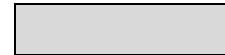


Field Requirements and Messages - Web Client



**Change History**

Update the following table as necessary when this document is changed:

Date	Name	Change Description
06/06/20XX	Jodie Tice	Initial Draft
06/08/20XX	Jodie Tice	Given to P. Jones. Peer review complete, document edited (now reflects updates). Requires 2 <sup>nd</sup> peer review.
06/08/20XX	Jodie Tice	Given to M. Shih for review. Peer review complete, document edited (now reflects updates). Waiting for Screenshot changes with Yellow ! Warnings before finalizing message sections.
06/09/20XX	Jodie Tice	Given to P. Jones for 3 <sup>rd</sup> Peer Review.
06/10/20XX	Jodie Tice	Peer review complete, document edited (now reflects updates). Ready for SME Review. Dan Smith received doc for review at 12 noon. Edits due 06/14/2005 (Noon).
06/16/20XX	Jodie Tice	Received doc with minor changes. Generated HTML & Doc for website. Moved doc and HTML to \\Alpha\sap-eas\CRM_Production\CRM 4.0\training.
06/16/20XX	Jodie Tice	Renamed doc to Field Requirements and Messages - Web Client
07/06/20XX	Jodie Tice	Made role-based link corrections per Joe LoCoco. (Step 5) Regenerated HTML for website. Moved doc and HTML to \\Alpha\sap-eas\CRM_Production\CRM 4.0\training.
07/13/20XX	Jodie Tice	Corrected Logo to User Site in Step 3 per Ashish Murana. Regenerated HTML for website. Moved doc and HTML to \\Alpha\sap-eas\CRM_Production\CRM 4.0\training.

## Overview

A STAR, from its creation to its closure, typically is processed and updated by various persons. During this processing, the STAR goes through various milestones and stages that are represented by relevant statuses of a STAR. Definitions of STAR statuses and associated field validation rules drive how a STAR should be processed and tracked.

This training topic describes the validation rules for STAR in SAP CRM and the different types of validation messages generated in CRM Web Client.

## Helpful Hints

Symbols in this document indicate:



Note to the user.



Important that the user **DOES** perform an action.



Important that the user **DOES NOT** perform an action.



Shortcut that the user can perform.



Refers to another resource (typically, another document).

Tables in this document indicate:


- R: Required
- O: Optional
- C: Conditional

Fields in CRM indicate:



On this screen, items that are prefaced with an asterisk (\*) are required fields. The required fields must be completed or the system **WILL NOT** allow you to save the STAR.



The following button:  indicates that a drop-down menu is available. A drop-down box provides choices from which you must select. Choose from the selection provided.

## Procedure

### 1. Sections in this Document:


To Review:	Go To
Field Consistency Validation,	Step 2
Field Validation on STAR Status,	Step 4
Statistics Automatically Calculated in STARS,	Step 6
Field Level Change Control,	Step 8
System-Generated Validation Messages,	Step 10
Returning to Edit a STAR from a Validation Message other than "Transaction Saved,"	Step 17
Preventing the Creation of Follow-Up Transactions,	Step 20

### 2. For the field consistency valuation, review the information below:

#### Field Consistency Validation

### 3. There are values entered by the user for different STAR fields that may result in inconsistency. The following table lists those fields and rules that ensure the consistency:

STAR Field	Validation Rules
User Site	<p><b>REQUIRED</b></p> <ul style="list-style-type: none"> <li>Must be a valid Site ID in SAP CRM. Business Partner Role = Site (CRM001) or Prospect (BUP002) are qualified.</li> <li>If User Site is not Alphacon, the Contact Person must be relevant to the customer User Site.</li> <li>There must be a valid business reason if User Site is Alphacon and Logo is Customer.</li> </ul>
Contact Person	<p><b>OPTIONAL</b></p> <ul style="list-style-type: none"> <li>If entered, must have Business Partner Role = Contact Person (BUP001) or Employee (BUP003).</li> </ul>
Current Assignee	<p><b>OPTIONAL</b></p> <ul style="list-style-type: none"> <li>If entered, must be a valid Employee (including Contractors) in CRM.</li> </ul> <p><b>REQUIRED</b></p> <ul style="list-style-type: none"> <li>If <b>Status</b> equals 'Assigned', then this field must NOT be blank.</li> </ul>

STAR Field	Validation Rules
Occurred At	<p><b>REQUIRED</b></p> <ul style="list-style-type: none"> <li>• If User Site is Alphacon, <b>Occurred At</b> <u>can not</u> be the following: <ul style="list-style-type: none"> <li>○ 'Production – Customer'</li> <li>○ 'Pre-Production Testing – Customer'</li> </ul> </li> <li>• If User Site is not Alphacon, <b>Occurred At</b> <u>can not</u> be the following: <ul style="list-style-type: none"> <li>○ 'Production – Internal'</li> <li>○ 'Pre-Production Testing – Internal'</li> <li>○ 'Regression Testing'</li> <li>○ 'Development'</li> </ul> </li> </ul> <p> <b>Important Process Note for Corporate Quality Metrics:</b> When a STAR is found by Alphacon in a production level code, both <b>User Site</b> and <b>Logo</b> should be Alphacon. And the <b>Occurred At</b> for the STAR should be 'Production - Internal.'</p>
Workaround Description	<p><b>REQUIRED</b></p> <ul style="list-style-type: none"> <li>• If <b>Workaround Status</b> equals 'Added', 'Verified' or 'Customer Accepted', this field can not be blank.</li> </ul>

4. For the field validation on STAR status, review the information below:

**Field Validation on STAR Status**

5. Required STAR fields that qualify each of the STAR statuses are respectively defined and validated as follows:

STAR Status	Required STAR Fields
New (STAR Creation)	<ul style="list-style-type: none"> <li>• User Site</li> <li>• Title</li> <li>• STAR Type</li> <li>• Category (required only when STAR type = 'Bug')</li> <li>• Interop Issue</li> <li>• Occurred At</li> <li>• Customer Severity</li> <li>• Product L1</li> <li>• Product L2</li> <li>• Release (Reported Version)</li> <li>• Platform</li> <li>• Problem Description (and text)</li> </ul> <p><b>STAR fields/data generated/entered by system at creation:</b></p> <ul style="list-style-type: none"> <li>• STAR ID (system generated)</li> <li>• Creator</li> <li>• Created Date</li> <li>• Status = 'New'</li> <li>• Priority</li> </ul> <p>i.e., Alphacon Severity, not required at creation, but this value defaults to Customer Severity at STAR creation with rules such as (Customer Severity &gt; Priority) 1&gt;1, 2&gt;2, 3&gt;3, 4&gt;3.</p> <ul style="list-style-type: none"> <li>• Business Partners, such as Initial Reviewer(s), and Dispatcher, etc. are determined and listed in the Partner tab of the STAR upon user's entry of Products in the STAR and the User Site. This is based on the established Organizational Model (product support team structure) set up for the Products the STAR is created for.</li> <li>• Logo (system-determined based on User Site entry)</li> <li>• Contact Person (system suggestions based on User Site entry, and determined by user)</li> </ul>

STAR Status	Required STAR Fields
New (STAR Creation) continued	<ul style="list-style-type: none"> <li>• License Site (System determined based on Entitlement Check) <ul style="list-style-type: none"> <li>○ License Site from IBase record where entitlement was found</li> <li>○ 'NO_MAINTEN' (no maintenance record) is used on failure of Entitlement Check</li> </ul> </li> <li>• Regression Test Required (default is 'Yes' - Checkbox is checked)</li> <li>• DesignWare SotW (default is 'Yes' - Checkbox is checked)</li> <li>• Language Key (default is 'English')</li> </ul>
Confirmed	(none)
Ranked	<ul style="list-style-type: none"> <li>• Internal Priority</li> <li>• Priority (System-generated)</li> </ul>
Scheduled	<ul style="list-style-type: none"> <li>• Target Release - Int</li> </ul>
Assigned	<ul style="list-style-type: none"> <li>• Current Assignee</li> </ul>
Fixed	<ul style="list-style-type: none"> <li>• Fixed Version</li> <li>• Root Cause</li> </ul> <p><b>Generated by system at Fixed status:</b></p> <ul style="list-style-type: none"> <li>• Fixed Date</li> </ul>
Fix Validated	<ul style="list-style-type: none"> <li>• Fixed Version</li> <li>• Root Cause</li> <li>• Validated Version</li> <li>• Regression Test Path (required if Regression Test Required Checkbox is checked)</li> </ul>
Closed	<ul style="list-style-type: none"> <li>• Reason Code</li> </ul> <p><b>Generated by system at Closed status:</b></p> <ul style="list-style-type: none"> <li>• Closed Date</li> </ul>
Closed & Reason Code = 'Duplicate'	<ul style="list-style-type: none"> <li>• Requires a link to a Master STAR.</li> <li>• Status of Master STAR must be 'Fixed', 'Fix Validated' or 'Closed'.</li> </ul>
Closed & Reason Code = 'Fixed'	<ul style="list-style-type: none"> <li>• Fixed Version</li> <li>• Root Cause</li> <li>• Regression Test Path (required if Regression Test Required Checkbox is checked)</li> <li>• Closed Release</li> </ul> <p><b>Generated by system at Closed status:</b></p> <ul style="list-style-type: none"> <li>• Closed Date</li> </ul>

STAR Status	Required STAR Fields
Needs Info	(none)
Deferred	(none)
Further Review Required	(none)
Release Items	(none) Do NOT use.
Complete	(none) Do NOT use.

6. For the statistics automatically calculated in STARs, review the information below:

#### Statistics Automatically Calculated in STARs

7. There are a few fields where the values are dynamically generated by the system when the described conditions as follows are met:

STAR Field	Validation Rules
Duplicate STARs	This field keeps track of the count of duplicate STARs currently linked to this Master STAR, or if this is a Duplicate STAR, the count of Duplicate STARs currently linked to its Master STAR.
Equivalent STARs	This field keeps track of the count of equivalent STARs, currently linked to this original STAR, or if this is an Equivalent STAR, the count of Equivalent STARs linked to its original STAR.
Re-Open Count	Each time a STAR has reached status of 'Fixed', 'Fix Validated', or 'Closed' and is then moved to any other STAR status, then the 'Re-Open Count' is updated with an increment of 1.



**To re-open a STAR, users should follow the agreed process of:**

- (1) Changing the STAR status from 'Fixed', 'Fix Validated', or 'Closed' to 'New' unless dictated otherwise by BU.
- (2) Filling in the Current Assignee field with the relevant owner (Initial Reviewer) of the STAR reviewing the re-opened issue.

8. For field level change control, review the information below:

#### Field Level Change Control



Alphacon job roles dictate which personnel may edit the following fields. If any of these fields are grayed out on the screen, then your job role does not include access to edit this information.

[Click here](#) for further information about which job roles may access restricted fields.


9. The list of limited fields follows:

Tab/Section	STAR Field(s)
STAR Summary	<ul style="list-style-type: none"> <li>• Asked Release</li> </ul>
BU Priority	<ul style="list-style-type: none"> <li>• Priority</li> <li>• Internal Priority</li> <li>• B4 Release Required</li> </ul>
Release Control	All fields, which include: <ul style="list-style-type: none"> <li>• Target Release Cust</li> <li>• Target Fix Date Cust</li> <li>• Target Release Int</li> <li>• Target Fix Date Int</li> <li>• Est Days Effort</li> <li>• Document Affected</li> <li>• Regression Test Required</li> <li>• DesignWare SotW</li> <li>• Release Note Required</li> <li>• Release Note Ready</li> </ul>
Fix/Close Control	All fields EXCEPT Validated Version, which include: <ul style="list-style-type: none"> <li>• Fixed Version</li> <li>• Root Cause</li> <li>• Actual Days Effort</li> <li>• Regression Test Path</li> <li>• Reason Code</li> <li>• Closed Release</li> </ul>

10. For system-generated validation messages, review the information below:

#### System-Generated Validation Messages

11. A cleanly saved STAR has a message similar to the following:




 **Info** : Transaction 9000057346 saved

when the user presses the **Save** button.

12. There are 3 other types of validation messages in CRM Web Client, which appear in a slightly different manner on the screen. These messages display issues in a STAR resulting from the STAR not meeting the validation rules described in previous sections.





The 3 types of messages begin with the following icons: , , and . These icons refer to different types of issues:



indicates missing required information. This includes all fields with a red star after them.



indicates a change of information may or may not be of special concern to the user. (For example, re-opening a STAR, may change the **Status** from **Closed** to **New**. Since this changes the re-open count, the user needs to be aware of the impact of the change.)



indicates a general message, informing you that there are no validation rule conflicts or that a STAR has been saved.



A STAR cannot be saved until the user resolves all messages other than *Transaction saved*.

**Example:** User Site and Product L2 information was not selected in this example.

## Display of Validation Messages

CRM Web Client

Home STAR Case Tech Contact Web Search BW CRM Info Help

**STAR**

3 Message(s) Page 1 of 1 Hide List

Type	Message Text	Reference
Product L2: cannot be blank. Please enter a level 2 product. Please hit Enter once to go back to edit.		
Obligatory text * Problem Description not maintained	<a href="#">Details</a>	Header Data
Enter User Site		Header Data

Show My Favorites Get STAR Number Go Open Advanced Search Settings

Create Save Change Print Remove from Favorites Help

Title\* System hangs on reboot \* indicates required field

Status\* New User Site\*

Current Assignee Contact Person

**STAR Summary**

STAR Number

Star Type\* Bug

Category\* CRASHES/HANGS

Interop Issue\* No

Occurred At\* Pre-Production Testing - Int

Customer Severity\* Medium

Asked Release

User Test Case Path

Master STAR Workaround Requested

**Product**

Product L1\* JIIP

Product L2\*

Product L3

Product L4

Release\* W-2004.1--SP

Build

Platform\* All Platforms

OS/Version

13. To handle these messages, the **User Site** must be filled in, and the **Product L2** must be selected from the drop-down.
14. Also, the text for the **Product Description** is missing. The word **Details** appears as a link on the right side of the message area, indicating a long text field.

## Highlight of Additional Validation Message Information

**STAR**

3 Message(s) Page 1 of 1 Hide List

Type	Message Text	Reference
Product L2: cannot be blank. Please enter a level 2 product. Please hit Enter once to go back to edit.		
Obligatory text * Problem Description not maintained	<a href="#">Details</a>	Header Data
Enter User Site		Header Data

15. Click this word (**Details**) to open up the *Details* screen. This appears when a long-text, required field is blank when you attempt to save the STAR.

## Details Screen

**Details**

### Diagnosis

The text type '\* Problem Description' is flagged as mandatory in Customizing for the text determination procedure. However, no long text is maintained.

### Procedure

Maintain the long text for the text type '\* Problem Description'.

16. Close the *Details* screen by clicking the X in the upper right corner of the *Details* screen.
17. To return to edit a STAR from a Validation Message other than “Transaction Saved,” review the information below:

### Returning to Edit a STAR from a Validation Message other than “Transaction Saved”

18. When a message is encountered, the system holds the STAR in Edit mode. At the same time, a system message is displayed in the system message area in the top left area of the STAR screen. Scroll/move to the field where information is missing and complete that information.

## Message Area

Type	Message Text	Reference
Product L2:	cannot be blank. Please enter a level 2 product. Please hit Enter once to go back to edit.	
Obligatory text *	' Problem Description' not maintained	<a href="#">Details</a>
Enter User Site		Header Data

19. The **Hide List** link can be selected and this hides the list of errors, showing only one error (the top-most Header Data item). It also indicates the number of errors on the right.

## Message Area - After Hide List Link Selected

Type	Message Text	Reference
Error :	Obligatory text '* Problem Description' not maintained	<a href="#">Details</a>



It is strongly recommended that you do not click the Hide List link until you have resolved all of the issues displayed. Once the Hide List link is selected, any error that is not part of the Header Data (in this example, the missing **Product L2** message) will

appear to vanish from the list, and the only 2 messages appearing will be the Header Data-related messages.

20. To prevent the creation of follow-up transactions, review the information below.

### Preventing the Creation of Follow-Up Transactions

21. Although the system allows saving a STAR with soft errors, the system prevents a STAR with errors from creating a Follow-Up transaction, such as STAR or Case.



Follow-up transactions can not be set up in CRM Web Client.



In the Win GUI version of CRM, if you press  (create follow-up transaction) for a STAR that has soft errors, the follow-up transactions options are grayed out.

22. You have completed this transaction.

### Result

You have viewed a list of Field Requirements and Messages in CRM 4.0 Web Client.

### Comments

None.