the scenarios still open. You are not able to change or delete scenarios that have already been activated.

## Define Scenarios

In this IMG activity, you define scenarios for internal service requests.

By defining a scenario, you standardize how each service request is requested and executed.

### Example

Suppose you want to define a scenario for the internal service request *office move*.

You now specify all parameters that:

- Characterize the scenario
- Are the same for all applicants in this scenario You enter a *contact person* for the scenario in the *basic data*.

You decide on the entry type for the request.

Since an office move involves costs, you specify the means by which the service is to be allocated. If necessary, you use a template to define the allocation.

In the *characteristics*, you specify which fields are to be called in the internal service request form.

In the *tasks*, you specify how the internal service request is to be processed.

### Requirements

You need notification types to be able to define scenarios. In the notification type, you have specified whether the service request requires approval and if so, by whom. A large number of notification types are provided. To be able to use them, you need to transfer the settings from client 000 using transaction QISR_SM29. Then you need to process the number ranges for notification types. If the notification types in client 000 are not sufficient, you can create your own. The same procedure applies to catalogs.
Note that you can use a given notification type for more than one scenario.

### Standard settings

All scenarios provided by SAP are in namespace *S*.

### Activities

1. Choose *New entries*.
2. Enter a technical name and also the *application* to which the scenario is to relate. The following applications are available:
   - *Standard Application* (no value in *Application* field) - Application for standard scenarios for the Internal Service Request
   - *HCM Processes and Forms* (value H in *Application* field) - You can link a scenario with this application to a form scenario in *HR Administrative Services*. For additional information, in Customizing choose *Personnel Management -> HR Administrative Services -> Configuration of Forms/Processes -> Configuration of Form*s.
   - *Simplified Interactive Forms* (value S in *Application* field) - Application for simplified forms that can be integrated in *Express Planning*. For additional information, see the SAP Library under *Cross-Application Components -> Express Planning -> Planning Services -> Planning Services with Close Linkage-> Adobe Form Service.*
3. Choose *Version* and create a new version of the scenario using *New Entries*. The first version of a scenario has version number 0 (zero). The version number is automatically assigned sequentially when you create a new version.
4. Specify a validity period for the scenario version.
   New requests can only be entered within the validity period. You can continue to process requests after the validity period expires. To enable the version to be used without time restrictions, set the *active* indicator and do not specify a validity period. The validity periods of different versions must not overlap.

5. In the *general data*, make the required entries.
   Take this opportunity to store a long text for the scenario. This description is displayed as an explanation when you call up the form. You can also use this description to find a corresponding form in the intranet. When you enter the text, you do not have to enter key words as the search engine filters the text using not only the words, but also their conjugation or declination. Word groups are also used for the search.
   For more information on the search engine, see the *SAP Library* under *Financials -> Controlling -> Cost Center Accounting -> Information System -> Interactive Information System*, and then see *Report Documentation* under *Document Search Using The Retrieval System*.

6. Under *Action Box*, enter information on the subsequent activities of the processor. You can specify one of the following generic function modules and program the subsequent activity with the BAdI

Execution of a Function in the Action Box (QISR4).

- ISR_ACTIVITY_EXECUTE_TASKDOC
- ISR_ACTIVITY_EXECUTE_ACTIONDOC
- ISR_ACTIVITY_EXECUTE

7. Under *Automatic Update* you specify whether the applicant and approver are allowed to execute individual activities for automatic update.
   The activity is executed when you send the form. Only those activities are offered for automatic update that are not a follow-up activity or dependent activity, meaning that do not require a preceding activity. The automatic activity must be run through in the back end **without** interaction that is, without output or display on screens. The activity must not, for example, branch to the transaction for displaying or changing an object, but the call should be implemented using BAdI QISR4 (Method EXECUTE_FUNCTION), for example using BAPIs or SELECTs.

8. Specify how the internal request should be created. You can choose between:

   - Text entry only
   - Entry using notification transaction
   - Entry using Adobe PDF (for detailed information, see step 9)
   - Entry using ITS service (for detailed information, see step 10)
   - Entry using BSP (if you select this type of entry, you must define a BSP application. An example application is ISR_DEMO1.)
   - Entry using JSP iView (the scenario is used as an iView in the Enterprise Portal. You can generate a JSP iView. To do this, choose *Additional Data for Scenario*. Enter an existing portal component or generate a component.)

9. You only need to specify an Adobe PDF form if you selected the entry type *Entry Using Adobe PDF*.

You can generate a form. If you do not enter a name for the form, one will be created automatically when you generate the form. The name will be ISR_FORM_XXXX (XXXX = technical name of scenario). You can generate a form using a template. You can use either a standard SAP form or a form from another scenario.

During generation, the characteristics of the scenario are automatically transferred to the interface and the context of the form. You can switch to the *Form Builder* and change the layout. If you define new fields in the layout, you can transfer these automatically as characteristics to scenario Customizing when you exit the Form Builder. When you do this, the data binding of the new fields is also automatically stored in the layout.

For more information about the Form Builder, choose *Help -> Application Help* in the Form Builder.

For more information about the use of Adobe PDF forms in ISR scenarios, see the ISR cookbook on the SAP Service Marketplace under service.sap.com/isr.

You only need to specify an ITS service if you selected the entry type *Entry Using ITS Service*. You enter the request using an HTML form specially designed for the scenario. To do this, you need to assign an internet service to the scenario. This internet service must contain the HTML templates, ITS (Internet Transaction Server), and language-dependent resources required for the request. You also have a choice of business add-ins (BADIs) in which you can define specific requirements.
You can assign an Internet service to only **one scenario**. To create a new Internet service, choose *Generate.* You have three options:

10. *Generate Internet Service Using Reference*
    If you specify a scenario with an existing Internet service as a reference when you generate the Internet service, the system copies it to the new Internet service name.

    - *Regenerate Internet Service (SAP Design)*
      If you do **not** specify a scenario with an existing Internet service as a reference when you generate the Internet service, the system creates a copy of the default Internet service *SR00*. An Internet service generated in this way contains all the settings required for immediate testing of the scenario definition. The system automatically inserts a *Request Data* area (with the corresponding entry fields) for the request-specific characteristics defined in the scenario.

    - *Regenerate Internet Service Plain HTML)*
      The same conditions apply here as for generation in SAP Design.

    The last two ways of creating Internet service requests is only possible using Customizing for scenarios for internal service requests.

    **Note**
    Before you can test the Internet service, you need to publish it manually. This takes you automatically to the Internet service processing in the development workbench, where you can publish the entire Internet service. Then you can test the ITS service from Customizing using *Test*.

11. To modify forms, choose *Business Add-Ins*. You can now change the implementation (create, change, delete and so on).
    If you require special initialization or checks on the request for the scenario, you can use a business add-in (BADI QISR1). For more information on BADIs, see *Basis -> Change and Transport System - Overview -> Transactions and Tools -> BC Changes to SAP Standards -> Business Add-Ins.*

12. Decide whether this scenario incurs costs.
    If you activate the *Cost Incurring* indicator, you can:

    - Specify *estimated costs*.

    - You can create a *price list*. Based on the price selected from the price list, each request automatically updates costs to a cost collector in Controlling (such as a cost center or order) once the notification is completed.
    - You can specify a *template*, which determines the values for the cost allocation from the information in the form. If you have not yet prepared a template, choose *Create Template*. You then need to specify a *costing variant* and a *fixed account assignment object*.
      If you have decided to use a template for costing, use the Easy Cost Planning functions. For more information on Easy Cost Planning, refer to the SAP Library under *Financials -> Controlling -> Product Cost Controlling -> Product Cost Planning -> Easy Cost Planning and Execution Services*.

13. If you decide to use Adobe PDF or the JSP iView, you must specify *Additional Data for the Scenario*. For both of these entry types, you must specify the server that is required to call the form

from the back-end system. You can only enter one server for each entry type. That server is then valid for all scenarios.

All other settings are only necessary if you have chosen entry using JSP iViews. These are the same settings as those you can make in the business package Manager Self-Service. For more information, see the Implementation Guide (IMG) for Manager Self-Service under

*Integration with Other SAP Components -> Business Packages/Functional Packages -> Manager Self-Service -> Internal Service Request -> Maintain Additional Data for Scenarios for Internal Service Request*.

14. Choose *Characteristics* from the selection area. Now enter the fields that you want to have in the form for the scenario. You can choose between:

    - *Uncategorized characteristics*
      Characteristic with up to 20 characters
    - *Characteristics in the dictionary category*
      Existing characteristic from the dictionary
      For data elements, the system transfers the system category and characteristic description from the dictionary. For structures, it uses all data elements within the structure.

    **Note**

    The following restrictions apply to the definition of the scenario characteristics:

    - Characteristic names or structure field names within a scenario must be unique.
    - Characteristic names or structure field names may not begin with ISR_
    - Characteristic names or structure field names should not be named as HTML-Business indicator, LABEL, NAME, VALUE, DIM, MAXSIZE, TYPE, EXISTS, ENABLED or VISSIZE.
    - Characteristic names or structure field names should have a maximum of 28 characters.
    - The data length of the characteristic names or structure field names is restricted to 20 characters.

    To use the input help - programmed in the BAdI QISR1 - for Adobe forms, you must define the technical key values of this input help in the characteristic. The fields *Placeholder for Key Values* and *Placeholder for Default Values* are available for this. You must set the *long text field* indicator for each characteristic that you want to use as a field for a multiline long text.
15. Choose *Tasks* from the selection area. Use the workflow or worklists in the SAP System to specify the processing of the internal service request.
16. Give each task in the processing a description.
17. If you want to evaluate tasks, specify a key. An action is automatically filled if you choose a key.
18. To enable the correct processor to be selected for the task, you can specify a standard role. You can define your own standard roles in transaction PFAC. In the container, you store characteristic names or field names from one of the following tables:

    - *TQ80*
    - *VIQMEL*
    - *VIQMSM*

    The fields specified there enable the correct processor to be found based on the standard role. If one of the fields in the container is filled in the form, the correct processor is found during runtime.

    If you want your user-defined fields that are not in the above tables to be used for standard role determination, use the Business Add-In *QISR3*.

For more information on roles, see the SAP Library under *Basis Components -> Business Management -> Organizational Management -> Integration With SAP Business Workflow ->Role Resolution -> Role Definition -> Define Roles Using Responsibilities.*

19. You can specify a subtemplate for a scenario that incurs costs. With multiple tasks, a subtemplate enables you to group and assign the rules for the template to the task. The subtemplate also enables you to assign items correctly in Easy Execution.

## Define Scenario Groups

### Use

You can display scenario groups supplied by SAP in this IMG activity. Different internal service request (ISR) scenarios are grouped together in a scenario group.These grouped ISR scenarios can be made available as pushbuttons in one Web application. When the user of the Web application chooses one of these pushbuttons, the form for the corresponding ISR scenario is called.

Any required number of scenarios can be assigned to a scenario group. One scenario may exist in more than one scenario group.

### Activities

It is currently not possible to define customer-specific groups in addition to the groups supplied by SAP. You can assign scenarios to the existing groups and remove scenarios from these groups. This is, however, a modification of the supplied Customizing.

## Settings for Cost-Incurring Scenarios

This section shows you which **additional** steps are required once you have defined cost incurring scenarios, and have used templates and Easy Cost Planning for your cost estimate.

## Settings for Template Transport

In this IMG activity, you trigger transport of the template settings manually.

### Standard settings

The template settings are not transported to the productive system automatically. When you start this transport, the system transports template environment 214.

### Activities

1. Choose a controlling area.

2. Specify whether the transport should include a template or function tree.

## Define Settings for Execution Services

To be able to post the Execution Services, you need to enter data in addition to that entered in planning. So that the planner does not have to make these entries on starting the Execution Services you can specify them here:

- Which document type and which account assignment category should you use to create the purchase requisitions and purchase orders? Only use account assignment categories without special stock. You are advised to select the same account assignment category for the purchase orders as you did for the purchase requisitions for each object type.
- Which transaction type should you use to create the reservations and post the goods issues?

**Recommendation**

You are advised not to change the SAP settings.

# Business Add-Ins

# BAdI: Form Programming Interface

### Use

This Business Add-In (BAdI) is used in the *internal service request* area. It can be used to control the flow logic of the request form in the back-end system.

For more information about the use of this BAdI and its methods, see the ISR Cookbook, which you can find on SAP Service Marketplace at http://service.sap.com/isr.

### Activities

After you call the IMG activity, the system displays a dialog box where you enter a name for the implementation.

If implementations of this Business Add-In have already been created, the system displays them in a dialog box. You then choose one of them by choosing ***Create***, and continue as follows:

1. In the dialog box, enter a name for the implementation of the Add-In and choose ***Create***. The system displays the initial screen for creating Business Add-In implementations.
2. On this screen, enter a short description for you implementation in the ***Implementation Short Text*** field.

3. If you choose the ***Interface*** tab, you will notice that the system has filled in the ***Name of the Implementing Class*** field automatically, by assigning a class name based on the name of your implementation.

4. Save your entries and assign the Add-In to a package.

5. To edit a method, double-click its name.

6. Enter your implementation code between the `method <Interface Name>~<Name of Method>.` and `endmethod.` statements.

7. Save and activate your code. Navigate back to the ***Change Implementation*** screen.

   Note: You can also create an implementation for an Add-In and not activate it until later. If you want to do this, do not carry out the following step:

8. Choose ***Activate***.

   When the application program is executed, the system carries out the code in the method you wrote.

## BAdI: Account Assignment Determination

### Use

This Business Add-In (BAdI) is used in the *internal service request* area. You can use this BAdI to freely define the account assignment object for cost incurring scenarios.

For more information about the use of this BAdI and its methods, see the ISR-Cookbook, which you can find on the SAP Service Marketplace under http://service.sap.com/isr.

### Activities

After you call the IMG activity, the system displays a dialog box where you enter a name for the implementation.

If implementations of this Business Add-In have already been created, the system displays them in a dialog box. You then choose one of them by choosing ***Create***, and continue as follows:

1. In the dialog box, enter a name for the implementation of the Add-In and choose ***Create***. The system displays the initial screen for creating Business Add-In implementations.

2. On this screen, enter a short description for you implementation in the ***Implementation Short Text*** field.

3. If you choose the ***Interface*** tab, you will notice that the system has filled in the ***Name of the Implementing Class*** field automatically, by assigning a class name based on the name of your implementation.

4. Save your entries and assign the Add-In to a package.

5. To edit a method, double-click its name.

6. Enter your implementation code between the `method <Interface Name>~<Name of Method>.` and `endmethod.` statements.

7. Save and activate your code. Navigate back to the ***Change Implementation*** screen.

Note: You can also create an implementation for an Add-In and not activate it until later. If you want to do this, do not carry out the following step:

8. Choose ***Activate***.
   When the application program is executed, the system carries out the code in the method you wrote.

## BAdI: Filling of Container to Find Processor

### Use

This Business Add-In (BAdI) is used in the *internal service request* area. You can use this BAdI to change the determination of the container for the workflow standard role used to find the processor.

For more information about the use of this BAdI and its methods, see the ISR-Cookbook, which you can find on the SAP Service Marketplace under http://service.sap.com/isr.

### Activities

After you call the IMG activity, the system displays a dialog box where you enter a name for the implementation.

If implementations of this Business Add-In have already been created, the system displays them in a dialog box. You then choose one of them by choosing ***Create***, and continue as follows:

1. In the dialog box, enter a name for the implementation of the Add-In and choose ***Create***. The system displays the initial screen for creating Business Add-In implementations.
2. On this screen, enter a short description for you implementation in the ***Implementation Short Text*** field.
3. If you choose the ***Interface*** tab, you will notice that the system has filled in the ***Name of the Implementing Class*** field automatically, by assigning a class name based on the name of your implementation.
4. Save your entries and assign the Add-In to a package.
5. To edit a method, double-click its name.
6. Enter your implementation code between the `method <Interface Name>~<Name of Method>.` and `endmethod.` statements.
7. Save and activate your code. Navigate back to the ***Change Implementation*** screen.
   Note: You can also create an implementation for an Add-In and not activate it until later. If you want to do this, do not carry out the following step:
8. Choose ***Activate***.
   When the application program is executed, the system carries out the code in the method you wrote.

## BAdI: Execution of a Function from the Action Box

### Use

This Business Add-In (BAdI) is used in the *internal service request* area. You can use this BAdI to program an activity in the action box. This is only possible if you have stored one of the following generic function modules for defining the action box in ISR Customizing:

ISR_ACTIVITY_EXECUTE_TASKDOC

ISR_ACTIVITY_EXECUTE_ACTIONDOC

ISR_ACTIVITY_EXECUTE

For more information about the use of this BAdI and its methods, see the ISR-Cookbook, which you can find on the SAP Service Marketplace under http://service.sap.com/isr.

### Activities

After you call the IMG activity, the system displays a dialog box where you enter a name for the implementation.

If implementations of this Business Add-In have already been created, the system displays them in a dialog box. You then choose one of them by choosing ***Create***, and continue as follows:

1. In the dialog box, enter a name for the implementation of the Add-In and choose ***Create***. The system displays the initial screen for creating Business Add-In implementations.
2. On this screen, enter a short description for you implementation in the ***Implementation Short Text*** field.
3. If you choose the ***Interface*** tab, you will notice that the system has filled in the ***Name of the Implementing Class*** field automatically, by assigning a class name based on the name of your implementation.
4. Save your entries and assign the Add-In to a package.
5. To edit a method, double-click its name.
6. Enter your implementation code between the `method <Interface Name>~<Name of Method>.` and `endmethod.` statements.
7. Save and activate your code. Navigate back to the ***Change Implementation*** screen.
   Note: You can also create an implementation for an Add-In and not activate it until later. If you want to do this, do not carry out the following step:
8. Choose ***Activate***.
   When the application program is executed, the system carries out the code in the method you wrote.

## BAdI: Processor Determination

### Use

This Business Add-In (BAdI) is used in the *Internet Service Request* area. You can use this BAdI to change processor determination for the Internet Service Request.

for more information about the use of this BAdI and the methods in it, see the ISR Cookbook, which you can find on the SAP Service Marketplace under http://service.sap.com/isr.

### Activities

After you call the IMG activity, the system displays a dialog box where you enter a name for the implementation.

If implementations of this Business Add-In have already been created, the system displays them in a dialog box. You then choose one of them by choosing ***Create***, and continue as follows:

1. In the dialog box, enter a name for the implementation of the Add-In and choose ***Create***. The system displays the initial screen for creating Business Add-In implementations.
2. On this screen, enter a short description for you implementation in the ***Implementation Short Text*** field.
3. If you choose the ***Interface*** tab, you will notice that the system has filled in the ***Name of the Implementing Class*** field automatically, by assigning a class name based on the name of your implementation.
4. Save your entries and assign the Add-In to a package.
5. To edit a method, double-click its name.
6. Enter your implementation code between the `method <Interface Name>~<Name of Method>.` and `endmethod.` statements.
7. Save and activate your code. Navigate back to the ***Change Implementation*** screen.
   Note: You can also create an implementation for an Add-In and not activate it until later. If you want to do this, do not carry out the following step:
8. Choose ***Activate***.

When the application program is executed, the system carries out the code in the method you wrote