Master Guide
SAP Business Planning and Consolidation 10.0
Version for SAP NetWeaver

Target Audience

- Technical Consultants
- System Administrators

CUSTOMER
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You can find this document at the following address: `http://service.sap.com/instguidesEPM-BPC.`

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
Example	Emphasized words or expressions
Example	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, http://www.sap.com
/example	Quicklinks 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 123456
Example	■ Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. ■ Cross-references to other documentation or published works
Example	■ Output on the screen following a user action, for example, messages ■ Source code or syntax quoted directly from a program ■ File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
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, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

Document History

CAUTION

Before you start the implementation, make sure you have the latest version of this document. You can find the latest version on the SAP Service Marketplace at `http://service.sap.com/instguidesEPM-BPC` ▶ *10.0, version for SAP NetWeaver → SBOP Plan & Consol 10.0 NW Master Guide* ↵.

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

Version	Date	Description
1.0	2012-04-23	Version 1.0 to accompany GA release.
1.1	2013-03-05	Updated the topic *Downloading and Installing Components* [page 25] to include details about SAP Crystal Dashboard Design.
1.2	2013-04-30	Updated the topic "Important SAP Notes" with the central note number for support package 10.
1.3	2013-09-09	Updated the topic "Important SAP Notes" with the central note number for support package 11.
1.31	2014-03-20	Minor editorial changes made throughout the document.

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1 Getting Started

1.1 About this Document

This Master Guide is the starting point for the technical implementation of SAP Business Planning and Consolidation. Use this Master Guide for an overview of Business Planning and Consolidation from a technical perspective. The Master Guide is a planning tool that helps you to design your Business Planning and Consolidation system landscape and it refers you to all of the detailed documentation you need. For a general overview of the available SAP documentation, see *The Main SAP Documentation Types*.

This Master Guide includes the following main sections:

- Business Planning and Consolidation Overview
- Downloading and installing the SAP BusinessObjects XI
- Installing the ODBO Provider
- Using SAP Crystal Dashboard Design with Business Planning and Consolidation
- Using SAP BusinessObjects Analysis, edition for OLAP with Business Planning and Consolidation
- Using SAP BusinessObjects Process Control with Business Planning and Consolidation

1.2 Related Information

Further Useful Links

The following table lists links on SAP Service Marketplace that may be helpful during your implementation and use of Planning and Consolidation:

Content	Location on SAP Service Marketplace
SAP Notes search	http://service.sap.com/notes
SAP Software Distribution Center (software download and ordering of software)	http://service.sap.com/swdc
SAP Online Knowledge Products (OKPs) – role-specific Learning Maps	http://service.sap.com/rkt

1.3 Important SAP Notes

You must read the following SAP Notes before you start the installation. These SAP Notes contain the most recent information about the installation, as well as corrections 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 http://service.sap.com/notes.

SAP Note Number	Title	Description
1586088	Planning and Consolidation 10.0 for NetWeaver Documentation Addendum	Contains information that does not appear in the application help of Planning and Consolidation 10.0, version for the SAP NetWeaver platform.
1893075	Business Planning & Consolidation 10.0 NW SP12 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP12, version for the SAP NetWeaver platform.
1826720	Business Planning & Consolidation 10.0 NW SP11 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP11, version for the SAP NetWeaver platform.
1779357	Business Planning & Consolidation 10.0 NW SP10 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP10, version for the SAP NetWeaver platform.
1744028	SAP Planning and Consolidation 10.0 SP09, version for the NetWeaver platform	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP09, version for the SAP NetWeaver platform.
1703032	SAP Planning and Consolidation 10.0 SP08, version for the NetWeaver platform	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP08, version for the SAP NetWeaver platform.
1682291	SAP Planning and Consolidation 10.0 SP07, version for the NetWeaver platform	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP07, version for the SAP NetWeaver platform.
1660062	SAP Planning and Consolidation 10.0 SP06, version for the NetWeaver platform	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP06, version for the SAP NetWeaver platform.
1627973	SAP Planning and Consolidation 10.0 SP05, version for the NetWeaver platform	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP05, version for the SAP NetWeaver platform.
1615237	Planning and Consolidation 10.0 SP04 Central Note	This note contains installation information, enhancements, and

SAP Note Number	Title	Description
		resolved issues for SAP Planning and Consolidation 10.0 SP04, version for the SAP NetWeaver platform.
1597468	Planning and Consolidation 10.0 SP03 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP03, version for the SAP NetWeaver platform.
1580564	Planning and Consolidation 10.0 SP02 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP02, version for the SAP NetWeaver platform.
1573567	Planning and Consolidation 10.0 SP01 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP01, version for the SAP NetWeaver platform.

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2 SAP Business Planning and Consolidation Overview

2.1 Software Units

In development and productive environments, SAP Business Planning and Consolidation, version for SAP NetWeaver, runs on the SAP NetWeaver platform.

The application is built on top of the NetWeaver Flex Client Platform and provides the necessary user environment capabilities. It allows the implementation of a rich flex-based user interface with a consistent look and feel and a common flexible user interaction model. It provides prebuilt components for reuse across different applications as well as configuration capabilities through its Flex runtime. It uses standard RESTful connectivity to the ABAP backend, ensures consistent accessibility of the user interface, and provides client-side localization and logging capabilities.

The following platforms and components are supported at each tier:

Tier	Operating System	Others
Client	Microsoft Windows Vista (32–bit & 64–bit) Microsoft Windows XP (32–bit) Microsoft Windows 7 (32–bit & 64–bit) (post SP release) Windows Server 2008 R2 Foundation (64-bit) Windows Server 2008 R2 Standard, Enterprise, DataCenter (64-bit)	Microsoft Office 2007 and 2010 Internet Explorer 7.0 and 8.0 as of SP11
NetWeaver Application Server	Any OS Supported by NetWeaver	See SAP NetWeaver 7.30 Product Availability Matrix for supported databases

For information about all supported platforms and databases, see the Product Availability Matrix on SAP Service Marketplace at http://service.sap.com/pam. Search on Planning and Consolidation.

Content Lifecycle Management Software Units

The Content Lifecycle Management component aims to support the management of partner content, providing users with a consistent way to package, version-control, inspect, and import partner content into their systems. It focuses on the capability to deliver content from vendors' landscapes to customers' landscapes and does not provide means to transport content within one single landscape. The latter capability is already provided by the ABAP transport system.

CLM is available on ABAP 7.3 and ABAP 7.02.

CLM is delivered as a single software component. There are different versions of this software component available, depending on the version of the target platform.

Event & Notification Software Units

The event and notification function allows you to create and send messages to users through various channels. Users can select the preferred delivery channel through which they want to receive messages. This is configurable; an administrator has the ability to predefine a channel for all users.

This function also allows you to scan all message attachments using a Virus Scanner Interface (VSI) available on the server.

Context & Insights Software Units

Context allows business users to track data selection in their workspaces. The application can use the selected data to guide what to display to the user.

It enables context-aware interaction in the workspace environment. Users can alter the display of data based on the selection of dimension members at the different levels within a workspace. The hierarchy of visual containers is used to scope and filter the selected context data. When the workspace is saved the selected context is saved with it.

Server Components

The installation requires an ABAP application server.

Server	Description
ABAP Application Server	The main business logic for Planning and Consolidation is performed on this server. It has the following characteristics: ■ Runs SAP NetWeaver 7.3 ■ Is a 64-bit tier where Planning and Consolidation application business logic resides ■ Exclusively handles database access
Business Intelligence Accelerator (optional)	Runs in-memory high performance SAP NetWeaver BW Accelerator

2.2 Software Component Matrix

This section provides an overview of the components available for integration with Business Planning and Consolidation. Each component is installed on separate hardware than Business Planning and Consolidation. Software requirements for each component are documented in the relevant installation guides.

Software Component	Technical Scenario Key: M = mandatory; O = optional
SAP BusinessObjects Enterprise components	
SAP BusinessObjects Enterprise XI 4.0	O – Required only if integrating with other SAP BusinessObjects Enterprise systems.
SAP BusinessObjects Information Platform Services 4.0	O – Provides additional authentication options including single sign-on (SSO) to other integration components.
Integration components	

SAP BusinessObjects Risk Management	O – Use this if you want to build test plans using Process Controls for compliance purposes. Test plans can consist of manual or automated compliance checks You can build automated checks using Business Planning and Consolidation transaction data, as well as metadata.
SAP BusinessObjects Analysis, edition for OLAP	O – Use this if you want to display, analyze, and share multidimensional data sets in SAP BusinessObjects Analysis, edition for OLAP.
SAP BusinessObjects Dashboards	O – Use this if you want to display and analyze Business Planning and Consolidation transaction data in SAP BusinessObjects Dashboards. Transaction data is available within SAP Crystal Dashboard Design through the EPM Add-in. SAP BusinessObjects Dashboards can pull live data from Business Planning and Consolidation through a native EPM Connector for SAP Crystal Dashboard Design. SAP BusinessObjects Dashboards can use Business Planning and Consolidation data outside of the application, for example, to create an Adobe PDF document or PowerPoint presentation that takes live data from Business Planning and Consolidation. SAP BusinessObjects Information Platform Services can provide single sign-on to Business Planning and Consolidation from the Dashboards model.
SAP BusinessObjects Web Intelligence	O – Use this if you want to display and report on Business Planning and Consolidation data in SAP BusinessObjects Web Intelligence.
SAP Crystal Reports	O – Use this if you want to display Business Planning and Consolidation data in SAP Crystal Reports.
SAP BusinessObjects Process Control	O – Use this if you want to use Business Planning and Consolidation in SAP BusinessObjects Process Control.
SAP Financial Information Management	O – Use this if you want to use SAP Financial Information Management as a source of data in Business Planning and Consolidation, or to export data. For more information, see SAP Library for SAP Financial Information Management at http://help.sap.com/epm → *Financial Information Management*.

Software Component	X = Mandatory or (X) = Optional	Description
POASBC Version: 100_730	X	POA Shared Business Components ABAP 100_730

The POA_SBC_100_730 component includes the Content Lifecycle Management functions, which are broken into two business processes: Providing Content and Consuming Content.

2.3 System Landscape

Key advantages of the application architecture are the following:

- Service-Oriented Architecture (SOA) providing easy integration
- 64-bit ABAP application server support

- Operating system and database independence, when running operating systems and databases supported by the NetWeaver ABAP application server
- Patented, enterprise-scale Microsoft Office integration with a world class user interface

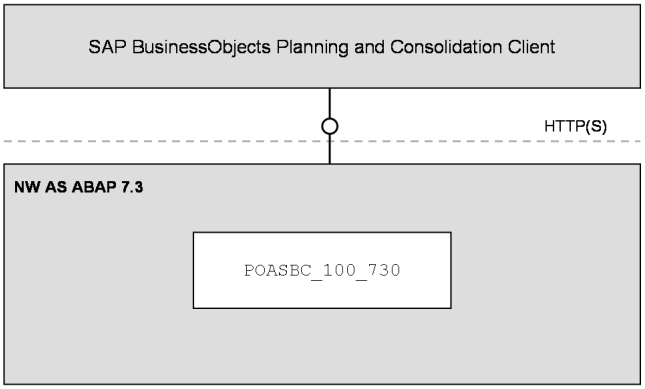

Figure 1: SAP Business Planning and Consolidation on NW ABAP 7.3

Content Lifecycle Management System Landscape

Content Lifecycle Management (CLM) is a software component with its own user interface, communicating with one, or more managed applications. There are different landscape setups, based on two key usage characteristics:

- Single or Multi Application System management
- Standalone or Integrated Installation

		Version Standalone	Integrated
Number of Application Systems to be Managed	**One**	If CLM is used to manage application content residing on a different system, the landscape depicted in figure 1 can be applied, where CLM is installed standalone as an add-on to the NetWeaver platform. In this case, CLM can communicate with the application system using an RFC connection. This landscape model can be used if you do not want to interfere with an existing running application system and its associated technical resources. See figure 1: Standalone + one system	If CLM is used to manage application content residing on a single system, the landscape depicted in figure 2 can be applied, where CLM is installed as an add-on to the same managed application system. When you install a managed application on your system, you can also install the CLM add-on on the same system. In this case, both the application and CLM can be operated from a single system without an RFC connection. See figure 2: Integrated + one system

		Version	
		Standalone	Integrated
	Multiple	If CLM is used to manage application content residing in multiple systems on the landscape, the deployment landscape scenario depicted in figure 3 can be applied. In this landscape model, CLM is installed standalone as an add-on to the NetWeaver platform. This landscape can be used when you want to have only CLM system as a central box that can communicate with other managed application systems. See figure 3: Standalone + multiple systems	If CLM is used to manage application content residing in multiple systems on the landscape, the complex deployment landscape scenario depicted in figure 4 can be applied. In this landscape model, CLM is installed as an add-on to one of the managed application systems. This landscape mode could fit use cases where one application system is frequently used with CLM for managing the its content lifecycle, while other participating application systems interact with CLM only a few times. See figure 4: Integrated + multiple systems

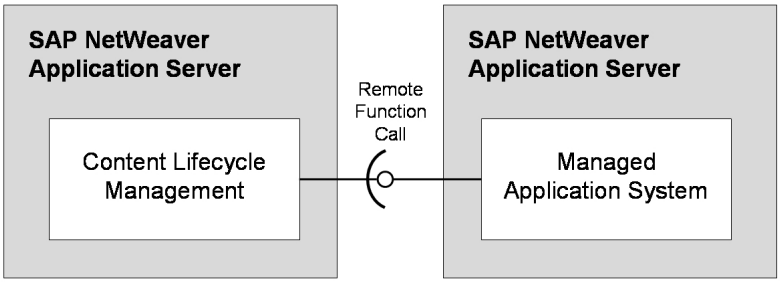

Figure 2: Figure 1: Standalone + One System

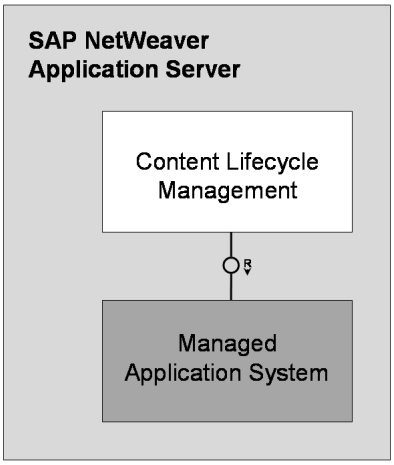

Figure 3: Figure 2: Integrated + One System

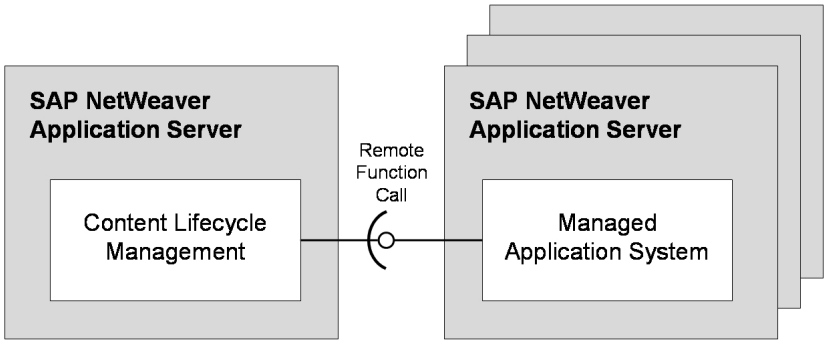

Figure 4: Figure 3: Standalone + Multiple Systems

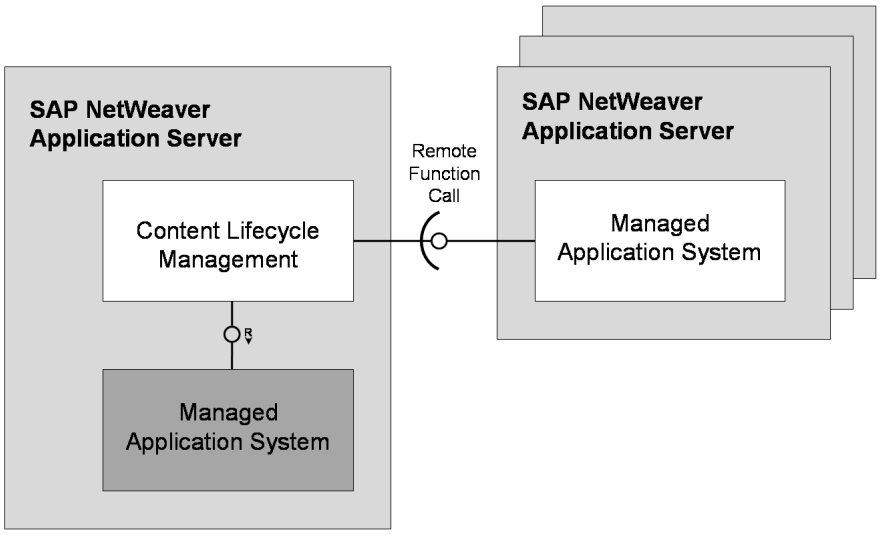

Figure 5: Figure 4: Integrated + Multiple Systems

Communication with managed applications happens via function calls through RFC destinations of SAP NetWeaver Application Server ABAP. Such communication channels can be configured for remote communication. This allows different actual landscapes to be formed.

NOTE

A landscape designed according to the above principles can be used for both providing content and consuming content. In case of separate Content Provisioning (vendor) and Content Consumption (customer) processes; a typical landscape can look as follows:

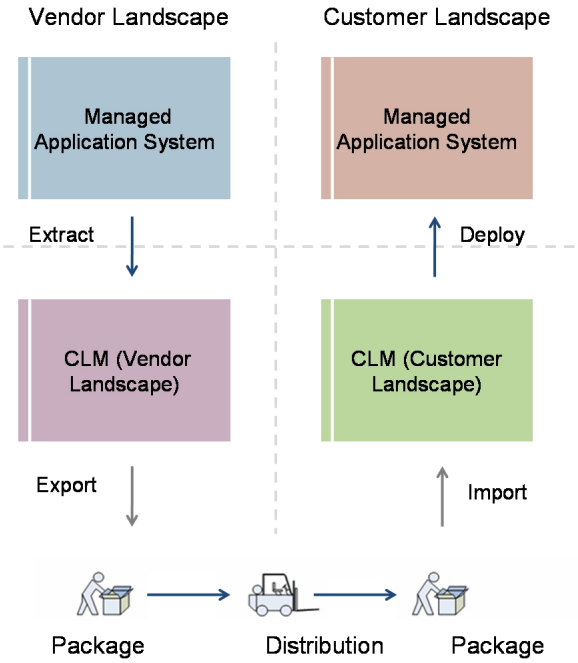

Figure 6:

Alternatively, these two processes can share the same landscape (with both extraction and deployment being handled in the same CLM system. It must be verified during the design of the landscape that both business processes can be executed in such a dual-purpose landscape.
For example: Separate authorizations/users must be associated with separate application systems so that content deployment is not accidentally performed on the system that is restricted for content extraction.

2.4 Development Environment

A development environment is an integral part of a successful implementation. It provides an environment for the following development aspects:

- Allows testing of third party software updates
- Can be used as a staging area for new Planning and Consolidation releases that require conversions

- Allows testing of changes to the design of Planning and Consolidation environments
- Facilitates the development of future Planning and Consolidation models and environments
- Serves as fail over and disaster recovery hardware
- Reduces the impact of any of the above activities on production users

Production and development environments do not have to be identical in hardware or configuration.

We strongly recommend that you use a minimal system landscape for test and demo purposes only.

For performance, scalability, high availability, and security reasons, do **not** use a minimal system landscape as your production landscape.

For information about system requirements, see the Installation Guide.

2.5 Overall Implementation Sequence

The following table describes the high level steps for installing Business Planning and Consolidation:

Process

The basic steps for the application server installation are the following:

Step	Action and Relevant Documentation
1	Verify and install prerequisites. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Server Prerequisites and Installing the Server Prerequisites*]
2	Acquire media. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Acquiring Media*]
3	Install and configure SAP NetWeaver. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Installing and Configuring SAP NetWeaver*]
4	Install the ABAP server component. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Installing the ABAP Server Component*]
5	Configure ABAP server component. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Configuring the ABAP Server Component*]

The basic steps for the Planning and Consolidation client installation are the following:

Step	Action and Relevant Documentation
1	Verify and install client prerequisites. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Verifying and Installing Client Prerequisites*]
2	Uninstall previously installed Planning and Consolidation clients. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Uninstalling Previous Client Components*]
3	Install the Admin and Office clients. [*SAP Business Planning and Consolidation 10.0 NW Installation Guide – Installing the Admin and Office Client Components*]

For documentation listed in the tables, see *List of Documents*.

Prerequisites:

- SAP NetWeaver 7.30 ABAP
- SAP Business Warehouse 7.30
- Adobe Flash Player 10.1

Step	Action	Remarks
1	Installation of software component `POASBC`, Version `100_730`	Mandatory
2	Post-installation of software component	Mandatory For more information about the installation and configuration steps, see the installation information.

NOTE

If CLM is being installed along with the application, the minimum platform prerequisites are met during the installation of the application. If you are installing CLM as an add-on to a separate server, make sure that NetWeaver 7.30 for ABAP is already installed.

Specifying a unique authoring namespace is not mandatory if CLM is only used for consuming content.

CAUTION

If CLM is installed for the dual purpose of consuming content and providing content, the rules for providing content apply to the formulation of the vendor namespace. It must be globally unique, as supplied by SAP. For more information about the service for namespace issuing provided by SAP, see SAP Service Marketplace at `http://service.sap.com/namespaces`.

2.6 Solution-Wide Topics

Localization

Planning and Consolidation is distributed as a standard version and does not include localized reporting and consolidation functionality. However, you can run Planning and Consolidation in a number of languages (see SAP Note 1178001) and it does support customized planning and consolidation processes after appropriate configuration (see *SAP Library Administration Guide*).

Session Locking

While a Planning and Consolidation session has no automatic time-out feature, system administrators and users can set up session locking through a Microsoft Windows screen saver.

Timestamps

Timestamps in Planning and Consolidation, including but not limited to data package start and end times, posting times in the Content Library, and audit report times, reflect application server time, not local time.

2.7 Business Scenarios

You can use Content Lifecycle Management to manage the creation and distribution of application content. This is particularly useful if you want to create content packages for a specific application that are going to be shared with or reused by other instances of the same application. This applies even if they are running in a different system landscape. For example, consulting companies can create content packages for an application and distribute this content to their customers. Those customers can merge this new content with the content currently used in the application.

Content Lifecycle Management covers extraction of content from applications, creation of content packages for content sharing across system landscapes, and editing of extracted content in a spreadsheet application. It also includes detection of differences between content groups and deployment of content to an application.

The Content Lifecycle Management business scenario is divided into two business processes:

- Providing Content: Used by vendors and content authors to provide and distribute application content to their customers
- Consuming Content: Customers deploy and use vendor content in their applications

For more information about the business scenario and business processes, refer to the Solution Manager Content documentation.

For technical system landscape, software units, and implementation sequence, refer to sections in previous chapter of this guide.

3 Downloading and Installing SAP BusinessObjects Enterprise XI

Planning and Consolidation supports the use of the single sign-on functionality of Information Platform Services to access SAP BusinessObjects Analysis, edition for OLAP. To use Information Platform Services , you must download and install SAP BusinessObjects Enterprise XI 4.0 before installing Planning and Consolidation.

For information on installing SAP BusinessObjects components, see http://service.sap.com/bosap-instguides.

Procedure

Downloading SAP BusinessObjects Enterprise XI 4.0

1. Navigate to http://service.sap.com/swdc
2. Choose *BusinessObjects Downloads* and use *A-Z Index* to locate the BusinessObjects Enterprise XI 4.0 download page.
3. Choose *Installation and Upgrade*, and select the appropriate platform.
4. Select the BusinessObjects Enterprise XI server, client, and temporary keys packages, and then choose *Add to Download Basket*.
5. Choose *my DOWNLOAD BASKET* to install the Download Manager (if necessary) and download the selectted BusinessObjects Enterprise XI packages.

Installing SAP BusinessObjects Enterprise XI 4.0

You can find instructions for installing SAP BusinessObjects Enterprise XI 4.0 (together with other useful information) in the SAP BusinessObjects Enterprise Installation Guide, which you can download from http://service.sap.com/bosap-instguides.

More Information

Configuring Single Sign On [page 32]

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4 Installing the ODBO Provider

You install the OLE DB for OLAP (ODBO) provider if you want to display planning and consolidation data in the SAP BusinessObjects Enterprise XI components, such as SAP BusinessObjects Analysis, edition for OLAP, Web Intelligence, or SAP Crystal Dashboard Design. The provider is available as part of the SAP GUI for Windows installation.

Follow these guidelines for installation:

- If using the ODBO provider with SAP BusinessObjects Analysis, edition for OLAP, you must install the ODBO provider on each server that has SAP BusinessObjects Enterprise XI installed on it.
- If using the ODBO provider within a Universe, which enables Web Intelligence, Explorer, and SAP Crystal Dashboard Design, it needs to be visible to the Connection Service.
- For SAP Crystal Dashboard Design, you must install the ODBO provider on client machines on which you have installed SAP Crystal Dashboard Design and the EPM Add-in for Microsoft Office.
- The SAP BW ODBO provider is installed on every machine containing SAP BusinessObjects Analysis, SAP Crystal Dashboard Design, Web Intelligence, or other components.

Prerequisites

The following software is installed:

- SAP BusinessObjects Enterprise XI 4.0 (see *Downloading and Installing SAP BusinessObjects Enterprise XI* [page 21]).
- Microsoft Visual C++ 2005 Service Pack 1 Redistributable Package ATL Security Update on the Planning and Consolidation Web server and SAP BusinessObjects Enterprise XI server for SAP BusinessObjects Analysis, edition for OLAP or a Universe. You can download the installer from `http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=766a6af7-ec73-40ff-b072-9112bab119c2` and choose the appropriate installer:
  - For 32-bit servers, choose `vcredist_x86.exe`
  - For 64-bit servers, choose `vcredist_x64.exe`

Procedure

1. Download *SAP GUI for Windows 7.20* from the SAP Download area by selecting *Downloads* → *Installations & Upgrades* on the SAP Service Marketplace.
2. Run the installation for SAP GUI for Windows and select *OLE DB for OLAP Provider* for installation.

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5 Using SAP Crystal Dashboards with Business Planning and Consolidation

SAP Crystal Dashboards bridges the gap between data analysis and visual presentation, empowering users to create interactive reports and applications.

Installing and configuring SAP Crystal Dashboards to work with Business Planning and Consolidation comprises the following activities:

- Downloading and installing the necessary components
- Configuring SAP Crystal Dashboards
- Creating a SAP Crystal Dashboard
- Publishing a SAP Crystal Dashboard document

5.1 Downloading and Installing Components

To use SAP Crystal Dashboard Design to generate reports on Business Planning and Consolidation data, there are a number of components that you need to download and install. You may already have some of these components installed – ensure that you have the correct version and support package (SP).

Procedure

Download Components

Download the following components from SAP Marketplace (SMP):

- SAP Crystal Dashboard Design 4.0 as follows:
  - Download SP02 or lower if using EPMConnector SP13 Patch 3 or lower (Flex 2)
  - Download SP04 or higher if using EPMConnector SP13 Patch 4 or higher (Flex 4)
- SAP EPM Add-in for Microsoft Office

  You must also download the SAP EPM Connector add-on file, `EPMConnector.xlx`.

  You can download the *EPM Add-in for Microsoft Office Installation Guide* (including installation information for the EPM Connector add-on) from `http://service.sap.com/support` → *Release & Upgrade Info* → *Installation & Upgrade Guides* → *SAP BusinessObjects* → *SAP Enterprise Performance Management (EPM)* → *EPM Solutions, add-in for Microsoft Office* → *10.0*.

  `EPMConnector.xlx` is installed as an SAP Crystal Dashboard Design add-on.
- SAP BW OLE DB for OLAP Provider

The OLE DB for OLAP (ODBO) provider is required so that Crystal can access Business Planning and Consolidation data.

Download the Microsoft Visual C++ 2005 Service Pack 1 Redistributable Package ATL Security Update installer from http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=766a6af7-ec73-40ff-b072-9112bab119c2 and choose the appropriate installer:

- For 32-bit servers, choose `vcredist_x86.exe`
- For 64-bit servers, choose `vcredist_x64.exe`

Download the optional `BPCDataGrid` component from the SAP Development Network (SDN). All required files, including installation and use instructions are at: https://www.sdn.sap.com/irj/scn/go/portal/prtroot/docs/library/uuid/8032028f-82c7-2b10-0995-8333d8041b30.

`BPCDataGrid` is installed as an SAP Crystal Dashboards add-on.

Install Components

When installing the components in a production environment, consider the following:

- SAP BusinessObjects XI 4.0 should be installed on its own distinct server.
- Install the Microsoft Visual C++ 2005 Service Pack 1 Redistributable Package ATL Security Update on the Business Planning and Consolidation Web server.
- SAP BW OLE DB for OLAP Provider should be installed on the client machine.

For information on installing SAP software, go to the SAP Help Portal (http://help.sap.com) and download the appropriate installation instructions.

Instructions for installing Microsoft Visual C++ 2005 are contained in the download package.

Installing SAP Crystal Dashboard Add-ons

1. Open SAP Crystal Dashboard Design.
2. Select *File* → *Manage Add-ons*.
   The *Add-On Manager* dialog box opens.
3. Click *Install Add-On*.
   The *Open* dialog box opens.
4. Select the `EPMConnector.xlx` file.
   The `EPMConnector.xlx` file is located in the `EPMConnector` subfolder of the EPM Add-in for Microsoft Office installation folder.
5. Select *Open*.
6. Select *Close*.
7. Repeat steps 2 to 6 for `BPCDataGrid`
8. Restart SAP Crystal Dashboard Design.

5.2 Configuring SAP Crystal Dashboard Design

You can use data from SAP Enterprise Performance Management (EPM) combined with Business Planning and Consolidation information to design an SAP Crystal dashboard that can be published within the Business Planning and Consolidation Documents view.

To enable SAP Crystal Dashboard Design to retrieve data, metadata and master data from EPM, you should install an EPM connector as an add-on to SAP Crystal Dashboard Design.

Prerequisites

You have downloaded and installed the following components:

- SAP Crystal Dashboard Design
- SAP EPM Add-in for Microsoft Office
- SAP EPM Connector add-on file, `EPMConnector.xlx`
- SAP BW ODBO Provider
- Microsoft Visual C++ 2005 Service Pack 1 Redistributable Package ATL Security Update
- `BPCDataGrid`

Procedure

Configure SAP Crystal Dashboard Design

To improve the stability of SAP EPM Add-in for Microsoft Office when embedded in SAP Crystal Dashboard Design, we strongly recommend enabling *Live Office Compatibility* in the SAP Crystal Dashboard Design preferences.

To enable *Live Office Compatibility*:

1. In SAP Crystal Dashboard Design, select *File* → *Preferences*.
2. On the left of the dialog box, select *Excel Options*.
3. In the *Live Office Compatibility* area, select the *Enable* option.
4. Click *Apply*.
5. Click *OK*.

5.3 Creating an SAP Crystal Dashboard

You can use SAP Crystal Dashboard Design to create interactive reports and dashboards based upon Business Planning and Consolidation data.

Features

The following is an overview of the process to create a dashboard.

- Design report in the SAP EPM solutions, add-in for Microsoft Office
  Use Excel functions to model data derived from EPM products and other data (such as Business Planning and Consolidation data). The EPM add-in designs reports based on the selected data.

- Design dashboard
  Based upon the EPM add-in reports, create a design for the dashboard and its user interface.
- Configure data connections with the EPM connector
  Link the dashboard user interface with the report data.
- Generate Flash dashboard
  Export the dashboard to the Flash player.
- Upload the dashboard SWF file to the Business Planning and Consolidation library
  Publish the Flash dashboard in Business Planning and Consolidation for use in workspaces

5.4 Publishing an SAP Crystal Document

You can publish an SAP Crystal document, such as a report or a dashboard, to appear in and use data from Planning and Consolidation. The following publishing methods are available within Planning and Consolidation:

- Publishing SAP Crystal documents to the Planning and Consolidation Web client
- Publishing SAP Crystal documents to the EPM Add-in for Microsoft Office

Procedure

Publishing SAP Crystal Documents to Planning and Consolidation Web Client

1. From the *Home* tab, choose *Documents*.
2. Choose *Post a document*.
   The *Post a Document* wizard opens. Follow the steps of the wizard to achieve the following:
   - Choose a document and enter an optional description of the document
   - Select users or teams of users that need to be able to access the document
   - Select the appropriate type and subtype for the document
   - Choose whether to send an e-mail to all users who can access the document, and enter the text for the e-mail message.
   - Choose a document context for the document if applicable

   The document is now displayed in the *Documents* list.

The SAP Crystal dashboard inherits context members provided that they are not included in the page header of the Analyzer query.
Any dimensions, used in the page header, inherit from context when the *GetCurrentView* service is used.

Publishing SAP Crystal Documents to EPM Add-in for Microsoft Office

1. From the EPM Add-in, choose *Insert Dashboard* in the action pane.
2. Selected the Flash file that you exported from SAP Crystal Dashboard Design.
3. For Excel and Word, choose *Toggle Edit Mode* in the action pane to publish the dashboard.

NOTE

Currently, Office 2007 applications do not save an embedded flash file. You should save as a 2003 document type. This may be resolved in the future.

You should also consider the following:

- The published dashboard inherits from the context. That is, changing the context refreshes the SAP Crystal models.
- Embedding Crystal flash files in any other way (such as using the Office application's capability) does not inherit from context.
- When embedding within Office, it is best to design the models such that filters are set in the action pane.
- The SAP Crystal dashboard inherits context members if they are included in the page header of the query. Any dimension, used in the page header, only inherits from the context if the *GetCurrentView* service is used.
- Within PowerPoint, a flash file only runs in slideshow mode. Within the edit mode, the flash file is static.

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6 Using SAP BusinessObjects Analysis, edition for OLAP, with Business Planning and Consolidation

SAP BusinessObjects Analysis, edition for OLAP is a query and analysis tool for working with multidimensional data in the SAP BusinessObjects BI launch pad.

You can allow users of Analysis to access Business Planning and Consolidation data for analysis in their application. For example, with the Business Planning and Consolidation application, you can:

- Develop timely and accurate plans and budgets that are aligned with strategic goals
- Seamlessly integrate corporate and departmental planning
- Quickly model business scenarios
- Reforecast to meet rapidly changing business conditions

However, you may need to extend this analysis to provide power users with the ability to perform queries and analysis of Business Planning and Consolidation information. By accessing Business Planning and Consolidation data in SAP BusinessObjects Analysis, users can gain deeper insight and understanding about the way in which Business Planning and Consolidation is being executed.

6.1 Providing Business Planning and Consolidation Data

This section describes the overall process for making Business Planning and Consolidation data available in SAP BusinessObjects Analysis, edition for OLAP.

Prerequisites

Ensure that your SAP BusinessObjects Enterprise XI installation conforms to the following:

- SAP BusinessObjects Enterprise XI 4.0 is installed. The server can be installed on either the same machine with Business Planning and Consolidation or a separate machine (recommended).
- The SAP BusinessObjects Analysis server is installed and configured on the SAP BusinessObjects Enterprise XI server.

For more information on installing SAP BusinessObjects components, see http://service.sap.com/bosap-instguides.

Features

The process of making Business Planning and Consolidation data available for analysis by SAP BusinessObjects Analysis, edition for OLAP, involves the following sequence of steps.

1. Install the ODBO provider. See *Installing the Planning and Consolidation ODBO Provider* [page 23].
2. Configure SAP BusinessObjects Analysis for single sign-on. See *Configuring Single Sign On* [page 32].
3. Create a SAP BusinessObjects Analysis Connection. See *Creating a Connection* [page 32].
4. Assign SAP BusinessObjects Analysis users and groups to the connection. See *Assigning Users and Groups to the Connection* [page 33].

   NOTE

   This step is necessary only if you want to authenticate using single sign on (SSO)
5. Create a SAP BusinessObjects Analysis workspace for the Business Planning and Consolidation application. See *Creating a Workspace* [page 34].

6.2 Configuring Single Sign On

You can configure single sign on (SSO) between Planning and Consolidation and SAP BusinessObjects Analysis.

Procedure

1. Install BusinessObjects Enterprise XI. SAP BusinessObjects Analysis is installed along with the Enterprise XI, but you must add a license key to the *Central Management Console* (CMC) to activate it.
2. Add at least one Information Platform Services user to Enterprise XI.
3. In the Planning and Consolidation Administration area, add the same Information Platform Services users to some environments and grant proper member access and tasks permissions.
4. Install Planning and Consolidation 10.0 by setting the authentication type to CMS mode, and pointing the Trusted CMS Name to the server where you installed Enterprise XI.
5. Create an SAP BusinessObjects Analysis connection with SSO authentication in the Enterprise XI Central Management Console and ensure the application that the connection uses can be accessed by the Information Platform Services user created in step 2.

   See also *Creating a Connection* [page 32].
6. Log on to a BI launch pad with the same user and create a workspace by using the connection set used for SSO authentication.

   See also *Creating a Workspace* [page 34].

6.3 Creating a Connection

Prerequisites

- You have installed the ODBO Provider
- To use the SSO authentication method to connect to SAP BusinessObjects Analysis, you must first configure the Central Management Console on the Business Planning and Consolidation

application server and run the CMS Migration Wizard. For more information, see the *SAP Business Planning and Consolidation Administrator's Guide*.

Procedure

1. Start the SAP BusinessObjects Enterprise XI *Central Management Console* and log on.
2. Stop services in the SAP BusinessObjects Enterprise XI *Central Configuration Manager*.
   The CMS server and multidimensional analysis service should be enabled but all others can be disabled. This reduces the memory footprint by a considerable amount.
3. Choose the *Connections* tab.
4. Enter a description for this connection in the *Description* field.
5. Select *Planning and Consolidation* as the ODBO Provider in the *Provider* field.
6. Enter the IP address and port of the server where Business Planning and Consolidation is deployed in the *Server* field.
7. Click *Connect* and log into the Business Planning and Consolidation application as an administrator.
8. In the *Environment* folder (catalog), select a model to associate with the connection, and click *Select*.
9. Choose the desired authentication method: *Prompt*, *SSO*, or *User-Specified*.
   If you want to authenticate using Single Sign On, choose *SSO*.
10. Click *Save*.

6.4 Assigning Users and Groups to the Connection

If you want the authentication method between the Business Planning and Consolidation application and SAP BusinessObjects Analysis to be Single Sign On (SSO), you must set up the SAP BusinessObjects Analysis users to have full access to the connection.

This procedure describes one method of setting up user access to the SAP BusinessObjects Analysis connection. For information about all methods of setting up users and access levels in SAP BusinessObjects, see the *SAP BusinessObjects Enterprise Administrator's Guide* on the SAP Help Portal at `http://help.sap.com`.

If you want to use a different authentication method, you can skip this procedure.

Prerequisites

- You have installed the ODBO Provider
- You have created a SAP BusinessObjects Analysis connection and chosen SSO as the authentication method
- You have added a users area to the Business Planning and Consolidation group in SAP BusinessObjects Enterprise XI *Central Management Console* to identify them as Business Planning and Consolidation users

Procedure

1. Start the SAP BusinessObjects Enterprise XI *Central Management Console* and log on.
2. Choose the *Connections* tab.
3. Select ▶ *Manage* → *Top-Level Security* ↵.
   The *User Security* window is displayed.
4. Click *Add Principals*.
5. From the *Available users/groups* list, select the SAP BusinessObjects Analysis users and groups who need to be able to log on to Business Planning and Consolidation with SSO.
6. Click *Add and Assign Security*.
7. Make the selection to allow the SAP BusinessObjects Analysis group to have Full Access, then click *Apply* and click *OK*.

6.5 Creating a Workspace

Prerequisites

- You have installed the ODBO Provider
- You have created a SAP BusinessObjects Analysis connection and chosen SSO as the authentication method.
- You have added a SAP BusinessObjects Analysis users area to the Business Planning and Consolidation group in SAP BusinessObjects Enterprise XI *Central Management Console* to identify them as Business Planning and Consolidation users

Procedure

1. Start the SAP BusinessObjects BI *launch pad* and log in with the appropriate username and password.
2. Create a new workspace by choosing ▶ *Document List* → *New* → *Workspace* ↵.
3. Connections are listed in a *Choose Connection* window. Select the connection you just created, then click *OK*.
4. Drag the metadata on the left side to the appropriate positions of Crosstab.
   You can also use other data view types such as 3D Clustered Columns, Stacked Bar, and so on.

Result

You are now ready to work with Business Planning and Consolidation data in SAP BusinessObjects Analysis. For more information, see the *SAP BusinessObjects Analysis, edition for OLAP, User's Guide* on the SAP Help Portal at ▶ `http://help.sap.com` ↵.

7 Using Process Control with Business Planning and Consolidation

SAP Governance, Risk, and Compliance (GRC) Solutions

- Promote corporate accountability by unifying corporate strategy
- Control initiatives, opportunity discovery, and loss mitigation across the extended enterprise

Managing governance, risk and compliance across the extended enterprise allows processes and strategies to be evaluated within the company and extended to partners, suppliers, and customers.

SAP Process Control

SAP Process Control is an enterprise software solution for internal control management. It enables organizations to document their control environment, test and assess controls, track issues to remediation, and certify and report on the state and quality of internal controls.

Using a combination of data forms, automated workflows, certification, and interactive reports, this solution enables members of internal control, audit, and business process teams to effectively manage compliance activities.

Business Planning and Consolidation Integration

The integrated solution of Process Control and Business Planning and Consolidation offers the following advantages:

- With Sarbanes-Oxley and other regulatory requirements, consolidation and reporting are important processes in the financial closing cycle.
- The integrated solutions focus on consolidation and reporting
- The integrated solution allows you to automate the monitoring process without compromising compliance, which potentially decreases the manual effort spent on internal controls and reduces the hours and cost of external auditing
- The integrated solution increases confidence in the effectiveness of control and compliance work by automating the control and monitoring process and minimizing the manual intervention

Prerequisites

The integrated solution requires Business Planning and Consolidation 10.0, version for SAP NetWeaver and SAP Process Control 3.0.

7.1 Process Control and Business Planning and Consolidation Integration

You can use SAP Process Control to build compliance test plans. Such test plans can consist of manual or automated compliance checks.

A Business Planning and Consolidation business process flow (BPF) can combine compliance checks into BPF steps to create a test plan. There can be multiple checks for a single BPF step or multiple BPF steps for a single check in the overall test plan.

Prerequisites

- Business Planning and Consolidation 10.0 for NetWeaver is installed and configured
  See the *SAP Business Planning and Consolidation Installation Guide*.
- SAP Process Control 3.0 is installed and configured
  See the *SAP Process Control and Risk Management Installation Guide*.

Features

Monitoring using Business Planning and Consolidation Transactional Data

Monitor through providing tests that read transaction data within the Business Planning and Consolidation model. Typical scenarios include:

- Flag transactions over a threshold for a range of accounts
- Clear validation imbalance
- Balance sheet
- Fully eliminate investment at subsidiary during consolidation
- Eliminate all balance sheet and profit and loss intercompany declarations are at consolidation level
- Compile scope change with the accounting method change

Monitoring using Planning and Consolidation Metadata

Monitor through providing tests that read Business Planning and Consolidation metadata such as work status, journals, and so on (data stored in Business Planning and Consolidation DDIC tables, and dynamic tables). Typical scenarios include:

- Ensure that a given configuration remains in effect for a key control
- Set data work status correctly
- Audit the transaction sequence for compliance
- Maintain journal entries

Integration

In Business Planning and Consolidation, you can build automated checks using Business Planning and Consolidation transactional data and metadata. For example:

- To build automated test plans within Process Control, use queries within Process Control to check on Business Planning and Consolidation transactional data

- Use SAP NetWeaver InfoSet queries to check Business Planning and Consolidation metadata such as journal entries

The following is an overview of the integration process:

1. In Business Planning and Consolidation, build a BI query to monitor reported data. This query is based on the infocube where the consolidation data is stored.
2. Customize a remote function call (RFC) in Process Control to connect to the Business Planning and Consolidation system.

   Use transaction `SPRO` to configure and register the RFC connection. Transaction `SM59` illustrates the RFC destination.
3. In Process Control, connect to the BI query by using the rule scripting feature within the automated control framework.
4. Create automated testing rules in Process Control and, within each rule, customize the filter and set deficiency criteria.
5. Schedule the rule to run in a recurring job.

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A Appendix

A.1 List of Documents

The following table provides the location of all documents mentioned in this Master Guide:

Title	Location on SAP Service Marketplace
SAP Business Planning & Consolidation 10.0, version for NetWeaver, Master Guide	SAP Service Marketplace at http://service.sap.com/instguidesEPM-BPC ▶ *10.0, version for SAP NetWeaver* ↵
SAP Business Planning & Consolidation 10.0, version for NetWeaver, Security Guide	SAP Service Marketplace at http://service.sap.com/securityguide
SAP Business Planning & Consolidation 10.0, version for NetWeaver, Installation Guide	SAP Service Marketplace at http://service.sap.com/instguidesEPM-BPC ▶ *10.0, version for SAP NetWeaver* ↵

A.2 List of SAP Notes

The following table lists all SAP Notes mentioned in this Master Guide:

SAP Note Number	Title	Description
1586088	SAP Planning and Consolidation 10.0 for NetWeaver Documentation Addendum	Contains information that does not appear in the application help of Planning and Consolidation 10.0, version for the SAP NetWeaver platform.
1826720	Business Planning & Consolidation 10.0 NW SP11 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP11, version for the SAP NetWeaver platform.
1779357	Business Planning & Consolidation 10.0 NW SP10 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP10, version for the SAP NetWeaver platform.
1744028	Business Planning & Consolidation 10.0 NW SP09 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP09, version for the SAP NetWeaver platform.
1703032	Business Planning & Consolidation 10.0 NW SP08 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and

SAP Note Number	Title	Description
		Consolidation 10.0 SP08, version for the SAP NetWeaver platform.
1682291	Business Planning & Consolidation 10.0 NW SP07 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP07, version for the SAP NetWeaver platform.
1660062	Business Planning & Consolidation 10.0 NW SP06 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP06, version for the SAP NetWeaver platform.
1627973	Business Planning & Consolidation 10.0 NW SP05 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP05, version for the SAP NetWeaver platform.
1615237	Business Planning & Consolidation 10.0 NW SP04 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP04, version for the SAP NetWeaver platform.
1597468	Business Planning & Consolidation 10.0 NW SP03 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP03, version for the SAP NetWeaver platform.
1580564	Business Planning & Consolidation 10.0 NW SP02 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP02, version for the SAP NetWeaver platform.
1573567	Business Planning & Consolidation 10.0 NW SP01 Central Note	This note contains installation information, enhancements, and resolved issues for SAP Planning and Consolidation 10.0 SP01, version for the SAP NetWeaver platform.

B Reference

B.1 The Main SAP Documentation Types

The following is an overview of the **most important** documentation types that you need in the various phases in the life cycle of SAP software.

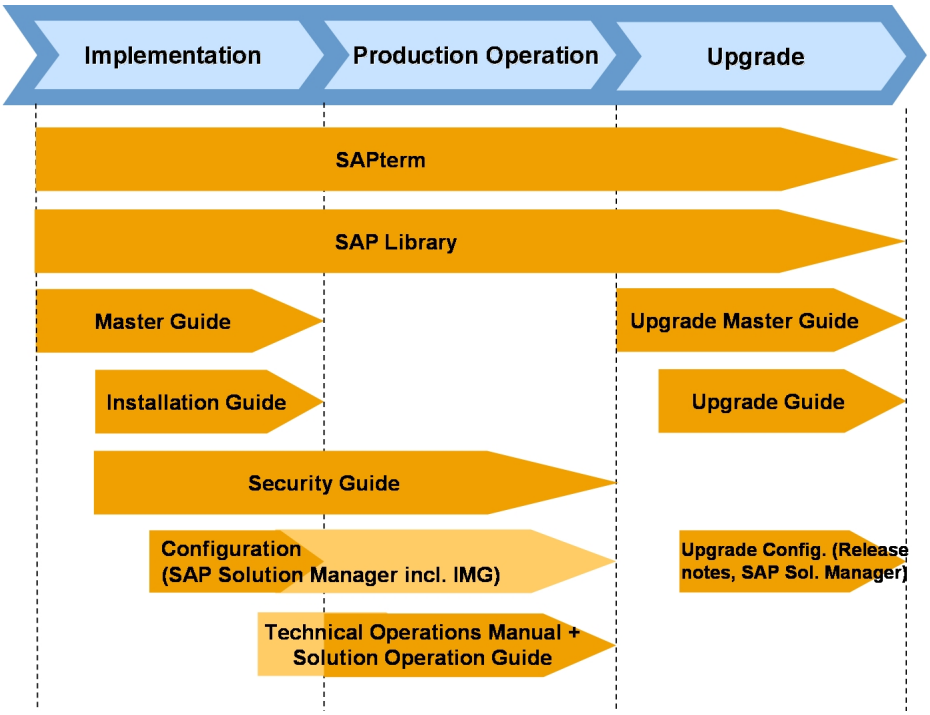

Figure 7: Documentation Types in the Software Life Cycle

Cross-Phase Documentation

SAPterm is SAP's terminology database. It contains SAP-specific vocabulary in over 30 languages, as well as many glossary entries in English and German.

- The target group for this documentation is the following:
  - Relevant for all groups
- You can find the current version of this documentation at the following locations:
  - On SAP Help Portal at http://help.sap.com → *Additional Information* → *Glossary* ↵ (direct access) or *Terminology* (as terminology CD)
  - In the SAP system in transaction STERM

SAP Library is a collection of documentation for SAP software covering functions and processes.

- The target group for this documentation is the following:

- Consultants
- System administrators
- Business users
- Project teams for implementations or upgrades

- You can find the current version of the following documentation on SAP Help Portal at http://help.sap.com/EPM. The application help contains the following information:
  - Provides instructions for administrators about setting up and maintaining Planning and Consolidation models.
  - Provides instructions about building, distributing, and publishing reports, and about collecting data and submitting it to the database using input schedules and journals.
  - Provides instructions about publishing reports and unstructured documents, and about creating and analyzing live reports.
  - Provides instructions about moving data into and out of Planning and Consolidation, and about copying and moving data within and across models.
  - Provides information about system reports available within Planning and Consolidation.

The **security guide** describes the settings for a medium security level and offers suggestions for raising security levels. A collective security guide is available for SAP NetWeaver. This document contains general guidelines and suggestions. Other technologies and individual applications have a security guide of their own.

- Target group:
  - Technology consultants
  - Solution consultants
  - System administrators
- Current version:
  - On SAP Service Marketplace at http://service.sap.com/securityguide.

Implementation

The **master guide** is the starting point for implementing an SAP solution. It lists the required installable units for each business or IT scenario. It provides scenario-specific descriptions of preparation, execution, and follow-up of an implementation. It also provides references to other documents.

- The target group for this documentation is the following:
  - Technology consultants
  - System administrators
- You can find the current version of this documentation at the following location:
  - On SAP Service Marketplace at http://service.sap.com/instguidesEPM-BPC ▶ *10.0, version for SAP NetWeaver* ↵.

The **installation guide** describes the technical implementation of an installable unit, taking into account the combinations of operating systems and databases. It does not describe any business-related configuration.

- The target group for this documentation is the following:
  - Technology consultants
  - System administrators
- You can find the current version of this documentation at the following location:
  - On SAP Service Marketplace at `http://service.sap.com/instguidesEPM-BPC` ▶ *10.0, version for SAP NetWeaver* ◀.

NOTE

You should ensure that SAP NetWeaver 7.3 is properly installed and configured before setting up Planning and Consolidation. See the NetWeaver documentation on the Service Marketplace at `http://service.sap.com/instguides` ▶ *SAP NetWeaver* → *SAP NetWeaver 7.3* → *Installation* ◀.

Release notes are documents that contain short descriptions of new features or changes in Planning and Consolidation or an SAP application since the previous release. Release notes about ABAP developments enable the SAP system to generate delta and upgrade IMGs.

- The target group for this documentation is the following:
  - Consultants
  - Project teams for upgrades
- You can find the current version of this documentation at the following locations:
  - On SAP Service Marketplace at `http://service.sap.com/releasenotes`.
  - In the SAP menu of the SAP system under ▶ *Help* → *Release Notes* ◀ (only ABAP developments)

Production Operation

The security guide provides information about managing security within Planning and Consolidation by setting up users, teams, member access profiles, and team access profiles.

The **administrator's guide** is used for operating an SAP application, and it refers users to the tools and documentation that are needed to carry out the various operations-related tasks.

- The target group for this documentation is the following:
  - Technical consultants
  - System administrators
  - Solution consultants
  - Business process owners
  - Support specialists
- You can find the current version of this documentation at the following location:

- On SAP Service Marketplace at http://service.sap.com/instguidesepm-bpc ▶ *10.0, version for SAP NetWeaver* ◀.

Upgrade

The **upgrade guide** describes the technical upgrade of an installable unit, taking into account the combinations of operating systems and databases. It does not describe any business-related configuration.

- Target group:
  - Technology consultants
  - Project teams for upgrades
- Current version:
  - On SAP Service Marketplace at http://service.sap.com/instguidesEPM-BPC ▶ *10.0, version for SAP NetWeaver* ◀.

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