

SAP BusinessObjects Planning and Consolidation 10.0

version for the Microsoft platform

Document History

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

Table 1

Version	Date	Description
1.0	2012-02-02	This version accompanies the General Availability release of SAP BusinessObjects Planning and Consolidation 10.0, version for the Microsoft platform.
1.1	2012-06-07	Modified the document to incorporate SQL Server 2012 support within support package 7.
1.15	2012-06-08	Additional modifications for SQL Server 2012 support within support package 7.
1.2	2013-04-30	Updated the topic "Important SAP Notes" with the central note number for support package 10.
1.3	2013-05-13	Updated the topic "Migrating Data from 7.0 or 7.5 to 10.0" with information about work status.
1.4	2013-09-09	Updated the topic "Important SAP Notes" with the central note number for support package 11.
1.45	2014-01-10	Updated the topic "Important SAP Notes" with the central note number for support package 12.
1.5	2015-06-04	Added SQL Server 2014 throughout the document; other minor editorial changes.
1.6	2016-04-20	Updated the topic "Important SAP Notes" with the central note number for support package 21.

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1 Important SAP Notes









Caution

Check regularly to see which SAP Notes are available for this Upgrade Guide.

Table 2:

SAP Note Number	Title	Comments
1584890	Documentation Addendum	Contains information that does not yet appear in the application help of Business Planning and Consolidation 10.0, version for the Microsoft platform.
2257136	Planning & Consolidation 10 for Microsoft SP21 Central Note	This note contains important information about the installation of support package 21.
2212913	Planning & Consolidation 10 for Microsoft SP20 Central Note	This note contains important information about the installation of support package 20.
2181412	Planning & Consolidation 10 for Microsoft SP19 Central Note	This note contains important information about the installation of support package 19.
2148603	Planning & Consolidation 10 for Microsoft SP18 Central Note	This note contains important information about the installation of support package 18.
2104846	Planning & Consolidation 10 for Microsoft SP17 Central Note	This note contains important information about the installation of support package 17.
2070276	Planning & Consolidation 10 for Microsoft SP16 Central Note	This note contains important information about the installation of support package 16.
2034385	Planning & Consolidation 10 for Microsoft SP15 Central Note	This note contains important information about the installation of support package 15.
2000499	Planning & Consolidation 10 for Microsoft SP14 Central Note	This note contains important information about the installation of support package 14.
1961655	Planning & Consolidation 10 for Microsoft SP13 Central Note	This note contains important information about the installation of support package 13.
1897745	Planning & Consolidation 10 for Microsoft SP12 Central Note	This note contains important information about the installation of support package 12.
1846917	Planning & Consolidation 10 for Microsoft SP11 Central Note	This note contains important information about the installation of support package 11.
1804918	Planning & Consolidation 10 for Microsoft SP10 Central Note	This note contains important information about the installation of support package 10.
1755355	Planning & Consolidation 10 for Microsoft SP09 Central Note	This note contains important information about the installation of support package 9.

SAP Note Number	Title	Comments
1733053 	Planning & Consolidation 10 for Microsoft SP08 Central Note	This note contains important information about the installation of support package 8.
1689792 	Planning & Consolidation 10 for Microsoft SP07 Central Note	This note contains important information about the installation of support package 7.
1665656 	Planning & Consolidation 10 for Microsoft SP06 Central Note	This note contains important information about the installation of support package 6.
1643037 	Planning & Consolidation 10 for Microsoft SP05 Central Note	This note contains important information about the installation of support package 5.
1620464 	Planning & Consolidation 10 for Microsoft SP04 Central Note	This note contains important information about the installation of support package 4.
1601213 	Planning & Consolidation 10 for Microsoft SP03 Central Note	This note contains important information about the installation of support package 3.
1591848 	Planning & Consolidation 10 for Microsoft SP02 Central Note	This note contains important information about the installation of support package 2.
1573539 	Planning & Consolidation 10 for Microsoft SP01 Central Note	This note contains important information about the installation of support package 1.

2 Introduction

This guide provides instructions on how to upgrade to Planning and Consolidation 10.0, and how to migrate your environments.

The term **upgrade** refers to the process of overwriting your existing software with a newer version of the software. You can perform an upgrade if you already have version 10.0 (including any support packages) installed and you are using SQL Server 2008, SQL Server 2008 R2, SQL Server 2012, or SQL Server 2014. If these conditions do not apply to you, you must uninstall all previous versions and perform a full install of Planning and Consolidation 10.0. See the installation guide for the support package you are upgrading to at help.sap.com/bopacms100.

The term **migrate** refers to the process of moving your environments, models, and data from one version to another. The following are conditions for which you must migrate:

- After performing an upgrade
- If you are installing a newer version of the software that has fundamental changes (such as technology platform or underlying table structure changes)
- If you are migrating from a different software altogether (such as moving from SAP SRC to SAP BusinessObjects Planning and Consolidation).

For a list of the prerequisite software needed for this version of Planning and Consolidation, see the Product Availability Matrix on the SAP Support Portal at support.sap.com/pam. Search on Planning and Consolidation.

The upgrade guide includes the following topics:

- Upgrading your software to 10.0 (see [Upgrade to Planning and Consolidation 10.0 \[page 9\]](#))
- Backing up your 7.0 and 7.5 environments (see [Back Up Environments in Planning and Consolidation 7.0 or 7.5 \[page 11\]](#))
- Migrating your backed up environments to 10.0 (see [Migrate Environments to Planning and Consolidation 10.0 \[page 15\]](#))
- Migrating your data from 7.0 or 7.5 to 10.0

About Upgrading from OutlookSoft 4.2 or Planning and Consolidation 5.x

This document does not include instructions on upgrading or migrating from OutlookSoft 4.2 or Planning and Consolidation 5.x.

To upgrade your software and migrate your environments from OutlookSoft 4.2 SP3 or later, or Planning and Consolidation 5.x, an SAP certified partner can assist you.

About Upgrading from Earlier Versions of Planning and Consolidation

This document includes information about migrating your environments from 7.x, but does not include instructions on upgrading your software.

To upgrade your software from earlier versions of Planning and Consolidation, you must perform a full install by uninstalling the existing software then installing Planning and Consolidation 10.0 server and client software. For information, see the corresponding installation guide at help.sap.com/bopacms100.

About Upgrading from SQL Server 2005 to SQL Server 2008, SQL Server 2008 R2, SQL Server 2012, or SQL Server 2014

Planning and Consolidation 10.0 requires SQL Server 2008, SQL Server 2008 R2, SQL Server 2012, or SQL Server 2014.

This document does not include instructions for upgrading your software from SQL Server 2005 to 2008, 2012, or 2014. To upgrade your software from a SQL Server 2005 platform, you must perform a full install by uninstalling then reinstalling your Planning and Consolidation server and client software. For information, see the installation guide at help.sap.com/bopacms100.

After installing the software, you can use this guide to migrate your environments.

Note

Legacy Applications

By default, Planning and Consolidation 10.0 supports SQL Server 2008, SQL Server 2008 R2, SQL Server 2012, or SQL Server 2014 with full 64-bit compliance. It is possible that some customers have packages based on SQL 2005 SSIS. Upgrading these packages may not be feasible or even possible.

About Upgrading from SQL Server 2008 to 2012 or 2014

Planning and Consolidation 10.0 requires SQL Server 2008, SQL Server 2008 (R2), SQL Server 2012, or SQL Server 2014. This document does not include instructions on upgrading your software from SQL Server 2008 to the later versions. To upgrade your software, you must perform an install using the upgrade mode for your Planning and Consolidation server after upgrading from 2008 to 2012 or 2014.

Planning and Consolidation 10.0 supports SQL Server 2012 with full 64-bit compliance starting with support package 7. It is possible that some customers have packages based on SQL 2008 SSIS. To use 2008 packages on SQL Server 2012, see SAP note [1707410](#) for more information.

To use 2008 packages on SQL Server 2014, you need OsoftSSIS2014_Client; see SAP note [2122201](#) for more information.

3 Upgrade to Planning and Consolidation 10.0

It is not possible to upgrade directly from an earlier version of Planning and Consolidation to version 10.0. You should create back-up versions of your environments, uninstall the current version of Planning and Consolidation, and then install Planning and Consolidation 10.0.

If you need to do a full installation, see the installation guide corresponding to this release at service.sap.com/instguidesEPM-BPC ► [10.0, version for the Microsoft Platform](#) ►.

If Planning and Consolidation version 10.0 or later is already installed, you can use the Client Auto Update program to set up the server so that it determines if an upgrade for a connecting Administration Client is necessary.

The following describes the use of the auto update program for the Administration Client and the SAP BusinessObjects EPM solutions, add-in for Microsoft Office.

Procedure

For the Administration Client

If Client Auto Update is enabled and the system finds a newer version than the one installed, it prompts the user to perform the upgrade. If Client Auto Update is not enabled and a newer version is detected, clients must be installed manually. For more information about manual installation, see *Installing the Administration Client* in the *Installation Guide*.

To use the Client Auto Update program for the Administration Client, proceed as follows:

1. From the Server Manager, select ► [Options](#) ► [Client Options](#) ►.
2. Select [Admin Update](#).
3. If users without administrator rights on their machines use the auto update, enter an administrator ID and password in the [Admin ID](#) and [Admin password](#) fields, respectively. The [Admin ID](#) should be a member of the local administrators group on all the computers running the auto update. This setting is not needed if all users have administrator rights on their machines.
4. Select [Update](#).

For the EPM Add-in

The following types of update are possible:

- **User Update**

In this case, the notification dialog allows a user to choose an option that suppresses future notifications. This option is stored in the user preferences, and may also be turned on or off using the [User Options...](#) menu item. If [Auto Update](#) is activated on the server, this option has no effect.

- **Auto Update**

In this case, the update notification is displayed as soon as a newer version is detected. Users can choose to install the new package now or later, but has no way to stop notifications, whatever the [Auto Update](#) setting is.

- **Forced Update**

In this case, the update notification is displayed as soon as a newer version is detected, and a user has to install it before using the EPM add-in:

The following describes the use of the update procedure for the EPM add-in:

1. Download the add-in file from the SAP Market Place (SMP) at service.sap.com.

All support packages and patches are available from the SMP as a zip file:

- EPMEXCLCLNT<SPL>.zip is for a support package
- EPMEXCLCLNT<SPL>P<PL>.zip is for a patch

The zip file includes two files. One is installation package and the other is information file that includes version and policy information. For a support package, these files are:

- EPM Addin Support Package <SP version>.msp
- EPM Addin Support Package <SP version>.xml

For a patch, these files are:

- EPM Addin Patch <patch number>.msp
- EPM Addin Patch <patch number>.xml

2. Unzip the zip file and extract the two files to the application server folder (\Websrvr\Web\BPC\Installation\).

3. From the Server Manager, select ► **Options** ► **Client Options** ►.

The system lists the available packages. Select the package that you want to use for the autoupdate.

You can set a different update policy for each package listed.



Example

The following table illustrates some possible situations assuming that you have installed the first full version (V1):

Table 3

Available maintenance packages	V2-user update V3-forced update V4-forced update V5-user update	V5-user update	V5-user update V6-auto update V7-forced update
Minimum Required Version	V4	V4	V7
Notification	A prompt tells the user to install maintenance package V4 using the Forced Update behavior.	If User Update is enabled, the prompt informs the user that maintenance package V5 is available.	A prompt tells the user to install maintenance package V7 using the Forced Update behavior.
New Version	V4	V4 or V5	V7

If you change the update policy for any package, click **Update** to complete the change.

4 Back Up Environments in Planning and Consolidation 7.0 or 7.5

To migrate environments from 7.0 or 7.5 (including any support package), you first need to create a backup of all the environments that you wish to migrate. You can do this using the *Backup/Restore* facility of the server manager.

The normal backup process backs up any Planning and Consolidation configuration files that reside on the file share. All application configuration information is stored in the Planning and Consolidation database, and is backed up and restored with the database. Files and directories that are used for logging and configuration that reside on your local machine are not automatically backed up.

Note

In Planning and Consolidation 7.0 and 7.5, environments are known as application sets or AppSets. This process backs up your application sets, which are migrated to Planning and Consolidation 10.0 as environments.

Procedure

To back up environments, proceed as follows:

1. From your application server, select ► *Windows Start* ► *(All) Programs* ► *SAP BusinessObjects* ► *Planning and Consolidation* ► *Planning and Consolidation Server Manager* ►.
2. Select ► *Environment* ► *Backup Environment* ► or ► *AppSet* ► *Backup* ►.
3. Select the checkbox next to one or more environments or application sets that you want to back up.

Note

Select the *Select All Environments* checkbox to select all the environments in the list.

4. In the *Destination* field, enter the path that describes where you want to save the backed up files, or click the browse button to search for the target backup folder.
5. If the SQL database is on a separate server and DMZ configuration exists between the SQL server and the application server, select the *Use backup files path on a remote SQL server* checkbox, and enter the name of the local path to the SQL database, for example, C:\SQLBackup.
6. Click *Next*.
7. Click *OK*, then click *Close*.

5 Migrating Data from 7.0 or 7.5 to 10.0

If you are migrating from Planning and Consolidation 7.0 or 7.5, much of your data and settings are migrated automatically.

The following section is a brief description of what the migration process accomplishes.

Features

When you are upgrading from Planning and Consolidation 7.0 or 7.5 to 10.0, the migration process of your data and settings is as described in the following.

7.0 or 7.5 Application Data

All data associated with the 7.0 or 7.5 applications, that is, numerical data and comments at the cell level, migrate automatically to equivalent 10.0 models.

Migration of 7.0 or 7.5 Application Sets

Migration executes in the back-end to update 7.0 or 7.5 application sets to 10.0 environments.

Note

Excel report migration is not controlled by migration process. You should run this directly from the SAP BusinessObjects EPM solutions, add-in for Microsoft Office.

Administration Settings

Administration settings and configuration are migrated automatically. This includes:

- Settings defined in the 7.0 or 7.5 Administration Console
- Settings defined in 7.0 or 7.5 Web Admin screens in the Web client

After migration, settings may be found in a different place. For example, in 10.0 all Web Admin parameters move to the Administration Client.

Migration removes some tasks from version 7.0 or 7.5, combines other tasks, and creates some new 10.0 tasks. See the migration log file for detailed information.

During migration, the process validates the length of each property and issues a warning message if necessary. If you receive a warning message, you have to confirm and check the length of each property.

Business Rules

There are no changes to Business Rules.

Ownership Data

There is no change to the ownership data. The 7.0 or 7.5 ownership application migrates to the 10.0 ownership model.

Data Manager

Data Manager Transformation files and Conversion files are supported without modification in the 10.0 EPM add-in.

Data Manager package script settings (which parameters appear in the user dialogs when the package is executed) are supported in 10.0.

Package authorizations, defined by an administrator in the Data Manager, are also supported.

Web Client

Live Reports

Live reports are not migrated. Live reports are replaced by Web reports, which have a different implementation. Direct migration is not possible so business users need to create a new set of reports.

Content Library – Documents and URLs

Documents and URLs, with their associated contexts and types, migrated to the new *Documents* view in the Web client *Home* tab.

Content Library – Custom Web Pages

Custom Web pages are not migrated.

In 10.0, workspaces provide a similar functionality to the custom Web pages of 7.0 or 7.5. There are limitations since HTML pages and external documents cannot be embedded in workspaces.

The most frequent uses of custom Web pages were the following:

- Provide a customized business process flow (process) execution page.
In 10.0, business process flows (processes) have dedicated activity workspaces.
- Display a published book
Books are now displayed directly in the built-in Books Viewer window.

Insight

All Insight functionality (variance analysis and predictive analysis) is removed. Planning and Consolidation 10.0 for the Microsoft platform includes a new automated variance analysis functionality. You need to set this up manually. For more information, see the Application Help.

Books

Books are partially migrated.

Book definitions in Excel are fully supported in the EPM add-in.

The history of published books – HTML or PDF files in the `FileDB` folder on the SAP BusinessObjects Planning and Consolidation fileserver – are not available after upgrade. For published books that users wish to keep, it is necessary to publish them again using the *Book Publication* feature in the EPM add-in.

Books can only be generated as PDF. The HTML version of books is no longer supported.

Excel

Reports and Templates

Reports and Templates are only partially migrated.

Reports generated in the 7.0 or 7.5 Excel client that use the EvDRE function with a standard use of built-in parameters can be converted using the EPM add-in to a native 10.0 report. This means that the sheet based control panel corresponds to the one in the wizard templates or the one generated automatically by EvDRE.

Reports that have been heavily customized may not be converted automatically and may require some manual modifications.

Reports can be used in the EPM add-in without any migration steps as of EPM add-in Support Package 4 Patch1. Once reports are migrated using EvDRE Migration, they are converted to a native EPM add-in report. If you want to keep the existing EvDRE, do not migrate the reports.

For more information, see the *SAP BusinessObjects EPM solutions, add-in for Microsoft Office* help.

Custom Menus

Custom menus, implemented in the Excel client, are no longer supported

It is possible with the EPM add-in to create Excel workbooks that contain links that are equivalent to the 7.0 and 7.5 custom menu commands. This makes it possible to achieve something similar to a custom menu but without the automatic generation of the layout.

API

The complete rewriting of the REST APIs means that any custom solutions that call the internal APIs of 7.0 or 7.5 no longer work.

Work Status

The migration process deletes the contents of the Work Status tables in order to achieve performance improvements in version 10.0. You must re-enter work status values following your migration.

6 Migrate Environments to Planning and Consolidation 10.0

To migrate your backed up environments to Planning and Consolidation 10.0, you must first restore the environments in the new 10.0 system and then migrate the environments into Planning and Consolidation.

Procedure

Restoring Environments

1. From your application server, select the Windows ► *Start* ► *(All) Programs* ► *SAP* ► *Server Manager* ►.
 2. Select ► *Environment* ► *Restore Environment* ►.
 3. In the Step 1 dialog box, do one of the following:
 - If it is a single server configuration, enter the path to the folder that contains the backed up environment in the *Environment Folder* field, or click the browse button to search for the folder. Click *Next*.
 - If your backup files for *FileDB*, *SQL* and *WebFolder* are not in one folder, do the following:
 1. You can leave the *Environment Folder* field blank.
 2. In the *Webfolder* field, enter the path and name of the zip file that contains the backed up *Webfolder* folder, or click the browse button to search for the file.
 3. In the *FileDB* field, enter the path and name of the zip file that contains the backed up *FileDB* folder, or click the browse button to search for the file.
 4. In the *SQL database* field, enter the path and name of the SQL server .bak file, or click the browse button to search for the file. If the SQL database is on a separate server and a DMZ configuration exists between the SQL server and the application server, select the *Use backup files path on a remote SQL server* checkbox and enter the name of the local path to the SQL database, for example, C:\SQLBackup.
 5. Click *Next*.
 4. In the Step 2 dialog box, check the SQL and OLAP server names and click *Next*.
 5. In the Step 3 dialog box, set the SQL data directory..
 - If you use the default SQL data directory, click *Next*.
 - If you use separate directories for each SQL data file, deselect the checkbox and browse the directory you want.
- i** **Note**

If the SQL server is on a separate server from the application server, the path *Restore As* must be a local SQL data path.
6. In the Step 4 dialog box, wait until the restore process is complete, then click *Close*.
 7. The restore procedure resets the connection strings on the application server to the internal server name. So if you require users to access the environment from an external IP address, you must modify those settings.

8. When restoring an environment, the restore procedure creates the storage model of the write-back OLAP partition to be MOLAP. You should reset the storage model to be a write-back OLAP partition. For more information, see *Installing SQL Server* in the *Installation Guide*.

Migrate Environments

1. From your application server, select ► *Windows Start* ► *(All) Programs* ► *SAP* ► *Server Manager* .
2. Select ► *Environment* ► *Migrate Environment* .

Result

The environments, their models and data migrate to the new Planning and Consolidation system. The migration process updates the environment parameters to operate within the Planning and Consolidation configuration.

The following information provides an overview of what kind of work is done during the migrate environment process.

Environments

- The database role in the Microsoft SQL server is redefined for the Admin and User accounts that are defined during the installation of Planning and Consolidation
 - The Admin account has a database creating permission, `dbcreator`, for the SQL server
 - The Admin and User accounts have a database owner permission, `db_owner`, that grants the activities of all the fixed database roles as well as the maintenance and configuration activities in the database
 - The database table is adjusted to allow for creating new tables and modifying column information
 - There are some new SQL stored procedures
- SQL Server Analysis Service (SSAS) roles are redefined for the Admin and User accounts that are defined during installation
 - The Admin account has an administrator role for the SSAS server to create databases
 - The database role is divided between the Admin and User roles to give a proper permission when a user accesses the SSAS database. The Admin role grants a full permission and the User role grants only read permission for each database.
- Business User Interface (BUI) data is generated to compose fundamental data for the Web client

Dimensions

- The migrate base period is a particular time period, for which data is gathered and used as a benchmark in measuring financial or economic data. The `MONTHNUM` property is added to `BASE_PERIOD`, and the previous value of 7.5 is migrated automatically.

Applications

- Because of new terminology, Data Manager packages in each application need to be migrated to run the packages with correct information. For this process, only SQL 2008 and SQL 2008 R2 packages are migrated.
- All measure formulas in each application are updated to each SSAS cube.

Security

- Security tasks are added, removed and changed. The migrated information is generated as a log file and you can check the log to apply the changed information.
- There are new built-in security task profiles, as follows:
 - Default_System Admin
 - Default_Primary Admin
 - Default_Secondary Admin

Each profile can be used as a model to grant correct security permission when you create new security profile. These profiles cannot be modified but you can adapt the copied profiles when you create new profile.

Business Process Flows (Processes)

- There are some additional and some removed Business Process Flow tasks. The migrated information is generated as a log file and users can check the log to modify the changed Business Process Flow information. For the deleted action tasks, you have to redefine that part of Business Process Flow.
- There is a new parameter, `GroupId`, added for Data Manager packages that does not exist in 7.5. So you need to map the `GroupId` parameter to each Data Manager launching Business Process Flow action.

Data Manager Packages

- Planning and Consolidation 10.0 only supports the migration of SQL 2008 SSIS packages. SQL 2005 SSIS packages cannot be run on an SQL 2008, SQL 2012, or SQL 2014 environment because Microsoft does not support backward compatibility. However, it is possible to upgrade from SSIS 2005 packages to SSIS 2012 or SSIS 2014 packages, whereas it is not possible to upgrade from SSIS 2005 packages to SSIS 2008 because SQL Server 2008 does not support it. See SAP notes [1710266](#) and [2122201](#) for more information.
- Planning and Consolidation 10.0 does not support the package included with the legacy FTP task (`ImportUsingFTP.dtsx`) of the custom tasks. This support is provided by Microsoft.
- Planning and Consolidation 10.0 does not support duplicated Excel packages for Excel 2003 (`Import Access.dtsx`, `Import Access into fact table.dtsx`, `Import Excel.dtsx`). You should save these packages in Excel 2007 format before use.
- Audit dts packages for SQL2000 DTS (`AuditRestore.dts`, `AuditPurge.dts`, `AuditClear.dts`, and `AuditBackup.dts`) are replaced by new audit packages for SSIS 2008, SSIS 2012, and SSIS 2014 (`AuditRestore.dtsx`, `AuditPurge.dtsx`, `AuditClear.dtsx`, and `AuditBackup.dtsx`).
- Legacy custom task information is migrated to adjust for Planning and Consolidation 10.0 in the packages.

Package Migration Process

1. Original packages are stored in a backup folder (`%Environment%\%Model%\DataManager\PackageFiles_Backup`).
2. The migration process moves the migrated packages to the migrated folder (`%Environment%\%Model%\DataManager\PackageFiles_Migrated`).

As part of the migration, “old” terminology is replaced by “new” terminology as outlined in the following table:

Table 4

"Old" Terminology	"New" Terminology
AppSet, MailAppSet, strAppSet	Environment
%APPSET%	%Environment%
App, strApp	Model
%APP%	%Model%
%APPPATH%	%ModelPath%
ApplicationProcess	ModelProcess
APPLICATIONLIST	ModelList
%APP_LIST%	%Model_List%

3. If the migration completes without error, the `PackageFiles_Migrated` folder becomes `PackageFiles`. If errors occur, you need to complete the migration process manually (see below).

Note

Packages in the team folder are not migrated as it is not possible to determine if these are custom packages.

Manual Corrections

If the migration process does not complete successfully, you can examine the log file to determine the appropriate actions. The following scenarios can occur:

- The migration log warning list contains:
 - SSIS2005 and SQL2000 DTS packages
 - Packages associated with Excel 2003
 - Packages associated with the legacy Planning and Consolidation FTP.

After comparing this list with the contents of the `PackageFiles_Migrated` folder, you can move the packages that migrated successfully (that is, not on the warning list) to the `PackageFiles` folder.

Before copying, packages associated with legacy FTP must be associated with Microsoft FTP and Excel 2003 packages must be saved as Excel 2007.

The remaining packages cannot be seen by Planning and Consolidation and must be removed. You can remove these by using SQL queries as follows:

- SQL query to find GroupID of the packages



Syntax

```
Select [AppID], [GroupID], [PackageID] From [%Environment%].[DBO].
[tblPackages] where [AppID]=N'%Model%' and [PackageID] in (N'%PackageName%')
```

- SQL query to remove nonexistent package information



Syntax

```
Delete [%Environment%].[DBO].[tblPackages] where [AppID]=N'%Model%' and
[GroupID]=N'%GroupID%' and [PackageID]=N'%PackageName%'
```

- If you upgrade from SSIS2008, SSIS2005, or SQL2000, you should consider copying “EnvironmentShell packages to your target environment except for any customized packages. You should remake customized packages in BIDS for SSIS2008.
- The Scenario Modeling package is removed in Planning and Consolidation 10, because the `Scenario.LGX` file is not provided in the EnvironmentShell.

If you want to use scenario modeling, locate the file `Scenario.LGX` in `%ModelPath%\..\AdminApp\Logic Examples\Scenario.LGX`. Change the lines:

```
'TASK(Execute formulas,LOGICFILE,%ModelPath%\..\AdminApp\Logic Examples
\Scenario.LGX)
```

```
'TASK(Execute formulas,DEBUGFILE,%TEMPPATH%DEBUG.LOG)
```

to:

```
TASK(Execute formulas,LOGICFILE,%ModelPath%\..\AdminApp\Logic Examples
\Scenario.LGX)
```

```
TASK(Execute formulas,RUNMODE,1)
```

```
TASK(Execute formulas,LOGICMODE,1)
```

If you do not want to use scenario modeling, you should remove useless records with SQL queries similar to the following:

- SQL query to find GroupID of the packages



Syntax

```
Select [AppID], [GroupID], [PackageID] From [%Environment%].[DBO].
[tblPackages] where [AppID]=N'%Model%' and [PackageID] =N'Scenario Modeling'
```

- SQL query to remove nonexistent package information



Syntax

```
Delete [%Environment%].[DBO].[tblPackages] where [AppID]=N'%Model%' and
[GroupID]=N'%GroupID%' and [PackageID] =N'Scenario Modeling'
```

Log Files

The migration process generates log and information files to assist you with any required further actions.

More Information

[Migration Tables \[page 20\]](#)

7 Migration Tables

The tables in the following contain reference information that may help with managing the migration process.

Features

Business Process Flow (Process) Migration Tables

Removed Tasks

If your previous process template has one or more of the removed Business Process Flow tasks, you need to redefine these tasks.

The Action Type of a Business Process Flow task can be one of the following:

- *Launch* – a target action that launches the step action
- *Sub* – a related action that is displayed on the action pane

The following table lists the removed Business Process Flow (BPF) tasks:

Table 5

Group	Task ID	Name	Action Type
Journal	T0001	Journal Activation	Launch
	T0002	Save	Sub
	T0003	Save As	Sub
	T0006	Unpost Journals	Sub
	T0007	Repost Journals	Sub
	T0009	Journal Report	Launch
	T0011	Journal Report	Sub
Interface for Excel	T0016	Expand All	Sub
	T0017	Validate submission	Sub
	T0018	Submit unstructure data	Sub
	T0027	Publish book wizard	Sub
	T0028	Offline distributor wizard	Sub
	T0079	Manage Dynamic hierarchies	Launch
Data Manager	T0083	Data Manager For PackageExecute	Launch
	T0084	Data Preview For PackageExecute	Sub

Group	Task ID	Name	Action Type
	T0085	Run Specific package For PackageExecute	Launch
	T0086	Run user package For PackageExecute	Launch
	T0087	View package status For PackageExecute	Sub
	T0088	View schedule status For PackageExecute	Sub
Interface for Word	T0045	Insert KPI	Sub
Interface for PowerPoint	T0051	Insert KPI	Sub
Interface for the Web	T0060	Open content Web page	Launch
	T0066	Delete selected Comments	Sub
	T0067	Modify selected Comments	Sub
	T0074	Park & Go	Sub
	T0078	View Insight Dashboard	Launch

Additional Tasks

You can assign new process tasks to your process action.

The following table lists additional BPF tasks:

Table 6

Group	Task ID	Name	Action Type
Microsoft Excel	T0114	Open Report Library	Launch
	T0115	Open Input Form Library	Launch
	T0111	Offline distributor wizard	Launch
	T0112	Publish book wizard	Launch
	T0116	Save & refresh active workbook	Sub
	T0117	Save & refresh active worksheet	Sub
	T0118	Refresh active worksheet	Sub
	T0119	Refresh active workbook	Sub
	T0120	Drill through to URL	Sub
	T0121	Manage comments	Sub
	T0122	Set work status	Sub
Library & Documents	T0161	Open Library	Launch

Group	Task ID	Name	Action Type
	T0162	Open specific Web input form	Launch
	T0163	Open specific report	Launch
	T0164	Open specific Book	Launch
	T0165	Open specific workspace	Launch
	T0167	Add Document	Sub
	T0168	Open specific Web input form	Sub
	T0169	Open specific Web report	Sub
	T0170	Open specific report	Sub
	T0173	Open specific Book	Sub
	T0174	Open specific workspace	Sub
Data Manager	T0134	Data download	Sub
	T0135	Data upload	Sub
	T0136	Run user package	Sub
	T0133	View package status	Launch
	T0132	View schedule status	Launch
Consolidation	T0101	Create a New Journal	Launch
	T0182	Open Ownership Manager	Launch
	T0186	Open Ownership Manager	Sub
Audit	T0166	Open comments audit report	Launch
	T0171	Open Activity audit report	Sub
	T0172	Open Data audit report	Sub
	T0175	Open User Security Report	Launch
	T0176	Open Team Security Report	Launch
	T0177	Open Task Security Report	Launch
	T0178	Open Data Access Security Report	Launch
	T0179	Open Security Process Report	Launch
	T0195	Open User Security Report	Sub
	T0196	Open Team Security Report	Sub
	T0197	Open Task Security Report	Sub

Group	Task ID	Name	Action Type
	T0198	Open Data Access Security Report	Sub
	T0199	Open Security Process Report	Sub
Analysis	T0191	Open Analysis	Launch
	T0194	Open Analysis	Sub

Security Task Migration Tables

Removed Tasks

The removed security tasks are automatically removed during the migration.

The following table lists removed security tasks:

Table 7

Group	Task ID	Name
AnalysisCollection	P0066	ManageEVDREDefaultStyle
CreateWebpage	P0026	ZFP

Changed Tasks

The changed security tasks are automatically migrated during the migration.

The following table lists changed security tasks:

Table 8

Group	Task ID (7.5)	Name (7.5)	Task ID (10.0)	Name (10.0)
Web reporting	P0056	ManageLiveReport	P0020	Edit Reports
Processes	P0070	RemoveProcessInstances	P0075	Remove Process Instances
System Security	P0065	OfflineAccess	P0073	Use System When Offline
Analysis and Collection	P0073	EndUserDrillThrough	P0070	Run Drill Throughs

Split Tasks

The split security tasks are automatically split during the migration.

The following table lists the split security tasks:

Table 9

Group	Task ID (7.5)	Name (7.5)	Task ID (10.0)	Name (10.0)
Data Manager	P0016	Execute	P0093	Edit Transformation Files
			P0094	Edit Conversion Files

Group	Task ID (7.5)	Name (7.5)	Task ID (10.0)	Name (10.0)
			P0097	Edit Package Schedules for Any User
			P0098	Run Packages
			P0101	Upload Data
			P0102	Download Data
	P0018	GeneralAdmin	P0093	Edit Transformation Files
	P0019	PackageExecute	P0097	Edit Package Schedules for Any User
			P0098	Run Packages
	P0031	PrimaryAdmin	P0091	Run Admin Packages
			P0092	Edit Packages
			P0093	Edit Transformation Files
			P0094	Edit Conversion Files
			P0096	Cancel Any User Packages
			P0097	Edit Package Schedules for Any User
	P0041	TeamLeadAdmin	P0093	Edit Transformation Files
			P0094	Edit Conversion Files
			P0101	Upload Data
			P0102	Download Data
Journal	P0029	PostJournals	P0029	Post Journals
			P0114	Reopen Journals
Web reporting	P0003	WebAdmin	P0109	Manage Document Types
			P0116	View System Logs

Additional Tasks

You can assign new security tasks to your security task profile.

The following table lists additional security tasks:

Table 10

Group	Task ID	Name
Administration	P0109	Manage Document Types
Data Manager	P0091	Run Admin Packages
	P0092	Edit Packages
	P0093	Edit Transformation Files
	P0094	Edit Conversion Files
	P0096	Cancel Any User Packages
	P0097	Edit Package Schedules for Any User
	P0098	Run Packages
	P0101	Upload Data
	P0102	Download Data
Journal	P0105	Lock/Unlock Journals
	P0035	View Journals
	P0114	Reopen Journals
Web reporting	P0104	Edit Workspaces
	P0112	Edit Crystal Dashboards
ITSAM	P0076	Manage Transport
Consolidations	P0082	View Ownership Manager
	P0083	Edit Ownership Manager
Automated Variance Analysis	P0077	Manage KPIs
	P0078	Use Automated Performance Analysis

Typographic Conventions

Table 11

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, 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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, <code>SELECT</code> and <code>INCLUDE</code>
EXAMPLE	Keys on the keyboard



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