SAP Portfolio and Project Management 6.1
Using SAP NetWeaver 7.4

SAP

Document History

> ⚠️ **Caution**
>
> Before you start the implementation, make sure you have the latest version of this document. You can find the latest version at the following location: service.sap.com/instguides ↗ .

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

Table 1

Version	Date	Description
1.0	2014-10-29	Initial version
1.1	2016-02-18	Support Package 05: Chapter *Portfolio and Project Management* updated (new: *Object Links to Extended Material Numbers*)

SAP Portfolio and Project Management 6.1
Document History

Content

1 Getting Started

1.1 About this Document

This Upgrade Master Guide is the central starting point for the technical upgrade of SAP Portfolio and Project Management. You can find cross-scenario upgrade information as well as scenario-specific information in this guide.

> **i Note**
>
> The central starting point for the **technical implementation** of your SAP solution is the Master Guide, which you can find on SAP Service Marketplace at service.sap.com/instguides.

Use the Upgrade Master Guide to get an overview of the upgrade paths, the upgrade of the involved software units and scenarios from a technical perspective. The Upgrade Master Guide is a planning tool that helps you to decide what software units you have to upgrade taking into account the dependencies between the software units. It refers you to the required detailed documentation, mainly:

- Upgrade guides for single software units
- SAP Notes
- Configuration documentation
- SAP Library documentation

For a general overview of available SAP documentation, see *The Main SAP Documentation Types*.

The Upgrade Master Guide consists of the following main sections:

- Getting Started

  This section contains information about how to use this document, and references to related documentation and SAP Notes.

- SAP Portfolio and Project Management Upgrade Overview

  This section contains:

  - A short introduction to the solution
  - The upgrade paths
  - The software component matrix that provides information about which application uses which component and whether the corresponding component is mandatory or optional
  - Information on how to set up a minimal system landscape for test and demo purposes
  - Information about the overall upgrade sequence and subsequent steps

- Post-Upgrade Activities

  This section contains the information on post-upgrade activities for each component of SAP Portfolio and Project Management.

> **i** Note
>
> You can find the most current information about the technical upgrade of SAP Portfolio and Project Management and the latest upgrade, installation, and configuration guides on SAP Service Marketplace at service.sap.com/instguides.
>
> We strongly recommend that you use the documents available here. The guides are regularly updated.

SAP Fiori Apps

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

Constraints

- The business scenarios that are presented here serve as examples of how you can use SAP software in your company. The business scenarios are only intended as models and do not necessarily run the way they are described here in your customer-specific system landscape. Ensure to check your requirements and systems to determine whether these scenarios can be used productively at your site. Furthermore, we recommend that you test these scenarios thoroughly in your test systems to ensure they are complete and free of errors before going live.

- This Upgrade Master Guide at hand primarily discusses the overall technical upgrade of SAP Portfolio and Project Management, rather than its subordinate components. This means, that additional software dependencies may exist without being mentioned explicitly in this document. You can find more information about component-specific software dependencies in the corresponding upgrade guides.

1.2   Related Information

Planning Information

For more information on planning topics not covered in this guide, see the following content on SAP Service Marketplace:

Table 2

Content	Location on SAP Service Marketplace
Latest versions of installation and upgrade guides	service.sap.com/instguides
General information about SAP Portfolio and Project Management	service.sap.com/plm
SAP Business Maps – information about solutions and business scenarios	service.sap.com/businessmaps
Sizing, calculation of hardware requirements – such as CPU, disk and memory resource – with the Quick Sizer tool	service.sap.com/quicksizer
Released platforms and technology-related topics, such as maintenance strategies and language support	service.sap.com/platforms

SAP Portfolio and Project Management 6.1
Getting Started

Content	Location on SAP Service Marketplace
	To access the Platform Availablity Matrix directly, enter service.sap.com/pam
Network security	service.sap.com/securityguide
High Availability	service.sap.com/ha
Performance	service.sap.com/performance
Information about Support Package Stacks, latest software versions and patch level requirements	service.sap.com/sp-stacks
Information about Unicode technology	service.sap.com/unicode@sap

List of Related Documentation

The following table lists related documentation on SAP Service Marketplace:

Table 3

Content	Location on SAP Service Marketplace
Component Installation / Upgrade Note	SAP Note 1821685
Master Guide and Upgrade Master Guide for SAP Portfolio and Project Management 6.1	service.sap.com/instguides under ▶ *SAP Business Suite Applications* ❯ *SAP PLM* ❯ *using SAP Portfolio and Project Management 6.1* ❯
Master Guide for SAP ERP	service.sap.com/instguides
Application Operations Guide for SAP ERP	service.sap.com/instguides
Security Guide for SAP Portfolio and Project Management 6.1	service.sap.com/securityguide
Information about creating error messages	service.sap.com/messages
SAP Notes search	service.sap.com/notes
SAP Software Distribution Center (software download and ordering of software)	service.sap.com/swds
SAP Online Knowledge Products (OKPs) – role-specific Learning Maps	service.sap.com/rkt

Components

To create customer messages, use the following support components:

Table 4

Software Component	Support Component
SAP NetWeaver Application Server Java	`BC-JAS`
SAP NetWeaver Application Server ABAP	`BC-ABA`
SAP Business Connector	`BC-MID-BUS`

Software Component	Support Component
SAP Content Server	`BC-SRV-KPR-CMS`
Project Management	`PPM-PRO` `BW-BCT-PPM-PRO` (SAP Business Intelligence component)
Portfolio Management	`PPM-PFM` `PPM-CF-DFM` (Decision Flow Management) `BW-BCT-PPM-PFM` (SAP Business Intelligence component)
Business Package for SAP Portfolio and Project Management 5.0 73	`EP-PCT-PPM-PFM` (Portfolio Management) `EP-PCT-PPM-PRO` (Project Management)

1.3   Important SAP Notes

You must read the following SAP Notes before you start the upgrade. These SAP Notes contain the most recent information on 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 service.sap.com/notes .

Table 5

SAP Note Number	Title	Description
2026407	FAQs – SAP Portfolio and Project Management 6.1	This note contains general information about SAP Portfolio and Project Management 6.1
2026050	PPM 6.1: Support package information, notes, and schedule	This note contains information and references to other notes about importing support packages for SAP Portfolio and Project Management 6.1.
2026426	PPM 6.1: Performance	This note contains information about performance notes.
427215	Overview: Notes on cFolders, cProjects, xRPM and PPM	This note contains an overview of all SAP notes for current and former releases of SAP Portfolio and Project Management.
2034467	Support Packages for CPRXRPM 610_740	This note contains information about support packages for the component CPRXRPM.
1821685	Release strategy for ABAP add-on CPRXRPM	This note describes how to install / upgrade the ABAP add-on component CPRXRPM 610_740 on SAP NetWeaver 7.4.

SAP Note Number	Title	Description
894009	Adobe Document Services – Configuration Guide	This note contains information about how to access the latest configuration documentation for ADS.
2026422	PPM 6.1: Supported Browsers, Java versions, etc.	This note contains information about the browsers supported by SAP Portfolio and Project Management.
1399319	Portfolio Management: Customer UIs	This note is only relevant for Portfolio Management.
1406590	Configuration of KM	This note is only relevant for Portfolio Management. It contains information about configuring document management to use KM.
202642	PPM 6.1: Restrictions	This note lists restrictions for SAP Portfolio and Project Management 6.1.
2026421	PPM 6.1: Configuration Content	This note contains information about how to find the Configuration Guide for SAP PPM 6.1.
1406591	Portfolio Management: FAQ	In this note you can find some FAQs for the Portfolio Management area.
1808669	Error during installation of PPM (CPRXRPM) with ERP/SRM/CRM/SCM	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 ".
1794297	Secondary Indexes for the business suite on HANA	Contains information about when using secondary indexes is beneficial.

1.4   Performing Backup

We recommend you perform a backup of the system and configuration data of the systems you plan to upgrade to SAP Portfolio and Project Management 6.1 at various points in time during the upgrade and the migration procedure. If there are any issues arising out of upgrade or migration program runs, you can always revert back by playing the corresponding backup file.

2 SAP Portfolio and Project Management Upgrade Overview

> **i Note**
>
> For detailed information about applications and technical components, see the Master Guide for SAP Portfolio and Project Management.

2.1 Applications of SAP Portfolio and Project Management

Portfolio Management Overview

Portfolio Management is designed to manage the capacity and deployment of human capital assets across multiple projects. Portfolio Management integrates information from existing project management, human resources, and financial systems to provide a complete overview of an organization's project portfolio with easy drilldown to details for portfolio managers, project managers, and resource managers. Moreover, you can use initiatives to link to projects and documents in Project Management. You can synchronize objects between Portfolio and Project Management (horizontal synchronization), or objects within Portfolio and Project Management (vertical synchronization).

Project Management Overview

Project Management enables you to realize innovative ideas in all kinds of projects (for example, Development projects or projects to simplify internal processes) to implement recognized quality standards, and to reduce costs incurred by errors.

Project Management is a cross-industry application that supports the entire process of your project, from conception to planning and quality checks, through to the completion of the project. It also allows you to communicate with external partners or lead customers.

Project Management incorporates internationally recognized standards (QS-9000) and is based on methods like Advanced Product Quality Planning (APQP) developed in the automotive industry. Furthermore, Project Management supports several business scenarios such as New Product Development and Introduction (NPDI), Professional Service Delivery (consulting projects), internal IT projects, and Six Sigma improvement projects.

Project Management also provides tight integration with Portfolio Management in order to support project data synchronization and resource management. For this reason, Project Management and Portfolio Management are included in one software component (CPRXRPM).

Key Benefits of Project Management include:

- As single source of truth Project Management provides company-wide transparency of all projects.
- Complete functional support for project planning, execution and controlling
- Project structuring and scheduling
- Clear responsibilities based on roles
- Well-defined handovers through approval protected phase gates

- Effective collaboration for all project stakeholders through web interface
- Effective use of resources through Project Management enterprise resource planning and tracking.
- Reduce project time to market and costs by implementing project templates
- Timely and consistent status information based on dashboards, evaluations and alerts
- Rapid access to all project related information in the entire SAP Business Suite.
- Governance through comprehensive authorizations
- Tracking project history through status reports and versions

2.2 Upgrade at a Glance

SAP Portfolio and Project Management comprises an SAP NetWeaver Application Server, Foundation components, and the SAP Portfolio and Project Management add-on component (CPRXPRM).

You can use all databases and operating systems supported by SAP NetWeaver Application Server.

For more information about supported platforms, see SAP Service Marketplace at service.sap.com/platforms .

The technical implementation depends on the system landscape and in particular on the security policy of your enterprise.

> **i Note**
>
> In addition to a stand-alone installation on SAP NetWeaver for SAP Portfolio and Project Management 6.1, the installation on
>
> - SAP enhancement package 7 for SAP ERP 6.0
> - SAP enhancement package 3 for SAP CRM 7.0
> - SAP enhancement package 3 for SAP SRM 7.0
> - SAP enhancement package 3 for SAP SCM 7.0
>
> is supported.
>
> For more information, see
>
> - the Master Guide for SAP ERP 6.0 on SAP Service Marketplace at service.sap.com/instguides under
>   ▶ *SAP Business Suite Applications* ❯ *SAP ERP* ❯ *SAP ERP 6.0* ❯ *Installation* ❯
> - the Master Guide for SAP CRM 7.0 on SAP Service Marketplace at service.sap.com/instguides under
>   ▶ *SAP Business Suite Applications* ❯ *SAP CRM* ❯ *SAP CRM 7.0* ❯ *Installation* ❯
>
> For more detailed information about the installation of SAP Portfolio and Project Management, see SAP Note 1821685 .

2.3 Upgrade Paths

An upgrade path to SAP Portfolio and Project Management 6.1 is supported for the following source releases:
- SAP Resource and Portfolio Management 4.5
- cProject Suite 4.0
- cProject Suite 4.5

- SAP Portfolio and Project Management 5.0
- SAP Portfolio and Project Management 6.0

If you are using cProjects 4.5 and SAP Resource and Portfolio Management 4.5 together, you have to upgrade both of them at the same time.

2.4 Upgrade of Involved Software Units

Upgrading from cProjects 4.0 / cProjects 4.5 and/or SAP Resource and Portfolio Management 4.5 or SAP Portfolio and Project Management 5.0/6.0 to SAP Portfolio and Project Management 6.1 involves:

- Upgrading SAP NetWeaver Application Server and Foundation components.
- Upgrading the SAP Portfolio and Project Management ABAP component (`CPRXRPM`)

  The configuration and operational data is automatically transferred from lower releases to SAP Portfolio and Project Management 6.1 logic as part of the upgrade of the SAP Portfolio and Project Management ABAP component.

- If the solution is used in the portal, the Business Package for SAP Portfolio and Project Management 5.0 73 (`BP_PROJ_PORT_DESIGNCOLL 5.0 73`) has to be installed, too. Remark: There is no new Business Package version for SAP Portfolio and Project Management 6.1.

- If you used the KM document management in SAP Resource and Portfolio Management 4.5 or SAP Portfolio and Project Management 5.0/6.0 and you still want to use it in SAP Portfolio and Project Management 6.1 (instead of the KPro solution new as of SAP Portfolio and Project Management 5.0), you additionally have to do the following:
  - Install the SAP Portfolio and Project Management Java component (`PPM_KM 503`). Remark: There is no new version of PPM_KM for SAP Portfolio and Project Management 6.1.

Regarding the installation of SAP Portfolio and Project Management 6.1 in combination with SAP R/3 or ECC, there are the following options:

- Installation on the same server: SAP enhancement Package 7 for SAP ERP 6.0 is required.
- Installation on different servers: See the software component matrix for the supported versions of SAP R/3 and SAP ECC.

2.5 Software Component Matrix

This section provides information about which application of SAP Portfolio and Project Management uses which component and specifies the minimum release of each component.

Key: X = relevant for application (X); = useful for application; — = not part of the application

Table 6

Software Component	Portfolio Management	Project Management
CPRXRPM 610_740 (ABAP component for SAP Portfolio and Project Management 6.0)	X	X

Software Component	Portfolio Management	Project Management
SAP NetWeaver 7.4: see SAP Note 2026050 .	X SAP NetWeaver with usage types AS ABAP and AS Java (needed only for ADS when ADS is installed on the same server or if KM document management is used) Optional: usage of SAP NetWeaver Portal (see below)	X SAP NetWeaver with usage types AS ABAP and AS Java (needed only for ADS when ADS is installed on the same server) Optional: usage of SAP NetWeaver Portal (see below)
Foundation components (SAP_BS_FND 747 etc.): see SAP Note 2026050	X	X
SAP GUI	X 7.20 or higher	X 7.20 or higher
Adobe Document Services (ADS) 7.3x or 7.4	X Can run on a separate server	X Can run on a separate server
Adobe Reader on client PCs	(X) (Optional, but required if using Adobe Forms for Printing)	(X) (Optional, but required if using Adobe Forms for Printing)
SAP Content Server	(X) Must correspond to interface version 0045 or 0046	(X) Must correspond to interface version 0045 or 0046
SAP IGS	X	X
Browsers	See SAP Note 2026422 for information about supported browsers for SAP Portfolio and Project Management	See SAP Note 2026422 for information about supported browsers for SAP Portfolio and Project Management
SAP NetWeaver Portal 7.3x and 7.4: see SAP Note 2026050	(X)	(X)
Business Package for SAP Portfolio and Project Management 5.0 73	(X)	(X)
PPM_KM 503 (Java component for Portfolio Management)	(X) (Optional, but required if KM document management is used)	-
SAP NetWeaver Business Warehouse (BW) 7.0	(X) Can run on a separate server	(X) Can run on a separate server
SAP Business Information (BI) Content	(X) SAP NW 7.0 BI Content 7.0.3 SP08 or higher (optional, but required if using SAP BI)	(X) SAP NW 7.0 BI Content 7.0.3 SP08 or higher (optional, but required if using SAP BI)

Software Component	Portfolio Management	Project Management
	BI Content 7.0.5 if BI content for portfolio initiative is used	BI Content 7.0.5 if BI content for forecasted dates, sort numbers for checklists, and responsible resource is used
SAP R/3 or ECC	(X) 4.6C SP47, 4.70 SP20, ECC 5.00 SP00, ECC 6.00 SP Stack 11, if using integration to SAP FI, SAP HR, or SAP PS For enhanced ERP integration, SAP ERP 6.0 enhancement package 5 is required. Can run on a separate server	(X) 4.6C SP47, 4.70 SP20, ECC 5.00 SP00, ECC 6.00 SP Stack 11 Can run on a separate server
SAP NetWeaver Exchange Infrastructure (XI) (usage type Process Integration) For integration with SRM	-	(X) 7.4
XI CONTENT CPRXRPM 6.1 740 (only relevant for SRM integration)	-	(X)
Text Retrieval and Information Extraction (TREX)	-	(X) 7.10
Portal Drive (for integration with WebDAV)	-	(X) 4.4
Easy Document Management 7.1	-	(X) 7.1
Virus Scanner for documents	(X) Optional but highly recommended, see Security Guide for SAP Portfolio and Project Management 6.1	(X) Optional but highly recommended, see Security Guide for SAP Portfolio and Project Management 6.1
SAP BusinessObjects Explorer (XI3.2 or higher)	(X)	(X)

⚠ Caution

If you use a popup blocker, make sure that it is configured to allow pop-ups from your SAP Portfolio and Project Management system, for example `<server>.<your company>.com`. Otherwise, the system cannot close your session automatically when you leave the application by browsing away or closing your browser. This may result in objects being locked by you although you have already left the application.

2.6 System Landscape

⚠️ **Caution**

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.
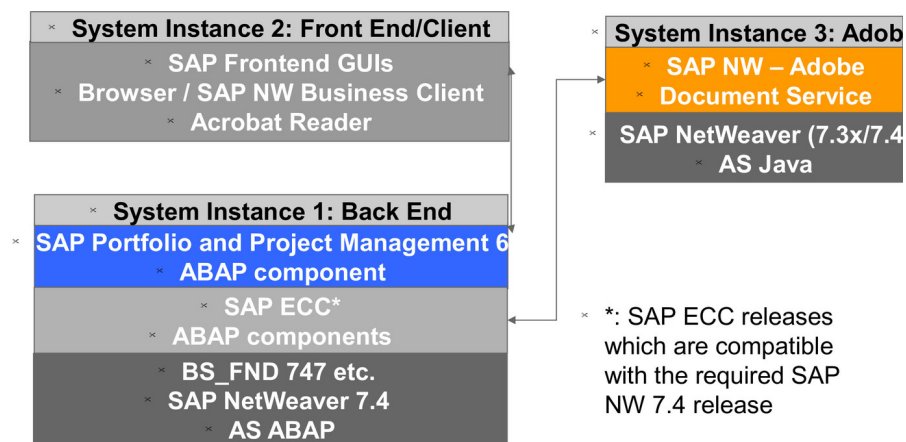
Minimal System Landscape

SAP Portfolio and Project Management consists of three main components:

- SAP Portfolio and Project Management (SAP NetWeaver Application Server, SAP Portfolio and Project Management add-on (CPRXPRM), and optional KM document management (PPM_KM))
- Product instance SAP NetWeaver – Adobe
- SAP Business Information Warehouse (BW)
- SAP NetWeaver Portal / SAP NetWeaver Business Client

Other components include:

- Back-end systems

- SAP front-end GUI relevant for Customizing
- Browser / SAP NW Business Client can be used alternatively
- Role for SAP NW Business Client can be defined in the back-end system instance or in SAP Portal via usage types
- Acrobat Reader required for printing, status reports, approval documents; requires installation of Adobe Document Server

Figure 1: Minimal System Landscape

Technical System Landscape

The following graphic provides an overview of the recommended basic technical infrastructure of SAP Portfolio and Project Management:
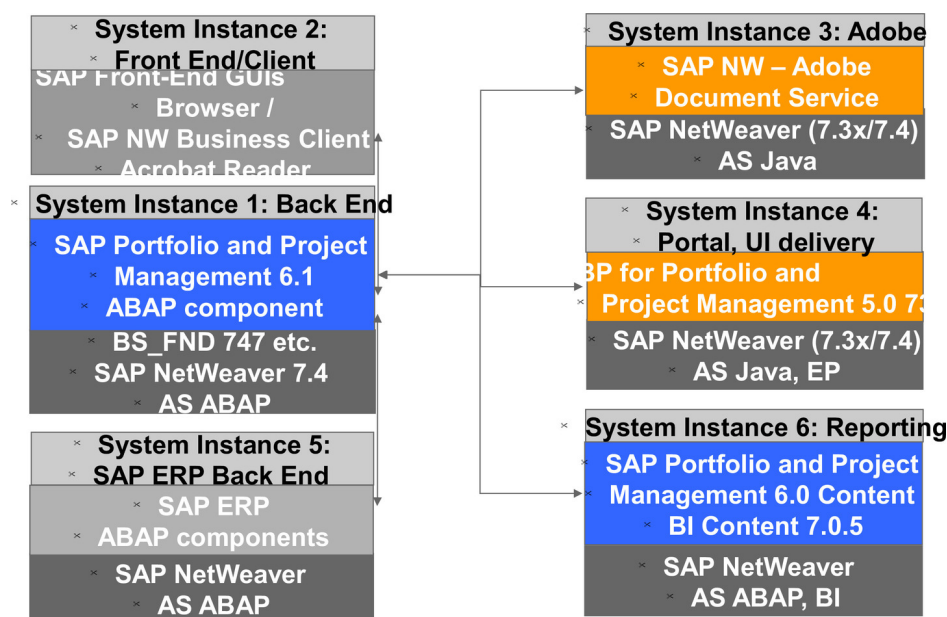
Figure 2: Technical System Landscape

2.7 Overall Upgrade Sequence

The following table describes the overall upgrade sequence for SAP Portfolio and Project Management.

This table contains all available software units. However, to run a specific scenario, you only need a subset of available software units. Some are only required for special processes. For information about which software is required to run a specific scenario, see [reference to Software Component Matrix or scenario-specific sections].

For the latest component version and patch level requirements, see SAP Service Marketplace at

service.sap.com/sp-stacks .

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

Process

> ⚠️ Caution
>
> Before you start the upgrade for SAP Portfolio and Project Management 6.1, make sure that you have installed at least Support Package 23 of SAP enhancement package 1 for SAP Solution Manager 7.0 system (see SAP Note 1169247) and that you have applied the latest version of SAP Note 1415315 . Prior to the upgrade process, SAP Solution Manager determines which components need to be installed on the SAP Portfolio and Project Management system and in which sequence.

Table 7: Implementation Sequence

No	Action [Corresponding Documentation]	Remarks and Subsequent Steps
1	Install or upgrade to SAP NetWeaver 7.4 and apply the required support packages. [Guide: *Installation Guide* on the SAP Service Marketplace at service.sap.com/instguides/ instguidesnw74]	This includes the following components: • `SAP_ABA 740` • `SAP_BASIS 740` • `SAP_UI 740` • `SAP_BW 740` • `SAP_GWFND 740` • `SAP KERNEL 740` • `PI_BASIS 740` • `ST-PI 2008_1_710` Installing the required languages [Guide: *Language Transport*, (BC-CTS-LAN)]
2	Install the foundation components for SAP Business Suite applications	This includes the following components: • `MDG_FND 747` • `SAP_BS_FND 747` • `WEBCUIF 747` Installing the required languages [Guide: *Language Transport*, (BC-CTS-LAN)]
3	Install SAP Portfolio and Project Management 6.1 either on a dedicated SAP NetWeaver Server or on the SAP NetWeaver system of the SAP ECC system (see SAP Note 1821685), and apply the required support packages.	SAP Portfolio and Project Management includes two applications: • Project Management • Portfolio Management CPRXRPM 610_740 is an add-on for SAP NetWeaver 7.4.
4	Install SAP Internet Graphics Server.	
5	Install Adobe Document Server.	
6	Optional: Install SAP NetWeaver Portal.	The Unification Server is optional.
7	Optional: Download, import, and deploy the Business Package for SAP Portfolio and Project Management 5.0 73 (`BP_PROJ_PORT_DESIGNCOLL 5.0 73`), depending on the processes you want to implement.	Download Business Packages from the SAP Solution Manager. For more information, see SAP Service Marketplace at service.sap.com/ solutionmanager .

No	Action [Corresponding Documentation]	Remarks and Subsequent Steps
	[For general information about Portal content, see service.sap.com/ep-content]	
8	Optional: Upgrade to SAP R/3 or SAP ECC. [ECC 6.0 Upgrade Guide: <Operating System>]	Regarding the installation of SAP Portfolio and Project Management 6.1 in combination with SAP R/3 or SAP ECC, there are the following options: • Installation on the same server: SAP Enhancement Package 7 for SAP ERP 6.0 is required. • Installation on different servers: See the software component matrix for the supported versions of SAP R/3 and SAP ECC.
9	Optional: Install the Portfolio Management Java component PPM_KM 503 (see SAP Note 1406590)	
10	Optional for Project Management: Install a WebDAV Client (for example Xythos).	
11	Optional for Project Management: Install SAP NetWeaver Exchange Infrastructure (XI) (usage type Process Integration). (Only required for integration with SRM)	
12	Optional for Project Management: Install XI CONTENT CPRXRPM 6.1 740 component on SAP NetWeaver AS ABAP.	This component is only required for SRM integration.
13	Optional: Install SAP NetWeaver Business Warehouse (SAP BW) with SAP Business Intelligence (SAP BI) 7.0.	
14	Install BI_CONT 7.0.3 SP8 or higher.	
15	Optional: Install Microsoft Project. See Microsoft Project documentation.	If you intend to import project plans (*.mpp files) from Microsoft Project Client, you must install the Microsoft Project Client software on your PC. For the supported versions of Microsoft Project, please see SAP Note 892638 (Integrated Office Suites (IOS): Maintenance Information) and SAP

No	Action [Corresponding Documentation]	Remarks and Subsequent Steps
		Note 2026422 ⤴ (PPM 6.1: Supported Browsers, Java versions, and so on).
16	Optional: Install SAP BusinessObjects Explorer For more information about the Installation and Upgrade of SAP BusinessObjects Explorere, see service.sap.com/bosap-explorer ⤴ under ▶ *Installation & Upgrade Guides* ❯ *SAP Business Objects* ❯ *SAP Business Objects Intelligence (BI)* ❯ *Explorer* ❯ *XI 3.2 or 4.0* ❳.	

When you use SAP Portfolio and Project Management 6.1 together with Collaboration Folders (cFolders), refer to the installation options in the cFolders Master Guide and Upgrade Master Guide on SAP Service Marketplace at service.sap.com/instguides ⤴ under ▶ *SAP Business Suite Applications* ❯ *SAP PLM* ❯ *using Collaboration Folders 4.5* ❳.

3 Post-Upgrade Activities

> **i** Note
>
> Before starting post-upgrade activities, refer to the SAP Notes mentioned in section 1.3 for functional changes. Also check the configuration content in SAP Note 2026421 .

3.1 Portfolio and Project Management

The following post-upgrade activities are relevant for both Portfolio Management and Project Management:

Navigation

Upgrade from cProjects 4.0/4.5, SAP Resource and Portfolio Management 4.5, or SAP Portfolio and Project Management 5.0/6.0

During an upgrade to SAP Portfolio and Project Management 6.1 you must carry out the following manual steps to enable the new navigation as of release 6.1:

1. You must maintain the Customizing settings in *SAP Portfolio and Project Management* under ▶ *Portfolio Management* ⟩ *Global Customizing* ⟩ *Process and Service Settings* ⟩ *Navigation Settings* ◀. We deliver the Customizing entries as standard in the Customizing client.

2. After the upgrade, from the delivery client, you must copy the data from the Customizing tables mentioned below by choosing transaction `/n/RPM/CUST_COPY`:

   ○ `/RPM/DASH_PERS`: Dashboard Customization

   ○ `/RPM/DASH_ROLE`: Dashboard Attributes Override Table

   ○ `INM_NAV_CTX`: INM Navigation Context

   ○ `INM_NAV_CTX_W`: INM Navigation Context Workcenter

   ○ `INM_NAV_INF_W`: INM Navigation Information

3. You manually adjust and compare the Customizing data with the delivery client by choosing transaction `SCU0`.

4. After the upgrade, initially all dashboard fields are displayed as standard fields. With this, it is not possible to navigate to the object windows. To activate the links to the object windows, select the *Link* checkbox in Customizing for *SAP Portfolio and Project Management* under ▶ *Portfolio Management* ⟩ *Global Customizing* ⟩ *Global Field Settings* ⟩ *Dashboard Settings* ⟩ *Define Fields for Dashboards* ◀.

You can also copy the Customizing for the dashboards by copying `/RPM/DASHBOARD` using transaction `/n/RPM/CUST_COPY`.

> **⚠** Caution
>
> This transaction copies the standard Customizing for all dashboards and invalidates all customer-specific Customizing for the dashboards. Object-type-specific copying is not supported by transaction `/RPM/CUST_COPY`.

For more information, see SAP Note 1406591 .

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 2026422 .

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 .

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.

> ℹ **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 help.sap.com under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver Library: 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* ◀.

Object Links to Extended Material Numbers

In the following cases, you must prepare your system for the creation or the use of object links to materials that are based on the extended material number (maximum length of 40 characters) instead of the standard material number (maximum length of 18 characters):

- **Upgrade of the target system**

  In your *Portfolio and Project Management* applications, you already use object links to materials stored in an SAP system that uses the standard material number. As a result of an upgrade, this system now uses the extended material number. You want to retain the availability of your existing object links to materials. Furthermore, you want to create new object links to extended material numbers.

- **New target system**

  You integrate a new system, which uses the extended material number, into your system landscape. In *Portfolio and Project Management* applications, you want to create object links to materials stored in this new system.

For more information, see the *Setting Up Object Links to Extended Material Numbers* chapters in the Configuration Guide for *SAP Portfolio and Project Management*.

Product Instance SAP NW – Adobe Document Service (ADS)

General Overview

The following Adobe software is included in the Adobe PDF-based forms used by SAP Portfolio and Project Management:

- **Adobe LiveCycle Designer**

  Adobe LiveCycle Designer is a graphical tool for designing form layouts. It is part of the SAP NetWeaver Developer Studio and ABAP Workbench.

- **Adobe Document Services (ADS)**

  Adobe Document Services are a set of Web services used to generate the PDF forms at runtime. In interactive scenarios, these services extract the XML data from the form and send it to the system. In the front end, Adobe Reader needs to run. For more information, see SAP Note 834573 .

Product instance *SAP NW – Adobe Document Service* includes Adobe Document Services. You install this set of runtime services on SAP NetWeaver Application Server Java. Ensure that you always use the latest version of both, SAP NW – Adobe Document Service and the Adobe Reader Software.

The key capabilities of SAP NW – Adobe Document Service are:

- Convert XML form templates (created using Adobe LiveCycle Designer) to PDF and various print formats
- Set Adobe Reader rights to enable to fill out and annotate forms, save, and print them locally, and include digital signatures for authentication using Adobe Reader
- Extract data from SAP applications into Adobe PDF-based forms and transfer the data for the form back into SAP applications using XML

ADS can run on a separate server: You can use ADS locally or as a shared service on a central SAP NetWeaver AS Java. For more information, see the Master Guide for SAP NetWeaver on SAP Service Marketplace at service.sap.com/instguidesnw74 .

For temporary release restrictions on Adobe Document Services (product instance SAP NW - Adobe Document Service) regarding the number of supported platforms, see the corresponding presentation in SAP Service Marketplace, at service.sap.com/pam .

For installation information, consult SAP Service Marketplace at service.sap.com/erp-inst under *Installation Guides*.

For development prerequisites that relate to Adobe PDF-based forms, see the document *Installing ADS on SAP NetWeaver 7.3x/7.4*, located on SAP Service Marketplace at service.sap.com/adobe under ▶ *Media Library* ▶ *Documentation* ❱.

Adobe in SAP Portfolio and Project Management

The following in SAP Portfolio and Project Management 6.0 only run using Adobe Document Services (ADS):

- **Project Management:**

  Approval documents, project status reports, and print forms. Please note: After an upgrade from cProjects 4.0/4.5, you can still use existing Smart Forms for printing, but they are deprecated (see release notes for SAP Portfolio and Project Management 5.0 on SAP Help Portal at help.sap.com).

  Using digital signatures (certificates) in the approval process requires a secure connection to the Adobe Document Services. Certificates have to be installed in the Adobe Document Services for verification during the approval process.

- **Portfolio Management:**

  The printing and fact sheet in Portfolio Management in SAP Portfolio and Project Management 6.1 only run using Adobe Document Services (ADS).

Also, for all users you need the Adobe Reader for printing.For more information about compatible versions of Adobe Reader, see the Adobe Document Services in the *Configuration Guide For SAP Interactive Forms by Adobe* on the SAP Developer Network (SDN) Community at www.sdn.sap.com/irj/sdn/adobe under ▶ *Installation and Configuration* ▶ *SAP Interactive Forms – Configuration Guides* ❱.

Upgrade from cProjects 4.0/4.5

As of SAP Portfolio and Project Management 5.0, the Adobe Forms in Project Management (print forms, status reports, approval documents) have been converted from ACF to ZCI technology as ACF for Adobe is deprecated as of SAP NetWeaver Release 7.01 (see SAP Note 1249189). This also implies that all ACF-based custom Adobe forms have to be converted to ZCI (see SAP Note 956074 and 978037 .

For Project Management you have to migrate the following forms:

- Project Status Reports
- Approval Document

PFCG Roles

As of SAP Portfolio and Project Management 5.0, the following usage types are supported:

Table 8

Usage Type	Client / Browser	Rendering	Roles and Navigation Area	SAP Portfolio and Project Management Application / Coding
Portal	Browser (Internet Explorer / Firefox)	HTML	PCD Role in SAP NetWeaver Portal	ABAP Back-End System
NetWeaver Business Client for HTML (NWBC for HTML)	Browser (Internet Explorer / Firefox)	HTML	PFCG Role in ABAP Back-End System	ABAP Back-End System
NetWeaver Business Client for Desktop (NWBC for Desktop)	NWBC for Desktop	HTML	PFCG Role in ABAP Back-End System	ABAP Back-End System
		HTML	PCD Role in SAP NetWeaver Portal	ABAP Back-End System

For more information about supported browsers, see SAP Note 2026422 .

The PFCG role `SAP_BPR_PPM` needs to be assigned to every user for NWBC for HTML or NWBC for Desktop (when SAP NetWeaver Portal is not used). Via the role, the navigation menus are provided.

The PFCG roles for BCV are:

Table 9

Role Name	Description
`SAP_CPR_BCV_USER`	Role for Usage of BCV in Project Management
`SAP_CPR_BCV_USER_COMP`	User of BCV in Project Management
`SAP_RPM_BCV_USER`	Portf. Mgmt BCV Authorization
`SAP_RPM_BCV_USER_COMP`	Portf. Mgmt BCV User Profile

The following PFCG roles of SAP Portfolio and Project Management 6.1 include authorizations to start the Web Dynpro ABAP applications (authorization check `S_START`) for Project Management and Portfolio Management:

- `SAP_CPR_USER`
- `SAP_XRPM_USER`

For details see the particular roles in transaction `PFCG` and choose ▶ *Authorizations* ❯ *Display Authorization Data* ❯ *Cross-application Authorization Objects* ❯ *Start Authorization Check for TADIR Objects* ◀.

SAP recommends to adapt custom-specific roles accordingly.

SM59 Destinations and Portal System Aliases

The following system aliases (in SAP NetWeaver Portal) and `SM59` destinations of type `H` (HTTP) in the SAP Portfolio and Project Management (backend) system have to be defined:

- `SAP_cProjects` and `SAP_RPM`

  Both should point to the SAP Portfolio and Project Management backend system itself.

- `SAP_BS_FND` (needed only in SAP NetWeaver Portal)

  Should point to the SAP Portfolio and Project Management backend system itself.

- `SAP_BW`

  Should point to the (optional) BI system.

For HTTPS, you need to define the following `SM59` destinations of type `H` (HTTP) in the SAP Portfolio and Project Management (backend) system in addition to the ones listed above (both should point to the SAP Portfolio and Project Management backend system itself):

- `SAP_CPROJECTS_HTTPS`
- `SAP_RPM_HTTPS`

For these two `SM59` destinations, maintain the *Logon & Security* tab under *Security Options* and set *SSL* to *Active*.

New URL

Upgrade from cProjects 4.0/4.5 or SAP Resource and Portfolio Management 4.5

When using SAP Portfolio and Project Management without SAP NetWeaver Portal, consider the following:

The URL to call the SAP Portfolio and Project Management application in 6.1 is different from the URL for cProjects 4.0/4.5. You call the SAP Portfolio and Project Management 6.1 application in the browser using a URL that is structured as follows:

> **Syntax**
> ```
> <Protocol>://<Host>.<Domain>.<Extension>:<Port>/sap/bc/nwbc/
> ```

For more information, see section *Determining the URL for Calling Portfolio and Project Management* in the *Basic Settings for Portfolio Management* or *Basic Settings for Project Management* in SAP Solution Manager.

URLs from cProjects 4.0/4.5 should still work as they should be redirected to the new screens. But it is recommended to use the new URLs directly whenever possible.

Document Management

If SAP Resource and Portfolio Management 4.5 and SAP Portfolio and Project Management 6.1 are set up on different boxes, make sure that the migration of the SAP Resource and Portfolio Management 4.5 objects such as portfolio, item, decision point, collection, review, and bucket has been performed before you run this report.

Migration is done only once for a given object. Upon running the report again, migration is skipped for objects that have already been migrated.

If the user that created or modified the document to be migrated is not present in the target system, the user that runs the migration will be taken as the creator and/or modifier of the document. In order to still use the KM based document management, the software component PPM_KM 503 has to be deployed. For more information, see SAP Note 1406590 .

Upgrade from SAP Resource and Portfolio Management 4.5 (relevant for Portfolio Management only)

If you are upgrading from SAP Resource and Portfolio Management 4.5 to SAP Portfolio and Project Management 6.1, it is recommended to switch from the KM based document management to a KPro-based solution. For this you have to migrate your KM documents to KPro documents. For this, you can use the report `/RPM/MIGRATE_KM_DOCS`. Before executing the report, you need to correctly set up the logical port to connect to the SAP Resource and Portfolio Management 4.5 portal as follows:

1. In transaction `SOAMANAGER`, you have created a logical port with the name `RPMKM` for the consumer proxy class `/RPM/CO_REPOSITORY_FRAMEWORK_W`. To do this, choose ▶ *Application and Scenario Communication* ▶ *Single Service Administration* ◀.
2. In the *Search By* field, select *Consumer Proxy*.

3. In the *Search Pattern* field, enter `/RPM/CO_REPOSITORY_FRAMEWORK_W`.

4. In the *Field* field, select *Internal Name*

5. Choose *Go*.

6. Select the entry found and choose *Apply Selection*.

7. Choose *Configurations*.

8. Choose *Create Logical Port* to create a logical port.

> ℹ **Note**
>
> Make sure that you use the authentication setting *User ID / Password* to log on to the SAP Resource and Portfolio Management 4.5 system with a user that has content administrator rights.

If SAP Resource and Portfolio Management 4.5 and SAP Portfolio and Project Management 6.1 are set up on different boxes, make sure that the migration of the SAP Resource and Portfolio Management 4.5 objects such as portfolio, item, decision point, collection, review, and bucket has been performed before you run this report.

Migration is done only once for a given object. Upon running the report again, migration is skipped for objects that have already been migrated.

If the user that created or modified the document to be migrated is not present in the target system, the user that runs the migration will be taken as the creator and/or modifier of the document. In order to still use the KM based document management, the software component PPM_KM 503 has to be deployed. For more information, see SAP Note 1406590 .

Upgrade from cProjects 4.0 (relevant for Project Management only)

If you are upgrading from cProjects 4.0 to SAP Portfolio and Project Management 6.1, all CFF content models will be overwritten automatically with the default settings; you have to restore your old settings manually.

In Project Management, it will for security reasons no longer be possible to save non-standard URLs (such as file paths) as documents (the URL may contain fatal script). For more information, see SAP Notes 1236155 and 866020 .

After the upgrade, the prior saved non-standard URLs will no longer be available as hyperlink but as a simple text. If you want to restore the old hyperlink, you must create a new version for each document in which you enter a URL according to the following syntax:

> 📑 **Syntax**
> ```
> <scheme>://<host>/<uri>
> ```

> 🧩 **Example**
> ```
> http://www.sap.com
>
> file://DWDF204.wdf.sap.corp/documents/myfile.doc
>
> file://10.18.121.18/documents/myfile.doc
> ```

SAP Web Dynpro Active Component Framework (ACF)

The ACF is a framework for integrating active components, such as ActiveX and Java Applets in Web Dynpro. To install ACF, you require administration authorization on the client PC. To run ACF, you must enable ActiveX in your Web browser. For more information about installing the ACF, see SAP Note 766191 . For information about supported browsers, see SAP Note 1826387 .

Java Gantt Chart

Project Management and in Portfolio Management the timeline monitor and the portfolio structure graphic use a Gantt chart. Therefore, when calling the Gantt chart for the first time, a Java Applet has to be signed and installed on the local computer. For information about supported browsers, see SAP Note 2026422 .

3.2 Portfolio Management

Below you find post-upgrade activities that are relevant for Portfolio Management only:

XPRA for Object Links

Upgrade from SAP Resource and Portfolio Management 4.5

During the upgrade of SAP Portfolio and Project Management, you might face the following issues with XPRA:

- The Customizing of FI object link types cannot be updated. This affects only FI object link types that belong to the following groups:
  - `PD` (Project Definition)
  - `PR` (WBS Element)
  - `NP` (Network)
  - `NV` (Network Activity)
  - `EL` (Network Activity Element)

  You need to update the FI object link types manually. To do so, log on to the SAP Portfolio and Project Management system with the Customizing client. Go to the Customizing for *SAP Portfolio and Project Management* under ▶ *Portfolio Management* ❯ *Base System Interfaces* ❯ *Application Object Settings* ❯ *Define Object Link Types* ◀. Adjust the following views for the relevant FI object link types against client `000` by choosing ▶ *Utilities* ❯ *Adjustment* ◀ in the menu:
  - *Settings for Object Link Type*
  - *Name of Class in SAP System per Object Type*
  - *Table/View in SAP System per Object Type and Meth.*
  - *Standard Consistency Checks per Object Type*

  Adjust both FI object link types delivered by SAP and customer-specific FI object link types of the above mentioned groups. To identify to which group an object link type belongs, double-click an object link type in the above mentioned Customizing activity. On the follow-on screen, you see the settings for an object link type. In the *Group* field, you can check to which group the object link type belongs.
- The FI object link itself cannot be updated because of connectivity issues with the relevant system, for example, the FI system. In this case, check if the relevant systems are connected and available when XPRA is run. If this is the case, restart the XPRA by choosing transaction `SE38` and executing the program `/RPM/XPRA_500_OBL_OBJ_KEY`.

New User Interface Technology

Upgrade from SAP Resource and Portfolio Management 4.5

As of SAP Portfolio and Project Management 5.0, the user interface technology of Portfolio Management is changed to Web Dynpro for ABAP. All Web Dynpro for Java pages are replaced by corresponding Web Dynpro for ABAP pages and the Web Dynpro for Java pages are no longer supported.

Customer adjustments in Web Dynpro for Java pages (Web Dynpro for Java personalization, Visual admin configuration) must be converted to Web Dynpro for ABAP manually. An automatic or semi-automatic migration of Web Dynpro for Java pages to Web Dynpro for ABAP pages is not possible.

Customer Web Dynpro for Java pages of previous released can be used with limitations:

- Data retrieve has to be adjusted
- Limited support for RFCs

It is recommended to create the customer UIs newly in Web Dynpro for ABAP.

Additionally all Visual Administrator and Configurations done in the portal must be converted manually.

For more details about customer UIs in Portfolio Management, see SAP Note 1399319 .

Activation of Enhancements

Upgrade from SAP Portfolio and Project Managment 5.0

In SAP Portfolio and Project Management 5.0, various enhancements were delivered which had to be activated by implementing a BAdI method or setting a global switch in Customizing. As of SAP Portfolio and Project Management 6.0, many of these enhancements are active in the standard system.

See the following release information for software component version CPRXRPM 600_740 (Release 6.0) to check the default system settings for Portfolio Management as well as the Customizing options to change these settings as needed:

- Release Information *Enhancement from Portf. and Proj. Mgmt 5.0* (version for Portfolio Management)
- Release Information *Activation of Enhanced Capital and Resource Management*

You can find a list of all enhancements in SAP Note 1631964 .

Archiving

Upgrade from SAP Portfolio and Project Management 6.0 SP00–SP03

If you have used the archiving function in SAP Portfolio and Project Management 6.0 SP00–SP03, run the correction report mentioned in SAP Note 2044766 to solve database inconsistencies (table CGPL_ARCH_IDX).

For more information, see SAP Notes 1977292 and 2044766 .

Dashboards

If end users have already defined filters for dashboards via personalization in previous releases, then they may need to define these settings again due to changes in the storage of filter definition.

3.3 Project Management

Below you find post-upgrade activities that are relevant for Project Management only.

New User Interface Technology

Upgrade from cProjects 4.0/4.5

The user interface technology as of cProjects 4.0 was changed to Web Dynpro for ABAP (except for control plans and evaluations). The existing BSP coding was moved to the development class PPM_OBSOLETE. With cProjects 4.5, the development class PPM_OBSOLETE including all existing objects and sub packages was deleted. Moreover, the BSP pages were replaced by corresponding Web Dynpro pages.

If you are upgrading from cProject 4.0/4.5 to SAP Portfolio and Project Management 6.1, all existing BSP elements will be deleted automatically.

Customer modifications and enhancements in BSP elements must be converted to Web Dynpro manually. An automatic or semi-automatic migration of BSP pages to Web Dynpro pages is not possible. Depending on what modifications and enhancements are made in the BSP elements, it may be helpful to carry out the conversion in a separate system (a copy of the development system).

Customer-Specific Fields

You add additional fields that you want to view on the interface to the database table. As the end customer you make the enhancements using a customer include. As an SAP Partner or SAP IBU, you make the enhancements in the table using an APPEND structure.

You executed the `DPR_CUST_FLDS_IN_FC_MAP` report. The Web Dynpro interface uses the API structures. The field mapping between old and new API structures is defined in the `DPR_FC_MAP` table. The `DPR_CUST_FLDS_IN_FC_MAP` report also adds the additional customer fields to this mapping table. This means that field control is then also available for the additional customer fields.

After an upgrade it could happen that the entries for the customer includes are missed. Therefore start the `DPR_CUST_FLDS_IN_FC_MAP` report for the missing structures again. When you execute this report, you only have to create the structure with the customer include, for example `DPR_TS_PROJECT_EXTENDED_ATTR`.

Below you find a list of entity tables with their enhancements:

Table 10

Entity Table	Structure with Customer Include/ APPEND Structure	Object Category
`DPR_PROJECT`	`DPR_TS_PROJECT_EXTENDED_ATTR`	DPO (Project definition)
`DPR_PHASE`	`DPR_TS_PHASE_EXTENDED_ATTR`	PPO (Phase)
`DPR_TASK`	`DPR_TS_TASK_EXTENDED_ATTR`	TTO (Task)
`DPR_CHECKLIST_H`	`DPR_TS_CHCKLST_H_EXTENDED_ATTR`	CTO (Checklist)
`DPR_CHECKLIST_I`	`DPR_TS_CHCKLST_I_EXTENDED_ATTR`	ITO (Checklist item)
`DPR_CHECKLIST_R`	`DPR_TS_CHCKLST_R_EXTENDED_ATTR`	RAG (Checklist reference)
`DPR_APPROVAL`	`DPR_TS_APPROVAL_EXTENDED_ATTR`	not relevant
`DPR_IND_APPROVAL`	`DPR_TS_IND_APPR_EXTENDED_ATTR`	not relevant
`DPR_CTRLPLAN_I`	`DPR_TS_CP_ITEM_EXTENDED_ATTR`	WTO (Control plan – item)
`DPR_CTRLPLAN_V`	`DPR_TS_CP_VERS_EXTENDED_ATTR`	VPO (Control plan – version)

Entity Table	Structure with Customer Include/ APPEND Structure	Object Category
DPR_PART	DPR_TS_PART_EXTENDED_ATTR	MTG (Role)
DPR_SKILL	DPR_TS_SKILL_EXTENDED_ATTR	not relevant
DPR_BUPA_FAVO	DPR_TS_BUPA_FAVO_EXTENDED_ATTR	not relevant
DPR_BUPA_LINK	DPR_TS_BUPA_REF_EXTENDED_ATTR	not relevant
DPR_ENTITY_LINK	DPR_TS_ENTT_REF_EXTENDED_ATTR	not relevant

Upgrade from cProjects 4.0

Customer-specific fields on BSP pages in cProjects 4.0 cannot be migrated automatically to the new Web Dynpro user interface. You will therefore have to re-create these fields after the upgrade. Customer-specific fields on Web Dynpro ABAP pages in cProjects 4.0/4.5 can be migrated automatically to the user interface in SAP Portfolio and Project Management 6.1.

SRM Integration

The SRM integration for external service procurement requires the installation of SAP NetWeaver Exchange Infrastructure (XI) (usage type Process Integration) and the optional component XI CONTENT CPRXRPM 6.0 740 to enable communication between Project Management of SAP Portfolio and Project Management 6.0 and the corresponding SRM component.

BAdIs

Upgrade from cProjects 4.0/4.5

For cProjects 4.5, nearly all BAdIs were migrated to kernel BAdIs, as were some for SAP Portfolio and Project Management 5.0. If you are upgrading to SAP Portfolio and Project Management 6.1, the migrated kernel BAdIs are displayed in transaction SPAU. You have to switch these BAdI implementations manually.

For more information, see SAP Library for SAP NetWeaver at help.sap.com under ▶ *SAP NetWeaver* ▶ *<Release>* ▶ *Function-Oriented View* ▶ *Application Server ABAP* ▶ *Application Development on AS ABAP* ▶ *ABAP Customer Development* ▶ *Enhancement Framework* ▶ *Business Add-Ins (BAdIs)* ▶ *Migrating Classical BAdIs.* ◀ .

Project Self-Services

Upgrade from cProjects 4.0/4.5

The Project Self-Services (PSS) are not supported as of Portfolio and Project Management 5.0. Instead equivalent functionality, such as convenient task confirmation, is available in-place the main application. See also SAP Notes 1167840 , 1226233 , and 1156006 .

Control Plans

Upgrade from cProjects 4.0/4.5

Control plans (incl. control plan templates, search for control plan objects, and so on) are deprecated as of SAP Portfolio and Project Management 5.0 (see SAP Note 1114207 💠) and invisible per default, but can be enabled (which is not recommended), see SAP Note 1404960 💠.

Obsolete Web Dynpro ABAP UI Components and Applications

Upgrade from cProjects 4.0/4.5

The following UI components are obsolete and have been moved to package `DEVELOPMENT_PROJECTS_UI_OBSOLE` as of SAP Portfolio and Project Management 5.0:

- `DPR_ENTRY`
- `DPR_LOCATOR`
- `DPR_MAINFRAME`
- `DPR_PROJECTS_STRUCTUR`
- `DPR_PROJECTS_VIEW`
- `DPR_TRANSFER`

Additionally, for all Web Dynpro ABAP views of these components, the `ROOTUIELEMENTCONTAINER` elements have been set to *Disabled*. This is in order to enable the (manual) migration of custom developments from the obsolete UI components to the new ones.

The following Web Dynpro ABAP (WDA) applications have been deleted and replaced by new WDA applications:

- `CPROJECTS_AUTH_ADMIN: CPROJECTS_AUTH_ADMIN_FPM`
- `CPROJECTS_VACANT_ROLES: CPROJECTS_VACANT_ROLES_FPM`

The WDA application `CPROJECTS` is obsolete and does now only redirect to either the new work center views or the project element detail screens (depending on the parameters).

Obsolete BSP Pages and ActiveX Deleted

Upgrade from cProjects 4.0/4.5

The obsolete BSP pages for SRM integration and import/export have been deleted as they have been replaced by Web Dynpro ABAP screens as of SAP Portfolio and Project Management 5.0. Additionally, the former ActiveX for import/export of MSP Client files has also been deleted as it has been replaced by a NetWeaver solution (see *Microsoft Project Integration* in section 3.3.1).

Customizing: Obsolete Nodes Removed

Upgrade from cProjects 4.0/4.5

Some Customizing nodes in Project Management are obsolete and have been removed accordingly as of SAP Portfolio and Project Management 5.0. For more information, see *UI Alignments (Enhanced)* and *Usability (Enhanced)* in the release notes for SAP Portfolio and Project Management 5.0 on SAP Service Marketplace at service.sap.com/releasenotes 💠 under ▌▶ *SAP Solutions* ❭ *SAP Product Lifecycle Management (SAP PLM)* ❭.

Business Package for Portfolio and Project Management 5.0 73

Upgrade from cProjects 4.0/4.5

With release 4.5, you could call the whole cProjects application in one single iView. There is no such iView in the BP for Portfolio and Project Management 5.0 73 as all the functionality of the application is available also via the delivered content of the BP.

Nesting Depth of Custom UI Components

Upgrade from cProjects 4.0/4.5

Some browsers support only a restricted nesting depth of HTML tables. This is relevant, for example, for Microsoft IE and Firefox. If the nesting depth gets too big, the browser does not render elements any more. The nesting depth of Project Management has changed with release 5.0 mainly due to FPM usage and UI alignments. This has increased the standard nesting depth in some areas. Customers should check and adapt their custom UI components and/or enhancements/modifications accordingly in case of any issues.

GANTT BAdI

Upgrade from cProjects 4.0/4.5

There are some changes regarding the Gantt BAdI `DPR_GANTT` (enhancement spot `CPRO_GANTT`):

The example implementation class `CL_EXM_IM_DPR_GANTT` was set as **fallback class** in cProjects 4.5. As of SAP Portfolio and Project Management 5.0 this fallback class is not necessary anymore as the formerly contained functionality has been included in the standard coding. The method implementations are now mostly empty containing only example coding or comments. This means that when you had created your own BAdI implementation in cProjects 4.5, you must check it and omit all standard coding as it might interfere with the new standard coding. Refer to the comments in example class `CL_EXM_IM_DPR_GANTT`. Especially no additional JAR file is needed anymore, and method `GET_ADDITIONAL_JARS` is obsolete.

There are two new view types 'Fit' and 'Date Range' which take effect on the timescale selected.

In BAdI method `IF_EX_DPR_GANTT~GET_GANTT_PARAMETERS`:

With this new timescale the two parameters `cv_section_unit` and `cv_section_unitsize` must not be changed. For more information, see commented example coding in the method (`IF iv_selected_timescale NE 'FIT' AND iv_selected_timescale NE 'DATE'.`).

In example implementation class `CL_EXM_IM_45_DPR_GANTT` the old implementation from cProjects 4.5 is still available as it did not contain the fallback class, meaning the old look of the graphic (for example, with old TypeRepository).

BAdI Interface IF_EX_DPR_GANTT

The BAdI Interface `IF_EX_DPR_GANTT` has been extended by three new methods (as of SAP Portfolio and Project Management 5.0):

- `DISPLAY_ADDITIONAL_FIELDS`

  This method is required to add customer-defined columns in the Gantt.

- `CHANGE_COMBO_COLUMNS`

  This method is required to add customer-defined columns in the Gantt.

- `GET_PRINT_HEADER_FOOTER`

  This method can be used to deliver own values for the printing header and footer.

For more information, see comments and example coding in the example implementation class `CL_EXM_IM_DPR_GANTT`.

SET/GET Parameters have been replaced by a BAdl

Upgrade from cProjects 4.0/4.5

In former releases, to delete a project, checklist or checklist item, you used the functionality described in SAP Note 1319442 by setting SET/GET parameter `DPR_DELETION_ALLOWED`. As of SAP Portfolio and Project Management 5.0, this functionality has to be replaced by implementing method `DELETE_CHECK_ITO_CTO` of BAdl `DPR_ATTRIBUTES`. If you had set the SET/GET parameter ID `DPR_DELETION_ALLOWED` user-dependent to value `X` in former releases, then you have to set the changing parameter `cv_deletion_possible` in the implementation of method `DELETE_CHECK_ITO_CTO` accordingly in SAP Portfolio and Project Management 6.0.

Activation of Enhancements

Upgrade from SAP Portfolio and Project Management 5.0

In SAP Portfolio and Project Management 5.0, various enhancements were delivered which had to be activated by implementing a BAdl method or setting a global switch in Customizing. As of SAP Portfolio and Project Management 6.0, many of these enhancements are active in the standard system.

See the following release information for software component version `CPRXRPM 600_740` (Release 6.0) to check the default system settings for Project Management as well as the Customizing options to change these settings as needed:

- Release Information *Enhancements from Portf. and Proj. Mgmt 5.0* (version for Project Management)
- Release Information *Activation of Enhanced Capital and Resource Management*

You can find a list of all enhancements in SAP Note 1631964.

4 Solution-Wide Topics

4.1 SAP Solution Manager

SAP provides the SAP Solution Manager as the highly recommended platform to efficiently support the implementation of your solution. Using SAP Solution Manager will significantly accelerate the implementation process and help you to achieve your business goals. At the same time, SAP will be able to deliver Support Services based on the business scenarios designed and documented in SAP Solution Manager. Implementation content for your solution may further accelerate the implementation process. For information about availability of content specifically tailored to your solution, see SAP Service Marketplace under service.sap.com/solutionmanager ⤴.

You can find the business processes under ▌▶ *Organizational Areas* ❯ *Product Development and Introduction* ❯ *Business Processes* ◗. *At least* SAP enhancement package 1, SP23, for SAP Solution Manager 7.0 is required.

For Portfolio Management:

- Managing Portfolio Initiatives (Portf. and Proj. Mgmt)
- Managing Portfolios (Portf. and Proj. Mgmt)
- Financial Planning (Portf. and Proj. Mgmt)
- Resource Demand Planning (Portf. and Proj. Mgmt)
- Managing Portfolio Metrics (Portf. and Proj. Mgmt)

For Project Management:

- Project Execution with Project Management (Portf. and Proj. Mgmt)
- Project Planning with Project Management (Portf. and Proj. Mgmt)
- Resource and Time Management with Project Management (Portf. and Proj. Mgmt)
- Project Accounting with Project Management (Portf. and Proj. Mgmt)

The following configuration elements are available:

- ▌▶ *SAP Portfolio and Project Management* ❯ *Configuration Structures* ❯ *SAP Portf. and Proj. Mgmt <Release>* ❯ *Basic Settings for Project Management* ◗
- ▌▶ *SAP Portfolio and Project Management* ❯ *Configuration Structures* ❯ *SAP Portf. and Proj. Mgmt <Release>* ❯ *Basic Settings for Portfolio Management* ◗

A Appendix

A.1 List of Documents

The following table lists documentation relevant for SAP Portfolio and Project Management and its applications.
Key: X = relevant for application (X) = useful for application – =not part of the application

Table 11

Title	Location	Project Management	Portfolio Management
SAP NetWeaver 7.4	SAP Service Marketplace at service.sap.com/instguides 🔄 under *SAP NetWeaver*	X	X
Language Transport	SAP Service Marketplace at service.sap.com/instguides 🔄 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver 7.4* ❯ *Operations* ❯ *Cross-NetWeaver* ❱	X	X
SAP ERP	SAP Service Marketplace at service.sap.com/instguides 🔄 under ▶ *SAP Business Suite Applications* ❯ *SAP ERP* ❱	(X)	(X)
Technical Operations Manual for SAP NetWeaver	SAP Service Marketplace at service.sap.com/instguides 🔄 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver 7.4* ❯ *Operations* ❯ *Cross-NetWeaver* ❱	X	X
Adobe Document Services – Configuration Guide	*Configuration Guide for SAP Interactive Forms by Adobe* on the SAP Developer Network (SDN) Community at www.sdn.sap.com/irj/sdn/adobe 🔄 under ▶ *Installation and Configuration* ❯ *SAP Interactive Forms – Configuration Guides* ❱	X	X
Relevant for Adobe and SAP NetWeaver Portal:	SAP Presentation CD	X	X

Title	Location	Project Management	Portfolio Management
SAP J2EE Engine Installation/Dialog Instance Installation/Standalone Gateway Instance Installation on SAP Portfolio and Project Management			
BI Content 7.0.3 / 7.0.5 (or higher)	SAP Help Portal at help.sap.com 🔗 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver Business Warehouse* ❯ *BI Content* ❚	(X)	(X)
SAP Content Server Installation Guide	SAP Service Marketplace at service.sap.com/instguides 🔗 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver 7.4* ❯ *Installation – Standalone Engines* ❚	(X)	(X)
SAP NetWeaver Portal – see Installation Guide for SAP NetWeaver 7.4	SAP Service Marketplace at service.sap.com/instguides 🔗 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver 7.4* ❯ *Installation* ❚	(X)	(X)
Business Package for SAP Portfolio and Project Management 5.0 73	SAP Help Portal at help.sap.com 🔗	(X)	(X)
SAP NetWeaver Exchange Infrastructure (usage type Process Integration) – see Installation Guide for SAP NetWeaver 7.4	SAP Service Marketplace at service.sap.com/instguides 🔗 under ▶ *SAP NetWeaver* ❯ *SAP NetWeaver 7.4* ❯ *Installation* ❚	(X)	
Information about the Business-Context Viewer (BCV) – see ERP Application Operations Guide	SAP Service Marketplace at service.sap.com/instguides 🔗 under ▶ *SAP Business Suite Applications* ❯ *SAP ERP* ❯ *SAP ERP 6.0* ❯ *SAP enhancement packages for SAP ERP 6.0* ❯ *SAP enhancement package 7 for SAP ERP 6.0* ❯ *ERP application operations guide* ❚	X	X

Title	Location	Project Management	Portfolio Management
Master Guide and Upgrade Master Guide for SAP Portfolio and Project Management	SAP Service Marketplace at service.sap.com/instguides under *SAP Business Suite Applications* > *SAP PLM* > *using SAP Portfolio and Project Management 6.0*	X	X
Security Guide for SAP Portfolio and Project Management	SAP Service Marketplace at service.sap.com/secguide	X	X
SAP BusinessObjects Explorer	SAP Service Marketplace at service.sap.com/bosap-explorer	X	X

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.

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.

- Target group:
    - Relevant for all target groups
- Current version:
    - On SAP Help Portal at ▶ help.sap.com ⤳ ❯ *Glossary* ❭
    - In the SAP system in transaction STERM

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

- Target group:
    - Consultants
    - System administrators
    - Project teams for implementations or upgrades
- Current version:
    - On SAP Help Portal at help.sap.com ⤳ (also available as documentation DVD)

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. SAP applications have a security guide of their own.

- Target group:
    - System administrators
    - Technology consultants
    - Solution consultants
- Current version:
    - On SAP Service Marketplace at 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, such as installation guides, the technical infrastructure guide and SAP Notes.

- Target group:
    - Technology consultants

- Project teams for implementations
- Current version:
  - On SAP Service Marketplace at service.sap.com/instguides ↗

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.

- Target group:
  - Technology consultants
  - Project teams for implementations
- Current version:
  - On SAP Service Marketplace at service.sap.com/instguides ↗

Configuration Documentation in SAP Solution Manager – SAP Solution Manager is a life-cycle platform. One of its main functions is the configuration of business scenarios, business processes, and implementable steps. It contains Customizing activities, transactions, and so on, as well as documentation.

- Target group:
  - Technology consultants
  - Solution consultants
  - Project teams for implementations
- Current version:
  - In SAP Solution Manager

The **Implementation Guide (IMG)** is a tool for configuring (Customizing) a single SAP system. The Customizing activities and their documentation are structured from a functional perspective. (In order to configure a whole system landscape from a process-oriented perspective, SAP Solution Manager, which refers to the relevant Customizing activities in the individual SAP systems, is used.)

- Target group:
  - Solution consultants
  - Project teams for implementations or upgrades
- Current version:
  - In the SAP menu of the SAP system under ▮ *Tools* ❯ *Customizing* ❯ *IMG* ▮

Production Operation

The **technical operations manual** is the starting point for operating a system that runs on SAP NetWeaver, and precedes the application operations guides of SAP Business Suite. The manual refers users to the tools and documentation that are needed to carry out various tasks, such as monitoring, backup/restore, master data maintenance, transports, and tests.

- Target group:
  - System administrators
- Current version:
  - On SAP Service Marketplace at service.sap.com/instguides ↗

The **application operations guide** is used for operating an SAP application once all tasks in the technical operations manual have been completed. It refers users to the tools and documentation that are needed to carry out the various operations-related tasks.

- Target group:
  - System administrators

- ○ Technology consultants
- ○ Solution consultants
- Current version:
  - ○ On SAP Service Marketplace at service.sap.com/instguides ↗

Upgrade

The **upgrade master guide** is the starting point for upgrading the business scenarios and processes of an SAP solution. It provides scenario-specific descriptions of preparation, execution, and follow-up of an upgrade. It also refers to other documents, such as upgrade guides and SAP Notes.

- Target group:
  - ○ Technology consultants
  - ○ Project teams for upgrades
- Current version:
  - ○ On SAP Service Marketplace at service.sap.com/instguides ↗

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 service.sap.com/instguides ↗

Release notes are documents that contain short descriptions of new features in a particular release or changes to existing features since the previous release. Release notes about ABAP developments are the technical prerequisite for generating delta and upgrade Customizing in the Implementation Guide (IMG).

- Target group:
  - ○ Consultants
  - ○ Project teams for upgrades
- Current version:
  - ○ On SAP Service Marketplace at service.sap.com/releasenotes ↗
  - ○ In the SAP menu of the SAP system under ▶ *Help* ❯ *Release Notes* ❮ (only ABAP developments)

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