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| Test ScriptSAP S/4HANA - 18-09-20 | public |
| Service Management Overview (43B) |

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# Purpose

This scope item helps the customer service manager ensure on-time service delivery by monitoring the service orders for completeness and whether they are overdue. It also helps to compare the average service duration per product.

The customer service manager must also know how many service contracts have expired or are near expiry. It also helps to compare and view the service contracts from various dimensions such as total contract value and profit margin. The customer service manager can also trigger action to renew them.

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data, and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| SAP S/4HANA | Accessible via SAP Fiori launchpad. Your system administrator provides you with the relevant URL. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

These roles are examples provided by SAP. You can use them as templates to create your own roles.

For more information about business roles, refer to the Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide).

Fiori Frontend Roles

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Customer Service Manager (Customer Management) | SAP\_BR\_CUSTOMER\_SERVICE\_MGR | N/A | N/A |  |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT | N/A | N/A |  |

Application Business Roles

The business roles in the following table contain authorization and navigation objects specific to the SAP S/4HANA Service application. Your system administrator can use them as templates to create customer-specific business roles with the appropriate authorizations.

|  |  |
| --- | --- |
| Name (Role) | ID (Role) |
| S4CRM UIU - Service Professional | SAP\_S4C\_UIU\_SRV\_PRO |
| CRM Role for UIU Framework | SAP\_CRM\_UIU\_FRAMEWORK |

In addition to these Service-specific authorizations, generic SAP application access must be granted by your system administrator. The system administrator assigns all required application business roles to your system user.

Note For detailed information about roles and authorizations, refer to the SAP S/4HANA security guide at <https://help.sap.com/viewer/product/SAP_S4HANA_ON-PREMISE> > Implement.

# Overview Table

This scope item consists of several process steps provided in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | App/Transaction | Expected Results |
| [Review Service Contracts for Expiry / Renewal](#unique_6) [page ] 6 | Customer Service Manager | Expiring Service contracts | Expiring Service contracts based on contract value are displayed |
| [Review Service Contracts by Total Contract Value/Profit Margin](#unique_7) [page ] 7 | Customer Service Manager | Expiring Service contracts | Expiring Service contracts based on profits are displayed |
| [Verify Situation Handling Alerts for Expiring Service Contracts](#unique_8) [page ] 9 | Configuration Expert - Business Process ConfigurationCustomer Service Manager | Manage Situation Type / Service management overview | Situation Types are displayed |
| [Review Overdue Service Orders](#unique_9) [page ] 11 | Customer Service Manager | Overdue Service orders | Overdue Service orders are displayed |
| [Review Incomplete Service Orders](#unique_10) [page ] 13 | Customer Service Manager | Incomplete Service Orders | Incomplete Service orders are displayed |
| [Monitor Average Service Duration by Product](#unique_11) [page ] 14 | Customer Service Manager | Average Repair Time | Bar graph is displayed showing top 4 products with maximum Average Service Duration |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Review Service Contracts for Expiry / Renewal

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

To review the Expiring Service Contract card in Service Management overview that displays Service contracts with end date in past, current week, and next four week.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 2 | Open app | Service Management Overview app is displayed under Service Monitoring and Analytics. | The Service Management Overview app is displayed. |  |
| 3 | View app | View Expiring Service Contracts app, it has filter option to choose Service Contract either ‘By Contract Value’ or ‘By Number’. | The screen shows Expiring service contracts based on ‘By Contract value’ or ‘By Number’. |  |
| 4 | Choose Expiring Service Contracts | Choose Expiring Service Contracts based on Contract value or Number. | The screen is navigated to Expiring Service Contracts Analysis displaying the Expiry period of service contracts and details of the service contracts. |  |
| 5 | Adapt Filter | Service contracts due to expire in next weeks can be viewed by updating the Contract End Date in filters.Choose Go. | The content chart shows the service contracts expired this week till week +2 by default. |  |
| 6 | Choose Filters on Standard tab | Choose Compact filter - Choose display currency for desired currency and select the contract end date. | The content chart shows the service contracts expired this week till week +2 by for the selected Contract end date range. |  |

## Review Service Contracts by Total Contract Value/Profit Margin

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

To review the service contracts by contract value / profit margin.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 2 | Open app | Service Management Overview app is displayed under Service Monitoring And Analytics. | The Service Management Overview app is displayed. |  |
| 3 | View Service contract by Contract value app | This app has a filter with an option highest value/lowest value which helps to know which service contract is the highest/lowest. By default, the filter is set to Highest Value. | The Screen shows the app with Most profitable Service contracts. |  |
| 4 | Review Service contract by contract value | Select Service Contracts by Contract Value.This card has a filter with an option ‘highest value/lowest value’ which helps to know which service contract has the highest/lowest value. (by default, highest value is displayed). | The Screen is navigated to Service Contracts Analysis and table showing the Service contracts by contract value is displayed. |  |
| 5 | View Service contract by Profit Margin app | This card has a filter with an option most profitable/least profitable which helps to know which service contract has the most profitable/least profitable.By default, the filter is set to Most Profitable. | The Screen shows the app with Highest contract value. |  |
| 6 | Review Service contract by Profit margin | Choose Service Contracts by Profit Margin. This card has a filter with an option ‘most profitable/least profitable’ which helps to know which service contract is the most/least profitable. (by default, most profitable is displayed). | The Screen is navigated to Service Contracts Analysis and Table showing the Service contracts by contract value is displayed. |  |
| 7 | Choose Additional filters | Select one of the filters:* By Contract
* By region'
* By sales Organization
* Year to Date - By sales Organization
* Revenue , Cost and Profit Margin - By Month
 | The table is displayed based on contract, region, and sales organization. |  |
| 8 | Choose Filters on Standard tab | Select display currency for desired currency.For desired sales group:Select sales organization > distribution channel > division > sales office > sales group. (in a hierarchical order). | The number of figures in the cards will be displayed in the desired currency and for desired sales group.These filters help to view the information specific to sales organization. |  |

## Verify Situation Handling Alerts for Expiring Service Contracts

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

The purpose is to verify situation handling alert for the Service contracts that are due to expire in time and to start the process of renegotiation and renewal for those contracts.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori Launchpad using the role Configuration Expert - Business Process Configuration. | The Home screen is displayed. |  |
| 2 | Situation Handling | Choose Situation Handling. | The Apps relevant to Situation Handling is displayed. |  |
| 3 | Manage Situation types | Choose Manage Situation Types app under Situation Handling. | The Manage Situation Types page is displayed. |  |
| 4 | Search Template | Search for “SRVC\_EXPIRING\_SERVICE\_CONTRACT”. | The template is displayed under Standard templates tab. |  |
| 5 | Choose the template | Choose “SRVC\_EXPIRING\_SERVICE\_CONTRACT”. | The Situation type page is displayed. |  |
| 6 | Copy template | Choose Copy on the top right of the screen. | The Situation type is copied, and New situation Type page is displayed. |  |
| 7 | Assign Unique ID and Name to New Situation type | Assign a Unique ID and Name to New situation type.For example,ID: ZEXPIRING\_SERVICE\_CONTRACT\_TYPEName: Expiring SC alertsDisplay Sequence: Very High | The Unique ID and Name will be updated. |  |
| 8 | Verify the Condition status | Choose Conditions tab.Verify:Set to Status: ‘Open’‘Send Notification’ box is checked. | The condition status and notification is verified. |  |
| 9 | Set Batch Schedule | Under the Batch Job Scheduling tab, update the Time Zone and Start Batch. | The Batch schedule is set. |  |
| 10 | Set Notification | Under Situation Display - Choose Notification from the drop down - Check both Aggregate Notifications and Resend notifications. | The Notification details are updated. |  |
| 11 | Save | Choose Save. | The message ‘object saved’ is displayed and a pop is displayed. |  |
| 12 | Yes | Choose Yes on pop up. | The newly created Situation Type is enabled.Status in header is Enabled. |  |
| 13 | Log on | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 14 | Open app | Service Management Overview app is displayed under Service Management Analytics. | The Service Management Overview app is displayed. |  |
| 15 | Notifications | Choose Notifications in the right of the Home page. | Notifications will be displayed ‘By Date’, ‘By Type’ and ‘By Priority’. |  |
| 16 | Alert | Choose Notification for service contract. | The Service contract ID, Service contract description and Net value is displayed. |  |
| 17 | Choose Service Contract | Choose Service Contract hyperlink (green colour). | The screen is navigated to service contract object page. |  |

## Review Overdue Service Orders

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

The purpose is to review “Overdue Service Orders” Card in Service management overview page displaying service Orders with requested end date in past having Open ,In process and released status.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 2 | Open app | Service Management Overview app is displayed under Service Monitoring And Analytics. | The Service Management Overview app is displayed. |  |
| 3 | Review Overdue Service Orders | Choose Overdue Service Orders. | The screen is navigated to overdue service order analysis and service order by Service transaction type, Service order by confirmed items and Overdue service orders are displayed in graph and tabular format. |  |
| 4 | Select Required Overdue Service Order | Choose required Overdue Service Orders based on priority. | The screen is navigated to Manage Service Orders app. |  |
| 5 | Select Visual Filter | Select Number of Service Order by Transaction Type and Service Orders by Confirmed Items.For example, select SRVO service order and No confirmed items (from Service orders by confirmed items). | The screen displays Service order SRVO and No confirmed items based on priority. |  |
| 6 | Compact Filter | Choose Compact Filter.Select display currency for desired currency and Service order type as required. | The Screen displays all Overdue Service orders based on the filters selected. |  |
| 7 | Select Additional Filter | Select the Service Order Type filter. | The below mentioned Value help options are displayed.* Service Order
 |  |

## Review Incomplete Service Orders

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

The purpose is to review "Incomplete Service Orders” Card in Service management overview page displaying service Orders based on three filters. 1. Service confirmation existing 2. Doc Type 3. Priority.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 2 | Open app | Service Management Overview app is displayed under Service Monitoring And Analytics. | The Service Management Overview app is displayed. |  |
| 3 | Review Incomplete Service Orders | Choose Incomplete Service Orders. | The screen is navigated to Service Orders Analysis page and Net value by Service order Type, Service Order Items by Life Cycle Status is displayed by default. |  |
| 4 | Choose Visual Filter | Choose visual filters such as Net Value by Service Order Type and Service Order Items by Life Cycle Status.For example, Choose Service order SRVO under Net Value by Service Order Type and Released status (D) under Service Order Items by Life Cycle status. | The service orders are displayed as bar graph and as tabular form based on their priority. Select the desired service orders based on priority. |  |
| 5 | Choose Compact Filter | Select the filter Service order type , Life Cycle Status and Equipment ID. | Different Service order types are selected and verified. |  |

## Monitor Average Service Duration by Product

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

To Monitor the average repair time required for the service orders by top four products with maximum average repair time.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori Launchpad using the role Customer Service Manager. | The Home screen is displayed. |  |
| 2 | Open app | Service Management Overview app is displayed under Service Monitoring And Analytics. | The Service Management Overview app is displayed. |  |
| 3 | Monitor Average Service Duration | On Average Service Duration for Service order. | The Bar graph showing Top Products with service Orders having maximum Average Service Duration is displayed. |  |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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