Quick Guide for implementing the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution
## Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Caution" /></td>
<td>Caution</td>
</tr>
<tr>
<td><img src="image" alt="Example" /></td>
<td>Example</td>
</tr>
<tr>
<td><img src="image" alt="Note" /></td>
<td>Note</td>
</tr>
<tr>
<td><img src="image" alt="Recommendation" /></td>
<td>Recommendation</td>
</tr>
<tr>
<td><img src="image" alt="Syntax" /></td>
<td>Syntax</td>
</tr>
</tbody>
</table>

## Typographic Conventions

<table>
<thead>
<tr>
<th>Type Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Example text</em></td>
<td>Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.</td>
</tr>
<tr>
<td>Example text</td>
<td>Emphasized words or phrases in body text, titles of graphics and tables.</td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.</td>
</tr>
<tr>
<td>Example text</td>
<td>Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.</td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.</td>
</tr>
<tr>
<td>Example text</td>
<td>Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.</td>
</tr>
<tr>
<td><code>&lt;Example text&gt;</code></td>
<td>Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.</td>
</tr>
</tbody>
</table>
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Quick Guide Implementing the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution

1 About this Quick Guide
This Quick Guide helps consultants and customer project members to implement the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution. The guide focuses on the technical implementation aspects and usage of the SAP Solution Manager. The document mentions all required steps for a successful implementation of the solution and directs you to more detailed documentation if necessary.

2 Solution Overview
SAP Portfolio Management for Innovation and Product Development rapid-deployment solution:
- Based on SAP Portfolio and Project Management 5.0 SPS07
- Supports the following processes:
  - Project Management
  - Portfolio Management for Innovation Management
  - Portfolio Management for Product Development
- Targets customers that already using SAP Project System for operative project management and financial accounting

In general we assume that the customer has a running ERP installation ECC 6.0 EhP6, which forms the basis for the ERP part of this package. Controlling Area, Company Code, Cost elements, HR mini-master are required in the corresponding ERP backend system to complete the Business Processes.

Since this package only covers the implementation of SAP PPM for Innovation and Product Development and the integration with SAP Project System, core ERP functions need to be implemented upfront.

The SAP Best Practices Baseline Packages can be used to run the core business scenarios that support the most important business needs.

3 Implementation Methodology
Overall project guidance is provided by a specific implementation roadmap, the Implementation Methodology for rapid deployment of SAP Portfolio Management for Innovation and Product Development, which is a phased, delivery-oriented methodology that streamlines research and development projects for the consumer products industry and manufacturing industries respectively.

The methodology supports project teams with templates, tools, questionnaires, and checklists, including guidebooks and accelerators to ensure the quick and pragmatic implementation of rapid-deployment solutions.

To get access to the methodology, contact your local SAP Consulting office.
4 SAP System Requirements (Administrator)

This section summarizes the prerequisites that are assumed to be delivered by the customer, that is, in a phase preceding the actual implementation project.

⚠️ Setting up the system landscape is not part of the delivery scope for the SAP rapid-deployment solution.

The customer is expected to:
- Provide the system landscape with the required software components already installed
- Enable the project team to implement and configure the scope of the rapid deployment of SAP Portfolio Management for Innovation and Product Development

Prior to installing and activating the solution, you must apply the required Support Package Stack (SPS) for the target SAP Application Server (AS), and implement the SAP Notes specified in Required SAP Notes and Messages.

4.1 SAP Software Component Installation Check

Before you can execute the rapid deployment of SAP Portfolio Management for Innovation and Product Development, the SAP project team performs a check of the software installation based on the requirements provided in this guide. Depending on the result, the SAP project team advises the customer on any missing steps that must be performed.

4.2 Required SAP Software Components

The deliverables of the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution were developed and tested in a system landscape with specific SPS levels. To run the solution, you must apply these specific or higher SPS levels.

The required software components and their support package levels are covered in the following sections.

4.2.1 SAP Best Practice Add-On

The following SAP Best Practices add-ons must be imported into the system:

<table>
<thead>
<tr>
<th>Software Component</th>
<th>Release</th>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP-ERP</td>
<td>606</td>
<td>V6</td>
<td>Use the latest version as outlined in SAP Note 1301301 Release Strategy for SAP Best Practices Package ABAP Add-ons. For more information, see the document Importing SAP Best Practices Add-Ons (ADDONINS.PDF) on the configuration DVD.</td>
</tr>
<tr>
<td>BP-CANW</td>
<td>731</td>
<td>V1</td>
<td>BS 710 Cross Appl. objects and SAP NW; installation on the SAP Portf. and Proj. Mgmt. system.</td>
</tr>
<tr>
<td>BP-SOLBLD</td>
<td>70</td>
<td>V9</td>
<td>SAP Best Practices solution builder</td>
</tr>
</tbody>
</table>
This add-on contains the SAP Best Practices solution builder application.

If your system has SAP Portfolio and Project Management installed on other system than SAP ECC system, install BP-ERP on the ERP System, BP-CANW on the SAP PPM system and BP-SOLBLD on both.

You can find additional and detailed information in the document Importing SAP Best Practices Add-Ons (ADDONINS.PDF) on the Configuration DVD (latest available DVD via SAP Note 1240936).

To download the SAP Best Practices Add-ons, go to the Software Distribution Center (SWDC) on the SAP Service Marketplace:

https://service.sap.com/swdc → Installations and Upgrades → Search for Installations and Upgrades → Search term: BP-ERP or BP-CANW or BP-SOLBLD

Regular Updates Technical Environment

The technical add-ons provided by SAP Best Practices form the technical environment required for the automated implementation of your SAP Best Practices version with Solution Builder. This technical framework is continuously updated providing enhanced, fixed, or additional technical objects required for the technical implementation process.

SAP Best Practices therefore offers updated versions of the add-ons on a regular basis. Each updated add-on replaces the previous version in your system. For more information about the currently available versions of the add-on BP-ERP and the add-on BP-SOLBLD, see SAP Note 1301301 (see also section SAP Notes and Messages of this document.)

Since the solution file and the most current installation data files always correspond to the current technical add-ons, you always have to ensure the system is at the current versions before you start the technical implementation of the SAP Best Practices version.

The update of the technical framework has no impact on scope or business content of your SAP Best Practices version as it is described in the respective documentation.

4.2.2 SAP Solution Manager

For the implementation of the solution package, a SAP Solution Manager system is recommended. SAP Solution Manager in general is needed for installing and managing maintenance certificates, Enhancement Packages and upgrades. In the context of SAP Rapid-Deployment solutions, implementation content is delivered via SAP Solution Manager templates.

It is assumed that a productive SAP Solution Manager system is available in the customer’s system landscape: if the customer is already using other SAP products (for example, SAP ERP), SAP Solution Manager should already be present in the system landscape.
Import the following content add-on corresponding to the SAP Solution Manager product version in place:

<table>
<thead>
<tr>
<th>Software Component</th>
<th>Product Version</th>
<th>SP Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ST</td>
<td>SAP Solution Manager 7.0 Enhancement Package 1</td>
<td>SP18 or higher</td>
<td>In case the SP is below 24, see SAP Note 1579267.</td>
</tr>
<tr>
<td>Or</td>
<td>SAP Solution Manager 7.1</td>
<td>SP01 or higher</td>
<td></td>
</tr>
<tr>
<td>ST-RDS 100</td>
<td></td>
<td>Always latest SP level</td>
<td>This add-on contains SAP Solution Manager content. See also SAP Notes 1686668, 1726649.</td>
</tr>
</tbody>
</table>

For more information about SAP Solution Manager (including system administration and implementation aspects described in chapters below), see the SAP Library documentation for SAP Solution Manager at [http://help.sap.com](http://help.sap.com) → Application Lifecycle Management → SAP Solution Manager, or at [http://service.sap.com/solutionmanager](http://service.sap.com/solutionmanager).

The latest available ST-RDS 100 content support package has to be downloaded from the SAP Software Download Center on SAP Service Marketplace ([http://service.sap.com/swdc](http://service.sap.com/swdc) → Installation and Upgrades → Browse our Download Catalog → SAP Rapid Deployment solutions → SAP Solution Manager Implementation Content → ST-RDS 100).

### 4.2.3 SAP Portfolio and Project Management

Before this solution can be implemented, you must set up two SAP Portfolio and Project Management systems with the system roles:

- development/quality system
- production system

You must apply the following product versions:

<table>
<thead>
<tr>
<th>Component</th>
<th>Mandatory</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Portfolio and Project Management 5.0</td>
<td>Required</td>
<td>SP 09</td>
</tr>
<tr>
<td>Business Package for SAP Portfolio and Project Management 5.0</td>
<td>Optional</td>
<td>This business package must be deployed if you want to install SAP Portfolio and Project Management on an existing SAP NetWeaver Portal.</td>
</tr>
<tr>
<td>SAP Business Suite Foundation 731</td>
<td>Required</td>
<td>SP 07</td>
</tr>
<tr>
<td>Enhancement package 1 for SAP NetWeaver 7.3</td>
<td>Required</td>
<td>SP 07</td>
</tr>
</tbody>
</table>
For more information about required support packages for SAP Portfolio and Project Management 5.0, see SAP Note 1377082.

4.2.3.1 Installation
For the installation of SAP Portfolio and Project Management 5.0, you must use the Maintenance Optimizer in SAP Solution Manager.
For more information about installing SAP Portfolio and Project Management 5.0, see SAP Note 1402752.

4.2.3.2 Front End Components
SAP GUI is required for the Customizing of the SAP Portfolio and Project Management back end. Users can access SAP Portfolio and Project Management using SAP NetWeaver Business Client or the SAP NetWeaver Portal. In the latter case it is assumed that the customer has an existing SAP NetWeaver Portal already in place.
When you use SAP Portfolio and Project Management 5.0 in SAP NetWeaver Portal, ensure that the protocol used by SAP Portfolio and Project Management to access the portal and the protocol used by the Portal to access back-end system is the same. For example, if you use HTTPS for the Portal, you must use HTTPS for SAP Portfolio and Project Management.
For usage in the SAP NetWeaver Portal, the following usage types are supported:

- SAP NetWeaver Business Client for HTML Browser
  Supported browser versions are Internet Explorer 6.1, 7.0, 8.0 and Firefox 3.5.x. For more information about supported Web browsers, see SAP Note 1098009.
- SAP NetWeaver Business Client for Desktop 3.0
  For more information about supported front end components, see SAP Note 1402912.

4.2.4 EhP6 for SAP ERP 6.0 or Higher Release
For the implementation of this solution, the customer must be using an existing SAP ECC system on release level EhP6 for SAP ERP 6.0 or higher to manage projects with an SAP Project System.
The scenario can run technically on EhP5 for SAP ERP 6.0 but is tested on the above mentioned release. Information on lower releases see below.
For the integration of SAP Portfolio and Project Management and SAP ERP without using object links, the required minimum support package stacks are as follows:

- SAP ERP 6.0 SP21
- SAP ERP 6.0 EHP2 SP11
- SAP ERP 6.0 EHP3 SP10
- SAP ERP 6.0 EHP4 SP11
- SAP ERP 6.0 EHP5 SP08
- SAP ERP 6.0 EHP6 SP05

4.3 Receiving the Software at the Correct SP Level
For delivery of the software, an installation number and a corresponding license agreement are required. An S-USER is required to order software in the Software Catalog or download from the SAP Software Download Center on SAP Service Marketplace at http://service.sap.com/swdc. You can only order unrestricted SAP software. Contact the SAP contract department to ask for a physical shipment or create a customer message on component XX-SER-GEN-CONTR.
For downloading SPSs, use the Maintenance Optimizer in SAP Solution Manager.
4.4 Required SAP Notes and Messages

Once the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution has been shipped, errors and issue may become apparent.

Before you start the configuration process, check the latest version of the SAP Note below to obtain updates and corrections for problems that do not become apparent until after shipment.

<table>
<thead>
<tr>
<th>SAP Note #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1768193</td>
<td>SAP Portfolio Management for Innovation and Product Development rapid-deployment solution</td>
</tr>
</tbody>
</table>

All SAP Notes must be applied to the system using the SAP Note Assistant (transaction SNOTE). They must have the Completely implemented status. Some SAP Notes require manual action before you set them to the Completely implemented status. Implement the following SAP Notes before proceeding with the next steps in this guide:

<table>
<thead>
<tr>
<th>SAP Note #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1377104</td>
<td>FAQs - SAP Portfolio and Project Management 5.0</td>
</tr>
<tr>
<td>1582396</td>
<td>Dump SYSTEM_ON_COMMIT_INTERRUPTED in background</td>
</tr>
<tr>
<td>1659529</td>
<td>Dump on navigating to tab 'Phases and Decisions' of item</td>
</tr>
<tr>
<td>1710197</td>
<td>Corrections for unified rendering up to SAP BASIS 731/04 Ia</td>
</tr>
<tr>
<td>1722226</td>
<td>Corrections for unified rendering up to SAP BASIS 731/04 Ia</td>
</tr>
<tr>
<td>1722812</td>
<td>UNCAUGHT_EXCEPTION when opening a project version</td>
</tr>
<tr>
<td>1725479</td>
<td>Corrections for unified rendering up to SAP BASIS 731/04 Iib</td>
</tr>
<tr>
<td>1731880</td>
<td>Corrs for unified rendering up to SAP_BASIS 731/04 IIla</td>
</tr>
<tr>
<td>1736212</td>
<td>FileUpload: File is not uploaded</td>
</tr>
<tr>
<td>1737427</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 Iva</td>
</tr>
<tr>
<td>1741713</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 IVb</td>
</tr>
<tr>
<td>1742795</td>
<td>Error when loading the graphic view (Gantt)</td>
</tr>
<tr>
<td>1743256</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 IVc</td>
</tr>
<tr>
<td>1743257</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 IV</td>
</tr>
<tr>
<td>1747016</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 Va</td>
</tr>
<tr>
<td>1752676</td>
<td>Corrections for unified rendering up to SAP_BASIS 731/04 Vb</td>
</tr>
<tr>
<td>1757115</td>
<td>Corrections to Unified-Rendering until SAP_BASIS 731/05 Ia</td>
</tr>
<tr>
<td>1765241</td>
<td>Corrections to Unified-Rendering until SAP_BASIS 731/05 Ib</td>
</tr>
<tr>
<td>1768637</td>
<td>Corrections to Unified-Rendering until SAP_BASIS 731/05 Iia</td>
</tr>
<tr>
<td>1776722</td>
<td>Corrections to Unified-Rendering until SAP_BASIS 731/05 IIIa</td>
</tr>
<tr>
<td>1776744</td>
<td>Corrections to Unified-Rendering until SAP_BASIS 731/05 III</td>
</tr>
</tbody>
</table>
With the **Customer Connection Program**, SAP delivers new features and functions for SAP Portfolio and Project Management 5.0.

Customer Connection aims at incrementally enhancing and improving the products and solutions our customers are using today.

The delivery model of Customer Connection is via Note/SP.

Features and functions delivered with Customer Connection can be switched on depending on customer needs.

More information: [https://service.sap.com/influence](https://service.sap.com/influence)

**Note 1631964 CustConn PPM: Composite SAP Note** - includes all features and functions delivered within the Customer Connection Program

### 4.5 Troubleshooting

If errors occur during the installation process, log on to the SAP Service Marketplace and search for problem-related SAP Notes.

If the problem persists, proceed as follows:

- If the problem relates to the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution pre-configuration, create a customer message for component **SV-RDS-PPM**.

- If the problem is a general one, indicate the relevant application component.

### 4.6 Related Documentation

The **Master Guide SAP Portfolio and Project Management** provides crucial information on the installation of SAP Portfolio and Project Management 5.0. Read this guide thoroughly.

The **Application Operations Guide SAP Portfolio and Project Management** provides a starting point for managing your SAP solutions and keeping them up and running optimally.

To access the latest version of these guides, see SAP Service Marketplace at http://service.sap.com/instguides → SAP Business Suite Applications → SAP PLM → Using SAP Portfolio and Project Management 5.0.

### 5 System Preparation (Administrator / Consultant)

Before implementing the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution, you must perform the configuration steps described in the following sections to set up standard system functionalities.

#### 5.1 System Preparation for Solution Implementation

##### 5.1.1 Creating User for Content Activation

**Use**

In this activity, you create a system user to run the activation of the related SAP rapid-deployment solution scope.

The solution does not supply separate roles for Customizing or setup tasks.

If necessary, use **Role Maintenance** (transaction code **PFCG**) to define a separate role corresponding to your individual IMG project, containing the authorizations required to access IMG activities required for the SAP rapid-deployment solution scope.
Alternatively, you can use the authorization profile SAP_ALL. If this authorization does not apply to your authorization concept, you should restrict the rights of the user according to your internal authorization guidelines. Without the profile SAP_ALL, issues during the activation may occur and must be solved. You can use the transaction SU53 to get information on the missing authorizations and extend the authorization data as necessary.

Directly after activation of the solution content, **remove the authorizations you have given to the system user** who performed the activation steps. This is for security reasons to avoid that the system user misuses those authorizations.

For the SAP Portfolio and Project Management rapid-deployment solution for innovation management, you only create the system users that are to be used to access the SAP ERP system using an RFC connection.

**Procedure**

1. Access the activity choosing one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP Menu</th>
<th>Tools → Administration → User Maintenance → Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>SU01</td>
</tr>
</tbody>
</table>

2. On the **User Maintenance: Initial Screen**, in the **User** field, enter `<User-ID>` and choose **Create**.

3. On the **Maintain User** screen, choose the **Address** tab.

4. Make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>User Action and Values</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last name</td>
<td><code>&lt;Last name of the user&gt;</code></td>
<td></td>
</tr>
<tr>
<td>First name</td>
<td><code>&lt;First name of the user&gt;</code></td>
<td></td>
</tr>
</tbody>
</table>

5. Choose the **Logon Data** tab.

6. Make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>User Action and Values</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Password</td>
<td><code>&lt;Enter an initial password.&gt;</code></td>
<td></td>
</tr>
<tr>
<td>User type</td>
<td>Dialog</td>
<td></td>
</tr>
</tbody>
</table>

7. Choose the **Defaults** tab.

8. Make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>User Action and Values</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logon language</td>
<td>EN</td>
<td></td>
</tr>
<tr>
<td>Decimal notation</td>
<td>1,234,567.89</td>
<td></td>
</tr>
<tr>
<td>Date format</td>
<td>DD.MM.YYYY</td>
<td></td>
</tr>
</tbody>
</table>

9. Choose the **Roles** tab.

10. Enter the user role you created that contains the necessary authorization profile.

    Alternatively, you can assign the profile **SAP_ALL** on the **Profiles** tab. Make sure that this corresponds to your internal security guidelines.

11. Save your entries.
Result
You have created a system user to activate the solution content.

5.1.2 Activating SAP Enterprise Business Functions

Use

Activating a business function changes your system irreversibly. Before activating a business function, make sure that you check the documentation for more information about the impact of a particular business function.

You must activate an Enterprise Business Function in the Switch Framework to enable the Business Context Viewer for reporting.

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SFW5</th>
</tr>
</thead>
</table>

2. On the Switch Framework: Change Business Function Status screen, select the checkbox for the following business function in the Planned Status column:

<table>
<thead>
<tr>
<th>Business Functions</th>
<th>Planned Status</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>/BCV/M O ]</td>
<td>Selected</td>
<td>FND, Business Context Viewer Main Application</td>
</tr>
</tbody>
</table>

3. Choose Activate Changes.
4. Confirm the system message.
5. Choose Back.

Result
After activating the business function, you can use the Business Context Viewer.

5.1.3 Activating Services

Use

After the installation of the Application Server ABAP (AS ABAP), all Internet Communication Framework (ICF) services are available but in an inactive state for security reasons. To call the Portfolio Management application, the required services must be activated. The complete path from the service to the root of the tree (default_host) must be active.

If you upgrade or implement a Support Package, the services may be deactivated. Therefore, check whether the services are still active after you upgrade or implement a Support Package.

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SICF</th>
</tr>
</thead>
</table>

2. On the Maintain Service screen, in the Hierarchy Type field, enter Service and choose Execute.
3. Expand each hierarchy below and activate the following services. To do so, right-click the service and choose Activate Service for each service:
   - /default_host/sap/public/icman
SAP Best Practices
Quick Guide for Implementing the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution

- /default_host//sap/public/myssocntl
- /default_host/sap/public/bc*
- /default_host/sap/public/PPM/*
- /default_host/sap/bc/nwbc*
- /default_host/sap/bc/webdynpro/bcv*
- /default_host/sap/bc/webdynpro/sap/inm_dfm_links
- /default_host/sap/bc/webdynpro/sap/inm_m_metrics_app
- /default_host/sap/bc/webdynpro/sap/inm_workcenter_app
- /default_host/sap/bc/webdynpro/sap/inm_resource_detail
- /default_host/sap/bc/webdynpro/sap/inm_timeline_mon_app
- /default_host/sap/bc/webdynpro/sap/inm_kfm_app
- /default_host/sap/bc/webdynpro/sap/inm_kfm_sel_app
- /default_host/sap/bc/webdynpro/sap/rpm_bucket_details
- /default_host/sap/bc/webdynpro/sap/rpm_decision_points_details
- /default_host/sap/bc/webdynpro/sap/rpm_item_details
- /default_host/sap/bc/webdynpro/sap/rpm_portfolio_details
- /default_host/sap/bc/webdynpro/sap/RPM_QNNR_DETAILS
- /default_host/sap/bc/webdynpro/sap/rpm_review_details
- /default_host/sap/bc/webdynpro/sap/RPM_USER_SETTING
- /default_host/sap/bc/webdynpro/rpm/CLASSIFICATION_DASH
- /default_host/sap/bc/webdynpro/rpm/ui_multiple_update
- /default_host/sap/bc/webdynpro/rpm/document_app
- /default_host/sap/bc/webdynpro/rpm/fin_cap_planning
- /default_host/sap/bc/webdynpro/rpm/obj_link_dashboard
- /default_host/sap/bc/webdynpro/rpm/port_structure_chart
- /default_host/sap/bc/webdynpro/rpm/qnnr_dashboard
- /default_host/sap/bc/webdynpro/rpm/res_mng_details
- /default_host/sap/bc/webdynpro/rpm/ui_changedoc_app

Result
You have activated all services relevant for this solution.

5.1.4 Check Delivery Customizing
SAP Portfolio Management for Innovation and Product Development rapid-deployment solution also uses standard customizing entries delivered by SAP in client 000. Please make sure, that this customizing is available in the implementation client. Either copy the client 000 or its customizing content to the implementation content. Or use the transaction /rpm/cust_copy to copy the PPM specific customizing.

This should be done before you activate the RDS content to avoid overwriting of customizing entries

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>/n/RPM/CUST_COPY</th>
</tr>
</thead>
</table>

2. On the *Delete/Restore customizing table entries* screen, enter client 000 in the *Delivery client* field.
3. Select all customizing tables and choose *Copy*.
4. If a message appears choose *Confirm*.

### 5.1.5 Setting up the Navigation for SAP Portfolio and Project Management

The following usage types are available for SAP Portfolio and Project Management:

- SAP NetWeaver Portal
- SAP NetWeaver Business Client

Depending on the usage type, you must define the following roles to enable the navigation:

<table>
<thead>
<tr>
<th>Usage Type</th>
<th>Client/Browser</th>
<th>Roles and Navigation Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP NetWeaver Portal</td>
<td>Browser (IE/Firefox)</td>
<td>PCD role in SAP NetWeaver Portal</td>
</tr>
<tr>
<td>SAP NetWeaver Business Client for HTML (NWBC for HTML)</td>
<td>Browser (IE/Firefox)</td>
<td>PFCG role in ABAP back-end system</td>
</tr>
<tr>
<td>SAP NetWeaver Business Client for Desktop (NWBC for Desktop)</td>
<td>NWBC for Desktop</td>
<td>PFCG role in ABAP back-end system</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PCD role in SAP NetWeaver Portal</td>
</tr>
</tbody>
</table>

The required configuration activities depend on the usage type you have chosen. The following sections describe settings that are relevant for both usage types and those that only apply for either EP or NWBC.

#### 5.1.5.1 Setting Up the Navigation (EP and NWBC)

##### 5.1.5.1.1 Setting Up the HTTP Server

**Use**

You set up an HTTP service to enable the SAP NetWeaver Application Server to communicate with your browser and display content.

For more information about the SAP NetWeaver Application Server, see SAP Help Portal at [http://help.sap.com](http://help.sap.com) → *SAP NetWeaver*

**Procedure**

1. Access the activity choosing one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP Menu</th>
<th>Tools → Administration → Monitor → System Monitoring → Internet Communication Manager Monitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>SMICM</td>
</tr>
</tbody>
</table>

2. On the *ICM Monitor* screen, choose *Goto* → *Services*.
3. On the *ICM Monitor - Service Display* screen, check if an HTTP or HTTPS service is available and active.
Continue with step 4 below if no HTTP or HTTPS service is available.

⚠️

Only a system administrator with experience in changing an instance profile should perform the next steps.

4. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>RZ10</th>
</tr>
</thead>
</table>

5. Enter your profile in the Profile field.

If you do not have a profile, enter the file name of the profile and choose Profile → Import to import the profile from your hard drive.

- The file name of the profile has the following naming convention: `<SID>`.<instance name>._<machine name>
- The file is located in the directory: `...usr\sap\<SID>\sys\profile`

6. Add the following new parameters:

- Parameter name: `icm/server_port_<#>`
  - `#` is a variable for a sequential number, for example, `icm/server_port_3`
  - Parameter value, for example:
    - `PROT=HTTP`
    - `PORT=1080`
    - `TIMEOUT=150`

- Parameter name: `icm/host_name_full`
  - Parameter value: `$(SAPLOCALHOST).<your enterprise.com>`

7. Save your entries.

8. To activate the HTTP service, you must restart your system.

### 5.1.5.1.2 Activating Single Roles for Portfolio Management

**Use**

A single role contains authorizations for a user to perform certain tasks. In Portfolio Management, the following standard single roles are available:

- **SAP_XRPM_USER**
- **SAP_XRPM_ADMINISTRATOR**
- **SAP_RPM_BCV_USER**

SAP_XRPM_USER and SAP_RPM_BCV_USER should be assigned to all users. SAP_XRPM_ADMINISTRATOR should be assigned to Portfolio Administrators with the authorization to, for example, create portfolios and maintain all portfolio objects.

You must generate the roles before you can activate them for Portfolio Management.

**Procedure**

1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SUPC</th>
</tr>
</thead>
</table>

© SAP AG
2. On the **Roles: Mass generation of profiles** screen, select **Roles with Non-Up-to-Date Profiles**.

3. In the **Role** field, enter the following roles:
   - SAP_XRPM_USER
   - SAP_XPRM_ADMINISTRATOR
   - SAP_RPM_BCV_USER

4. Select the **Generate Automatically** checkbox.

5. Choose **Execute**.

### 5.1.5.2 Setting up the Navigation (Only Relevant for EP)

#### 5.1.5.2.1 Defining the Navigation Area for Roles

**Use**

In this activity, you define the roles for navigation in the SAP NetWeaver Portal. You copy the standard role delivered by SAP to customer roles in the Portal Content Directory.

An example is shown below about how to create a Portal Role in SAP NetWeaver Portal. Implementing consultant is responsible for creating other required roles in the portal.

**Prerequisite**

You have administrator authorization for the Portal Content Directory.

**Procedure**

**Portfolio Manager Role**

1. Choose the following navigation option:

   | SAP NetWeaver Portal Navigation | Content Administration → Portal Content |

2. On the **Portal Content** tab, choose **Browse → Portal Content → Content Provided by SAP → End User Content → Portfolio and Project Management → Roles**.

3. Select the **Portfolio and Project Management** role, and in the context menu, choose **Copy**.

4. Select the folder to which you want to copy the role, and in the context menu, choose **Paste**.
   
   A copy confirmation opens on a separate tab.

5. Choose **Finish**.

6. On the **Browse** tab, in the context menu of the copied role, choose **Open → Object**.

7. In the **Property Editor** section, choose **Information** in the **Property Category** field and change the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Portfolio Manager</td>
</tr>
<tr>
<td>Name</td>
<td>Portfolio Manager</td>
</tr>
</tbody>
</table>

8. Save your entries.

9. In the context menu of the **Portfolio Manager** role, choose **Change ID**.
   
   An ID change confirmation opens on a separate tab.

10. Choose **Next**.
11. In the New Object ID field, enter `SAP_BPR_PPM_PORTFMGR` and choose Finish.

12. On the Browse tab, in the context menu of the Portfolio Manager role, choose Open → Object.

13. In the Portfolio Manager role structure, remove the following nodes:
   - My Portfolio Objects
   - Project Management
   - Resource Management
   - Portfolio and Project Administration
   Select a node and choose Delete.

14. From the Portfolio Management node, remove the following subnodes:
   - Overview → Portfolio Structure → Substitutes
   - Overview → Collections
   - Overview → Portfolio Initiatives
   - Overview → Attachments
   - Reports
   Select a subnode and choose Delete.

15. Navigate to the User tab and add those users who are Portfolio Managers to the role.

16. Save your entries.

5.1.5.2.2 Defining the Portal Alias

Use

In this activity, you connect the SAP Portfolio and Project Management back-end system to SAP NetWeaver Portal.

For more information about configuring a Web Dynpro application in a Portal environment, see SAP Note 945516.

Procedure

1. Choose the following navigation option:

| SAP NetWeaver Portal Navigation | System Administration → System Configuration → System Landscape |

2. On the Browse tab, in the context menu of the Portal Content node, choose New → System (from template).

   A system wizard opens on a separate tab.

   You choose a connection type depending on your system landscape. In this guide, it is assumed that you connect the back-end system by using the template SAP system using dedicated application server.

3. To create a portal system, choose a template for the system connection. Select SAP system using dedicated application server and choose Next.

4. Make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Name</td>
<td><code>SAP_RPM</code></td>
</tr>
<tr>
<td>System ID</td>
<td><code>&lt;System ID of your SAP Portfolio and Project Management system&gt;</code></td>
</tr>
</tbody>
</table>
System ID Prefix | Optional (for example, com.companyname) 
Master Language | English 
Description | SAP PPM System

5. Choose Next.

6. Choose Finish and select the Open the object for editing radio button.

7. In the Property Editor section, choose Connector in the Property Category field and create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Host</td>
<td>&lt;Application host of your SAP Portfolio and Project Management system&gt;</td>
</tr>
<tr>
<td>Logical System Name</td>
<td>&lt;PPM system ID&gt;CLNT&lt;client&gt;</td>
</tr>
<tr>
<td>Remote Host Type</td>
<td>3</td>
</tr>
<tr>
<td>SAP System Client</td>
<td>&lt;PPM system client&gt;</td>
</tr>
<tr>
<td>SAP System ID (SID)</td>
<td>&lt;PPM system ID&gt;</td>
</tr>
<tr>
<td>SAP System Number</td>
<td>&lt;PPM system number&gt;</td>
</tr>
<tr>
<td>Server Port</td>
<td>&lt;PPM system server port&gt;</td>
</tr>
</tbody>
</table>

8. In the Property Category field, choose Web Application Server and create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web AS Description</td>
<td>Web AS &lt;PPM system ID&gt;</td>
</tr>
<tr>
<td>Web AS Host Name</td>
<td>&lt;Application host of your SAP Portfolio and Project Management system&gt;</td>
</tr>
<tr>
<td>Web AS Path</td>
<td>&lt;Web AS path&gt; (for example, /sap/bc/bsp/sap)</td>
</tr>
<tr>
<td>Web AS Protocol</td>
<td>&lt;http or https&gt;</td>
</tr>
</tbody>
</table>

9. In the Property Category field, choose User Management and maintain the settings according to your user management landscape.

10. Choose Save.

11. In the Display field, choose System Aliases.

12. In the Alias Name field, enter SAP_RPM and choose Add.

13. Choose Save.

**Result**

You have set up the system connections for the SAP NetWeaver Portal.
5.1.5.3 Setting Up the Navigation (Only Relevant for NWBC)

5.1.5.3.1 Defining the Navigation Area for Roles

Use
In this activity, you define the roles for navigation in the NWBC.

An example is shown below about how to create a role for NWBC. All NWBC roles are delivered with the solution.

The following NWBC roles are delivered with this solution package and are attached to the SAP Note 1768193:

<table>
<thead>
<tr>
<th>Business Role</th>
<th>Technical Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio Admin</td>
<td>YNSAP_BPR_PPM_ADMIN</td>
</tr>
<tr>
<td>Development Manager</td>
<td>YNSAP_BPR_PPM_DEVMGR</td>
</tr>
<tr>
<td>Employee</td>
<td>YNSAP_BPR_PPM_EMPL</td>
</tr>
<tr>
<td>Portfolio Manager</td>
<td>YNSAP_BPR_PPM_PORTFMGR</td>
</tr>
<tr>
<td>Portfolio Review Board</td>
<td>YNSAP_BPR_PPM_PORTFREV</td>
</tr>
<tr>
<td>Production Manager</td>
<td>YNSAP_BPR_PPM_PRODMGR</td>
</tr>
<tr>
<td>Project Leader</td>
<td>YNSAP_BPR_PPM_PROJLEAD</td>
</tr>
<tr>
<td>Project Manager</td>
<td>YNSAP_BPR_PPM_PROJMGR</td>
</tr>
</tbody>
</table>

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>PFCG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>PFCG</td>
</tr>
</tbody>
</table>

2. On the Role Maintenance screen, choose Role → Upload.

3. Select the *.SAP file delivered with this solution (that is, YNSAP_BPR_PPM_ADMIN.SAP) and upload the role.

4. Repeat the upload for all roles.

If you need to develop your own roles follow the example given below.

Implementing consultant is responsible for creating other required roles,

Portfolio Manager Role
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>PFCG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>PFCG</td>
</tr>
</tbody>
</table>

2. On the Role Maintenance screen, choose role SAP_BPR_PPM in the Role field.

3. To create a copy, choose Copy Role.

4. In the Query dialog box, enter YNSAP_BPR_PPM_PORTFMGR as name of the target role.

5. Choose Copy All

6. On the Role Maintenance screen, enter role YNSAP_BPR_PPM_PORTFMGR and choose change button.
7. On Change Roles screen, change the description of the role. Enter SAP Portfolio and Project Management PFCG role for NWBC for Portfolio Manager.

8. On the Menu tab, remove the following nodes:
   - My Portfolio Objects
   - Project Management
   - Resource Management
   - Portfolio and Project Administration
   Select a node, right click and in the context menu, choose Delete File.

9. From the Portfolio Management node, remove the following subnodes:
   - Overview → Portfolio Initiatives
   - Overview → Collections
   - Overview → Services → Substitutes
   - Reports
   Select a subnode, right click and in the context menu, choose Delete File/Delete Node.

10. On the User tab, add those users who are Portfolio Managers to the role.

11. Save your entries.

5.1.5.3.2 Updating Roles

Use
You must update the newly created roles before they become active in the user profiles.

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SUPC</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPC</td>
<td></td>
</tr>
</tbody>
</table>


3. In the Role field, enter YNSAP_BPR_PPM*.

4. Select the Generate Automatically checkbox.

5. Choose Execute.

5.1.6 Setting Default Timeout for HTTP and HTTPS Services

Use
We recommend that you set a timeout of 300 or 600 (seconds) for the TIMEOUT and PROCTIMEOUT services. The default is 60.

Procedure
1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>RZ10</th>
</tr>
</thead>
<tbody>
<tr>
<td>RZ10</td>
<td></td>
</tr>
</tbody>
</table>

2. On the Edit Profiles screen, enter your instance profile.

3. In the Edit Profile box, select the Extended maintenance radio button and choose Change.

4. On the Maintain Profile screen, make the following entries:
### 5.1.7 Configuring the Print Environment

#### Use
Adobe Document Services are the prerequisites to print from the SAP Portfolio and Project Management dashboard or to print graphics from the Business Context Viewer.

It is assumed that for the rapid deployment of SAP Portfolio Management for Innovation and Product Development you have already configured Adobe Document Services for printing in your landscape.

In this activity, you connect the SAP Portf. and Proj. system to an existing ADS.

#### Prerequisites
An installation of the Adobe Document Services (ADS) is required for printing. For more information about setting up ADS, see SAP Note 894009.

#### Procedure
1. To activate the service for printing, access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SICF</th>
</tr>
</thead>
</table>

2. On the Maintain Services screen, choose Service in the Hierarchy Type field and choose Execute.

3. Expand the tree and select default_host/ sap/bc/fp. Choose Service/Host → Activate.

4. Exit the transaction.

5. To create an ADS connection for PDF printing, access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SM59</th>
</tr>
</thead>
</table>

6. On the Configuration of RFC Connections screen, choose Create.

7. On the RFC Destination screen, make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFC Destination</td>
<td>ADS</td>
</tr>
<tr>
<td>Connection Type</td>
<td>G</td>
</tr>
<tr>
<td>Description</td>
<td>ADS for Printing</td>
</tr>
</tbody>
</table>

8. Choose Enter.
9. On the **Technical Settings** tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Host</strong></td>
<td>&lt;Target host ADS server&gt;</td>
<td>Host name of the J2EE Engine running the Adobe document services, or the SAP Web Dispatcher, if applicable.</td>
</tr>
<tr>
<td><strong>Service Number</strong></td>
<td>&lt;Service number of ADS server&gt;</td>
<td>HTTP port number of the target host you have specified. The following naming convention applies: 5&lt;J2EE_instance_number&gt;00 (50000, for example, if your J2EE instance is 00).</td>
</tr>
<tr>
<td><strong>Path Prefix</strong></td>
<td>/AdobeDocumentServices/Config?style=rpc</td>
<td></td>
</tr>
</tbody>
</table>

10. On the **Logon & Security** tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic Authentication</strong></td>
<td>X</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>ADSUser</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>&lt;Password of ADSUser&gt;</td>
</tr>
<tr>
<td><strong>Client</strong></td>
<td>&lt;ERP client&gt;</td>
</tr>
</tbody>
</table>

11. Save your RFC destination.
    You can test the RFC connection by choosing **Connection Test**.

### 5.1.8 Activating the ALV Table PDF Export

**Use**

In this scenario, a PDF file is generated using the Adobe Document Services (ADS).

**Prerequisites**

A separate AS Java with Usage Type BI Java (and thus also Usage Type EP) is set up in your system landscape which is connected to the AS Java on which ADS runs.

You have configured the ADS. For more information about setting up a web service destination for ADS, see the Customizing for **SAP NetWeaver** under **Application Server** → **SAP List Viewer (ALV)** → **Set-Up Printing for Web Dynpro ABAP ALV** → **Set-Up Web Service Destination for Adobe Document Services**.

**Procedure**

#### 5.1.8.1 Create an RFC Destination in AS Java

1. Open the Visual Administrator and choose
   - Windows: the directory `<drive>\usr\sap\<SID>\JC <INSTANCE>\ j2ee\admin`
   - Unix: the directory `/usr/sap/<SID>/JC <INSTANCE>/j2ee/admin`
2. Double-click the file `go.bat`.
3. On the **Visual Administrator** logon screen, select the connection to the instance and choose **Connect**.
4. Enter the connection password.
5. In the directory, choose `<SID>/Server<#>/Services/Jco RFC Provider`.

6. Create a new RFC destination with the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program ID</td>
<td><code>&lt;PORTAL_HOSTNAME&gt;_PORTAL_&lt;SID&gt;</code></td>
<td></td>
</tr>
<tr>
<td>Gateway Host</td>
<td><code>&lt;GATEWAY_HOST&gt;</code></td>
<td>AS ABAP gateway of the SAP PPM system</td>
</tr>
<tr>
<td>Gateway Service</td>
<td><code>sapgw&lt;SYSTEM_NUMBER&gt;</code></td>
<td>System Number of the SAP PPM system</td>
</tr>
<tr>
<td>Number of Processes</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Application Server Host</td>
<td><code>&lt;GATEWAY_HOST&gt;</code></td>
<td>AS ABAP gateway of the SAP PPM system</td>
</tr>
<tr>
<td>System Number</td>
<td><code>&lt;SYSTEM_NUMBER&gt;</code></td>
<td>System Number of the SAP PPM system</td>
</tr>
<tr>
<td>Client</td>
<td><code>&lt;CLIENT&gt;</code></td>
<td>Client of the SAP PPM system</td>
</tr>
<tr>
<td>Language</td>
<td>EN</td>
<td></td>
</tr>
<tr>
<td>User</td>
<td><code>&lt;User&gt;</code></td>
<td>User in the SAP PPM system with authorization profile S_RFC</td>
</tr>
<tr>
<td>Password</td>
<td><code>&lt;Password&gt;</code></td>
<td>Password of the user in the SAP PPM system</td>
</tr>
</tbody>
</table>

7. To add the RFC destination to the available RFC destinations, choose Set.

8. To start the RFC server, choose Start.

### 5.1.8.2 Create an RFC Destination in AS ABAP

1. Access the activity using the following navigation option:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SAP IMG Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPRO</td>
<td>SAP NetWeaver → Application Server → SAP List Viewer (ALV) → Set-Up Printing for Web Dynpro ABAP ALV → Create an RFC Destination in AS ABAP</td>
</tr>
</tbody>
</table>

2. On the Configuration of RFC Connections screen, choose Create.

3. On the RFC Destination screen, make the following entries:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFC Destination</td>
<td><code>SALV_WD_EXPORT_PDF</code></td>
</tr>
<tr>
<td>Connection Type</td>
<td>T</td>
</tr>
<tr>
<td>Description</td>
<td>PDF Generation for ALV Table Export</td>
</tr>
</tbody>
</table>

4. Choose Enter.

5. On the Technical Settings tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activation Type</td>
<td>Registered Server Program</td>
<td></td>
</tr>
</tbody>
</table>
Program | <PORTAL_HOSTNAME>_PORTAL_<SID> | Program ID defined in the RFC destination on the AS Java
---|---|---
Gateway Host | <GATEWAY_HOST> |  
Gateway Service | sapgw<SYSTEM_NUMBER> |  

6. Save your RFC destination. 
You can test the RFC connection by choosing *Connection Test.*

### 5.1.9 Set Webdynpro Parameter

**Use**

Depending the set-up of the SAP Portfolio and Project Management system in the overall system landscape it could be that the alignment of text is not properly processed. Therefore you can set a Webdynpro parameter to control the system parameter.

**Procedure**

1. Access the activity using the following navigation option:

```
Transaction Code | SE80

SAP Menu | SAP Menu → Tools → ABAP Workbench → Overview → Object Navigator
```

2. Select *Edit Object* and select the tab *Web Object.*

3. Search for Webdynpro Application in the filed Web Dynpro Applicat. Insert the value *RPM_ITEM_DETAILS.*

4. Go to tab *Parameters* and in change mode add the Parameter *WDSTYLE_LABELALIGNMENT.*

5. Enter *Left* in the column Value.

6. Save your entries.

### 5.1.10 Activating Change Documents

**Use**

You activate change documents for the following objects:

- Portfolio
- Buckets
- Items
- Reviews

**Procedure**

1. Access the activity using the following navigation option:

```
Transaction Code | SPRO
```
2. On the *Activate Change Documents* screen, choose *New Entries* and create the following settings:

<table>
<thead>
<tr>
<th>Appl.</th>
<th>Object Type</th>
<th>ChangeDocuments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPM</td>
<td>RBH</td>
<td>X</td>
</tr>
<tr>
<td>PPM</td>
<td>RIH</td>
<td>X</td>
</tr>
<tr>
<td>PPM</td>
<td>RPH</td>
<td>X</td>
</tr>
<tr>
<td>PPM</td>
<td>EPO</td>
<td>X</td>
</tr>
<tr>
<td>PPM</td>
<td>RVO</td>
<td>X</td>
</tr>
</tbody>
</table>

3. Save your entries.

### 5.1.11 Activate Mail Notifications for Item and Decision Point Status Changes

**Use**
A mail is to be sent out to the stakeholders whenever the status of a decision point changes.

**Prerequisite**
An e-mail address is maintained for the users that are to receive the mail notification. You have configured a user for executing the workflow that has sufficient authorization to send mail notifications.

You have configured the e-mail services using SMTP for your SAP Portfolio and Project Management system. For more information, see SAP Note 455140.

**Procedure**

#### 5.1.11.1 Automatic Workflow Customizing

1. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SWU3</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Menu</td>
<td>Tools → Business Workflow → Development → Utilities → Automatic Workflow Customizing</td>
</tr>
</tbody>
</table>

2. Read carefully through the documentation displayed and create all prerequisites

⚠️

The user carrying out the workflow customizing should have sufficient authorizations to create RFC connections and workflow user (WF_Batch)

3. Choose from the Menu *Auto customizing – Execute (F9)*.

#### 5.1.11.2 Activate Portfolio and Project Management Workflows

1. Access the activity using the following navigation option:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SPRO</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Menu</td>
<td>Tools → Business Workflow → Development → Utilities → Activate Change Documents</td>
</tr>
</tbody>
</table>
2. On the Task Customizing Overview screen, choose SAP → PPM → PPM-PFM in the tree and choose Activate event linking.

3. On the Event Linkage: Triggering events screen, choose WS 00800006 and expand the node.

4. To activate the workflow for the event CL_RPM_DECISION-DECISION_POINT_STATUS_CHG,

5. Click the Deactivated pushbutton. The status changes and the workflow is activated.

6. Repeat step from 3 to 5 for WS 00800008 ( CL_RPM_PROJECT_ITEM_STATUS_CHANGED)

7. Go back to the IMG structure.

8. Access the activity using the following navigation option:

9. On the Map object types and activity types relevant for workflow screen, choose New Entries and create the following settings:

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Activity</th>
<th>Workflow ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPO Decision Point</td>
<td>Admin</td>
<td>Item Decision Point Status Change Workflow</td>
</tr>
<tr>
<td>RIH Item Details</td>
<td>Admin</td>
<td>Item Status Change Workflow</td>
</tr>
</tbody>
</table>

10. Save your entries and go back.

5.1.11.3 Make Settings for Sending E-Mail Notifications

1. Access the following transaction:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SCOT</th>
</tr>
</thead>
</table>

2. Double-click SMTP.

3. In the dialog box SAPconnect: General node data of node SMTP, next to the Internet checkbox, choose Set.

4. In the dialog box SAPconnect: Address type for node, in the Business Object/Link field, choose HTM as output format for SAP documents.

5. Choose Continue twice.

6. Save your entries.

Result

You have configured to send e-mails for decision point status changes and Item status changes.

The consultant defines which status changes trigger the e-mail notifications. For more information, see the Configuration Guide.

5.1.12 Configuring the Business Context Viewer

Use
The Business Context Viewer is used to display graphics in the context of the portfolio. For rendering graphics the Business Context Viewer requires the Internet Graphics Server to be configured.

**Prerequisites**

You have activated the business function /BCV/MAIN.

**Procedure**

1. Access the following transaction:

   | Transaction Code | SQ01 |

2. On the Query from User Group <User Group Name>: Initial Screen, select the user group /RPM/BCV_USR.

3. Generate the following queries choosing Query → More Functions → Generate Program:

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUE_BUCK_FD</td>
<td>Bucket Financial Data</td>
</tr>
<tr>
<td>QUE_BUC_FD_T</td>
<td>Bucket Financial Data by Timeline</td>
</tr>
<tr>
<td>QUE_BUD_VAR</td>
<td>Item Budget Variance</td>
</tr>
<tr>
<td>QUE_CAP_PLAN</td>
<td>InfoSet Query to get Capacity Planning data</td>
</tr>
<tr>
<td>QUE_FIN_PLAN</td>
<td>InfoSet Query to get Financial Planning data</td>
</tr>
<tr>
<td>QUE_ITEMS</td>
<td>InfoSet Query to get Item Data for Reporting</td>
</tr>
<tr>
<td>QUE_ITEMS_C</td>
<td>InfoSet Query to get Item Data – Cmplx. Column Chart</td>
</tr>
<tr>
<td>QUE_ITEMS_G</td>
<td>InfoSet Query to get Item Data – Cmplx. Gantt Chart</td>
</tr>
<tr>
<td>QUE_ITEM_FD</td>
<td>Item Financial Data</td>
</tr>
<tr>
<td>QUE_ITEM_FD_T</td>
<td>Item Financial Data by timeline</td>
</tr>
<tr>
<td>QUE_PHASES</td>
<td>InfoSet Query to get Phase/Decision Point Data</td>
</tr>
<tr>
<td>QUE_PHASES_G</td>
<td>InfoSet Query to get Phase/Dec Pt. Data – Cmplx Gantt Chart</td>
</tr>
<tr>
<td>QUE_PLAN_ACT</td>
<td>Item Financial Analysis: Plan versus Actual Cost</td>
</tr>
<tr>
<td>QUE_PRJ_COST</td>
<td>InfoSet Query to get Financial Project Costs Data</td>
</tr>
<tr>
<td>QUE_PRJ_COST_C</td>
<td>InfoSet Query to get Fin. Costs Data – Cmplx. Column Chart</td>
</tr>
</tbody>
</table>

4. On the Query from User Group <User Group Name>: Initial Screen, select the user group DPR_USER_G.

5. Generate the following queries choosing Query → More Functions → Generate Program:

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPR_QUE_BUAV</td>
<td>Business Partner Availability</td>
</tr>
<tr>
<td>DPR_QUE_BUST</td>
<td>Business Partner Staffing</td>
</tr>
<tr>
<td>DPR_QUE_COBU</td>
<td>Confirmation with Business Partner Data</td>
</tr>
<tr>
<td>DPR_QUE_COPA</td>
<td>Confirmation Plan Actual</td>
</tr>
<tr>
<td>DPR_QUE_COPR</td>
<td>Project Confirmation</td>
</tr>
<tr>
<td>DPR_QUE_RODE</td>
<td>Role Demand</td>
</tr>
</tbody>
</table>
6. Access the activity using the following navigation option:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SAP IMG Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPRO</td>
<td>Cross-Application Components → Processes and Tools for Enterprise Applications → Business Context Viewer → User Interface → Define Dashboards</td>
</tr>
</tbody>
</table>

7. On the Dashboard screen, select the entry with context key RPM_ITEM_FPA and dashboard key 1RPM_D_FIN_ANLYS.

8. Choose Delete.

9. Save your entries.

10. To display the graphics in the Business Context Viewer you must create an RFC Destination for the Internet Graphics Server. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SAP IMG Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>SM59</td>
<td></td>
</tr>
</tbody>
</table>

11. To create an RFC connection, choose Create.

12. On the RFC Destination screen, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFC Destination</td>
<td>IGS_RFC_DEST</td>
</tr>
<tr>
<td>Connection Type</td>
<td>T</td>
</tr>
<tr>
<td>Description</td>
<td>Generated RFC destination for IGS</td>
</tr>
</tbody>
</table>

13. Choose Enter.

14. On the Technical Settings tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activation Type</td>
<td>Registered Program</td>
</tr>
<tr>
<td>Program ID</td>
<td>IGS.&lt;PPM System ID&gt;</td>
</tr>
</tbody>
</table>

15. Save your RFC destination.

You can test the RFC connection by choosing Connection Test.

### 5.1.13 OPTIONAL - Configuration for SAP BusinessObjects Explorer Integration

**Use**

You can export dashboards from SAP Portfolio and Project Management to the SAP BusinessObjects Explorer. For this, you must create an RFC connection and set the SAP BusinessObjects Explorer system as target destination in the Customizing.

**Prerequisites**

You have already installed an SAP BusinessObjects Explorer system in your landscape or you are using the SAP BusinessObjects BI OnDemand solution.

**Procedure**
5.1.13.1 Update Certificates and SICF

1. Access the following transaction:

| Transaction Code | STRUST |

2. On the Trust Manager screen, select the SSL client in the navigation tree.
3. Choose Import Certificate and enter the certificate of the SAP BusinessObjects Explorer system.

   Example:
   
   CN=UTN-USERFirst-Hardware
   OU=http://www.usertrust.com
   O=The USERTRUST Network
   L=Salt Lake City
   SP=UT
   C=US for bi.ondemand.com

5. Save your entries.

5.1.13.2 Define Client Proxy Settings

1. Access the following transaction:

| Transaction Code | SICF |

2. On the Maintain Service screen, enter Service in the Hierarchy Type field and choose Execute.
3. Go to Client → Proxy Settings.
4. In the dialog box, on the Global Settings tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proxy Setting is Active</td>
<td>X</td>
</tr>
<tr>
<td>No Proxy for Local Server</td>
<td>X</td>
</tr>
<tr>
<td>No Proxy for the Following Addresses</td>
<td>*.&lt;company&gt;.&lt;com&gt;</td>
</tr>
</tbody>
</table>

5. On the HTTP Log tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Name</td>
<td>&lt;ProxyName&gt;</td>
</tr>
<tr>
<td>Port</td>
<td>&lt;ProxyPort&gt;</td>
</tr>
<tr>
<td>User Name</td>
<td>Empty or Domain User</td>
</tr>
<tr>
<td>Password</td>
<td>Empty or Domain Logon</td>
</tr>
</tbody>
</table>

6. On the HTTPS Log tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Name</td>
<td>&lt;ProxyName&gt;</td>
</tr>
<tr>
<td>Port</td>
<td>&lt;ProxyPort&gt;</td>
</tr>
<tr>
<td>User Name</td>
<td>Empty or Domain User</td>
</tr>
</tbody>
</table>
Password | Empty or Domain Logon

7. Choose Execute.
8. Save your entries.

5.1.13.3 Restart ICM

1. Access the following transaction:

| Transaction Code | SMICM |

2. On the ICM Monitor screen, choose Administration → ICM → Restart → Yes.

5.1.13.4 Create Connection to SAP BusinessObjects Explorer System

1. Access the following activity:

| Transaction Code | SM59 |

2. To create an RFC connection, choose Create.
3. On the RFC Destination screen, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFC Destination</td>
<td>&lt;SAP BO ExplorerSystem&gt; (for example, SAP_BI_ONDEMAND)</td>
</tr>
<tr>
<td>Connection Type</td>
<td>G</td>
</tr>
<tr>
<td>Description</td>
<td>SAP BusinessObjects Explorer</td>
</tr>
</tbody>
</table>

4. Choose Enter.
5. On the Technical Settings tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target host</td>
<td>&lt;Target host of SAP BusinessObjects Explorer system&gt; (for example, bi.ondemand.com)</td>
</tr>
<tr>
<td>Service number</td>
<td>&lt;HTTPS port of SAP BusinessObjects Explorer system&gt; (for example, 443)</td>
</tr>
<tr>
<td>Path Prefix</td>
<td>&lt;Path Prefix&gt;, if required (for example, /)</td>
</tr>
</tbody>
</table>

6. On the Logon & Security tab, create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logon Procedure</td>
<td>No Logon</td>
</tr>
<tr>
<td>SSL</td>
<td>Active</td>
</tr>
<tr>
<td>SSL Certificate</td>
<td>&lt;SSL certificate as defined in transaction STRUST&gt;</td>
</tr>
</tbody>
</table>

7. Save your RFC destination.
   You can test the RFC connection by choosing Connection Test.

5.1.13.5 Activate SAP BusinessObjects Explorer Integration in Customizing

1. Access the activity using one of the following navigation options:

| Transaction Code | SPRO |

© SAP AG
2. On the Settings Value (Customizing) screen, choose New Entries and create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
<td>0007</td>
</tr>
<tr>
<td>Name</td>
<td>0028</td>
</tr>
<tr>
<td>Settings Value</td>
<td>&lt;Name of the RFC destination of the SAP BusinessObjects Explorer system&gt;</td>
</tr>
</tbody>
</table>

3. Save your entries.

Result

You have configured the settings to integrate the dashboards with SAP BusinessObjects Explorer.

5.1.14 OPTIONAL - Configuring the Call-Up of the Online Help (SAP Library)

Use

SAP Portfolio and Project Management supports the following online help (SAP Library) variants:

- **PlainHtmlHttp**
  The help files are installed on a Web server.

- **PlainHtmlFile**
  The help files are installed in a directory on a file server, which facilitates general access.

- **DynamicHelp**
  The files are accessed via the Knowledge Warehouse Server.

Prerequisites

The table HLPRESOL contains no entries. You have maintained the entry OTHER_RELEASE in the IWBSETTING table, or you have created the entry if it did not yet exist. For more information, see SAP Note 684431.

5.1.14.1 Installation of the Online Help for the Variants PlainHtmlHttp and PlainHtmlFile

1. Navigate to the file system of your Web server or file server and create a new directory (for example, <Drive>/SAPHelp/PlainHTML/helpdata). This directory is the root directory of the help installation.

2. In this directory, create a new folder for the English language version with the name EN.

   If you have already installed the online help for the Web Application Server (WAS) 7.00 as a PlainHtmlHttp or PlainHtmlFile variant, you do not have to create any new directories on the Web server or the file server. You can then use the existing directory structure of this installation. You can ignore any warning messages regarding the overwriting of existing files when you later copy help files to the directory structure.
3. Copy the files from the `plainhtml` document package of SAP Portfolio and Project Management into the EN folder.

4. Create a virtual directory on your Web server or file server, or release a directory and link this directory to the root directory of the help installation in the file system. For more information, see the help for your Web server or file server. The root directory of the help installation can now be viewed under the name that you assigned to the virtual directory or the released directory (for example, `saphelp`).

5. **Installation of the Online Help for DynamicHelp Variant**

The files for installing the application help on a Knowledge Warehouse Server are located in the document package you download for SAP Portfolio and Project Management into the corresponding language directory located in the htmlhelp directory. For more information about installation, see the `Import of SAP KW Contents` section in the following documents on SAP Service Marketplace:


5.1.14.3 Configuration in SAP NetWeaver 7.31

1. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SPRO</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP IMG Menu</td>
<td>SAP NetWeaver → General Settings → Setting Variants for Help (SAP Library)</td>
</tr>
</tbody>
</table>

2. On the Administration: Display of the SAP Library screen, choose New Entries and create the following settings:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variant</td>
<td><code>&lt;PPM_Docu_EN&gt;</code></td>
</tr>
<tr>
<td>Platform</td>
<td>None</td>
</tr>
<tr>
<td>Area</td>
<td>IWBHELP</td>
</tr>
</tbody>
</table>
   | Server     | For PlainHtmlHttp: Name of the Web server, and if necessary, include the domain and port of the server (this is only necessary if the port is not the default Http port 80).  
               For PlainHtmlFile: Not relevant  
               For DynamicHelp: This is copied from the configuration of the Knowledge Warehouse Server. |
Result
You can now use the help links to display the documentation.

5.2 System Preparation for Integration with SAP ECC System

5.2.1.1 Defining the Web Server Alias

Use
You define a Web Server Alias for the SAP ERP system, which enables you to call up transactions directly from the Portfolio Management application.

Procedure

1. Access the activity using the following navigation option:

<table>
<thead>
<tr>
<th>Transaction Code</th>
<th>SAP IMG Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPRO</td>
<td>SAP Portfolio and Project Management → Portfolio Management → Base System Interfaces → Application Object Settings → Define Web Server Alias</td>
</tr>
</tbody>
</table>

2. On the Alias for the Web Server of an SAP Transaction screen, choose New Entries and create the following settings:

<table>
<thead>
<tr>
<th>Web Server Alias</th>
<th>Web Server Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;ERP system ID&gt;CLNT&lt;client&gt; (for example, CS7CLNT200)</td>
<td>Web Server Address for HTML GUI (for example, <a href="HTTP://CS7CLNT200:50027/SAP/BC/GUI/SAP/ITS/WEBGUI?SAP-CLIENT=004">HTTP://CS7CLNT200:50027/SAP/BC/GUI/SAP/ITS/WEBGUI?SAP-CLIENT=004</a>)</td>
</tr>
</tbody>
</table>

3. Save your entries.

5.2.2 Prerequisites and Assumptions for ECC configuration settings

Use
For consistent integration between ECC and Portfolio and Project Management, some fundamental ECC configurations must be set up as prerequisites.
5.2.2.1 Controlling Area & Company Code

Use
This step ensures that the Portfolio and Project Management required Controlling Areas and Company Codes are defined and configured in the corresponding ERP backend system.

Procedure
1. To define the Controlling Area:

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
<th>IMG ➔ Enterprise Structure ➔ Definition ➔ Controlling ➔ Maintain Controlling Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>OX06</td>
</tr>
</tbody>
</table>

This step validates that the Portfolio and Project Management required Controlling Area is defined in the ECC backend system.

1. To define the Company Code:

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
<th>IMG ➔ Enterprise Structure ➔ Definition ➔ Financial Accounting ➔ Edit, Copy, Delete, Check Company Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>EC01</td>
</tr>
</tbody>
</table>

This step validates that the Portfolio and Project Management required Company Codes are defined in the ECC backend system.

1. To maintain the Controlling Area and Company Code assignment.

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
<th>IMG ➔ Enterprise Structure ➔ Assignment ➔ Controlling ➔ Assign company code to controlling area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>OX19</td>
</tr>
</tbody>
</table>

This step validates that the Portfolio and Project Management required Company Codes are assigned to the corresponding Controlling Area in the ECC backend system.

5.2.2.2 Project Profile

Use
This step is to ensure that the Portfolio and Project Management required Project Profile for automation has been configured in ECC backend system with correct organization level settings.

Procedure
1. To maintain Project Profile CPR0001 as required by the Portfolio and Project Management solution automation, access the transaction using one of the following methods:

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
<th>IMG ➔ Project System ➔ Structures ➔ Operative Structures ➔ Work Breakdown Structure (WBS) ➔ Create Project Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>OPSA</td>
</tr>
</tbody>
</table>
2. Select entry CPR0001.
3. Choose the Organization tab.
4. Validate the assigned Controlling Area and Company Code as required by the Portfolio and Project Management solution. Otherwise, you may encounter errors when triggering project creation automatically from Portfolio and Project Management to ECC.

5.3 General Client Settings

5.3.1 Deselecting Activation Links in BC Sets

We recommend that you turn off the creation of activation links. By doing this, you can significantly increase activation speed and avoid errors.

Procedure

1. Run the following activity:

<table>
<thead>
<tr>
<th>SAP Menu</th>
<th>Tools → Customizing → Business Configuration Sets → Activation of BC Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>SCPR20</td>
</tr>
</tbody>
</table>

3. Choose Change (Shift + F1).
4. In the Activation section, select the radio button for Do Not Create parameter.
5. Choose Enter on the information message.
6. Save your settings.

5.3.2 SAP Scripting

Use
eCATTs are used to automate the activation of SAP Portfolio Management for Innovation and Product Development rapid-deployment solution configuration settings. Prior to activation, you must allow eCATT processing in the system by setting the profile parameter sapgui/user_scripting. The value for Enable or disable user scripting on the front-end must be set true.

Procedure

1. Run the following activity:

   | Transaction Code | RZ11 |

2. On the Maintain Profile Parameters screen, make the following entries

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
<th>User action and values</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Param. Name</td>
<td>Profile parameter name</td>
<td>sapgui/user_scripting</td>
<td></td>
</tr>
</tbody>
</table>

3. Choose Display.
4. On the Display Profile Parameters Attributes screen, select Change values.
5. On the Change Parameter Value screen, make the following entries.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
<th>User action and values</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Value</td>
<td>New Value for user scripting</td>
<td>TRUE</td>
<td>Enable SAP Scripting</td>
</tr>
</tbody>
</table>

6. Choose Save.
When you save the change, the window closes and the current value of the parameter changes to TRUE. This change only becomes effective when you log on to the system again.

If the parameter is set in **RZ11**, you lose the change when you restart the server.

### 5.4 Prepare system user for Content Activation

#### 5.4.1 SAP Software Change Registration (SSCR): Developer Key

The user ID used for activation must be registered as developer on SAP Service Marketplace (SAP Software Change Registration (SSCR)). For more information, see SAP Note 86161. The SSCR developer key is needed, because the user ID used for SAP Portfolio Management for Innovation and Product Development rapid-deployment solution activation creates and changes objects from the customer name range during the SAP rapid-deployment solution activation process. If the SAP rapid-deployment solution activation user is not registered as a developer, the automated SAP rapid-deployment solution activation incurs errors.

**Procedure**

2. On the SAP Software Change Registration (SSCR) start page, you get the detailed user documentation on how to proceed to get the SSCR developer key.

An SSCR developer key is a 20 character combination of digits that is queried when an SAP ERP user tries to create or change an object from the customer name range FOR THE FIRST TIME. The prompting message for the developer key appears once for each SAP ERP user; if registration is successful, this SAP ERP user is no longer prompted to enter a developer key. The SSCR developer key is generated from the installation number of the affected installation and the SAP ERP user name.

#### 5.4.2 Activation Language

Make sure that your logon language is always *English* (and NOT your local language) for all activation activities.

#### 5.4.3 User Settings for Activation

For activation, we recommend that only one User ID be used to activate the SAP Rapid-Deployment Solution. It can be a tedious procedure to change ownership of the activation of the solution.

Make sure that you only have **one single SAP GUI session running** when you activate SAP Best Practices. If you run several SAP GUI sessions, some automated installation activities might run into errors.

#### 5.4.4 Deactivate Info Dialog Box on Dynpro Size Check

**Use**

To prevent the dialog box *Sizing conflicts may appear* from appearing during activation, you can deactivate the screen size check.
Procedure for GUI Version Below 720

4. Log on with the user in the system.
5. Choose the first button on the right of the standard toolbar (*Customize Local Layout*) or choose **ALT + F12**.
6. Choose the *Options* menu item.
7. Choose the *SAP Internal* node.
8. Choose the *SAP Internal* page.
9. Deselect the *Enable Dialog Box for Dynpro Size Check* checkbox.
10. Choose **OK**.

Procedure for GUI Version 720 and Above

11. Log on with the user in the system.
12. Choose the first button on the right of the standard toolbar (*Customize Local Layout*) or choose **ALT + F12**.
13. Choose the *Options* menu item.
14. Choose the *SAP Internal* node.
15. Choose *SAP Internal*.
16. Deselect the *Enable Dialog Box for Screen Size Check* checkbox.
17. Choose **OK**.

5.4.5 Unicode Settings

Use

Before each user logs on to the system for the first time, the user’s local GUI must be set to use the Unicode code page.

Procedure

1. From the SAP Logon pad, select your system ID.
2. Choose the *Change Item* button.
3. On the *System Entry Properties* dialog box, choose the *Code Page* tab.
4. On the *Encoding* dropdown, select *Unicode (UTF-8)*.
5. Choose **OK**.

5.4.6 Allow GUI Scripting

Use

Perform this activity to enable eCATTs GUI scripts to be executed with your GUI.

Procedure for GUI Version Below 720

18. Log on to the system.
19. Choose the first button on the right side of the standard toolbar (*Customizing of Local Layout*) or choose **ALT + F12**.
20. Select the menu item *Options*.
21. Choose the *Scripting* tab.
22. Select the *Enable scripting* checkbox.
23. Deselect the checkboxes Notify When a Script Attaches to a Running GUI and Notify When a Script opens a Connection.

24. Choose OK.

**Procedure for GUI 720 and Above**

25. Log on to the system.

26. Choose the first pushbutton on the right of the standard toolbar (Customize Local Layout) or press ALT + F12.

27. Choose the Options menu item.

28. Choose the Accessibility & Scripting node.

29. Select the Scripting page.

30. Select the Enable scripting checkbox.

31. Deselect the checkboxes Notify When a Script Attaches to a Running GUI and Notify When a Script Opens a Connection.

32. Choose OK.

**Result**

You are now able to use your GUI to execute eCATTs GUI scripts in the system.

5.4.7 Set Decimal Notation and Date Format

**Use**

Perform this activity to set up the activation user ID.

**Procedure**

1. Run the following activity:

<table>
<thead>
<tr>
<th>SAP Menu</th>
<th>Transaction Code</th>
<th>System → User Profile → Own Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>SU3</td>
<td>SU3</td>
<td></td>
</tr>
</tbody>
</table>

2. Choose the Defaults tab.

3. Make sure you set Decimal Notation according to your country’s default, such as 1.234.567,89.

4. Make sure you set Date Format according to your country’s default, such as DD/MM/YYYY.

5. Make sure that you assign your printer in the field output device (see also the section Printer Environment above).

6. Save your settings.

7. Log off from the system.

8. Log on to the system.

⚠️ A renewed log on is to necessary since the change in the user settings only becomes effective when you log on to the system again.

9. When the complete activation procedure is finished, you may change these values as desired.

**Result**

The decimal notation and date format have been set up according to your country format. The standard printer has been defined.
6 Implementation of RDS Business Content (Consultant)

When the customer has finished with the set-up of the system landscape, the project team can start with the implementation of the rapid-deployment edition. The following chapter describes additional preparation activities that must be carried out by the project team.

6.1 Installation of Language/Country-specific Content

SAP Portfolio Management for Innovation and Product Development rapid-deployment solution content is built only in English.

The current available version of SAP Portfolio Management for Innovation and Product Development rapid-deployment solution is only in English; there are no separate versions of SAP Portfolio Management for Innovation and Product Development rapid-deployment solution for different countries/languages.

6.2 Content Prerequisites

A range of indispensable master and organizational data (for example, master data for Financial Accounting, Controlling and mini-master HR) forms the basis of this package and is required in the ERP system to complete the Business Processes. The master data used for this package consist of standardized SAP Best Practices default values and the SAP Best Practices Baseline Packages is used as basis for this package. The “Financial_Capacity_Planning.zip” file attached to SAP note 1768193 provides the detail of Cost elements, Cost centers and Activity Types used in customizing. If you have the requirement to personalize the Organizational Unit values, please refer to the chapter “Personalize your solution”.

6.3 RDS Content Installation Variants

6.3.1 Automated Implementation using SAP Best Practices solution builder

Pre configuration of this package has following scenarios and configuration Building Blocks (BB). All technical objects required for automatic implementation such as BC sets & eCATTs are bundled under these building Blocks.

If SAP Portfolio and Project Management and SAP ECC are installed on different instances, the BBs have to be activated in both systems has reported below:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Scenario name</th>
<th>Building block for scenario</th>
<th>Building Block Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y89</td>
<td>Portfolio and Project Management for Innovation Mgmt.</td>
<td>Y85</td>
<td>Project Management for Research and Development</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y86</td>
<td>Portfolio Management for Innovation Management</td>
</tr>
<tr>
<td>Y90</td>
<td>Portfolio and Project Management for Product</td>
<td>Y85</td>
<td>Project Management for Research and Development</td>
</tr>
</tbody>
</table>
On ERP system

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Scenario name</th>
<th>Building block for scenario</th>
<th>Building Block Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y88</td>
<td>ERP Integration for R&amp;D PPM</td>
<td>Y88</td>
<td>Portfolio and Project Management for Research and Development ERP integration</td>
</tr>
</tbody>
</table>

If SAP Portfolio and Project Management is installed on SAP ECC instance, all Scenarios must be activated on the same system.

6.3.2 Getting the Business Content for Activation

Perform the steps Getting the Solution Scope File and Getting the Installation Data Files on the same day. If you download them at different times, you may encounter errors due to mismatching.

6.3.3 Getting the Solution Scope File

Use

The technical structure for each solution (scenarios, building blocks, and technical objects) of the SAP Best Practices is managed by a solution scope file.

Procedure

1. To download the solution scope file, first go to SAP Service Marketplace at http://service.sap.com/bp-implcontent.
2. Choose the Solution files link and then the link for: SAP Portfolio and Project Management 5.0
3. Download the following solution scope file:
   SOL_RDS_RND_PPM50_V1_BP_CANW731Vx.zip
4. Go back to the Installation Data and Solution file Download page
5. Choose the Solution files link and then the link for: EhP6 for SAP ERP 6.0
6. Download the following solution scope file:
   SOL_RDS_PPM_RND_ERP606V1_BP_ERP606Vx.zip

6.3.4 Getting the Installation Data Files

Use
The installation settings (configuration settings and master data) of the SAP Best Practices are managed by the installation data files.

**Procedure**

2. Choose the Installation data file sets link and then the link for SAP Portfolio and Project Management 5.0.
3. Download the following installation data file: INST_FILES_PPM50_XX_BP_CANW731Vx.zip

4. Go back to the Installation Data and Solution file Download page
5. Choose the Installation data file sets link and then the link for EHP6 for SAP ERP 6.0
6. Download the following installation data file: INST_FILES_PPM_XX_BP_ERP606Vx.zip

**6.3.4.1 Create Installation Folder for Content activation**

**Use**

The scoping, personalization, and installation phase of the Solution Builder require solution scope and installation data files in a specific folder.

**Procedure**

1. Create a folder on a server that can be accessed from within the SAP system in which you want to install the SAP solution package. Ensure that the folder fulfills the following criteria:
   - The persons who install the SAP solution package must have the necessary user rights to access this folder.
   - The length of the directory path must not exceed 128 characters.
   - The folder must not be located on the root directory of your local drive (for example, C:\).
2. Extract the files from the .zip files you downloaded in the previous step into the folder you created in step 1. You should have one solution file (*.xml) and many variant files (*.TXT).

**Result**

You can use this folder to store all downloaded data files for solution scope, installation data and import the files into SAP Best Practices solution builder. If your solution package also provides sample content (for example, survey templates), you can download this sample content here, too.

**6.3.5 Import Solution Scope File**

The relevant solution scope file (*.xml file) for this rapid-deployment solution has been copied into the installation data directory (as in Getting the Business Content for Activation)

**Procedure**

To install the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution, upload the relevant solution scope file as follows:

1. To start the Solution Builder, use one of the following navigation options:

<table>
<thead>
<tr>
<th>Transaction name</th>
<th>Solution and Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction code</td>
<td>/n/SMB/BBI</td>
</tr>
</tbody>
</table>

2. The Solution Editor screen displays, listing all solutions available in the system.
The solution list is empty the first time you enter the Solution Editor (if no other users have uploaded or created solutions in the system).

The button bar indicates the sequence of operation for users.

We strongly recommend adding the transaction for the Solution Builder (/SMB/BBI) to the favorites of your SAP user menu.

1. In the Solution Builder – Solution Editor screen, choose Solution → Import → Solution (XML) from the menu.
2. In the Select the Solution Scope File (XML) dialog box, indicate the path to the installation directory, select the relevant solution scope file and choose Open.
3. Choose one of the following Solution Scope files: RDS_PPM_RND_ERP605V1.xml and RDS_RND_PPM50_V1.xml

If SAP Portfolio and Project Management and SAP ECC are installed on different instances, upload:
- the Solution file RDS_RND_PPM50_V1.xml on the PPM system
- the Solution file RDS_PPM_RND_ERP606V1.xml on the ERP System

4. After the solution is uploaded (depending on the size of the solution a few seconds up to one minute), an information box about the uploaded scenarios and building blocks is displayed. Choose OK to confirm.

Result

The uploaded solution is visible in the solution list and is marked as your favorite solution.

If the path to the installation data directory is too long, the system displays an error message. If you receive this error message, either rename directories in the path to shorten the file path, or copy the installation files to a directory being closer to the root folder of the hard drive.

6.3.5.1 Maintain User Settings: Path to Installation Data

Use

The solution definition (as uploaded as XML file) and the installation data define the solution content that is implemented.

To simplify the procedure and to avoid confusion with different sets of installation data, we strongly recommend to assign the installation data directory’s path to the solution. This is done in the user settings (because path information is user-dependent).

This is an important step for consultants that have imported multiple solutions in the solution builder.

Procedure

1. On the Solution Builder – Solution Editor screen, choose Goto → User Settings from the menu.
2. On tab Solution Specific, select the directory where you stored your installation data files.

The solution ID of the Favorite solution is fixed. To maintain it for another
solution, select another solution as a Favorite before maintaining the solution-specific part of the user settings.

3. If you want to perform the activation using Installation Data stored on the local drive, check the checkbox 'Allow Activation with External Data'. Or you can perform the activation using the Installation Data uploaded to the Solution Builder. (See the Upload Installation Data section below)

4. Choose OK to confirm the settings.

Result

The path to the installation data directory being assigned to the solution is always set as default entry for the particular solution.

### 6.3.5.2 Maintain User Settings: Path to Documentation

#### Use

This activity sets the document path for information that may be useful during activation so that users can find details from the SAP Help Portal about the scenario being activated.

#### Procedure

1. Run the following activity:

   | Transaction Code | /n/SMB/BBI |

2. From the menu, choose Goto → User Settings.

3. Choose tab External Documents.

4. Choose Display <-> Change button.

5. Choose the Insert Row button.

6. Enter the following value:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
</table>

7. Save your entries.

8. Choose Back.

### 6.3.5.3 Maintain Solution Settings: Select Languages

#### Use

The configuration content (customizing) of SAP Portfolio Management for Innovation and Product Development rapid-deployment solution is provided in several languages. On the solution level, you can define the languages to be activated for language-specific customizing.

In the default settings, all languages supported by SAP Portfolio Management for Innovation and Product Development rapid-deployment solution are selected.

You must reduce the list of languages only in the following cases:

- Only a subset of languages is required for your solution
- Some languages active on solution level are not installed in your system

#### Procedure

1. On the Solution Builder – Solution Editor screen select your favorite solution.

2. Choose button Change Solution.

3. In dialog box Change Solution and screen area Released Languages, deselect those languages, which are not relevant for your project or which are not installed in the system (use transaction SMLT to identify the installed system languages).

Language EN always has to be active. (current version of RDS is only in English)
4. Choose Enter.

**Result**
The installation data path assigned to the solution is always set as default entry for the particular solution.

### 6.3.6 Scoping of the solution

**Use**
The Rapid Deployment of SAP Portfolio Management for Innovation and Product Development contains two scenarios that are covering two industry specific scenarios. One of these should be selected for implementation. There will be no technical error if both are installed in one client but one of the solutions might be semantically incorrect for a given business context.

**Procedure**
1. Go to view Solution Builder – Solution Editor.
2. From the menu choose Solution → Set as Favorite to set the uploaded solution RDS_RND_PPM50_V1 as a favorite.
4. In the dialog box select either
   - 01 SAP PPM RDS for Innovation Management
   - 02 SAP PPM RDS for Product Development.
5. Select Scope (F5).

### 6.3.7 Personalization of Solution

#### 6.3.7.1 Upload Installation Data

**Prerequisites**
The installation files have been downloaded to the local directory you created in step ‘Create Installation Folder’ for the SAP Portfolio Management for Innovation and Product Development Installation rapid-deployment solution Files and Scope File.

**Use**
This step is the prerequisite for the personalization of the default delivered settings for the implementation of a solution.

If you have the requirement to personalize the Organizational Unit values, first change the values in the TDC files before uploading the installation data.

In addition, the upload allows you to review the installation data for the tasks in the Building Block Builder for better transparency, troubleshooting, or to maintain installation data and run the activation much faster than using external Installation Data.

The step activating a solution is independent of the uploading the installation data step. The activation step uses the files in the installation data folder on the presentation server, to ensure that you have uploaded the correct installation data files and been pointed to the correct folder location.

**Procedure**
1. On the Solution Builder – Solution Editor screen, choose the Upload Installation Data button (Ctrl + F5).
2. In the Upload and Download external file data dialog box, browse to the location of your installation data files, select it, and choose Continue (Enter).

**Result**
The installation data upload step has been completed (with or without personalization).

### 6.3.7.2 Personalize your Solution

**Use**

Personalization is mandatory for SAP Portfolio Management for Innovation and Product Development rapid-deployment solution. **DO NOT SKIP THIS SECTION.**

SAP Portfolio Management for Innovation and Product Development rapid-deployment solution uses generic personalization to adopt/change some predefined values before activation of customer site to allow smooth activation.

Below are listed the few variant files which have been maintained for Generic Personalization and the values at customer site must be adopted for them.

#### ON THE PPM SYSTEM:

<table>
<thead>
<tr>
<th>Personalization</th>
<th>Variants</th>
<th>Parameters</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Logical System</td>
<td>SMBA0_V_TBDLS_B04 I_J01_Y85.TXT</td>
<td>I_LOGSYS</td>
<td>&lt;your PPM System&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I_LOGSYS</td>
<td>&lt;your ERP System&gt;</td>
</tr>
<tr>
<td>Assign Logical System to a Client</td>
<td>SMB99_SCC4_O002_B32_Y85.TXT</td>
<td>I_LOGSYS</td>
<td>&lt;your PPM System&gt;</td>
</tr>
<tr>
<td>Define RFC Destinations</td>
<td>SMB99_SM59_O223_J01_Y85.TXT</td>
<td>I_RFCDEST</td>
<td>&lt;your ERP System&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I_HOSTNAME</td>
<td>Host name of &lt;your ERP System&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I_RFCSID</td>
<td>System Number of &lt;your ERP System&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I_RFCSERVICE</td>
<td>Client of &lt;your ERP System&gt;</td>
</tr>
<tr>
<td>Define Capacity Planning Settings - Map capacity view to cost elem.</td>
<td>SMBAX_RPM_V_CAP_FIM_B496_J0B_Y87.TXT</td>
<td>I_COAREA</td>
<td>&lt;Your Controlling Area&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I_LOGSYS</td>
<td>&lt;your ERP System&gt;</td>
</tr>
<tr>
<td>Def. Financial Plan. Sett. - Map Financial View to Cost Elem</td>
<td>SMBAX_RPM_V_FIN_MAP_B46F_J0F_Y86.TXT</td>
<td>I_COAREA</td>
<td>&lt;Your Controlling Area&gt;</td>
</tr>
<tr>
<td></td>
<td>SMBAX_RPM_V_FIN_MAP_B46F_J0F_Y87.TXT</td>
<td>I_LOGSYS</td>
<td>&lt;your ERP System&gt;</td>
</tr>
</tbody>
</table>

#### ON THE ERP SYSTEM:

<table>
<thead>
<tr>
<th>Personalization</th>
<th>Variants</th>
<th>Parameters</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Logical</td>
<td>SMBA0_V_TBDLS_B04</td>
<td>I_LOGSYS</td>
<td>&lt;your PPM System&gt;</td>
</tr>
</tbody>
</table>
If your system has SAP Portfolio and Project Management installed on SAP ECC client, all personalization must be maintained on the same system.

### Procedure

1. On the **Solution Builder – Solution Editor** screen, choose the **Personalization** button (Ctrl+F8).

   On the **Generic Personalization Composer** screen, you can see all activities that can be personalized. These personalization steps are mandatory to handle the back-end client integration.

   The personalization of the information required for configuring the enterprise structure in the back end client is done in the **Generic Personalization** and not in the function **Enterprise Structure Personalization**.

2. Navigate to all activities and double-click the activity to maintain the required data.

   A document is attached for each step. These documents describe which data has to be maintained and how to determine the required values in the back-end client. To open the document, choose **Display documentation**.

3. Make any personalized entries and set the status to document the progress of your personalization activities.

4. Save your entries.

   You can download the installation data after personalization for your reference to the folder that already contains the complete set of installation data (confirm overwrite in case of a warning message). Otherwise, required files that are not covered by the up- and download process will be missing.

   To download the installation files to a local folder, on the **Solution Builder – Solution Editor** screen, choose **Goto → Installation data → Download**.
Existing files will be overwritten.

If more fields are required to be updated before you begin the activation, follow below mentioned step for personalization of those fields:

- From the Configuration Guide find the step for the field that must be updated and identify the corresponding activation step in the Building Block Builder.
- Identify the task (for example /SMBA0/RPM_V_FIN_MAP_B46F_J0F) that contains values that must be adapted prior to activation.
- From your SAP easy access menu go to Solution Builder screen (Transaction: /n/smb/bbi)
- Mark the imported solution as your favorite solution and choose Goto --> Building Block Builder
- On the Building Block Builder- Solution View Screen, double-click the step you need to personalize the field.
- On the second part of the screen select the tab Solution Specif end choose the Define Personalization button.
- On the Maintain Personalization definition screen locate your parameter (for example, I_LOGSYS) and for the Maintain Type field change it to Maintainable or Maintainable Val. in Centr. and select the field for Not Empty column for your parameter.
- Choose Save.

Result
You have personalized the solution.
You can get the list of default values and their personalized values. To generate a list containing default and personalized values refer to SAP Note 1421667.

6.3.8 Implementation of Solution

6.3.8.1 Activating a Solution

Use
The implementation of a solution is performed in the Implementation Assistant.
The Implementation Assistant provides two activation options:

- Activation in the Solution View (standard view)
  - All selected scenarios are installed according to the sequence listed in the Solution/Scenario structure.
  - No parallel activation or individual selection of scenarios possible.
  - Recommended Activation Option because activation conflicts are avoided.

- Activation in the Scenario View
  - Scenarios can be individually selected for activation and the installation sequence can be freely defined.

⚠️ Activation in the Scenario View does not prevent parallel activation of solution content, because only the currently activated scenario is protected.
If you run automated steps in different scenarios accessing the same data, table errors and inconsistencies can occur.
Therefore using this activation option is not recommended and is at your own risk – for example, you should make sure that only a single user is running the activation.
The **Implementation Assistant screen** provides the scenario list of a solution on the left-hand side. Expanding the Scenario shows the Building Blocks of the Scenario in the correct sequence.

Expanding a Building Block shows the implementation activities of each Building Block in the correct sequence.

On the right-hand side in the upper part of the screen, you see the Building Block repository for your solution.

The lower part shows all messages and message details that are generated during checks and implementation.

**Procedure**

1. On the **Activate solution** dialog box, make the following entries:

<table>
<thead>
<tr>
<th>Field name</th>
<th>User action and values</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Language</td>
<td>EN</td>
<td>You can also use target language EN. As consequence selected language independent fields are filled with English description texts instead of German texts.</td>
</tr>
<tr>
<td>Supplemental data</td>
<td>smb40_leaf.bmp</td>
<td>Use the folder that was created in step <em>Creating a Folder for the SAP Best Practices Activation</em>. In that folder the graphic file smb40_leaf.bmp is available. You can also select another folder if you ensure that the graphic file smb40_leaf.bmp is available in that folder.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>![⚠️] You cannot use UNC paths (for example, \dwdf030\SME...). Always use a mapped network drive (for example, Z:SME) It is not possible to use any root directory of your local drive (for example, Z:\ or C:)</td>
</tr>
<tr>
<td>Workbench</td>
<td>&lt;workbench request number&gt;</td>
<td>By default this field and the Workbench Request button are not active because the Create Request checkbox is selected. The system creates the workbench request automatically when the Create Request checkbox is selected. If you would like to manually create or select an existing transport, deselect the Create Request checkbox.</td>
</tr>
<tr>
<td>Customizing</td>
<td>&lt;customizing request number&gt;</td>
<td>By default this field and the Customizing Request button are not active because the Create Request checkbox is selected. The system creates the customizing request automatically when the Create Request checkbox is selected. If you would like to manually create or select an existing transport, deselect the Create Request checkbox.</td>
</tr>
<tr>
<td>Skip this screen</td>
<td>Deselect</td>
<td>If selected, the system does not display the Activate solution dialog box upon resumption of activation following an error or manual activity. If deselected, the Activate solution dialog box displays each time after resumption of activation.</td>
</tr>
</tbody>
</table>
2. Choose the Implementation button.
3. In the Implementation Assistant - Solution view choose the Activate button.
4. Alternatively, you can select a specific scenario in the Implementation Assistant - Scenario view for activation.
5. Specify the activation options as described above.
6. Confirm the Activation dialog box.

Result
The activation starts. Depending on the number of manual activities and possible errors during implementation, the activation may stop occasionally, waiting for manual input or troubleshooting:

⚠️ Refer to the information provided with your solution for any specific information that must be considered for prerequisites or during implementation. This also provides you with information of the expected implementation time and specific troubleshooting procedures.

If several people are involved in the implementation, ensure that you take activation ownership (choose the Take Ownership button). Otherwise, the solution is locked.

6.3.8.2 Manual interaction during Installation of Building Blocks

Use
The installation procedures of the following scenarios / building blocks contain manual installation steps and / or require manual confirmation.

Procedure
If the Solution Builder stops because of a manual activity, proceed as follows:
1. To access the transaction, choose the Go To Transaction button.
2. Follow the instructions in the document dialog.
3. Execute the required activity steps manually by following the instruction of the related section in the document dialog.
4. After executing the required steps, choose Back to leave the transaction.
5. Choose Proceed.
7. Enter a reason (optional) and choose Enter.
8. Proceed with the activation.

6.3.8.3 Processing General Errors during Installation

Use
When an activation of an automated task runs into errors, the activation stops at the point of the error. No further implementation can be done until the error is resolved.

Procedure
1. On the Implementation Assistant – Solution View screen, select a task that has a red light in the Current status column.
2. Expand the task and choose the log that is assigned to this task.
   - Detailed information about the error is displayed in the Error List pane.
3. In the Error List pane choose Display Detailed Log. The detailed log information about an eCATT or BC Set activation is displayed.

4. In this log information, check entries with a red light to identify the reason for the error.
   - If the error can be solved based on the log information, you can run the eCATT or BC Set again.
   - If the activation fails because of locked objects, ensure that no objects are locked by users. Once you have done so, you can activate the activity again.

See the document SAP Best Practices Tools for details about the manual activation of eCATTs and BC Sets. The document can be found in the documentation in the area Technical Information → Tools & Concepts.

5. If the log information is not sufficient to solve the problem you can proceed as follows:
   a. Execute the task manually: use the description of the related section in the Configuration Guide for executing the task,
      or
   b. Open a customer message for this problem specifying the component SV-RDS-PPM.

   Do NOT delete Solution Builder scenarios ONCE they have been activated. If you delete scenarios, the activation history and the respective logs are lost and it is not possible to find possible error reasons with tenable efforts.
   In such cases, NO SAP SUPPORT CAN BE PROVIDED.

6. When you have solved the problem (either executed the task manually or a solution has been provided via customer message), choose the Change button that is displayed in the Old Status column to the right of the task.

   Do NOT proceed with installation if the problem has not been solved. If you continue without solving the problem, severe errors might result in the subsequent installation steps that cause incalculable efforts to fix.
   In such cases, NO SAP SUPPORT CAN BE PROVIDED.

7. On the Confirmation dialog box, choose OK to manually change the status to successful.
8. On the Information dialog box, you can enter a reason for changing the status.
9. Choose Continue.

   The information is saved in a log. To view details for a changed task, choose the red light in the Original Status column for that task. A dialog box displays the user who performed the change, the date of the change, and the reason for the change. Choose Continue to close the dialog box.

10. Choose Activate to continue with the installation.

**6.3.9 Manual Implementation**

If you have decided to implement SAP Portfolio Management for Innovation and Product Development rapid-deployment solution, consultant implements the configuration guides in the sequence shown below. The configuration guides can be found in the SAP Portfolio Management for Innovation and Product Development rapid-deployment solution content library.

Building Blocks for SAP Portfolio Management for Innovation and Product Development rapid-deployment solution
6.4 Selecting the SAP Solution Manager Template

You select the SAP Solution Manager template in SAP Solution Manager so that you can use the content in your implementation project.

To select the SAP Solution Manager template, do the following:

1. In the SAP Solution Manager system, access transaction SOLAR_PROJECT_ADMIN.
2. On the Project Administration screen, select an existing implementation project.
   For more information about creating a new project, see SAP Help Portal at http://help.sap.com "SAP Solution Manager 7.0 EHP1 SP33" "SAP Solution Manager "Implementing and Upgrading SAP Solutions" "Project Administration" "Create/Change Project."
3. On the Scope tab, choose the Template Selection tab.
4. Select template RDS_PPM_AP Portfolio Management for Innovation and Product Development_V1. Expand the node to display the business scenarios it contains.
   To learn about the content of a template, you can access the template description on the Template Selection tab by selecting the template name.
5. Select the business scenarios you want to copy into your implementation project.
6. Save your project.
   If you save your project for the first time, you need to specify the enhancement context in which the project documents are to be saved in the Knowledge Warehouse.
7. Map the logical components assigned to the process steps of the selected business scenario to your current system landscape. The system identifies missing logical components for product versions / instances required for the business processes.
   To add the logical components to your system landscape, choose Continue.

The list of logical components is updated on the System Landscape tab.

Assign the systems in your system landscape to the logical components.

For more information about assigning logical components to a project, see SAP Help Portal at http://help.sap.com "SAP Solution Manager 7.0 EHP1 SP23" "SAP Solution Manager" "Implementing and Upgrading SAP Solutions" "Project Administration" "Create/Change Project" "System Landscape Tab" "Specify Project System Landscape" "Assign Logical Components to the Project."

6.5 System Preparation for Integration with Cross-Application Time Sheet

6.5.1 Preparing integration with Cross-Application Time Sheet

Use
To integrate Portfolio and Project Management with Cross-Application Time Sheets (CATS), you must set up a connection via Application Link Enabling (ALE). You do not have to set up this integration if CATS and Portfolio and Project Management are both on the same system and in the same client.

For more information about CATS integration without ALE, see SAP Note 913347.

**Prerequisites**

In the SAP ECC System you set up an RFC connection to the Portfolio and Project Management system using transaction SM59 (Configuration of RFC Connections) and you defined the logical system using transaction SALE (IDoc Interface /Application Link Enabling).

In the Portfolio and Project Management System you set up an RFC connection to CATS in SAP ECC using transaction SM59 (Configuration of RFC Connections), you activated confirmation via CATS under Structure Define Project Types in customizing and you defined the logical system using transaction SALE (IDoc Interface /Application Link Enabling).

The logical systems must have the same name as in the RFC connection.

### 6.5.1.1 Create Distribution Model in SAP ECC System

**Procedure**

33. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP IMG Menu</th>
<th>SAP NetWeaver → Application Server→ IDOC Interface / Application Link Enabling (ALE) → Modelling and Implementing Business Processes → Maintain Distribution Model and Distribute Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Code</td>
<td>BD64</td>
</tr>
</tbody>
</table>

1. Choose the Switch between display and edit mode button.
2. Choose Create model view.
3. On the Create model view screen, enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short text</td>
<td>RDS PPM CATS</td>
</tr>
<tr>
<td>Technical name</td>
<td>CATS_INT</td>
</tr>
</tbody>
</table>

4. Choose Enter.
5. On the Distribution Model Changed screen, select the Model View created and choose Add BAPI.
6. On the Add BAPI screen, enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sender/Client</td>
<td>&lt;Sender logical system&gt;</td>
</tr>
<tr>
<td>Receiver/server</td>
<td>&lt;Target logical system&gt;</td>
</tr>
<tr>
<td>Object name/interface</td>
<td>TSCPRCONNEN</td>
</tr>
<tr>
<td>Method</td>
<td>TRANSFERCPR</td>
</tr>
</tbody>
</table>

7. Choose Enter.
8. On the Distribution Model Changed screen, select Environment from the menu.
9. Choose Generate Partner Profiles
10. Choose Execute. The system creates a log list.
11. Choose Back twice.
12. On the Distribution Model Changed screen, select Edit from the menu.
13. Choose Model View Distribute then Enter.

6.5.1.2 Generate Partner Profile in SAP Portfolio and Project Management System

Procedure

14. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP IMG Menu</th>
<th>BD64</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP NetWeaver → Application Server → IDOC Interface / Application Link Enabling (ALE) → Modelling and Implementing Business Processes → Maintain Distribution Model and Distribute Views</td>
<td></td>
</tr>
</tbody>
</table>

8. Choose the Switch between display and edit mode button.
9. On the Distribution Model Changed screen, select Environment from the menu.
10. Choose Generate Partner Profiles
11. Choose Execute. The system creates a log list.
12. Choose Back twice.

6.5.2 Set up ALE Connection for HCM Integration

Use

If Portfolio and Project Management is installed by itself, you must perform the steps in this section to get the HCM data into the Portfolio and Project Management system. This section describes the steps for setup and processing of the ALE of personnel master data from the SAP ECC System to the Portfolio and Project Management System, for the purposes of creating business partner master data.

If the Portfolio and Project Management is installed on an ERP system, you only need to create business partner master data in the Portfolio and Project Management System and then link the data to the employees via the employee ID. You do not need to do the steps mentioned within this section.

6.5.2.1 Create Distribution Model in SAP ECC System

Use

The distribution model describes the Application Link Enabling (ALE) message flow between logical systems. The relationships between SAP ECC and Portfolio and Project Management logical systems, HR Master Data message types and filters for Specific HR Master Data Info Types are defined in this distribution model. Applications and the ALE layer use the distribution model to determine receivers and to control the data distribution.

Procedure

15. Access the activity using one of the following navigation options:
13. Choose the **Switch between display and edit mode** button.

16. Choose **Create model view**.

17. On the **Create model view** screen, enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short text</td>
<td>RDS PPM HCM Master Data</td>
</tr>
<tr>
<td>Technical name</td>
<td>RDS_PPM_01</td>
</tr>
</tbody>
</table>

18. Choose **Enter**.

19. On the **Distribution Model Changed** screen, select the Model View created and choose **Add message type**.

20. On the **Add message type** screen, enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sender</td>
<td>&lt;Sender logical system&gt;</td>
</tr>
<tr>
<td>Receiver</td>
<td>&lt;Target logical system&gt;</td>
</tr>
<tr>
<td>Message Type</td>
<td>HRMD_ABA</td>
</tr>
</tbody>
</table>

21. Choose **Enter**.

22. On the **Distribution Model Changed** screen, expand the Model View and double click on **No filter set**.

23. On the **Change Filter** screen, select **Create filter group**.

24. Expand **Data filtering**.

25. Double-click **Object Type**.

26. On the **Edit List of Values** screen, select **insert row** and enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>P</td>
</tr>
</tbody>
</table>

27. Choose **Enter**.

28. On the **Change Filter** screen, double click on **Infotype**.

29. On the **Edit List of Values** screen, select **insert row** and enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>0000</td>
</tr>
</tbody>
</table>

30. Repeat the above step for the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>0001, 0002</td>
</tr>
</tbody>
</table>

31. Choose **Enter**.

32. On the **Change Filter** screen, select **Create filter group**.

33. Expand **Data filtering**, double click on **Object Type**.
34. On the *Edit List of Values* screen, select *insert row* and enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>P</td>
</tr>
</tbody>
</table>

35. Choose *Enter*.

36. On the *Change Filter* screen, double click on *Infotype*.

37. On the *Edit List of Values* screen, select *insert row* and enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>0105</td>
</tr>
</tbody>
</table>

38. Choose *Enter*.

39. On the *Change Filter* screen, double click on *Subtype*.

40. On the *Edit List of Values* screen, select *insert row* and enter the following data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value List</td>
<td>0001</td>
</tr>
</tbody>
</table>

41. Choose *Enter* twice.

42. Save your distribution model.

### 6.5.2.2  Create Portfolio and Project Management System Port in SAP ECC System

**Use**

IDocs can be exchanged with ports in different ways using the external system. There are different technical ways of carrying out port type communication. Setting up ports is a basic precondition for exchanging data.

Four port categories are available in the standard SAP System, to which you can assign ‘real’ ports:

- Transactional RFC (Remote Function Call) for ECC – ECC connections and external systems
- File port
- CPI-C for R/2 connections
- Internet

In this package, we use a port with a transactional RFC. For this you enter the target system directly as the RFC destination.

The system sends the IDocs using this port. You must enter the port in the outbound parameters for the partner profiles.

**Procedure**

1. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
<th>Transaction Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tools → ALE → ALE Administration → Runtime Settings → Port Maintenance</td>
<td>WE21</td>
</tr>
</tbody>
</table>

2. On the *Port in IDoc processing* screen, select *Transactional RFC* and choose *Create*.

3. On the *Port in IDoc processing* pop-up window, Select *own port name* and make the following entries:

<table>
<thead>
<tr>
<th>Field name</th>
<th>User action and values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>&lt;Receiver port&gt;</td>
</tr>
</tbody>
</table>
4. Choose Enter.
5. On the Creating a tRFC port screen, make the following entries:

<table>
<thead>
<tr>
<th>Field name</th>
<th>User action and values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>RDS PPM AT - PPM CLIENT</td>
</tr>
<tr>
<td>Version</td>
<td>IDoc record types SAP Release 4.x</td>
</tr>
<tr>
<td>RFC destination</td>
<td>&lt;Receiver system RFC Destination&gt;</td>
</tr>
</tbody>
</table>

6. Save your entries.

### 6.5.2.3 Create Portfolio and Project Management System Partner Profile in SAP ECC System

**Use**
Partner profiles control the ALE communication of the sender system the SAP ECC System with the recipient system the Portfolio and Project Management System. The port to determine the recipient system and messages type of HCM Master Data are assigned to the Partner profile created.

**Procedure**

1. Access the activity using one of the following navigation options:

<table>
<thead>
<tr>
<th>SAP Easy Access Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tools → ALE → ALE Administration → Runtime Settings → Partner Profiles</td>
</tr>
<tr>
<td>Transaction Code WE20</td>
</tr>
</tbody>
</table>

2. Choose Create.

3. On the right side of the screen, enter the header data:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner No.</td>
<td>&lt;Partner No.&gt;</td>
</tr>
<tr>
<td>Partner Type</td>
<td>LS</td>
</tr>
</tbody>
</table>

4. On the Post processing: permitted agent tab, enter the following:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>US (User)</td>
</tr>
<tr>
<td>Agent</td>
<td>&lt;Your User Name&gt;</td>
</tr>
<tr>
<td>Language</td>
<td>EN</td>
</tr>
</tbody>
</table>

5. Save your entries.

6. On the Outbound parameters screen, choose Create outbound parameter.

7. On the Partner profiles: Outbound parameters screen, make the following entries:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message type</td>
<td>HRMD_ABA</td>
</tr>
<tr>
<td>Receiver port</td>
<td>&lt;Receiver port&gt;; the Port you created in the previous step</td>
</tr>
<tr>
<td>Output Mode</td>
<td>Transfer IDoc Immed.</td>
</tr>
<tr>
<td>Basic type</td>
<td>HRMD_ABA04</td>
</tr>
<tr>
<td>Pack. Size</td>
<td>100</td>
</tr>
</tbody>
</table>

8. Save your entries.

### 6.5.2.4 Create ECC System Partner Profile in SAP Portfolio
Use
This step creates the ECC system partner profile in the SAP Portfolio and Project Management system. The HCM master data message types and process codes are assigned to the new Partner profile.

Procedure
1. Access the activity using one of the following navigation options:

| SAP Easy Access Menu | Tools → ALE → ALE Administration → Runtime Settings → Partner Profiles |
|----------------------|------------------------------------------------|---|
| Transaction Code     | WE20                                         |

2. Choose Create.

3. On the right side of the screen, enter the header data:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner No.</td>
<td>&lt;Partner No.&gt;</td>
</tr>
<tr>
<td>Partner Type</td>
<td>LS</td>
</tr>
</tbody>
</table>

4. On the Post processing: permitted agent tab, enter the following:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>US (User)</td>
</tr>
<tr>
<td>Agent</td>
<td>&lt;Your User Name&gt;</td>
</tr>
<tr>
<td>Language</td>
<td>EN</td>
</tr>
</tbody>
</table>

5. Save your entries.

6. On the Outbound parameters screen, choose the Create inbound parameter button.

7. On the Partner profiles: Inbound parameters screen, make the following entries:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message type</td>
<td>HRMD_ABA</td>
</tr>
<tr>
<td>Process code</td>
<td>HRMD</td>
</tr>
<tr>
<td>Processing by Function Module</td>
<td>Trigger Immediately</td>
</tr>
</tbody>
</table>

8. Save your entries.

6.5.2.5 Maintain HCM Parameters in Portfolio and Project Management System

Use
This step is to maintain or create the specific values for the respective parameters combination.

Procedure
1. Access the activity using one of the following navigation options:

| Transaction Code | SM31 |

2. On Maintain Table Views: Initial screen, enter the following data:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table/View</td>
<td>V_T77S0</td>
</tr>
</tbody>
</table>
3. Choose **Maintain**.

4. On the **Change View "View T77S0": Overview** screen, create or maintain the following data:

<table>
<thead>
<tr>
<th>Group</th>
<th>Sem.abbr.</th>
<th>Value abbr</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRALX</td>
<td>HRA</td>
<td>X</td>
</tr>
<tr>
<td>HRALX</td>
<td>HRA</td>
<td>X</td>
</tr>
<tr>
<td>HRALX</td>
<td>OBPON</td>
<td>ON</td>
</tr>
<tr>
<td>HRALX</td>
<td>PBON</td>
<td>ON</td>
</tr>
<tr>
<td>HRALX</td>
<td>OROL</td>
<td>BUP004</td>
</tr>
<tr>
<td>HRALX</td>
<td>PPROL</td>
<td>BUP003</td>
</tr>
<tr>
<td>HRALX</td>
<td>OADRE</td>
<td>X</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PLOGI</th>
<th>PLOGI</th>
<th>the plan version to be distributed is defined. In the standard scenario, it has the value 01. Data of other plan versions are not taken into account.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLOGI</td>
<td>WORKF</td>
<td>the plan version to be distributed is defined. In the standard scenario, it has the value 01. Data of other plan versions are not taken into account.</td>
</tr>
<tr>
<td>HRALX</td>
<td>PRON</td>
<td>X</td>
</tr>
<tr>
<td>HRALX</td>
<td>PSYNP</td>
<td>BAL</td>
</tr>
</tbody>
</table>

5. Save your entries.

### 6.5.2.6 ALE Distribution of HR Master Data from ECC System to Portfolio and Project Management System

**Use**

In this step, you perform the initial distribution of HR master data with Object type P (Personnel) from the ECC System to the Portfolio and Project Management System.

As the prerequisites of the distribution of HR master data with Object type P, the HR master data some other Object types such as O, C and S are required to exist in the recipient system. Some specific sequence of the distribution of HR master data with different Object types is required. For more information, see SAP Note 363187 and SAP Note 157826

**Procedure**

1. Access the activity using one of the following navigation options:

   ![SAP Easy Access Menu](#)

   **Transaction Code**: PFAL

2. On the **HR: ALE Distribution of HR Master Data** screen, enter the following data:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object type</td>
<td>P</td>
</tr>
<tr>
<td>Object ID</td>
<td>Enter * if you distribute all the personnel master data in the system Enter the Personnel Number if you distribute the specific personnel master data</td>
</tr>
</tbody>
</table>
3. Choose Execute. The system displays a message with the IDoc number.