

# **SAP Business Planning and Consolidation 10.1, version for SAP NetWeaver Unified and Classic**



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# Typographic Conventions

Example	Description
<>	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, "Enter your <User Name>".
▶ ▶ ▶	Arrows separating the parts of a navigation path, for example, menu options
<b>Example</b>	Emphasized words or expressions
<b>Example</b>	Words or characters that you enter in the system exactly as they appear in the documentation
Example	Textual cross-references to an internet address, for example, <a href="http://www.sap.com">www.sap.com</a>
/example	Quick links added to the internet address of a homepage to enable quick access to specific content on the Web
123456	Hyperlink to an SAP Note, for example, SAP Note <b>123456</b>
Example	<ul style="list-style-type: none"> <li>Words or characters quoted from the screen. These include field labels, screen titles, push button labels, menu names, and menu options.</li> <li>Cross-references to other documentation or published works</li> </ul>
Example	<ul style="list-style-type: none"> <li>Output on the screen following a user action, for example, messages</li> <li>Source code or syntax quoted directly from a program</li> <li>File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools</li> </ul>
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, <code>SELECT</code> and <code>INCLUDE</code>
EXAMPLE	Keys on the keyboard

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# Document History

The following table provides an overview of the most important document changes:

Version	Date	Description
1.0	2013-12-20	First version of this document.
1.5	2014-01-08	Changes in the topics <a href="#">Activating Planning and Consolidation Unified [page 13]</a> and <a href="#">Ensure ICF Services are Activated [page 12]</a> .
1.6	2014-06-11	Updated the topic <a href="#">SAP Notes for the Installation [page 7]</a> with the central notes for SP01 and SP02. Changes in the topic <a href="#">Acquiring the Planning and Consolidation Installation Components [page 15]</a> .

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# 1 Introduction

SAP Business Planning and Consolidation 10.1, version for SAP NetWeaver has two product variations called classic and unified.

- Planning and Consolidation classic uses a new user interface technology - SAPUI5 (based on the standard HTML5). The new user interface provides all the benefits of HTML5 and it supports languages that are written from right to left (for example, Hebrew and Arabic). In a classic environment you can use all the functionalities that are available in the previous version - SAP Business Planning and Consolidation 10.0, version for SAP NetWeaver.
- Planning and Consolidation unified is integrated with SAP Business Warehouse Planning Applications Kit. By using the BW Planning Applications Kit you can perform SAP HANA-optimized planning. Note that you can use Planning and Consolidation unified only with SAP HANA-based systems.

This installation guide is intended for system administrators and technical consultants. It covers the installation and initial configuration of both Planning and Consolidation classic and unified. When the installation and configuration steps for classic and unified are different, the relevant sections are marked as “classic-only” or “unified-only”. The sections that are not explicitly marked as “classic-only” or “unified-only” are relevant for both product variations.

## 1.1 SAP Notes for the Installation

Read the following SAP Notes before you start the installation. These SAP Notes contain the most recent information on the installation, as well as additions to the installation documentation. Make sure that you have the up-to-date version of each SAP Note, which you can find on SAP Service Marketplace at the Internet address [service.sap.com/notes](http://service.sap.com/notes).

Table 3

SAP Note Number	Title	Description
<a href="#">1925081</a>	Inst/Upgrade ABAP-Add-On CPMBPC/HANBPC 810	This note provides information about the installation and upgrades of the ABAP add-ons CPMBPC 810 and HANABPC 810.
<a href="#">1916316</a>	Business Planning & Consolidation 10.1 NW Central Note	This note contains installation information, for SAP Business Planning and Consolidation 10.1, version for SAP NetWeaver.
<a href="#">1925425</a>	SAP Business Planning & Consolidation 10.1 NW SP01 Central Note	This is the central note for Planning and Consolidation 10.1 support package 01. It contains installation instructions and important information related to the release.

SAP Note Number	Title	Description
<a href="#">1952492</a>	SAP Business Planning & Consolidation 10.1 NW SP02 Central Note	This is the central note for Planning and Consolidation 10.1 support package 02. It contains installation instructions and important information related to the release.

## 1.2 Naming Conventions

In this document, the following naming conventions apply.

Table 4

Variable	Description
<PC_server:port>	Server name or IP address and port number of the Planning and Consolidation application location.
<drive>	The drive where Planning and Consolidation is installed.



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## 2 Installing and Configuring SAP Business Warehouse

As a prerequisite for using SAP Business Planning and Consolidation, you must first install SAP Business Warehouse. The SAP Business Warehouse component also installs the Planning and Consolidation unified. You can use Planning and Consolidation unified without installing any additional software. If you want to use Planning and Consolidation classic you must also install the required Planning and Consolidation ABAP server component. The following list shows the prerequisites, preparation steps and installation steps that apply to both classic and unified:

- [Server Hardware Requirements \[page 9\]](#)
- [Software Prerequisites for the Server \[page 9\]](#)
- [Installing the Server Prerequisites \[page 10\]](#)
- [Client Prerequisites \[page 10\]](#)
- [Installing the EPM Add-In for Microsoft Office \[page 11\]](#)

### 2.1 Server Hardware Requirements

#### Procedure

Before starting the Planning and Consolidation installation, make sure you follow the hardware requirements for the ABAP application server.

The ABAP application server can run on any supported NetWeaver platform. For information about the requirements for this server, see the NetWeaver Master Guide and Installation Guide at [service.sap.com/installnw74](http://service.sap.com/installnw74).

### 2.2 Software Prerequisites for the Server

Your SAP NetWeaver version must be SAP NetWeaver 7.4 support package stack 05 or higher.

#### Required Components

- Application Server ABAP – PI\_BASIS 7.40
- Application Server ABAP – SAP ABA 7.40
- Application Server ABAP – SAP BASIS 7.40
- Application Server ABAP – SAP BW 7.40
- Kernel (64-bit) and Unicode only

#### Other Prerequisites

- An operating system supported by SAP NetWeaver

- A database supported by SAP NetWeaver (Planning and Consolidation unified can be used only with an SAP HANA database)

## More Information

A list of the supported operating systems and database systems is also available in the Product Availability Matrix on SAP Service Marketplace at [service.sap.com/pam](http://service.sap.com/pam). Search on Planning and Consolidation.

For information on installing the prerequisite software, see [Installing the Server Prerequisites \[page 10\]](#).

## 2.3 Installing the Server Prerequisites

To install the SAP NetWeaver technology platform, you must first follow the steps outlined in the SAP NetWeaver installation documentation. For more information, see [service.sap.com/instguidesNW74](http://service.sap.com/instguidesNW74).

After you install SAP NetWeaver, configure it based on the guidelines in the SAP NetWeaver documentation. This means you must ensure all the post installation steps have been completed, including (but not limited to) setting up the Data Warehousing Workbench (RSA1) for normal use.

It is important that you refer to the following SAP Notes and apply the indicated corrections:

Table 5

SAP Note Number	Title
93042	Problems with SAPFTP

## 2.4 Client Prerequisites

Planning and Consolidation requires the following software for the Web client:

- A supported operating system. A list of supported operating systems available in the Product Availability Matrix on SAP Service Marketplace at [service.sap.com/pam](http://service.sap.com/pam). Search on Planning and Consolidation.
- Microsoft Internet Explorer 9.0 or higher
- Mozilla Firefox 17.0 or higher

To use the EPM Add-in in Mozilla Firefox, you must first install the EPM Plug-in for Firefox.

- Google Chrome 30.0 or higher
- For the EPM Add-in for Microsoft Office:
  - Microsoft Office 2007 or 2010 32-bit
    - As of support package 07: Microsoft Office 2003
    - As of support package 09: Microsoft Office 2010 64-bit
    - As of support package 10: Microsoft Office 2013
  - Microsoft .NET Framework 3.5 SP1
  - Microsoft Web Services Enhancement 3.0 (WSE 3.0)
  - Microsoft XML Parser 6.0 SP1

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**i** Note

For more information about the installation prerequisites for the EPM Add-in, see the *EPM Add-in for Microsoft Office Installation Guide*.

## 2.5 Installing the EPM Add-In for Microsoft Office

SAP EPM Solutions, add-in for Microsoft Office provides business users the capability to analyze data from within supported SAP EPM applications, using Microsoft Office tools: Excel, Word or PowerPoint. EPM Add-in for Microsoft Office creates the reports on and analyzes the data from Planning and Consolidation.

You can connect to the EPM Add-in for Microsoft Office through the Planning and Consolidation web portal.

For details of how to install and configure the EPM Add-in, see the *EPM Add-in for Microsoft Office Installation Guide*.

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## 3 Post-Installation: Steps After Installing SAP Business Warehouse

The post-installation steps given in this section are required for both Planning and Consolidation classic and unified. After performing these steps you can start using the Planning and Consolidation unified. If you want to use Planning and Consolidation classic, you must also perform the steps described in [Classic-Only: Post-Installation Steps \[page 18\]](#).

### Prerequisites

You have installed and configured SAP Business Warehouse as described in the documentation available on the SAP Service Marketplace at [service.sap.com/installnw74](http://service.sap.com/installnw74) and on the SAP Help Portal at [help.sap.com/nw74/](http://help.sap.com/nw74/).

### Post-Installation Steps

- [Activate Your SAP Technical Business Content \[page 12\]](#)
- [Ensure ICF Services are Activated \[page 12\]](#)
- [Activating Planning and Consolidation Unified \[page 13\]](#)

## 3.1 Activate Your SAP Technical Business Content

Use this procedure to activate the predelivered infoobjects, virtual providers, and Business Explorer (BEx) queries that are used for system reports.

### Procedure

1. Log into the SAP GUI.
2. Run transaction `RSTCO_ADMIN`.
3. Choose *Start Installation*.

## 3.2 Ensure ICF Services are Activated

### Procedure

Use transaction `SICF` to verify that the following services are activated:

#### For Planning and Consolidation

- **Classic-only:** Verify that all services under `/sap/EPM_BPC` are activated.
- Verify that all services under `/sap/public/bc` are activated.

- Verify that all services under `/sap/es/ina/` are activated.
- Verify that all services under `/sap/bw/cs` are activated.
- Verify that all services under `/sap/bc/ui5_ui5/sap/bpcwebclient` are activated.

#### For the EPM Connector

Verify that the services under `/sap/bw/xml/soap/xmla/` are activated.

## 3.3 Activating Planning and Consolidation Unified

### Prerequisites

- You are using SAP HANA database.
- You have activated the SAP Business Warehouse Planning Applications Kit. For more information, see SAP Note [1637199](#).

### Procedure

To activate the Planning and Consolidation unified follow the steps below:

1. Log on to the SAP GUI.
2. Run transaction SM30.
3. Enter the `RSPLS_HDB_ACT` table view.
4. Add and activate the following parameter:  
`BPC_ACT: BPC-PAK integration active`

For more information, see SAP Note [1919631](#).

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## 4 Classic-Only: Installing Planning and Consolidation

The main steps for installing Planning and Consolidation are the following:

1. Familiarize yourself with the software requirements — see [Server Prerequisites for Planning and Consolidation Classic \[page 14\]](#).
2. Familiarize yourself with the possible ways to install Planning and Consolidation — see [Installation Scenarios \[page 14\]](#).
3. Download the required components for Planning and Consolidation classic — see [Acquiring the Planning and Consolidation Installation Components and Support Packages \[page 15\]](#).
4. Install the add-in POASBC ABAP component — see [Installing the Add-In POASBC ABAP Component \[page 15\]](#).
5. Install Planning and Consolidation and the ABAP add-on server component — see [Installing the Server Components \[page 16\]](#).

After the initial installation of Planning and Consolidation, see [Installing an ABAP Server Component Support Package \[page 16\]](#) for details of installing support packages.

If you choose to use Planning and Consolidation with SAP HANA, download and install the add-in software component HANABPC. See [Installing the SAP HANA Component for Planning and Consolidation \[page 17\]](#).

### 4.1 Server Prerequisites for Planning and Consolidation Classic

#### Prerequisites

Before installing the server component for the classic model, you must have installed and configured SAP Business Warehouse. For more information, see [Installing and Configuring SAP Business Warehouse \[page 9\]](#).

#### Required Components

You must download the installation component for Planning and Consolidation.

For more information, see [Acquiring the Planning and Consolidation Installation Components and Support Packages \[page 15\]](#).

### 4.2 Installation Scenarios

You can install the ABAP server component in one of the following ways:

- On an existing SAP NetWeaver AS ABAP system (that meets minimum prerequisites)
- On a completely new SAP NetWeaver AS ABAP system

- During an update from SAP NetWeaver 7.3 or SAP NetWeaver 7.31 including Enhancement Package 1 to SAP NetWeaver 7.4. For more information about this scenario, see [Installing Planning and Consolidation during the update of NetWeaver \[page 17\]](#).

## 4.3 Acquiring the Planning and Consolidation Installation Components and Support Packages

### Procedure

You must download the Planning and Consolidation 10.1 installation files and the required support packages.

1. To download the installation files for Planning and Consolidation 10.1:

Go to ► [service.sap.com/swdc](http://service.sap.com/swdc) ► [Software Downloads](#) ► [Installations and Upgrades](#) ► [A - Z Index](#) ► ["B"](#) ► [SAP BPC FOR SAP NETWEAVER](#) ► [SAP PC 10.1 FOR SAP NW](#) ► [Installation](#) ►.

- Download software component *POASBC 100\_731*.
- For systems that are **not** based on SAP HANA, download software component *CPMBPC 810*.
- For systems that are based on SAP HANA, download software component *HANABPC 810*.

2. To download support packages:

Go to ► [service.sap.com/swdc](http://service.sap.com/swdc) ► [Software Downloads](#) ► [Support Packages and Patches](#) ► [A - Z Index](#) ► ["B"](#) ► [SAP BPC FOR SAP NETWEAVER](#) ► [SAP PC 10.1 FOR SAP NW](#) ► [Comprised Software Component Versions](#) ►.

- For systems that are **not** based on SAP HANA, go to ► [SAP EPM BPC ABAP 10.1](#) ► [Support Packages](#) ► and download the required support package.
- For systems that are based on SAP HANA, go to ► [SAP BPC ACCELA. HANA 10.1](#) ► [Support Packages](#) ► and download the required support package.

3. Click on a component you want to download and add the component to your Download Basket. Repeat this step for each component you want to download, using the links at the top of the page to locate other related components.
4. Download the components from the Download Basket using SAP Download Manager.

#### **i** Note

For information about using the SAP Download Manager, go to [service.sap.com/support](http://service.sap.com/support) and choose *my Download Basket* from the *my Personalized Information* pane.

## 4.4 Installing the Add-In POASBC ABAP Component

Check the system status dialog to ensure that there is not already a component with a name starting POASBC installed.

Install the POASBC ABAP component using transaction SAINT.

---

## 4.5 Installing the Server Components

### Prerequisites

- You have downloaded the server components from SAP Service Marketplace. See [Classic-only: Acquiring the Planning and Consolidation and ABAP Server Components \[page 15\]](#).
- You have read the topic *System and Client Settings* in SAP Library at [help.sap.com/saphelp\\_46c/helpdata/en/2e/d9530294f911d283d40000e829fbbd/frameset.htm](http://help.sap.com/saphelp_46c/helpdata/en/2e/d9530294f911d283d40000e829fbbd/frameset.htm) for information about which client to use when installing SAP Business Planning and Consolidation on SAP NetWeaver.
- Make sure that Business Warehouse (BW) is activated and that Planning and Consolidation is activated in the same client as BW.

### Procedure

To install the server components, use the transaction SAINT.

For information about using SAINT, see [help.sap.com/saphelp\\_nw74/helpdata/EN/49/3e896728ab2222e1000000a42189d/frameset.htm](http://help.sap.com/saphelp_nw74/helpdata/EN/49/3e896728ab2222e1000000a42189d/frameset.htm).

## 4.6 Installing an ABAP Server Component Support Package

You can download and import support packages to update the ABAP add-on server component.

### Prerequisites

The RFC destination for transport must be properly configured before importing a support package. Perform the following steps to configure the destination:

1. Run transaction `SM59` to create the RFC destination and make sure the client, user and PW Status are configured properly.
2. Use Connection Test to verify the RFC destination. All of the connection tests should pass.
3. Use Remote Logon to verify the RFC destination. This should logon to the system directly without prompting for a password.
4. Run transaction `RSTPRFC` to set the BW client and name of the destination.

### Procedure

Follow the instructions in SAP Note [1582356](#) for downloading and importing add-on support packages.



## 4.7 Installing the SAP HANA Component for Planning and Consolidation

Follow these instructions to install the SAP HANA Component for Planning and Consolidation. This component accelerates report generation within Planning and Consolidation.

### Procedure

1. Download the SAP HANA Component for Planning and Consolidation **HANABPC** from SAP Service Marketplace.
2. Install the component using transaction *SAINT*.
3. Run the program *BPC\_HANA\_MIGRATE\_FROM\_10* to migrate your version 10 environments.
4. Set the IMG parameter *ENABLE\_ACCELERATOR* to **x**.
5. Optional steps:
  - If you want your member formulas to use SAP HANA acceleration, set the IMG parameter *ENABLE\_HANA\_MDX* to **x** for a model. For more information, see SAP Note [1904344](#).
  - If you want to use the disaggregation functionality, set the IMG parameter *ENABLE\_DISAGGREGATION* to **x**. For more information, see SAP Note [1903169](#).
  - If you want to use the native HANA model, set the IGM parameter *ENABLE\_NATIVE\_HANA\_MODEL* to **x**. For more information, see SAP Note [1902743](#).
6. Turn on the shared memory hierarchy. For more information, see SAP Note [1657612](#).

## 4.8 Installing Planning and Consolidation during the update of NetWeaver

If you plan to update your SAP NetWeaver system from NetWeaver 7.3 or NetWeaver 7.3 Including Enhancement Package 1 to SAP NetWeaver 7.4, you can include the Planning and Consolidation components in the update process. To do this, you must select Planning and Consolidation in the *Select Add-on Products* step in the Maintenance Optimizer (MOPZ). After that you use the Software Update Manager (SUM) tool to update your system.

For more information, see SAP Note [1704901](#).

For more information about the SUM tool, see *Update Guide - Update of SAP Systems Using Software Update Manager <version>* that is available on the SAP Service Marketplace at: ► <http://service.sap.com/sltoolset> ► *Software Logistics Toolset 1.0* ► *SUM* ►.

# 5 Classic-Only: Post-Installation Steps

The main steps after installing the Planning and Consolidation classic are the following:

1. Activate your SAP technical business content – see [Activate Your SAP Technical Business Content \[page 18\]](#).
2. Generate the required authorization profiles and perform a User Mass Comparison – see [Generate Required Authorization Profiles and Perform User Mass Comparison \[page 18\]](#).
3. Configure the Planning and Consolidation ABAP add-on – see [Configure the ABAP Server Component \[page 19\]](#).

## 5.1 Activate Your SAP Technical Business Content

### Procedure

1. Go to transaction RSA1 and select *BI Content*.
2. Choose *Object Types*.  
Make sure *Grouping* is set to *In Dataflow Before and Afterwds* and *Collection Mode* is set to *Collect Automatically*.
3. Expand the *InfoObject* type and double-click *Select Objects*.
4. Filter the InfoObjects using the wildcard **OTCA\***.
5. Ensure that all of the objects are active.  
If they are not active, activate them using the *Install* button.

## 5.2 Generate Required Authorization Profiles and Perform User Mass Comparison

### Procedure

1. Go to transaction PFCG in SAP NetWeaver.
2. Choose ► *Utilities* ► *Mass generation* ▾.
3. In *Additional restrictions*, use a wildcard to filter for roles containing **\*BPC\***.
4. Choose *All Roles* and select *Generate automatically*.
5. Execute the program.  
Display the system log when the program finishes, if desired.
6. Return to transaction PFCG in SAP NetWeaver.
7. Choose ► *Utilities* ► *Mass comparison* ▾.
8. In *Selection of roles*, use a wildcard to filter for roles containing **\*BPC\***.
9. Execute the program.  
Display the system log when the program finishes, if desired.

10. Close the PFCG transaction window.

## 5.3 Configure the ABAP Server Component

You must configure the ABAP server component after installing it.

This procedure includes information about running the UJS\_ACTIVATE\_CONTENT program, which is how the default environment, EnvironmentShell, is created. It installs the EnvironmentShell environment by leveraging parts of the Planning and Consolidation transport framework. This program also supports the installation of many other table entries that are required in order for the system to work correctly, such as language settings, BW Business Content, and data manager instructions.

### Note

The UJS\_ACTIVATE\_CONTENT program cannot be used to activate an existing environment migrated from 10.0 to 10.1.

The activation program loads only dimension members (master data) for EnvironmentShell; the program does not load transaction data. The *Clean* option deletes BW objects of the environment and its entries in the Planning and Consolidation UJ\* metadata tables. If you use the *Clean* option on EnvironmentShell, refer to SAP Note [1615644](#).

## Prerequisites

The ABAP server component has been installed.

You have activated your SAP Business Content.

### Caution

Set the ABAP buffer size to at least 2 GB to minimize the risk of errors during the UJS\_ACTIVATE\_CONTENT step of the procedure. You can set the buffer size using the parameter `abap/buffersize` in the instance profile with transaction `RZ10`.

After completing the step, you can change it back. After changing the parameter, you must restart the ABAP instance, for example, with the SAP Management Console.

For more information about changing the buffer size, see [SAP Note 1273283](#).

## Procedure

These steps are required for proper functioning of the Planning and Consolidation software.

### Logistic System for Planning and Consolidation

Verify that the BW client on which you are installing EnvironmentShell is modifiable using transaction SCC4. When it is set to "No changes allowed" an exception occurs during the installation.

### Make Namespaces and Software Components Changeable

For maximum flexibility, you can make the following namespaces and software components changeable:

- Namespaces:

- /CPMB/
- /1CPMB/
- /B28/
- /POA/
- *Customer Name Range*
- *General SAP Name Range*
- Software Components:
  - CPMBPC
  - HOME
  - LOCAL

However, in a production environment, you may want to minimize the number of components that can be modified. If this is the case, you can set the following namespaces and software components to unchangeable:

- Namespaces:
  - /1CPMB/
  - *Customer Name Range*
  - *General SAP Name Range*
  - /CPMB/
  - /B28/
- Software Components:
  - CPMBPC

Use the following procedure to set the components to *Modifiable* or *Unmodifiable*:

1. Enter transaction *SE06* and choose *System Change Option*.
2. Make sure that the *Planning and Consolidation Addon* is set to *Restricted Modifiability*.
3. Set the namespaces and software components to *Modifiable*.

### Import Client-Dependent Objects

Using transaction *RSTPRFC*, set up transports by creating the RFC destination for the *After Import* method. Save the password, then assign the BW client. For more information, see [help.sap.com/saphelp\\_nw74/helpdata/en/45/b517e0ed2f52f5e10000000a1553f7/frameset.htm](http://help.sap.com/saphelp_nw74/helpdata/en/45/b517e0ed2f52f5e10000000a1553f7/frameset.htm).

If the transport fails, see SAP Note [1329561](#) for information.

### Run Connection Test on RFC Destination MDX\_PARSER

Enter transaction *SM59* and run a connection test on the RFC destination *MDX\_PARSER*.

#### Note

If this fails, apply [SAP Note 1032461](#). After applying this note, you must restart the ABAP server.

### Assign Authorization to Installation User

Assign the authorization *SAP\_BW\_CONTENT\_ADMIN* to the user installing *EnvironmentShell* as the *Planning and Consolidation* system administration user to activate business content (such as default BW objects).

We recommend that you also assign the *SAP\_ALL* profile during the installation process of *EnvironmentShell*. You can remove the *SAP\_ALL* profile after the installation.

### Create a Service User

The service user that you create is used for BPC background processing.

1. Create a service user, as follows: Enter transaction *SU01*, create a user with user type *System* (for example, *BPC\_SERVICE*).
2. Assign the role *SAP\_BPC\_SERVICE* to this user.

## Create and Assign BPC RFC Destination

1. Enter transaction SM59. Create an RFC destination to point to the client on which Planning and Consolidation is installed and run. In the *Logon & Security* tab, enter the service user created above with the correct password.
2. Enter transaction SPRO. Choose ► *SAP Reference IMG* ► *SAP Customizing Implementation Guide* ► *Planning and Consolidation* ► *Configuration Parameters* ► *Set Global Parameters* ►. Choose *New*. In *Field Name* enter *RFC\_DESTINATION* and press . In *Value* enter the RFC destination created above, save the change and quit.
  - Set the type of the RFC destination to *Connection to ABAP System* (type 3).
  - Set the *Communication Type* to *Unicode*

## Install EnvironmentShell

1. Run the program UJS\_ACTIVATE\_CONTENT.
2. In the *Content Activation* window, set the *Environment ID* to *EnvironmentShell* and the *Content Version* to *1*.
3. Choose the following options:
  - *Update Language*
  - *Activate BI Business Content*
  - *Update Default DM Instructions*
  - *Activate EnvironmentShell*
  - *Update Default Formulas Table*
4. Select ► *Program* ► *Execute* ►.
5. Check the logs by selecting ► *System* ► *Own Jobs* ►.
6. Select the job and display the spool.

### Note

There can be an X\_MESSAGE exception when running UJS\_ACTIVATE\_CONTENT to activate the environment *EnvironmentShell*. For details of how to resolve this issue, see SAP Note [1576929](#).

## 6 Tips

### 6.1 SMS for Planning and Consolidation Package Delivery

Use these instructions for SMS usage in the Planning and Consolidation installer and for patch publication.

#### Prerequisites

Client and SMS server are installed and configured.

#### Procedure

1. Log on to the server on which SMS is installed.
2. Create a folder for placing published packages.
3. Create the folders *SMSPACK* and *APOO1* on D: \, where SMSPACK is the parent folder for publishing packages with subfolders such as AP001, 002, and so on, for each package.
4. Place the Planning and Consolidation setup files in D: \SMSPACK\AP001\.
5. To publish the Planning and Consolidation setup files or to advertise them to the clients, create a package for the setup file as follows:
  1. Open the SMS Admin console from ► *Programs* ► *Systems Management Server* ► *SMS Administrator console* ►.
  2. Right-click on the packages folder, then select ► *New* ► *Package* ►.
  3. Enter the required data.
  4. On the *General* tab, click the data source and choose *This package contains source files*.
  5. Set the directory of the source files to the local drive D: \, then choose *Apply/OK*.
6. To run this package, create a program as follows:
  1. Expand the packages folder in the Admin console, right-click the programs, and select ► *New* ► *Program* ►.
  2. Enter the Program Properties as required.

#### **i** Note

If you have command line options for the setup, you can browse to choose the package and add the command line parameters next to it. If not, you can simply choose the setup file.

You can use the *After Running* dropdown to configure the action once the package is installed.

On the *Environment* tab, you can choose how the package should run and whether the user must be logged in or not and with what rights. If the user does not have administrator rights, select *Run with administrative rights* and *Allow users to interact with this program*.

3. Choose *Apply* to save the settings, then choose *OK*.
7. To notify client machines that a package is available, create an advertisement as follows:
  1. Right-click on the Advertisements folder and choose ► *New* ► *Advertisement* ►.

- 
2. Provide a name and appropriate details, and choose the package and the program.
  3. Choose the systems to which the package is available.
  4. Indicate whether to advertise the package at a specific time or set a mandatory assignment by choosing the yellow star button.

The checkbox allows users to run the package installation independently, whenever convenient, from Control Panel or Add/Remove Programs.

5. On the Advanced tab, set the location from which you want to run the program, then choose *Apply* and *OK*.
8. Create a distribution point for this program as follows:
  1. Expand the packages folder in the Admin Console, expand the package you created, and right-click the distribution point folder.
  2. Choose ► *New* ► *Distribution point* ▾, and set the distribution point.
  3. Update this with the package you created by right-clicking on the distribution points folder, selecting all tasks, and updating the distribution points.
  4. Choose *Yes* at the confirmation message.
9. Verify that the package is available on the client side.

---

# 7 Troubleshooting

## Client Installation Issues

By default, the installation program runs a diagnostic program. Here are some potential error messages that display during the client installation:

- “Visual Basic 6.0 SP5: Run-Time Redistribution Pack not installed”  
Download `vbrun60sp5.exe`, then run it.
- “Visual C++ 6.0 Run-Time not installed”  
Download `vc6redistsetup_enu.exe`, then run it.
- “OSoftDMClientTools.DMTools found in registry. Please refer to system administrator before installation”  
Open the registry table, find the key `OSoftDMClientTools.DMTool` under `HKEY_LOCAL_MACHINE\SOFTWARE\Classes` and delete this key.
- “.NET Framework x.x is not installed”  
Install the relevant version of .NET Framework before continuing.

## Other Potential Issues

The ABAP service users can be locked as a result of the install. Check and unlock any locked ABAP service users after performing the install. To do so, perform transaction SU01, enter the service user ID (for example, BPC\_SERVICE), and then press Ctrl+F5.



## 8 Connecting to Solution Manager Diagnostics

The diagnostics functions in SAP Solution Manager allow identification, analysis, and resolution of problems. This procedure provides the steps required to connect Planning and Consolidation to Solution Manager Diagnostics.

### Procedure

1. Install the Diagnostics Agent according to SAP Note [1234387](#) on all servers where Interface for the Web and Application Servers are installed.

#### **i** Note

Installation files for Diagnostics Agent are available on the SAP Service Marketplace by navigating to ► *Support Packages and Patches — Entry by Application Group* ► *SAP Technology Components* ► *SAP SOLUTION MANAGER* ► *SAP SOLUTION MANAGER 7.0 EHP 1* ► *Entry by Component* ► *Agents for managed systems* ► *DIAGNOSTICS AGENT 7.11* ►.

Download an installation file based on one of the following system landscapes:

- Windows Server on IA32
- 32bit Windows Server on IA64
- 64bit Windows Server on x64 64bit

2. Set up your system for Diagnostics.

Refer to *End-to-End Root Cause Analysis System Landscape Setup Guide*, which is available on Service Marketplace at [service.sap.com/~sapidb/011000358700000074392009E](http://service.sap.com/~sapidb/011000358700000074392009E), and follow the chapters that apply to Planning and Consolidation.

# 9 Security Considerations and Connection Issues

Your client/server configuration is unique as it relates to security, so you may experience connection problems with SSL, proxy servers, or programs and settings that interact with these components. If you are having any issues related to connection, review the following recommendations and troubleshooting tips.

## 9.1 Checking for Open Ports

You must ensure that all required ports are open for inbound/outbound traffic. By default, Planning and Consolidation requires that Port 80 (used by http) is open.

To test whether the required port is open, go to a command prompt and enter **Telnet <serveripaddress>**. For example, **Telnet 43.118.18.36 80**. If the system returns a blank command window, the port is open. If it returns a message stating that it cannot connect, the port is not open.

### **i** Note

You can use [www.myserver.org/portsniff.asp](http://www.myserver.org/portsniff.asp) to scan for the normal ports. It allows you to manually enter a port number to test.

You can change the name of a port.

## 9.2 Proxy Server and Firewall Issues

For questions about specific proxy servers, contact SAP Support.

### General Considerations

- If you connect to the Internet through a firewall or proxy server, you need to add the IP address of the Planning and Consolidation server as an exception. You can do this at the client level (► *Internet Explorer* ► *Tools* ► *Internet Options* ► *Connections* ► *LAN Settings* ⌵) or at the server level.
- Enabling content filtering on the proxy server or firewall may cause connection problems.
- If external users are having trouble connecting to the server, make sure the proxy server connects using a fully qualified domain name. Fully qualified domain names typically resolve both internal and external IP addresses.
- Each secure Planning and Consolidation server name must be identified on the proxy server.
- Proxy servers may or may not require authentication, which could conflict with Planning and Consolidation authentication. Do not use authentication on the proxy server. The system synchronizes the user name and password on the remote server with the local user name and password.

## **i** Note

For more information about setting up an ISA proxy server, contact SAP Support to request a copy of [Setting up ISA Proxy Server](#) White Paper. For more information about Business Planning and Consolidation firewall ports, see SAP Note [1505250](#).

### **Internet Explorer Settings Issues**

Internet Explorer settings must be set correctly to prevent errors and problems when you attempt to access the Planning and Consolidation server using the Connection Wizard. Change the settings by taking the following steps:

1. From Internet Explorer, select **Tools > Internet Options**.
2. From the *General* tab, delete all temporary Internet files, cookies, and history.
3. From the *Security* tab, set security to *Default* level for Internet and local intranet.
4. From the *Connections* tab, choose the *LAN settings* button. If you select *Use a proxy server for your LAN*, insert the IP address or fully qualified server name of the Planning and Consolidation server as an exception by choosing *Advanced*.
5. From the *Advanced* tab, choose *Restore Defaults*, *Apply*, then *OK*.

### **Microsoft Windows Issues**

If you have Windows XP SP2, disable the Microsoft Windows firewall.

### **Norton AntiVirus Issues**

Having *Script Blocking* enabled in Norton AntiVirus can cause some display and download issues.

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## 10 Terminal Services or Citrix Server

This section describes best practices and instructions for installing Planning and Consolidation in a Terminal Services or Citrix Server deployment.

### 10.1 Terminal Services Home Directories

We recommend using Terminal Server home directories rather than using the user's profile directory. The profile directory downloads a minimal amount of information about the dimensions of the environment you are logging on to and may be as large as 2 MB per user. The profile directory is on the system drive and has limited space. By specifying a home directory, you can manage the disk space required.

If you have a farm of servers, put the profile information in a common home directory rather than on each individual server, so that all users consistently use the current download of dimensions.

### 10.2 System Requirements

The Citrix server should be one of the following systems:

- XenApp 5 Enterprise
- XenApp 5 Platinum

The XenApp program must be installed on a Windows 2008 server.

Only client virtualization is supported with XenApp 5 Enterprise and Platinum. For details, SAP Notes [1098847](#) and [1409608](#).

The Terminal Services or Citrix Server computer requires the same client software as would be installed on the client server (see [Client Prerequisites \[page 10\]](#)).

### 10.3 Installing Planning and Consolidation in a Terminal Services or Citrix Server Deployment

#### Prerequisites

The server installation files have been downloaded from SAP Service Marketplace and installed.

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## Procedure

The following steps outline how to install the Planning and Consolidation clients in a Terminal Services (TS) or Citrix Server deployment:

1. Make sure the Terminal Services or Citrix Server machine has the system requirements installed.
2. Log on to the Terminal Services or Citrix Server machine with a user ID that has the rights to install on that server.
3. At a command prompt, enter **Change user/install**.
4. Open a browser and connect to the URL `<PC_server:port>/sap/epm/bpc/web`.
5. Log on to the Web site with the Planning and Consolidation administrative account.
6. Click *Install EPM Add-in for Microsoft Office* to install the EPM Add-in.
7. Go back to the command prompt and enter **Change user/execute** or **Restart the server**.
8. For the Citrix Server, you must publish each client application. Take the following steps:
  - To publish the Planning and Consolidation Launch page: `Iexplore.exe http(s)://<ServerName>-NetBIOS or FQDN/sap/epm/bpc/web`
  - To publish the EPM Add-in client: `C:\Program Files\Microsoft Office\Office\Excel.exe`

## 10.4 Creating a Shortcut to the Launch Page

### Procedure

If you use published desktops instead of published applications, the Planning and Consolidation desktop file (which is installed on the current user's desktop) must be moved to the *All Users/Desktop* folder.

[www.sap.com](http://www.sap.com)



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