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<td>32</td>
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Document History

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

⚠️ Caution
Before you start the implementation, make sure that you have the latest version of this document. You can find the latest version at http://help.sap.com.

Table 1:

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>2014-10-29</td>
<td>Initial Version</td>
</tr>
<tr>
<td>1.1</td>
<td>2017-05-26</td>
<td>New document template and template-related adaptions</td>
</tr>
</tbody>
</table>
1 Getting Started

Caution

This guide does not replace the daily operations handbook that we recommend customers to create for their specific production operations.

About this Guide

Designing, implementing, and running your SAP solution at peak performance 24 hours a day has never been more vital for your business success than now.

This guide provides a starting point for managing your SAP solutions and maintaining and running them optimally. It contains specific information for various tasks and lists the tools that you can use to implement them. This guide also provides references to the documentation required for these tasks, so you will sometimes also need other Guides such as the Master Guide, Technical Infrastructure Guide, and SAP Library.

SAP Fiori Apps

For more information regarding SAP Fiori apps, see SAP Library at http://help.sap.com/ppm under SAP Fiori for Portfolio and Project Management.

1.1 Global Definitions

SAP Application

An SAP application represents a market view of groups of related business scenarios. The delivery of an application contains SAP components which are essential for implementing all solution-related business scenarios, processes, and functions. Implementation knowledge is included with each solution.

Business Scenario

From a microeconomic perspective, a business scenario is a cycle, which consists of several different interconnected logical processes in time. Typically, a business scenario includes several company departments and involves with other business partners. From a technical point of view, a business scenario needs at least one
SAP application component (SAP ERP, SAP APO, or others) for each cycle and possibly other third-party systems. A business scenario is a unit which can be implemented separately and reflects the customer’s prospective course of business.

Component

A component is the smallest individual unit considered within the Application Development Lifecycle; components are separately produced, delivered, installed and maintained.

1.2 Important SAP Notes

⚠️ Caution

Check regularly to see which SAP Notes are available for the Application Operations Guide.

Table 2:

<table>
<thead>
<tr>
<th>SAP Note Number</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2026407</td>
<td>FAQs – SAP Portfolio and Project Management 6.1</td>
<td>This note contains general information about SAP Portfolio and Project Management 6.1</td>
</tr>
<tr>
<td>2026050</td>
<td>PPM 6.1: Support package information, notes, and schedule</td>
<td>This note contains information and references to other notes about importing support packages for SAP Portfolio and Project Management 6.1.</td>
</tr>
<tr>
<td>2026426</td>
<td>PPM 6.1: Performance</td>
<td>This note contains information about performance notes.</td>
</tr>
<tr>
<td>427215</td>
<td>Overview: Notes on cFolders, cProjects, xRPM and PPM</td>
<td>This note contains an overview of all SAP notes for current and former releases of SAP Portfolio and Project Management.</td>
</tr>
<tr>
<td>2034467</td>
<td>Support Packages for CPRXRPM 610_740</td>
<td>This note contains information about support packages for the component CPRXRPM.</td>
</tr>
<tr>
<td>1821685</td>
<td>Release strategy for ABAP add-on CPRXRPM</td>
<td>This note describes how to install / upgrade the ABAP add-on component CPRXRPM 610_740 on SAP NetWeaver 7.4.</td>
</tr>
<tr>
<td>SAP Note Number</td>
<td>Title</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>894009</td>
<td>Adobe Document Services – Configuration Guide</td>
<td>This note contains information about how to access the latest configuration documentation for ADS.</td>
</tr>
<tr>
<td>2026422</td>
<td>PPM 6.1: Supported Browsers, Java versions, etc.</td>
<td>This note contains information about the browsers supported by SAP Portfolio and Project Management.</td>
</tr>
<tr>
<td>1399319</td>
<td>Portfolio Management: Customer UIs</td>
<td>This note is only relevant for Portfolio Management.</td>
</tr>
<tr>
<td>1406590</td>
<td>Configuration of KM</td>
<td>This note is only relevant for Portfolio Management. It contains information about configuring document management to use KM.</td>
</tr>
<tr>
<td>2026424</td>
<td>PPM 6.1: Restrictions</td>
<td>This note lists restrictions for SAP Portfolio and Project Management 6.1.</td>
</tr>
<tr>
<td>2026421</td>
<td>PPM 6.1: Configuration Content</td>
<td>This note contains information about how to find the Configuration Guide for SAP PPM 6.1.</td>
</tr>
<tr>
<td>1406591</td>
<td>Portfolio Management: FAQ</td>
<td></td>
</tr>
<tr>
<td>1808669</td>
<td>Error during installation of PPM (CPRXRPM) with ERP/SRM/CRM/SCM</td>
<td>This note describes the solution in case the installation on an ERP, CRM, SRM, or SCM system results in error “Multiple active implementations for definition HRALE00INBOUND_IDOC” and “Errors occurred during post-handling AFTER_IMP_SXCI for SXCI L “.</td>
</tr>
<tr>
<td>1794297</td>
<td>Secondary Indexes for the business suite on HANA</td>
<td>Contains information about when using secondary indexes is beneficial.</td>
</tr>
</tbody>
</table>
2 Technical System Landscape

2.1 Scenario/Component Matrix

SAP Portfolio and Project Management 6.1 comprises the following applications:

- Project Management
- Portfolio Management

Both applications contain the CPRXRPM component, which contains the application data of Portfolio and Project Management.

The JAVA component PPM_KM is optional. It is only relevant for Portfolio Management and only required if KM documents are used.


For more information about which application uses which components, see the section Software Component Matrix in the Master Guide for Portfolio and Project Management 6.1.

2.2 Related Documentation

The following table lists where you can find more information about the technical system landscape.

Table 3:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Guide/Tool</th>
<th>Quick Link on SAP Service Marketplace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application- and Industry-specific Components such as SAP Financials and SAP Retail</td>
<td>Master Guides</td>
<td><a href="http://service.sap.com/instguides">http://service.sap.com/instguides</a></td>
</tr>
<tr>
<td>Technology Components such as SAP Web Application Server</td>
<td>Master Guides</td>
<td><a href="http://service.sap.com/instguides">http://service.sap.com/instguides</a></td>
</tr>
<tr>
<td>Sizing</td>
<td>Quick Sizer Tool</td>
<td><a href="http://service.sap.com/sizing">http://service.sap.com/sizing</a></td>
</tr>
</tbody>
</table>
3 Monitoring of SAP Portfolio and Project Management

3.1 Alert Monitoring with CCMS

Proactive, automated monitoring is the basis for ensuring reliable operations for your SAP system environment. SAP provides you with the infrastructure and recommendations needed to set up your alert monitoring to recognize critical situations for SAP Portfolio and Project Management as quickly as possible.

3.1.1 CCMS Monitoring Installation and Setup

SAP Portfolio and Project Management 6.1 is technically based on SAP NetWeaver 7.4 and thus re-uses monitoring tools from SAP NetWeaver. In order to enable the auto-alert mechanism of CCMS, see SAP Note 617547.


3.1.2 Alert Monitoring of Components

SAP NetWeaver

SAP NetWeaver is the integration and application platform for SAP Portfolio and Project Management 6.1, therefore the following SAP NetWeaver components must be integrated into the monitoring infrastructure:

- SAP NetWeaver Application Server (ABAP) 7.4
- SAP NetWeaver Application Server (Java) 7.3x, 7.4 (only required if Adobe is used in Portfolio and Project Management or if the PPM_KM component is used in Portfolio Management)
- SAP NetWeaver Portal 7.3x, 7.4 (optional)
- SAP NetWeaver Business Information Warehouse 7.0 (BI) or higher (only if BI is used)
Portfolio and Project Management

To set up the monitoring for Project Management follow the following procedure. Via this monitoring not all components which can be used by Project Management for example XI are covered but the most important ones.

Procedure

1. Go to transaction RZ20 and create a new monitor: Portfolio and Project Management monitor.
2. On the top level, create a virtual node for each of the following areas:
   - Adobe Availability
   - Database
   - ABAP WebDynpro
3. On the second level, create rule-based monitors for each area as described in the following table:

<table>
<thead>
<tr>
<th>Node</th>
<th>Type</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adobe Availability</td>
<td>Virtual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCMS_GET_MTE_BY_CLAS SS</td>
<td>Rule</td>
<td>R3System</td>
<td>&lt;CURRENT&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MTEClass</td>
<td>GRMG_ADS</td>
</tr>
<tr>
<td>Database</td>
<td>Virtual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCMS_GET_MTE_BY_CLAS SS</td>
<td>Rule</td>
<td>R3System</td>
<td>&lt;CURRENT&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MTEClass</td>
<td>CCMS_DB_mcmtec</td>
</tr>
<tr>
<td>ABAP WebDynpro</td>
<td>Virtual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCMS_GET_MTE_BY_CLAS SS</td>
<td>Rule</td>
<td>R3System</td>
<td>&lt;CURRENT&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MTEClass</td>
<td>WDAClass</td>
</tr>
</tbody>
</table>

With SAP Portfolio and Project Management, a monitor template is delivered which you can find in transaction RZ20 under SAP Portfolio and Project Monitor Templates SAP Portfolio and Project Management.

There is no specific alert monitoring functionality for the CPRXRPM and the PPM_KM components.

For more information about monitoring the additional components used by SAP Portfolio and Project Management, see below:

Monitoring SAP NetWeaver Usage Types AS-ABAP

For more information about monitoring the SAP Application Server ABAP, see SAP Help Portal at http://help.sap.com under SAP NetWeaver <Release> System Administration and Maintenance Information Technical Operations for SAP NetWeaver Administration of Application Server ABAP.

Monitoring SAP Content Server

For information about monitoring the SAP Content Server, see SAP Help Portal at http://help.sap.com under SAP NetWeaver <Release> System Administration and Maintenance Information Technical Operations for
SAP NetWeaver ➤ Administration of Standalone Engines ➤ SAP Content Server ➤ Content Server and Cache Server Monitoring.

Monitoring the Exchange Infrastructure


Monitoring the SAP Internet Graphics Server (IGS)


Monitoring Adobe Document Services


Usage Type Business Intelligence (BI)


SAP ECC


Search and Classification (TREX)


Monitoring SAP NetWeaver Portal

3.1.3 Alert Monitoring of Scenarios

There is no special monitoring for the SAP Portfolio and Project Management scenarios. There are no critical scenario-specific situations that need to be monitored.

3.2 Detailed Monitoring and Tools for Problem and Performance Analysis

3.2.1 CPRXRPM Analysis Tools

The technology of the CPRXRPM 610_740 component is based on ABAP SAP NetWeaver 7.4. For information about technical problem analysis (such as with a database, an operating system, or workload analysis), refer to the Technical Operations Manual for SAP NetWeaver. This Application Operations Guide is for SAP Portfolio and Project Management and covers only the differences and additional information specific to this solution.

Trace Files and Log Files

Trace files and log files are essential for analyzing problems.

- To call the back-end system from a Web browser, the Hypertext Transfer Protocol (HTTP) and Hypertext Transfer Protocol Secure (HTTPS) is used. For more information about the monitoring of these functions, see SAP Help Portal at http://help.sap.com under SAP NetWeaver <Release> System Administration and Maintenance Information > Technical Operations for SAP NetWeaver > Administration of Application Server ABAP > Monitoring and Administration Tools for Application Server ABAP > Monitoring and Administration of the SAP Message Server > Message Server Monitor.

  **Note**

  To display the Diagnosis tab page, on the General tab page, select the Diagnosis Settings Active checkbox.

- The ABAP Debugger for Remote Function Calls (RFC) contains a log. In this log, you can see the list of RFCs and also the information about how they are made.
- The Web Dynpro ABAP UI of SAP Portfolio and Project Management 6.0 uses the Floor Plan Manager (FPM). The FPM Message Manager has a connection to the ABAP application log and offers the option to write error messages occurring in the FPM Message Manager also to the application log in the backend. To activate this feature, go to transaction SAAB and activate the check point group FPM_RUNTIME_MESSAGES for your user or for all users in the server.

  For more information about FPM, see http://www.sdn.sap.com/irj/sdn/nw-ui Custom UI Development > Web Dynpro ABAP > Floorplan Manager (FPM) > Developer’s Guide.

- SAP Portfolio and Project Management 6.1 logs application errors for background reports to transaction SLG1. Background reports are executed in the areas of financial integration, migration, import from Microsoft Excel, and versioning. You can display these application logs via the objects RPM_DOCUMENT, RPM_DX, RPM_INTEGRATION, RPM_MIGRATION, RPM_PLANNING, RPM_UC, RPM_VERSIONING, DPR_DX.
Project Management

Project Management: To exchange data, for example the Cross-Application Time Sheet (CATS), Application Link Enabling (ALE) is used. For more information, see SAP Help Portal at http://help.sap.com under SAP NetWeaver > <Release> > Function-Oriented View > Application Server > Application Server Infrastructure > Components of SAP NetWeaver Application Server > Functions and Tools of SAP NetWeaver Application Server > Connectivity > Components of SAP Communication Technology > Classic SAP Technologies (ABAP) > IDoc Interface/ALE > Administration > Administration of ALE Functions.

This means that all the data that is sent from SAP ERP to Project Management is always transferred via an ALE connection. Therefore, the logs for the outbound IDocs are located in the SAP ERP system and can be viewed there using the transaction WE02. You can also view the logs for the inbound IDocs in Project Management using transaction WE02. Here you can view all IDocs located under ALE. You can check the status of inbound and outbound IDocs and edit incorrect IDocs. You do not have to switch this logging on. You can archive the entries to control the size of the database.

- Accounting Integration: You can view all the messages that are issued when you transfer your projects to Controlling in the Controlling Cockpit. For more information, see SAP Library at http://help.sap.com under SAP Business Suite > Portfolio and Project Management > Portfolio and Project Management 6.1 > Project Management > Accounting Integration > Controlling > Controlling Cockpit.
- For the optional SRM integration: The communication between Project Management and SAP SRM uses the usage type Exchange Infrastructure (XI). Therefore, the list of communication errors is displayed in the message monitor of XI. You can use built-in XI mechanisms to solve these errors. To monitor a queue, use transaction SMQ1. The logging of XI messages tracks the status of the XML messages that are to be processed before the first processing step (inbound message), as well as after every call of the pipeline service. The system saves the whole message as well as information about the processing status. You can use the XML messages that have been saved for evaluation purposes in monitoring. You can display the messages, if transferred or not, in the logged errors using transaction SXI_MONITOR. You can archive or delete the messages that are visible here.

Portfolio Management

All reports that are used to transfer data to other systems, for example to the ERP system, contain logs. You can access these logs directly from the individual reports.

3.2.2 Scenario-Specific Problem Analysis Tools

Invalid Characters in the Project ID

For security reasons, the system does not permit certain characters in the project ID. To avoid these invalid characters, the system checks the project ID entered by the user.

You can start the DPR_CHECK_CHAR_OF_PROJECT_ID program to check for existing projects that contain invalid characters. The result list displays all projects whose IDs you need to change.
Comparing Field Controls

You can use the program DPR_COMPARE_FC to compare two local Project Management field controls, to export a local field control as Comma Separated Value (CSV) file or to compare a local field control with an external field control that was imported as a CSV file. For more information about the program DPR_COMPARE_FC, see the program documentation.

Changing User Settings

You can use the DPR_CHANGE_USER_SETTINGS program to update the Project-Management-specific user settings for one user or for all users. The changeable user settings are the same as on the Personalization tab in the personalization object key column, entry DPR_USER_SETTINGS (transaction SU01).

For more information about the DPR_CHANGE_USER_SETTINGS program, see the program documentation.

Where-Used List for SAP Portfolio and Project Management GUIDs

With the program DPR_GUID_ANALYZE, you can search all database tables, relevant to SAP Portfolio and Project Management, for entries containing the GUID of a SAP Portfolio and Project Management application object, for example, a project or portfolio element. The program can be used by system administrators, consultants, or developers during problem analysis.
4 Management of SAP Portfolio and Project Management

SAP provides you with an infrastructure to help your technical support consultants and system administrators effectively manage all SAP components and complete all tasks related to middleware technology.


4.1 Administration Tools of Software Components

No specific tools are available for SAP Portfolio and Project Management.

4.2 Starting and Stopping

For SAP Portfolio and Project Management, no specific start or stop issues are applicable. You can start and stop the components in any order.

4.3 Backup and Restore

You need to back up your system landscape regularly to ensure that you can restore and recover it in case of failure.

The backup and restore strategy for SAP Portfolio and Project Management consists of two parts:

- Backup and restore coverage for each component
- Cross-system data dependencies and handling

The backup and restore strategy for your system landscape should not only consider SAP systems but should also be embedded in overall business requirements and incorporate your company’s entire process flow.

In addition, the backup and restore strategy must cover disaster recovery processes, such as the loss of a data center through fire. It is most important in this context that you ensure that backup devices are not lost together with normal data storage (separation of storage locations).

Based on the type of application data contained in a component, we have introduced a categorization scheme for system components that can be used to analyze the backup requirements of any system component and to easily...
determine an appropriate backup method for this component. The following table contains a component list for your solution and the appropriate Categories of System Components for Backup and Restore [page 30].

Table 5: Component list with categories of system components for backup and restore

<table>
<thead>
<tr>
<th>Component</th>
<th>Category</th>
<th>Application Data Type</th>
<th>Backup Method for Application Data</th>
</tr>
</thead>
</table>
| CPRXRPM   | XI       | ● Original application data in database  
|           |          | ● Data exchange with other systems, based on SAP NetWeaver AS | ● Database and log backup  
|           |          |                       | ● Backup of software  
|           |          |                       | ● Configuration Data consistency with other systems must be considered |
| PPM_KM    | I        | No application data   |                                    |

**CPRXRPM**

**Classification**

This component contains original application data. It is not copied from any other system.

**Backup and Restore**

SAP Portfolio and Project Management is based on the SAP NetWeaver Application Server ABAP technology. All backup and restore procedures for ABAP-based components also work for SAP Portfolio and Project Management. For more information about backup and recovery, see the SAP Help Portal at http://help.sap.com\[SAP NetWeaver\]\[Release\]\[Application Help\]\[Function-Oriented View\]\[Solution Life Cycle Management\]\[Backup and Recovery\]. You can back up configuration and software according to the standard procedures described above.

The following integration is optional for SAP Portfolio and Project Management:

- Collaboration Room Integration
  If you lose data in Portfolio and Project Management, the object link with the target collaboration room in SAP NetWeaver Portal is no longer valid. You must manually delete the invalid object link.

The following integration is optional for Project Management:

- While backing up data from the SRM system, if you lose the shopping carts that were connected to Project Management, you must regenerate the shopping carts.

**PPM_KM**

**Classification**

This optional component does not contain application data. It is only needed if the KM integration is used in Portfolio Management.

For more information, see the best-practices document *Backup and Restore for SAP* on SAP Service Marketplace at http://service.sap.com/bp-roadmap\[Operations Implementation\]\[Backup and Restore for SAP\].
Backup and Restore


4.4 System Copy

You can use standard SAP NetWeaver technology to copy the system. No specific administration tools are required. For more information about administration with SAP NetWeaver, see SAP Help Portal at [http://help.sap.com](http://help.sap.com) under SAP NetWeaver <Release> > Application Help > Function-Oriented View > Solution Life Cycle Management > System Copy.

Project Management

If the optional SRM integration is used, the following information is relevant:

After creating a system copy of the Project Management, there can be two references to the same SRM shopping cart.

Both the references are valid. However, the XI connection between Project Management and SRM must be adjusted as per the system copy so that the SRM callbacks reach the system copy.

**Note**

After creating an SRM system copy, if the process continues in both the original and the copied system, two purchase orders are created for materials or resources.

For system-dependent data changes, see SAP Note 762610.

4.5 Periodic Tasks

**Caution**

The following tasks must be carried out by an administrator.
### 4.5.1 Scheduled Periodic Tasks

#### Project Management

<table>
<thead>
<tr>
<th>Program Name/Task</th>
<th>Recommended Frequency</th>
<th>Detailed Description</th>
</tr>
</thead>
</table>
| DPR_REPLICATE_RATES_TO_R3 | When you use the accounting integration functions and create new cost or revenue rates within a project for costing | Project Management:  
You can use this report if you have an accounting system connected to Project Management. The report replicates cost and revenue rates to the accounting system so that they are recognized there.  
This replication of cost and revenue rates and accounting relevant characteristics has to start for each destination assigned to the corresponding object link for the accounting integration.  
After replication of cost and revenue rates, maintain the replicated data. You can add valid cost element, activity type and revenue element to the corresponding cost/revenue rates.  
For more information, see SAP Help Portal at [http://help.sap.com](http://help.sap.com) under  
[SAP Business Suite] > [Portfolio and Project Management] > [Portfolio and Project Management 6.1] > [Project Management] > [Accounting Integration] > [Controlling] > [Controlling Cockpit]. |
| DPR_FIN_GECCO_R3_REPLICATION | When you create new project types or project reasons | Project Management:  
Replicates project types and project reasons. |
<table>
<thead>
<tr>
<th>Report ID</th>
<th>Frequency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPR_EVE_BATCH_DPO</td>
<td>As needed</td>
<td>Project Management: Allows you to extract data from your projects and display the evaluations in Project Management. You can either plan the extraction of the data or trigger it manually. For more information, see the Extracting Evaluations for a Project section of the Basic Settings for Project Management in SAP Solution Manager.</td>
</tr>
<tr>
<td>RPTWFMIF</td>
<td>As needed</td>
<td>Project Management/ Workforce Deployment (WFD): Replicates data for WFD. For more information, see the Preparing Data Replication for WFD section of the Basic Settings for Project Management in SAP Solution Manager.</td>
</tr>
<tr>
<td>HR_SYNC_PERSON</td>
<td>Daily</td>
<td>Project Management: You use this report only if you use Project Management in combination with an ERP system. In that case, SAP HR is installed on the same system as Project Management. For more information, see the From SAP HR to Project Management section of the Basic Settings for Project Management in SAP Solution Manager.</td>
</tr>
<tr>
<td>DPR_QUALI_PERSON_TRANSFER</td>
<td>As needed</td>
<td>Project Management: You use this report only if you use Project Management in combination with an ERP system. In that case, SAP HR is installed on the same system as Project Management. This program replicates qualifications to the business partner objects. For more information, see SAP Note 1058953.</td>
</tr>
<tr>
<td>DPR_CATS_CPR_TRANSF</td>
<td>As needed</td>
<td>Project Management: Integration to the Cross-Application Time Sheet (CATS) You can use this report for transferring the recorded data from CATS to Project Management.</td>
</tr>
</tbody>
</table>

Operations Guide for SAP Portfolio and Project Management 6.1
Management of SAP Portfolio and Project Management

PUBLIC

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## Portfolio Management

Table 7: Standard/Housekeeping Jobs

<table>
<thead>
<tr>
<th>Program Name/Task</th>
<th>Recommended Frequency</th>
<th>Detailed Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RPM_FIN02</td>
<td>Daily</td>
<td>Only when RPM_FICO_DATA_Transfer is not available in ERP</td>
</tr>
<tr>
<td>/RPM/PLAN_INT_PREP</td>
<td>As Needed</td>
<td>FI/CO Integration to SAP ERP</td>
</tr>
<tr>
<td>RPM_FICO_DATA_TRANSFER</td>
<td>Daily</td>
<td>FI/CO Integration to SAP ERP (improved version). To be executed in the ERP system. Alternatively, /RPM/FICO_INT_PLANNING can be used (see below).</td>
</tr>
<tr>
<td>/RPM/FICO_INT_PLANNING</td>
<td>Daily</td>
<td>FI/CO Integration to SAP ERP (improved version). To be executed in the PPM system. Alternatively, RPM_FICO_DATA_TRANSFER can be used (see above).</td>
</tr>
</tbody>
</table>

### 4.5.2 Required Manual Periodic Tasks

Table 8:

<table>
<thead>
<tr>
<th>Task or Transaction</th>
<th>Description</th>
<th>Recommended Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Load Generator</td>
<td>Use transaction SGEN to start the SAP Load Generator. Project Management: When you call the individual WebDynpro pages that make up Portfolio and Project Management for the first time, you may experience delays. This is because the individual pages are generated at runtime. To avoid this, we recommend that you centrally generate each page once.</td>
<td>After you have installed Portfolio and Project Management for the first time or after an upgrade.</td>
</tr>
<tr>
<td>Activate Internet Communication Framework (ICF) services</td>
<td>If you upgrade or implement a Support Package, the ICF may be deactivated and needs to be activated again. For more information, see the <em>Data Replication</em> section of the <em>Basic Settings for Project Management</em> in SAP Solution Manager.</td>
<td>After you have upgraded or implemented a Support Package.</td>
</tr>
</tbody>
</table>
### Task or Transaction | Description | Recommended Frequency
---|---|---
Standard Business Intelligence (BI) reports | To analyze your application data, you can use the standard reports and analysis tools of the SAP NetWeaver BI system. | As needed

---

### Project Management

#### Table 9:

<table>
<thead>
<tr>
<th>Task or Transaction</th>
<th>Description</th>
<th>Recommended Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DPR_EVE_BATCH_DPO</strong></td>
<td>Project Management: You can use this report to extract data from your projects and display the evaluations in Project Management. You can either plan the extraction of the data or trigger it manually.</td>
<td>As needed</td>
</tr>
<tr>
<td><strong>RPM_FES_AVAILABILITY</strong></td>
<td>To maintain the availability of resources over a period of time for better performance.</td>
<td>Whenever the availability of a resource changes</td>
</tr>
<tr>
<td><strong>SHMM</strong></td>
<td>Refresh Shared Memory: Start the transaction and mark the corresponding entry of area CL_DPR_FC_MAP_AREA and choose <em>Delete all Instances</em> to delete this shared memory area.</td>
<td>After you have changed the field control Customizing.</td>
</tr>
<tr>
<td><strong>SARA</strong></td>
<td>To archive a project, specify the archiving object CPROJECTS and process the first step (Write).</td>
<td>As needed</td>
</tr>
<tr>
<td><strong>RSIR_CONTENT_UNMARK_PRELIM</strong></td>
<td>You can use this report to delete the temporary document content.</td>
<td>As needed</td>
</tr>
</tbody>
</table>

In the front-end system: [Portfolio and Project Administration Services ➔ Replace User / Resource ➔](http://help.sap.com) You can replace users and resources in multiple objects, relevant subobjects, and in role-task assignments. For more information, see SAP Library on SAP Help Portal at [http://help.sap.com](http://help.sap.com). | As needed |
Portfolio Management

Table 10:

<table>
<thead>
<tr>
<th>Task or Transaction</th>
<th>Description</th>
<th>Recommended Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>/RPM/PLANNING_DATA_DELETION</td>
<td>You can use this report to delete financial and capacity data.</td>
<td>As needed</td>
</tr>
<tr>
<td>RSIR_CONTENT_UNMARK_PRELIM</td>
<td>You can use this report to delete the temporary document content.</td>
<td>As needed</td>
</tr>
<tr>
<td>SARA</td>
<td>To archive Portfolio Management data, specify the respective archiving object RPM* and process the first step (Write).</td>
<td>As needed</td>
</tr>
</tbody>
</table>

4.6 Logging On and Load Balancing

SAP Portfolio and Project Management uses the standard functionality of SAP NetWeaver for logon and load balancing. For more information on network load balancing, see the documentation on SAP Service Marketplace at http://service.sap.com/ha under HA in Detail High Availability for Network Infrastructures 6.1 Network Load Balancing.

4.7 User Management

For more information about User Management tools, see:

- The section Granting Administration Authorization for an Object of the Basic Settings for Project Management and of the Basic Settings for Portfolio Management in SAP Solution Manager.

Authorization Concepts and Roles

4.8 Printing

Project Management uses Adobe PDF-based forms and Smart Forms (deprecated) for printing which is a standard functionality of SAP NetWeaver. For more information, see Print Forms (Enhanced) in the release notes for SAP Portfolio and Project Management 5.0 on SAP Service Marketplace at http://service.sap.com/releasenotes under SAP Solutions SAP Product Lifecycle Management (SAP PLM).

Portfolio Management uses Adobe PDF-based print forms which is a standard functionality of SAP NetWeaver.

For more information about printing in general, see the SAP Help Portal at http://help.sap.com under SAP NetWeaver Release SAP NetWeaver Library Function-Oriented View Application Server Adobe Document Services for Form Processing.

For more information about printing in Project Management, see the Preparing Printing section of the Basic Settings for Project Management in SAP Solution Manager.

4.9 Definition of Security Lists for OfficeControls

SAP Portfolio and Project Management uses OfficeControls for the integration with Microsoft Project and for the HTTP-based check-in and check-out of documents. Since rendered pages are normally displayed in a Web browser connected to the Internet in Web Dynpro, security aspects, such as OfficeControls, must be considered for UI elements.

Therefore, the following security measures have been implemented for OfficeControl:

- OfficeControl communicates only with authorized servers
- Data can be stored only in authorized directories
- Data can be read only from authorized directories
- Only authorized file types can be opened directly with the default application

The authorized servers and directories and the authorized file types are listed in a whitelist for security reasons; an administrator stores this information locally using transactions WDR_ACF_WLIST and ACF_WHITELIST_SETUP. If requests for access to directories or communication with servers are sent using HTTP or HTTPS, the control first checks whether this is allowed at all. It then compares the directories or servers in question with the data in the local whitelist file. It executes the relevant methods only if the authorization is set in the whitelist.

Whitelist certificates can be generated using transaction WDR_ACF_GEN_CERT and need to be installed on all end user PCs. To install the whitelist certificate, go to transaction ACF_WHITELIST_SETUP and choose Install Certificate.

For more information, see Customizing for SAP NetWeaver under Application Server Web Dynpro ABAP Set Up Whitelist for Active Controls and Activate Whitelist for Active Controls.

For more information about the required Java version for the OfficeControl, see SAP Note 1826387.
4.10 Activating HTTP-Based Document Management

SAP Portfolio and Project Management supports HTTP-based check-in and check-out of documents. Therefore, OfficeControl UI elements for the check-in and check-out of documents are used. For more information, see the Definition of Security Lists for OfficeControls section of the Basic Settings for Project Management in SAP Solution Manager.

You can activate the HTTP-based document management in Customizing for SAP Portfolio and Project Management under Portfolio Management > Global Customizing > Global Settings > Override Default Global Settings. For more information, see the Activating HTTP-Based Document Management section of the Basic Settings for Project Management in SAP Solution Manager.

To use the HTTP-based check-in and check-out of documents, every user needs to install a Java runtime on his client PC. For more information about the required Java version, see SAP Note 2026422.

4.11 MS Project Integration

The Import and Export UI in both Project Management and Portfolio Management uses the OfficeControl UI element for Microsoft Office Project Integration. For more information, see the Definition of Security Lists for OfficeControls section of the Basic Settings for Project Management in SAP Solution Manager.

Import and export from or to MS Project is only supported when either Internet Explorer or NWBC for Desktop (with browser rendering from Internet Explorer) are used. It is not supported for Firefox, for example. For supported browsers, see SAP Note 2026422.

The Web Dynpro ABAP OfficeControl uses an ActiveX that does not access any resources on the front end, other than via the MS Project application. The ActiveX is digitally signed with the official SAP signature. With the intact official signature, SAP guarantees that the ActiveX, as provided, has not been changed or modified in any way.

Note

The ActiveX must be installed once only, the first time you use the integration of Microsoft Project. This occurs automatically in the Internet Explorer. Subsequent calls to the integration then reuse the installed ActiveX. However, you can activate or deactivate the download and execution of ActiveX components in the standard Internet Explorer browser settings (local front-end settings). If you cannot use ActiveX, for example, due to company policy, you cannot use the Microsoft Project integration.

For more information about OfficeControl, see SAP Help Portal at http://help.sap.com under SAP NetWeaver <Release> Application Help Function-Oriented View Application Server Application Server ABAP UI Frameworks Based on Application Server ABAP Further UI Technologies in ABAP Web Dynpro ABAP Reference User Interface Elements.
5 High Availability


The use of SAP NetWeaver Application Server JAVA is optional.
6 Software Change Management

Software Change Management standardizes and automates software distribution, maintenance, and testing procedures for complex software landscapes and multiple software development platforms. These functions support your project teams, development teams, and application support teams.

The goal of Software Change Management is to establish consistent, solution-wide change management that allows for specific maintenance procedures, global rollouts (including localizations), and open integration with third-party products.

This section provides additional information about the most important software components.

The following topics are covered:

- Transport and Change Management – Enables and secures the distribution of software changes from the development environment to the quality assurance and production environment.
- Template Management – Enables and secures the rollout of global templates, including localizations.
- Quality Management and Test Management – Reduces the time, cost, and risk associated with software changes.
- Support Packages and SAP Notes Implementation – Provides standardized software distribution and maintenance procedures.
- Release and Upgrade Management – Reduces the time, cost, and risk associated with upgrades.

6.1 Transport and Change Management


6.2 Development Requests and Development Release Management


In the ABAP parts, customer-specific modifications and development are possible.
6.3 Template Management

SAP Portfolio and Project Management does not use any template management.

6.4 Quality Management and Test Management


6.5 Support Packages and Patch Implementation

SAP recommends implementing Support Package Stacks (SP stacks), which are sets of Support Packages and patches for the respective product version that must be used in the given combination. The technology for applying Support Packages and patches will not change.

You can find detailed information about the availability of SP stacks for SAP Portfolio and Project Management 6.0 in the SAP Service Marketplace under http://service.sap.com/sp-stacks and in the following SAP Notes:

Table 11:

<table>
<thead>
<tr>
<th>SAP Note Number</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>2026050</td>
<td>PPM 6.1: Support package information, notes, and schedule</td>
</tr>
<tr>
<td>1821685</td>
<td>Release strategy for ABAP add-on CPRXRPM</td>
</tr>
</tbody>
</table>

Read the corresponding Release and Information Notes (RIN) SAP Note 2026050 before you apply any Support Packages or patches of the selected SP stack.

To find out about RIN and currently available Support Packages for the components of the SAP Portfolio and Project Management solution package refer to the SAP Service Marketplace (quick link /patches).

For more information about the implementation of Support Packages as well as possible side effects, see http://service.sap.com/patches under SAP Support Packages in Detail.

7 Troubleshooting

For frequently asked questions, see SAP Note 2026407. For more information about performance, see SAP Note 2026426.

For more information about trace files and logs, see section CPRXRPM Analysis Tools [page 12].

Project Management

If the full-text search for documents with TREX does not work, make sure that you have made the relevant settings in Customizing [SAP NetWeaver] Application Server [Basis Services] Knowledge Provider Document Management Service Define Indexing Readiness and Schedule Asynchronous Indexing and De-indexing. For more information, see the Making Settings for the Search with TREX section of the Basic Settings for Project Management in SAP Solution Manager.
8 Support Desk Management

Support Desk Management enables you to set up an efficient internal support desk for your support organization that seamlessly integrates your users, internal support employees, partners, and SAP Active Global Support specialists with an efficient problem resolution procedure.

For support desk management, you need the methodology, management procedures, and tools infrastructure to run your internal support organization efficiently.

The following topics are covered:

- Remote Support
- Component hierarchy relevant for this application

8.1 Remote Support Setup

SAP Support needs to be able to work remotely for highest efficiency and availability. Therefore, all required support tools must be remotely accessible for SAP support. For SAP Portfolio and Project Management, the standard SAP procedures for setting up remote support apply.

For information about Remote Support Setup, see SAP Service Marketplace at http://service.sap.com/access-support.

8.2 Problem Message Handover

For information about processing of internal support messages and forwarding them to SAP, see SAP Help Portal at http://help.sap.com under Application Lifecycle Management > SAP Solution Manager > Service Desk.

For sending problem messages/tickets to SAP, choose the appropriate component (or subcomponent) name from the SAP component hierarchy:

Table 12:

<table>
<thead>
<tr>
<th>Component</th>
<th>Component Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPM</td>
<td>Portfolio and Project Management</td>
</tr>
<tr>
<td>+ PPM-PFM</td>
<td>Portfolio Management</td>
</tr>
<tr>
<td>+ PPM-PRO</td>
<td>Project Management</td>
</tr>
<tr>
<td>+ PPM-CF</td>
<td>Common Functions</td>
</tr>
</tbody>
</table>
## 9 Appendix

### 9.1 Categories of System Components for Backup and Restore

Table 13:

<table>
<thead>
<tr>
<th>Categories of System Components</th>
<th>Category Properties</th>
<th>Suggested Methods for Backup and Restore</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Only software, no configuration or application data</td>
<td>● No backup, new installation in case of a recovery or</td>
<td>BDOC modeler</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Initial software backup after installation and upgrade</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of log files</td>
<td></td>
</tr>
<tr>
<td>II</td>
<td>Only software and configuration information, no application data</td>
<td>● Backup after changes have been applied or</td>
<td>SAP Gateway</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● No backup, new installation and configuration in case of a recovery</td>
<td>Comm. Station</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of log files</td>
<td>SAP Business Connector</td>
</tr>
<tr>
<td></td>
<td>Data:</td>
<td>● No data backup needed</td>
<td>SAP IPC (2.0C)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of software, configuration, log files</td>
<td></td>
</tr>
<tr>
<td>III</td>
<td>Only replicated application data, replication time is sufficiently small for a recovery</td>
<td>Data:</td>
<td>SAP IMS/Search Engine *</td>
</tr>
<tr>
<td></td>
<td>Data:</td>
<td>● No data backup needed</td>
<td>SAP IPC (2.0B) *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of software, configuration, log files</td>
<td>Webserver *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Application specific file system backup or</td>
<td>SAP ITS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Multiple instances</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of software, configuration, log files</td>
<td></td>
</tr>
<tr>
<td>IV</td>
<td>Only replicated application data, backup recommended because replication time is too long, data not managed by a DBMS</td>
<td>Data:</td>
<td>SAP IMS/Search Engine *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Application specific file system backup or</td>
<td>Webserver *</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Multiple instances</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Backup of software, configuration, log files</td>
<td></td>
</tr>
<tr>
<td>Categories of System Components</td>
<td>Category Properties</td>
<td>Suggested Methods for Backup and Restore</td>
<td>Examples</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
</tbody>
</table>
| V                               | Only replicated application data, backup recommended because replication time is too long, data managed by a DBMS | Data:  
  - Database and log backup or  
  - Multiple instances  
  - Backup of software, configuration, log files | SAP IPC (2.0B) *  
Catalog Server |
| VI                              | Original application data, standalone system, data not managed by a DBMS               | Data:  
  - Application specific file system backup  
  - Backup of software, configuration, log files | Webserver * |
| VII                             | Original application data, standalone system, data managed by a DBMS, not based on SAP WebAS | Data:  
  - Database and log backup  
  - Backup of software, configuration, log files | Standalone SAP R/3 |
| VIII                            | Original application data, standalone system, based on SAP WebAS                       | Data:  
  - Database and log backup, application log backup (such as job logs in file system)  
  - Backup of software, configuration, log files | Standalone SAP R/3 |
| IX                              | Original application data, data exchange with other systems, data not managed by a DBMS | Data:  
  - Application specific file system backup, data consistency with other systems must be considered  
  - Backup of software, configuration, log files | SAP liveCache  
SAP Mobile Workbench |
| X                               | Original application data, data exchange with other systems, data managed by a DBMS, not based on SAP WebAS | Data:  
  - Database and log backup, data consistency with other systems must be considered  
  - Backup of software, configuration, log files |                      |
### Categories of System Components

<table>
<thead>
<tr>
<th>Categories of System Components</th>
<th>Category Properties</th>
<th>Suggested Methods for Backup and Restore</th>
<th>Examples</th>
</tr>
</thead>
</table>
| XI                             | Original application data, data exchange with other systems, based on SAP WebAS | Data:  
  - Database and log backup, application log backup (such as job logs in file system), data consistency with other systems must be considered  
  - Backup of software, configuration, log files | SAP ERP  
SAP CRM  
SAP APO  
SAP BI |

### 9.2 Related Guides

You can find more information about installation and configuration in the Master Guide and in the Upgrade Master Guides.

### 9.3 Related Information

The following table contains links to information relating to the Application Operations Guide.

Table 14:

<table>
<thead>
<tr>
<th>Content</th>
<th>Quick Link to the SAP Service Marketplace</th>
</tr>
</thead>
</table>
http://service.sap.com/ibc |
| Related SAP Notes                             | http://service.sap.com/notes  |
| Released Platforms                            | http://service.sap.com/platforms  |
| Network Security                              | http://service.sap.com/securityguide  
http://service.sap.com/network  |
| Technical Infrastructure                      | http://service.sap.com/ti  |
| SAP Solution Manager                          | http://service.sap.com/solutionmanager  |
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