



Installation Guide

SAP enhancement package 1 for SAP CRM 7.0 Java Hubs Based on SAP NetWeaver 7.3 Application Server Java

Additional Planning, Preparation, and Post-installation Steps

Target Audience

- System Administrators
- Technical Consultants

PUBLIC

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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: <http://service.sap.com/crm-inst>.

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

Version	Date	Description
1.0	2011-09-19	Initial Version

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1 Introduction

You need this document when you install SAP enhancement package 1 for CRM 7.0 Java Hubs based on SAP NetWeaver 7.3 application server Java. This document contains additional planning, preparation, and post-installation steps that you have to perform in addition to the installation procedure described in the documentation *Installation Guide — SAP Systems Based on SAP NetWeaver 7.3 Application Server Java on <OS>: <DB>*.

Make sure you have read the documentation *Master Guide — SAP Customer Relationship Management 7.0* before you start with any installation guide. The Master Guide and the installation guides are available at [▶http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) → SAP CRM → SAP enhancement package 1 for SAP CRM 7.0 → Plan ◀.

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2 Planning and Preparation

2.1 Prerequisites for the Business Packages for SAP CRM

You can install the Business Packages for SAP CRM in one of the following ways:

- Automatically using SAPinst
- Manually by downloading them from SAP Service Marketplace and *installing them using Java Support Package Manager (JSPM)* [[page 31](#)]

Prerequisites

The Business Packages for CRM require at least the following SAP NetWeaver usage types and the following CRM software units:

- SAP NetWeaver Application Server Java (AS Java)
- SAP NetWeaver Enterprise Portal (EP)
- SAP CRM Business Packages Foundation (BP-CRM-FND)
- SAP NetWeaver Application Server ABAP (AS ABAP) and SAP CRM Application Set (CRM APP)
To use the CRM functionality of the Business Packages for SAP CRM, you need an SAP CRM ABAP back-end system, consisting of AS ABAP and SAP CRM APP.
- SAP Retrieval and Classification Engine (TREX)
To use the search functions you need TREX.

Integration

Check the support for these usage types and software components using the Product Availability Matrix (PAM) at:

► <http://service.sap.com/pam> ◀

More Information

For more information about how to size the Enterprise Portal (EP), see:

► <http://service.sap.com/sizing> → *Hardware Sizing* → *Sizing Guidelines* → *Solutions & Platform* ◀

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3 Post-Installation

3.1 Checking the Availability of Back-End Systems for SAP CRM Java Components

After the installation, you have to check the availability of back-end systems as follows:

1. To test the connection to the ABAP back-end system, you *create a back-end user* [\[page 9\]](#).
2. Depending on various business processes, you check the following back-end systems:
 - *ABAP system* [\[page 10\]](#)
 - *TREX Server* [\[page 11\]](#)

3.1.1 Creating a Back-End User

You need service users to provide the anonymous remote function call (RFC) stateless connection between your back-end system and your Web-based applications.

Prerequisites

You have installed and configured CRM Web Channel Web-based applications.

Procedure

You create a service user in your back-end SAP CRM system and assign it to the Web-based application as follows:

1. In your ABAP back-end system on the *SAP Easy Access* screen, choose ► *Tools* → *Administration* → *User Maintenance* → *Users* ⚡ (transaction SU01).
2. Create a user of the type *Service User* and enter all required data.
3. Assign the appropriate service user authorization role to the user on the *Roles* tab. For a list of service user roles for the various Web-based applications, see the following table:

Application	Authorization Role for Service User
E-Selling B2B	SAP_CRM_ECO_ISA_TU_B2B
E-Selling B2C	SAP_CRM_ECO_ISA_TU_B2C
E-Selling EASYB2B	SAP_CRM_ECO_ISA_TU_EASYB2B
E-Selling CVIEWS	SAP_CRM_ECO_ISA_TU_CVIEWS
E-Selling SHOPADMIN	SAP_CRM_ECO_ISA_TU_SHOPADM
E-Selling USERADMIN	SAP_CRM_ECO_ISA_TU_USERADM
E-Selling Auctioning via Web shop (AVW)	SAP_CRM_ECO_TU_AVW
E-Service Internet Customer Self Service (ICSS)	SAP_CRM_ECO_ISE_TU_B2B (Authorizations for ICSS B2B)

3.1 Checking the Availability of Back-End Systems for SAP CRM Java Components

Application	Authorization Role for Service User
	SAP_CRM_ECO_ISE_TU_B2C (Authorizations for ICSS B2C)
E-Service Complaints and Returns	SAP_CRM_ECO_ISE_TU_CR
E-Service Remanufacturer inspection	SAP_CRM_ECO_ISE_TU_INSP
Channel Management (CHM) Shared Catalog	SAP_CRM_ECO_CHM_TU_SHRDCAT
Channel Management (CHM) BOB	SAP_CRM_ECO_ISA_TU_BOB
Channel Management (CHM) HOM	SAP_CRM_ECO_ISA_TU_HOM
Channel Management (CHM) CSR	SAP_CRM_ECO_ISA_TU_CSR

4. Save your entries.

More Information

For more information about service users see the documentation ► *<your project> → Basic Settings for CRM Web Channel → General Settings for CRM Web Channel → User Management* ◀ in the SAP Solution Manager [page 30].

3.1.2 Checking the Connection to the ABAP System

This section tells you how to check the connection to the ABAP system.

Prerequisites

To be able to test the connection to the ABAP system, you need to *create a user* [page 9] on this system.

Procedure

1. Go to the SAP NetWeaver Administrator using the following URL: http://hostname_of_Java_EE_Engine_Server>:5Instance_Number>00/nwa

For more information about the SAP NetWeaver Administrator, see the SAP Library at:

► <http://help.sap.com/nw73> → *SAP NetWeaver 7.3 Library English* → *SAP NetWeaver Library* → *SAP NetWeaver Library: Function-Oriented View* → *Application Server* → *Application Server Java* → *Administering Application Server Java* → *Administration* → *Administration Tools* → *SAP NetWeaver Administrator* ◀

2. Log on to the SAP NetWeaver Administrator with administrator rights.
3. Start an application that uses the SAP CRM ABAP system if it is stopped:
 1. Go to the *Operations* tab.
 2. Choose *Start & Stop*.
 3. Go to the *Java Applications* tab.
 4. Select one application from the *Application List*, for example:

Application	Context Root
crm~b2b	b2b
crm~icss_b2b	icss_b2b

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

5. To start the selected application, choose *Start*.
4. Open the user interface for the Extended Configuration Management (XCM) Administrator as follows:
 1. Open a Web browser and enter the following URL:
`http://<J2EE_host>:<J2EE_port>/<context root>/admin/xcm/init.do`
 where `<context root>` is the context root of the application started in the previous step.
 To find information about the components that can be configured, choose *help*.
 2. Choose ► *Start* → *Component* ◄.
 You can find information about configuration of components on the right hand side of the screen.
 3. To create a jco Component, follow the instructions provided in the *Example of component configuration field*.
 If the “run test” operation described in the component configuration section of a jco setting was successful, the ABAP system can be reached from the Java system.

More Information

For more information about using Extended Configuration Management (XCM) to configure your application, see *Using Extended Configuration Management (XCM)* [page 23] and the documentation in the *SAP Solution Manager* [page 30].

3.1.3 Configuring the TREX Service

You need to configure the TREX service.

Procedure

Maintain the values for `nameserver.address` and `nameserver.backupserverlist` as described in *Specifying the Address of the Name Server in Installation Guide - SAP NetWeaver 7.10 Standalone engine Search and Classification (TREX) Single Host* on SAP Service Marketplace at ► <http://service.sap.com/installnw73> → *Installation* → *Installation - Standalone Engines* → *SAP NetWeaver Search and Classification TREX* → *Installing and Updating TREX 7.1 Single Host* ◄.

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

Only valid for: CRM Java Components (JCRM); Extended E-Selling Components (XECO) |

You have to perform the following steps to check and configure Workforce Deployment Application and Calculation Services (WFD AS/CS):

- You implement *WFMCORE 200* using transaction *SAINT* [page 12].
- You configure the *XCM administration tool* for *WFD AS/CS* [page 12].

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

- You check WFD calculation services [page 14].
- You check the installation of WFD AS/CS [page 15].

End of: CRM Java Components (JCRM);Extended E-Selling Components (XECO) |

3.2.1 Implementing WFMCORE 200 Using Transaction SAINT

Before you can check and configure the Java part of Workforce Deployment Application and Calculation Services (WFD AS/CS), you need to implement WFMCORE 200.

Only valid for: CRM Java Components (JCRM) |

The WFMCORE 200 component contains all necessary ABAP classes and libraries required for the various Workforce Deployment scenarios and processes, including *Service Resource Planning in CRM* and *Retail Multisite Workforce Deployment*.

End of: CRM Java Components (JCRM) |

Procedure

1. Log on to your ABAP system.
2. Install WFMCORE 200 using transaction SAINT as described in [SAP Note 830595](#).

3. Only valid for: CRM Java Components (JCRM) |

If you are implementing the *Service Resource Planning in CRM* process variant, run the report WFDDBP_UPDATE_BLUEPRINT to update tables that define the settings required to properly display and maintain *Service Arrangements* in the *People-Centric User Interface*.

End of: CRM Java Components (JCRM) |

3.2.2 Configuring the XCM Administration Tool for WFD Application and Calculation Services

Workforce Deployment Application Services (WFD AS) sends calculation and forecasting requests to a CRM ABAP back-end system. WFD Calculation Services (WFD CS) picks up the requests from this CRM ABAP back-end system. You define the connection to the CRM ABAP back-end system through Extended Configuration Management (XCM) Admin.

For more information about using Extended Configuration Management (XCM) to configure your application, see *Using Extended Configuration Management (XCM)* [page 23] and the documentation in the *SAP Solution Manager* [page 30].

The `cs.jco.xxxxx` XCM parameters define the JCO connection to the SAP CRM ABAP system where the WFD CS maintains forecast and calculation requests. You can connect to the CRM ABAP system using one of the following:

- A message or dispatching server by specifying `cs.jco.mshost`, `cs.jco.group`, and `cs.jco.r3name`
- An application server by specifying `cs.jco.ahost` and `cs.jco.sysnr`

In either case, you must also specify `cs.jco.client`, `cs.jco.user`, and `cs.jco.password`.

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

XCM Parameter Name	Example Value	Description
cs.jco.ahost	us0091.wdf.sap.corp	Application server host name of the SAP CRM Calculation Service
cs.jco.sysnr	91	System number of the R/3 Calculation Service (for example, 09)
cs.jco.mshost	us0091.wdf.sap.corp	Message server host name of the SAP CRM Calculation Service
cs.jco.group	PUBLIC	Group of the SAP CRM Calculation Service (case sensitive; for example, PUBLIC)
cs.jco.r3name	Q5C	System ID of the SAP CRM Calculation Service (for example, IDES)
cs.jco.client	505	Client of the SAP CRM Calculation Service
cs.jco.user		Back end user for JCO connection to the SAP CRM Calculation Service
cs.jco.password		Password for the back-end user

You need to configure these `cs.jco.xxxx` XCM parameter values in each instance of WFD AS and WFD CS. Make sure that the values are the same in all instances.

Configuring the XCM Administration Tool for WFD Calculation Services

This business scenario is relevant for defining the WFD CS. You must perform this XCM configuration for the WFD CS to run.

1. Start the XCM administration tool using the following URL:
http://<J2EE_host>:<J2EE_port>/wfdcs/admin/xcm/init.do.
2. Access the configuration using the following path: ► *General Application Settings* → *Customer* → *sisopt* → *sisoptconfig* ⚙️.

Process	Description	Web Application	XCM Application Configurations
Calculations Service	Workforce scheduling application	wfdcs	sisoptconfig

3. In addition to the `cs.jco.xxxx` XCM parameters, you need to define the http port of the J2EE instance where WFD CS is running:

XCM Parameter Name	Example Value	Description
cs.http.port	51000	The http port of the webserver where the WFD Calculation Services application is running (for example, 50000).

4. Restart the application after saving the XCM configuration.

Configuring the XCM Administration Tool for WFD Application Services

This business scenario is relevant for connecting the WFD AS to the WFD CS.

1. Start the XCM Administration Tool using the following URL:
http://<J2EE_host>:<J2EE_port>/wfd/admin/xcm/init.do
2. Access the configuration using the following path: ► *General Application Settings* → *Customer* → *sis* → *sisconfig* ⚙️.

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

Process	Description	Web Application	XCM Application Configurations
Application Services	Web-based scheduling application	wfd	sisconfig

- Restart the application after saving the XCM configuration.

3.2.3 Checking Workforce Deployment Calculation Services

After configuring Workforce Deployment Calculation Services (WFD CS) with Extended Configuration Management (XCM) and restarting the application, you need to go to the WFD CS configuration page to check that it is running.

Prerequisites

- You have completed the installation of WFD Application Service (AS) and CS as described in this documentation.

■ Only valid for: CRM Java Components (JCRM) |

You have downloaded the *Business Package for Retail (Release 1.0)* from ► sdn.sap.com → *SAP NetWeaver Capabilities* → *User Productivity* → *Portal and Collaboration* → *Portal Content Portfolio* ◀.

For more information about the portal content versions for your release, see the documentation *Master Guide – SAP Customer Relationship Management 7.0* at <http://service.sap.com/crm-inst>.

| End of: CRM Java Components (JCRM) |

■ Only valid for: CRM Java Components (JCRM) |

You must have access to the *Portal Admin* role in SAP CRM through the Enterprise Portal to complete this part of the WFD AS/CS installation.

For more information, see *Configuring the CRM Business Package* on the SAP Service Marketplace at ► <http://service.sap.com/crm-inst> → *SAP CRM 7.0* → *CRM Business Packages and PC UI* ◀. Section *CRM Portal Administrator* contains specific instructions on configuring the portal for access to WFD AS and CS. Apply the instructions to the *Portal Admin* role

| End of: CRM Java Components (JCRM) |

- You have configured your portal users based on the required settings as described in the configuration documentation for your IT scenario.

For more information, see *Accessing Configuration Documentation in the SAP Solution Manager* [[page 30](#)].

Procedure

- Access the WFD CS configuration page through the Enterprise Portal using the role Portal Administrator.
- Choose ► *WFD Calculation Services* → *Configuration* ◀.
The *Configuration tab* looks as follows:

3.2 Post-Installation Steps for Workforce Deployment Application and Calculation Services

Tab	To Complete Installation.	For ongoing Configuration Management
<i>Calculation Servers</i>	Required for at least one calculation server	Required for each additional calculation server
<i>Logging Localization</i>	No	Required to add or change logging once fully operational

3.2.4 Checking the Installation of WFD Application Services and WFD Calculation Services

This section tells you how to check that you have correctly installed the Java components for Workforce Deployment Application Services (WFD AS) and WFD Calculation Services (WFD CS). This section does **not** tell you how to check the connection between the WFD AS and the WFD CS.

The procedure below shows you how to create a simple calculation request and verify that the Calculation Server has received the request. This helps you check that you have correctly installed all WFD AS or CS components and that they are communicating with each other.

Prerequisites

- You have completed all the installation steps described in this documentation.
- You have connected WFD AS or CS components with the Enterprise Portal.
- You have installed the required business packages according to *Checking Workforce Deployment Calculation Services* [page 14].

Procedure


1. To check that WFD AS is working and listening for HTTP requests, enter the following URL:
`http://<J2EE_host>:<J2EE_port>/wfd/login.do`.

The following error confirms that the application is working:

Your session has expired. Please renew your session by clicking a section link in the Portal menu.

2. Access the WFD CS from the Enterprise Portal through the Portal Admin role and check that the WFD CS page comes up with no errors.

If the page does not come up, possible errors are:

Error Message	Cause
Missing value for XCM configuration parameter cs.http.port	The XCM parameter cs.http.port was not filled.
The request could not be completed due to the following errors:<followed by details of the particular error, usually related to the JCO connection>	<div>  EXAMPLE The user or password are incorrect. </div>

3. Test the submission of a calculation request to see if the WFD CS can process the request.

3.3 Post-Installation Steps for the Business Packages for SAP CRM

You can simulate a calculation request submission by executing the RFC `TEST_WFDCS_CALCREQ_SUBMIT` from the CRM back-end system, defined in the `cs.jco.xxxx` XCM parameters of WFD CS.



EXAMPLE

For example, when you installed WFD CS, you configured the `cs.jco.xxxx` XCM parameters to point to system ID Q5C, client 505. You now need to log in to Q5C client 505 and execute `TEST_WFDCS_CALCREQ_SUBMIT` with transaction SE37 using the default import parameters.

4. Check the **Requests** tab of the WFD CS page to check the status of entries with the location name **SMOKETEST** has the status **FAILED**.
 - Status **FAILED** indicates a successful smoke test. It means that the Request Manager successfully sent the request to the Solver, which successfully processed it.
 - Status **QUEUED** probably means that the XCM parameter `cs.http.port` was incorrect.

3.3 Post-Installation Steps for the Business Packages for SAP CRM

The following sections provide information about the steps that you have to perform after importing the Business Package for SAP CRM.

3.3.1 Creating Roles for the SAP CRM Business Packages

Procedure

If you create your own roles from the SAP CRM Business Packages, also add the every user role (`eu_core_role`) to your role. The *Every User Role* contains the personalization functionality for the SAP NetWeaver Portal.

For more information about the *Every User Role*, see the SAP Library at:

► <http://help.sap.com/nw73> → SAP NetWeaver 7.3 Library English → SAP NetWeaver Library: Function-Oriented View → Enterprise Portal → Portal → Configuring the Portal for Initial Use → Understanding Preconfigured Portal Roles → Every User Roles ◀.

3.3.2 Installation of the Info Center for the SAP CRM Business Package

This section describes how to install the Info Center.

Prerequisites

- You have installed the Business Package for SAP CRM [page 31].

3.3 Post-Installation Steps for the Business Packages for SAP CRM

- You have administrator rights.

Process Flow

1. You import the SAP CRM info center configurations and directory structure [page 17].
2. You activate manual ordering of folders for the sapcrm Repository [page 19].
3. You create indexes and taxonomies for the sapcrmnews Repository [page 19].
4. You create the index for the sapcrm Repository [page 20].
5. You configure the personal search [page 21].
6. If required, you increase the number of JCo connections [page 21].

3.3.2.1 Importing the SAP CRM Info Center Configurations and Directory Structure

The directory structure of the info center has been made available in one content package and you can import it using the Information and Content Exchange (ICE) Repository.

For more information about ICE, see SAP Library at:

► <http://help.sap.com/nw73> → SAP NetWeaver 7.3 Library English → SAP NetWeaver Library: Function-Oriented View → Enterprise Portal → Knowledge Management → Content Managers' Guide → Managing Content → Content Exchange → Distributing Content (Offline) ◀

Procedure**Importing the Directory Structure**

1. Log on to the Portal as content manager.
2. Choose ► Content Management → Content Exchange → Upload ◀.

3. Only valid for: Windows |

Select file fullupdate_infocenter.zip from directory <servlet_engine>\irj\root\WEB-INF\portal\portalapps\ep.crm.chm.kmexp\ice\ and confirm the upload.

End of: Windows |

Only valid for: IBM i5/OS;UNIX |

Select file fullupdate_infocenter.zip from directory <servlet_engine>/irj/root/WEB-INF/portal/portalapps/ep.crm.chm.kmexp/ice/ and confirm the upload.

End of: IBM i5/OS;UNIX |

The zip file is now imported using the ICE protocol.

If you cannot see the ICE repository, this might be due to one of the following reasons:

- The ICE repository was hidden in the virtual root repository.

In this case, do the following:

1. Log on to the portal as system administrator.
2. In the SAP NetWeaver Enterprise Portal, choose ► System Administration → System Configuration → Knowledge Management → Content Management → Repository Managers → Virtual Root Repository ◀.

3.3 Post-Installation Steps for the Business Packages for SAP CRM

3. Check whether the ICE Repository has been entered under *Repositories to exclude*.
 4. Remove it from the list.
 5. Save your changes.
 6. Restart the Servlet Engine.
- The repository has been “switched” to invisible:
 1. Log on to the portal as system administrator.
 2. In the SAP NetWeaver Enterprise Portal, choose ► *System Administration* → *System Configuration* → *Knowledge Management* → *Content Management* → *Repository Managers* → *Content Exchange Repository* ◀.
 3. If the property `hide in root folder` is active, deselect it.
 4. Restart the Servlet Engine.

**NOTE**

After the import, check whether the directory structure was created by choosing ► *Content Administration* → *KM Content* ◀ in the SAP NetWeaver Enterprise Portal. The list of folders should contain the folders `sapcrm` and `sapcrmnews`.

Checking Whether the Directory Structure Has Been Imported Successfully

You can only import the structure if there is a repository with the same name. For example, if a zip file is exported from the repository `sapcrm`, there must also be a repository with the name `sapcrm` in the target system.

The `sapcrm` and `sapcrmnews` repositories as well as the `CRM-Namespaces` filter are created during the import of the SAP CRM KM extension configuration archive. To check whether this configuration archive has been imported successfully, proceed as follows:

1. Log on to the portal as system administrator.
2. In the SAP NetWeaver Enterprise Portal, choose ► *System Administration* → *Monitoring* → *Knowledge Management* → *Deployment Monitor* → *Config Archives* ◀.
3. Check whether the archive `com.sap.pct.crm.app.kmext.prjconfig` is installed in the system. If the archive `com.sap.pct.crm.app.kmext.prjconfig` is not installed in the system, import it manually as follows:
 1. Log on to the portal as system administrator.
 2. In the SAP NetWeaver Enterprise Portal, choose ► *System Administration* → *Monitoring* → *Knowledge Management* → *Deployment Monitor* → *Config Archives* → *Actions* → *Import* ◀.

3. Only valid for: Windows |

Select the archive `com.sap.pct.crm.app.kmext.prjconfig.configarchive` from directory `\<SAPSID>\J<instance_number>\j2ee\cluster\apps\sap.com\ep~crm~chm\servlet_jsp\ep.crm.chm.kmexp\root\WEB-INF\config` and confirm the import.

End of: Windows |

3.3 Post-Installation Steps for the Business Packages for SAP CRM

4. Only valid for: IBM i5/OS;UNIX |

Select the archive `com.sap.pct.crm.app.kmext.prjconfig.configarchive` from directory `/<SAPSID>/JC<instance_number>/j2ee/cluster/apps/sap.com/ep~crm~chm/servlet_jsp/ep.crm.chm.kmexp/root/WEB-INF/config` and confirm the import.

End of: IBM i5/OS;UNIX |

After the import, the directory structure has no restrictions on rights. Make sure that you modify the rights of the various folders to meet your company's requirements.

3.3.2.2 Activating Manual Ordering of Folders for the sapcrm Repository

The sapcrm Repository folders are ordered in a specific sequence.

Procedure

To display this sequence, activate manual ordering for each directory.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → *SAP NetWeaver 7.3 Library English* → *SAP NetWeaver Library: Function-Oriented View* → *Enterprise Portal* → *Knowledge Management* → *Managing Content* → *Providing Shared Access to Departmental Documents* → *Sorting Documents in a Folder Manually* ◀

3.3.2.3 Creating Indexes and Taxonomies for the sapcrmnews Repository

To make news available for indexing and searching, create two new indexes.

Prerequisites

You have administrator rights for Knowledge Management on the server.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → *SAP NetWeaver 7.3 Library English* → *SAP NetWeaver Library: Function-Oriented View* → *Enterprise Portal* → *Knowledge Management* ◀

Procedure

Creating Indexes and Taxonomies for the sapcrmnews Repository

The Business Package contains an iView — `ep.bp_crm.chm-pm.iviews.news_flash` — that combines all news with the `istopnews=yes` attribute in a virtual folder. To guarantee the function of this iView, create two indexes in KM.

1. In the SAP NetWeaver Enterprise Portal, choose ► *System Administration* → *System Configuration* → *Knowledge Management* → *Index Administration* ◀
2. Create an index of the **Search** and **Classification** type, with a suitably configured taxonomy.

3.3 Post-Installation Steps for the Business Packages for SAP CRM

3. Choose **sapcrmpartnernews** as the index ID. Otherwise the path to the folder specified in the iView is incorrect.

If you choose another index ID, you must also modify accordingly the folder properties in the iView for one of the following:

- Folders path to content and path to root
- FoldersPath to Initially Displayed Folder and Path to Root Folder for Navigation

If you want to link two portal servers with a TREX server, you must modify the index name and iView properties on one of the portal servers.

4. Assign folder **sapcrmpartner/Partnernews** as a data source.

This moves all news with the (virtual) Top flag from this folder to the Newsflash iView.

5. Create a “query-based” taxonomy with the name **PartnerNewsFlash**, choosing *Automatic Classification* before you save the taxonomy.

**NOTE**

The outbound delivery includes only the iView above for virtually combining news. If you also want to use this functionality for other news channels (for example, internal news), use your own index and taxonomy for each channel.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → SAP NetWeaver 7.3 Library English → SAP NetWeaver Library: Function-Oriented View → Enterprise Portal → Knowledge Management → Administering the Knowledge Management System → System Administration → System Configuration → Administering Indexes ◀

Creating Queries for the Taxonomies of sapcrmnews Repositories

1. Log on to the portal as content manager.
2. Choose ► Content Management → Classification → Taxonomy Query Builder ◀.
3. Add a search query to check the **istopnews** property for the value **Yes**.
4. Enter **PartnerNewsFlash** as the name for the taxonomy.

Here too, a property of the iView links to a taxonomy with this name. So, if you want to choose another name, you must modify the path to the content folder property of the iView.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → SAP NetWeaver 7.3 Library English → SAP NetWeaver Library: Function-Oriented View → Enterprise Portal → Knowledge Management → Administering the Knowledge Management System → System Administration → System Configuration → Administering Indexes ◀

3.3.2.4 Creating the Index for the sapcrm Repository

To make Info center documents available for indexing and searching, create a new index with **sapcrm** as a data source.

Prerequisites

You have administrator rights for Knowledge Management on the server.

Procedure

Choose a name of your own, **Search** as a service, and **standard** as a crawler parameter.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → *SAP NetWeaver 7.3 Library English* → *SAP NetWeaver Library: Function-Oriented View* → *Enterprise Portal* → *Knowledge Management* → *Administering the Knowledge Management System* → *System Administration* → *System Configuration* → *Administering Indexes* ◀

3.3.2.5 Configuring the Personal Search

Prerequisites

You have administrator rights for Knowledge Management on the server.

Procedure

1. Create an index for the **userhome** repository.
To make personal folder documents available for the search, create a new index with **root / userhome** as the data source.
2. Create a search option set for personal search.
To assign the search index and a start folder to the search for personal documents, create a Search Option Set with the name **CRMPersonalFolderSearch**. As an index, enter the index for the **userhome** repository created above and **/~alias~/userhome/user.id/Personal Documents** as the root folder for the search.

For more information, see the SAP Library at:

► <http://help.sap.com/nw73> → *SAP NetWeaver 7.3 Library English* → *SAP NetWeaver Library: Function-Oriented View* → *Enterprise Portal* → *Knowledge Management* → *Administering the Knowledge Management System* → *System Administration* → *System Configuration* → *Administering Indexes* ◀

3.3.2.6 Increasing the Number of JCo Connections

This section tells you how to increase the number of concurrent Java Connector (JCo) connections. By default, the maximum number of concurrent JCo connections is 100. The value depends on the number and behavior of the users in the portal. For more information, see **SAP Note 316877**.

You can specify this value when you plan the installation of your SAP NetWeaver Enterprise Portal. Make sure that you first analyze the number and behavior of the users.

Procedure

To increase the maximum number of concurrent JCo connections, increase the value of the environment variable **CPIC_MAX_CONV**.

**EXAMPLE**

Initial default value: CPIC_MAX_CONV=100

Increased value: CPIC_MAX_CONV=1000

3.4 Using Extended Configuration Management (XCM)

You use the Extended Configuration Management (XCM) to configure Web applications, once you have installed the Web components. You use it to make configuration settings needed at runtime.

The Web applications are used in the following scenarios:

- CRM Web Channel
- Channel Management
- Interaction Center
- Interaction Center WebClient
- Interaction Center Workforce Management
- Internet Customer Self-Service
- Software Agent Framework (SAF)

You only have to set up XCM configuration settings for those Web applications that are relevant to the scenarios and processes you are using. The XCM user interface is used for Java-side configuration of the Web application. You have to maintain two setting types in XCM:

- General Settings

Once set, these settings are valid for the whole Web application. These settings are located in the XCM tool under ► *Start* → *General Settings* → *Customer* ◀.

- Additional Web application configuration settings

Web applications can have multiple configurations with different settings. Depending on the configuration used, the application behaves differently at runtime. You can define a default configuration or select the configuration to be used at runtime.

**CAUTION**

Not all applications support multiple application configurations. Some only support general settings.

Some Web applications can run different configurations in different client sessions simultaneously. Each Web application provides one or more predefined (SAP) configurations, which you can find under ► *Start* → *Application Configurations* → *SAP* ◀.

You create a new customer configuration based on these predefined configurations and adjust it to your requirements. You then find your customer configuration under ► *Start* → *Application Configurations* → *Customer* ◀.

Each customer configuration contains:

- A configuration name
- Base configurations (from SAP on which you base your configuration)

3.4 Using Extended Configuration Management (XCM)

- A number of configuration parameters with associated values that you adjust.

The combination of these two setting types represents the final Web application configuration.

The following sections explain how to configure a Web application in XCM, assuming you have deployed the application:

- *Starting XCM* [page 23]
- *Changing the Language* [page 24]
- *Printable Help* [page 24]
- *General Settings* [page 24]
- *Multiple Application Configurations* [page 25]
- *Running the Web Application* [page 28]
- *Uploading and Downloading XCM Settings* [page 28]
- *Indication of Obsolete XCM Settings* [page 29]
- *IPC Switch for XCM Configuration of Web Channel* [page 29]

3.4.1 Starting XCM

This section describes how to start XCM.

Procedure

1. You access the XCM tool at:

<http://<host>:<port>/<web app name>/admin/xcm/init.do>



NOTE

You can also start XCM in accessibility mode (according to Section 508 Rehabilitation Act) at the following URL:

<http://<host>:<port>/<web app name>/admin/xcm/init.do?sap-accessibility=x>

2. Provide a user and password. If you are logging on for the first time use the Administrator user and the password you defined during the installation of the SAP system.



RECOMMENDATION

We recommend you create new users with less rights than the administrator for the administration of Web applications.

For more information, see the SAP CRM Security Guide, section *Web Channel*.

3. When the application opens a closed control tree is displayed on the left of the screen. A screen containing help information is displayed to the right.
You can use edit (change settings) or display (see settings) mode in XCM. You use the button in the top right hand corner of the screen to change between modes. When you switch to edit mode a DB lock is set meaning that only this user can edit the settings at one time. The lock is released once the user switches back to display mode or after session timeout (default timeout is 30mins).



NOTE

If the lock is not released after session timeout, you can release it manually.

3.4 Using Extended Configuration Management (XCM)

1. Go to the SAP NetWeaver Administrator using the following URL: http://hostname_of_Java_EE_Engine_Server>:5Instance_Number>00/nwa
2. Log on to the SAP NetWeaver Administrator with administrator rights.
3. Go to the *Troubleshooting* tab.
4. Choose *Java*.
5. Choose *Locks*.
6. Select the correct system lock entry
7. Choose *Remove lock*.

3.4.2 Changing the Language

This section describes how to change the language of your application.

Procedure

You can change the language of your application either by using the XCM UI configuration.

XCM UI configuration

1. Start the *Extended Configuration Management (XCM) Administration* page.
2. Select *Application Configuration*.
3. Open *Advanced Settings*.
4. Choose *ui* and then select the language you want to use.
5. Restart the application.

3.4.3 Printable Help

There is a printable help function for the application configuration and components. You access it by selecting *Help* in the header area of the main *XCM Admin* window. Within the documentation hyperlinks point to more information. The documentation displays the general settings separately.

3.4.4 General Settings

This section describes how to set the general settings. These settings are valid for the whole application.

Procedure

1. Choose the *Edit* mode and select ► *Start* → *General Settings* → *Customer* ◀.
The system displays the available nodes categorizing the general settings. Depending on the application you can have one or more tree nodes. For information on the possible settings, see the printable help information.

3.4 Using Extended Configuration Management (XCM)

2. Expand a configuration node and select the right hand configuration node to see possible configuration parameters in the right hand window.
3. Select a parameter and enter the settings values that meet your requirements. Each parameter contains a help description for information on what you need to enter.
Some parameters have default values set. When you change the values of these default parameters the system marks them orange. You can revert back to the original default entry by selecting *R* (revert).
4. Select *Save Configuration*.

If your Web application does not support multiple configurations, you are now finished with this chapter. You can return to the display mode and *restart* [\[page 10\]](#) the Web application to activate your changes.

If your application does support multiple configurations, see *Multiple Application Configurations* [\[page 25\]](#).

3.4.5 Multiple Application Configurations

Once you have set the *General Settings* [\[page 24\]](#) you can now configure the various configurations that you need.

Delivered SAP Configuration

You need to find out which SAP application configurations are delivered. In more complex applications, for example Web Channel, there are several preconfigured applications. In simpler applications, for example the User Management application, there are fewer, or only one, applications configurations. You display the list in the preconfigured scenarios under **Start** → *Application Configurations* → *SAP* in the control tree. Look through the configurations and choose the one that most suits your requirements.

Creating a Customer Application Configuration

Once you have selected the configuration that suits your needs go to *Edit* mode.

1. Enter a configuration name and choose *Create*.
2. Configure the application configuration by associating configuration data with the configuration parameters. There is a description for the scenario of each configuration parameter in the last column of the parameter table.



NOTE

During installation, only those parameters (mandatory) are displayed that are needed for the application to run. Optional parameters can be viewed and edited by selecting *Display Advanced Settings*.

Configuring a Customer Application Configuration

Once you have created the application configuration you need to configure it by changing the parameter values.

3.4 Using Extended Configuration Management (XCM)

1. Select *Configuration Documentation* to see a list of the parameters to be configured.
2. Select a parameter and use the dropdown list box to assign a value. You can display a description of possible values by selecting the ? help button next to the dropdown list box. If there is more details description for a parameter an additional ? button is displayed.
3. There are two value types:
 - **Static Values**
Values that can be selected from a dropdown list box.
These values do not have a button in the *Component Configuration* column.
 - **Values based on Component Configuration**
You first have to configure a component, for example a connection to your SAP CRM system, before assign the configured value to the parameter. These parameters have a button in the *Component Configuration* column. For example, the *jco* button for configuring connection parameters to the SAP system.
If no value is assigned to these parameters you have to create a new component configuration.
For more information, see the section *Creating a New Component Configuration*.
If a value is assigned, it is most likely that do not need to change anything during the installation.

Creating a New Component Configuration

A component is an independently configurable part of the application (for example the *jco* component, which enables connections between the SAP system and the Web application). A component can have several configurations, for example to different systems and clients. You assign one of the component configurations to the parameter in the application configuration. We recommend you create the component configuration at the same time as you set up the application configuration.

1. Select an empty entry in the dropdown list box for the parameter or choose *create component configuration*. The system switches to the component creation screen. The correct component, for example *jco*, is selected automatically and the system display a description of the use of the component.
2. Enter a name for the component configuration (for example **Q5C_505** for the Q5C system with client 505) and choose *Create*. The application switches to the component configuration parameters screen.
3. Select a base configuration from the *Base Configuration* dropdown list box. A description is displayed using the ? button.
4. Enter values for the component configuration parameter and choose *Save Configuration*. Test your values in the *Configuration Test* area.

Testing a Component Configuration

Once you have created the component configuration, save it and test it as follows:

3.4 Using Extended Configuration Management (XCM)

1. Select the test from the *Select Test* dropdown list box for the configuration. You can see a description by selecting the ? button.
2. Choose *Run Test*.
3. The system displays the test results in a new window. A red traffic light indicates the test failed and you must redo the configuration. A green traffic light indicates the test was successful.
4. Return to the application configuration, by selecting *Back to Application Configuration* and select the newly created configuration from the dropdown list box and assign it to the scenario parameter.

Defining a Default Application Configuration

You should perform this step after assigning values to all configuration parameters. If you have only one application configuration, the system uses it automatically when you start the application. If you have more than one application configuration you must select the *Default Configuration* checkbox for one of the configurations, so that the system runs this one as default when you start the application.

**NOTE**

A green icon in the control tree indicates the default configuration.

Saving the Application Configuration

Once you have assigned values to all your application configuration parameters you have to save it.

1. Select *Save Configuration*.
2. Check the option *Active Configuration*. If you do not check this field the configuration is disabled and does not run when you start the application. If you uncheck this box you determine that the configuration is disabled.

**NOTE**

A red icon indicates the configuration is disabled.

3. The system saves the new application configuration to the AS Java and it can then be displayed in the customers part of the control tree in XCM.

Activating the Application Configuration

Before a new application configuration can become active you have to stop and restart the Web application or, alternatively, restart the AS Java 7.3 Server.

1. Go to the SAP NetWeaver Administrator using the following URL: http://<hostname_of_Java_EE_Engine_Server>:5<Java_Instance_Number>00/nwa.
2. Go to the *Operations* tab.
3. Choose *Start & Stop*.
 - To start and stop Java applications, go to the *Java Applications* tab
 - To start and stop applications server instances, go to the *Java Instances* tab

For more information, see the AS Java 7.3 configuration documentation in *SAP Solution Manager* [page 30].

3.4.6 Running the Web Application

When you run the Web application the system needs to know which application configuration to use if there is more than one. You can set this up in one of three ways:

- Use the default configuration. Simply start the application and the configuration you set as default is used. If you have just one configuration this is automatically the default. For example if you want to call up the default configuration for the b2b Web shop the URL looks as follows:
<http://<host>:<port>/b2b/b2b/init.do>.
- Specify the application configuration name as a request parameter. In this case you run the application using a different application configuration to the default. You pass the name of the application configuration using the request parameter configuration.xcm when calling the application. The scenario name is case sensitive. For example if you want to call up the application configuration myB2BCRM the URL looks as follows:
<http://<host>:<port>/b2b/b2b/init.do?scenario.xcm=myB2BCRM>
- Display a start-up page containing links to all active configurations and starting the specific application configuration by using the link.



CAUTION

The start page is disabled after installation. You enable it using the following XCM parameter:

► Start → General Settings → <Web application name> → show.start.jsp ◀.

3.4.7 Uploading and Downloading XCM Settings

You can up and download application configurations. In XCM navigate to ► Start → XCM Settings ◀ and you can view the upload and download sections. Each section refers to two objects:

- Component configuration data
- Application configuration data

These two objects make up the application configurations of a Web application.

Procedure

Downloading XCM Configurations

This enables you to download XCM configuration from the AS Java database to XML files. Proceed as follows:

1. Select the download button for the component configuration data file. The system generates a file named `config-data.xml` containing all component configuration data saved for the Web application.
2. Select the download button for the application configuration data file. The system generates a file named `scenario-config.xml` containing all application configuration data saved for the Web application.

Uploading XCM Configurations

This function enables you to upload XCM configuration data from XML files to the AS Java. Proceed as follows:

1. Select the *Edit* button.
2. The system displays two file input fields in the upload section.
3. Specify the `config-data.xml` (component configuration) and `scenario-config.xml` (application configuration) files, with complete file system paths for both files, and select *Upload*.



NOTE

For the b2b and b2c Web applications in Web Channel, the XCM administration tool provides a switch to a separate maintenance view for the IPC-specific part of the application (see section *IPC Switch for XCM Configuration of Web Channel* below). When switching to IPC you can up- and download the IPC application and component configurations. The IPC application configuration file is `ipcscenario-config.xml`, the component configuration file is `ipcconfig-data.xml`.



CAUTION

If you intend to transport XCM when doing a system copy within the CRM 7.0 including SAP enhancement package 1 release, refer to the section *Data Storage Security* in the CRM Security Guide for Web Channel. In addition to the XCM data you have to also transport encryption keys used in Secure Storage of the AS Java.

3.4.8 Indication of Obsolete XCM Settings

After migrating XCM settings from an older to a newer Web application version, some settings may no longer be supported in the new version. If the customer made these settings, meaning they have been changed from their SAP delivered default values, the system marks them as obsolete by highlighting them in yellow. The following parameters can be specified as obsolete:

1. Application configurations (marked with an exclamation mark on yellow background)
2. Application configuration parameters (highlighted in yellow)
3. Components (marked with an exclamation mark on yellow background)
4. Component configurations (marked with an exclamation mark on yellow background)
5. Component parameters (highlighted in yellow)

3.4.9 IPC Switch for XCM Configuration of Web Channel

The Web Channel B2B and B2C Web applications each support two application configurations that must be maintained separately:

- The *Web Channel* application configuration, which allows the configuration of the overall application.

3.5 Accessing Configuration Documentation in SAP Solution Manager

- The *IPC* application configuration, which allows additional configuration of the IPC-specific part of the application.

When you start the XCM administration tool for B2B or B2C a dropdown list box is displayed in the upper left corner of the screen. This dropdown list box enables you to switch between the maintenance views for the *Web Channel* and *IPC* application configurations. All features of the XCM Administration tool, that is application configuration maintenance and their upload and download, can be used separately for both the *Web Channel* and *IPC* application configurations.

3.5 Accessing Configuration Documentation in SAP Solution Manager

To access configuration documentation in SAP Solution Manager, you have to connect your newly installed SAP system to SAP Solution Manager.

Procedure

Create a configuration project with the related configuration guide as described in the following documentation:

► <http://help.sap.com> → *SAP Solutions* → *SAP Solution Manager* → *Documentation for SAP Solution Manager*
→ *<current release>* → *SAP Solution Manager* → *Implementing and Upgrading SAP Solutions* → *Projects*
→ *Configuration* ◀.

More Information

► <http://service.sap.com/solutionmanager> → *Media Library* → *How-To Documents* → *How to Create a Configuration Guide using SAP Solution Manager* ◀

4 Additional Information

4.1 Installing the Business Packages for SAP CRM Using JSPM (Optional)

You can also install the Business Packages for SAP CRM using the Java Support Package Manager (JSPM).

Prerequisites

- Only valid for: IBM i5/OS;UNIX |
You have checked *hardware and software requirements* [external document].
End of: IBM i5/OS;UNIX |
- Only valid for: Windows |
You have checked *hardware and software requirements* [external document].
End of: Windows |
- You have checked the *Prerequisites for the Business Packages for SAP CRM* [page 7]

Procedure

1. Download version 7.3 of the files `sap.com_BPCRMAPP`, `sap.com_BPCRMFND`, `sap.com_CRMAPP`, and `sap.com_CRMFND` as follows:
 1. Go to ► <http://service.sap.com/swdc> → Download → Support Packages and Patches → Search for Support Packages and Patches ◀.
 2. Enter the following search terms:
 - BP CRM Application Coding 7.3
 - BP CRM Application Content 7.3
 - BP CRM Foundation Coding 7.3
 - BP CRM Foundation Content 7.3
2. Install the Business Packages for SAP CRM with JSPM as described in *Installing Additional Usage Types or Software Units in an Existing SAP System* [external document].
3. Perform the required *Post-Installation Steps for the Business Packages for SAP CRM* [page 16].

4.2 Troubleshooting for the Business Package for SAP CRM

The following sections describe the steps that you have to perform if you have problems after the installation:

- *Activating BI Templates Manually* [page 32]
- *Troubleshooting when Importing PAR Files* [external document]
- *Troubleshooting in SSO with SAP Logon Tickets* [external document]

- *Dragging the Central Search onto the Portal Desktop* [[page 32](#)]

4.2.1 Activating BI Templates Manually

If you have installed the Business Package, you might see error messages when loading the BI templates. This procedure describes how you can activate the templates afterwards.

Procedure

1. Note the technical name of all templates in your portal interface that are not working.
2. Log on to your BI system.
3. On the *SAP Easy Access* screen, choose ► *Modeling* → *Administrator Workbench: Modeling* ⚡ (transaction RSA1 or RSOR).
4. Choose ► *Business Content* → *Object Types* → *Web Template Name* → *Select Objects* ⚡.
A new window containing a list of BW objects and templates opens.
5. Find your missing templates, for example, 0TPL_0CRM_Cnn_Qnnn_Vnnn_M, and select the entries.
6. Choose *Transfer Selection*.
The template now appears on the right-hand side of the screen. The *Transfer* checkbox has been selected and cannot be changed. Nevertheless, we recommend that you repeat the following procedure so that your templates can be displayed.
7. Select the template.
8. Choose ► *Transfer* → *Transfer* ⚡.

Result

You have successfully activated your missing templates and no error messages appear in the portal.

4.2.2 Dragging the Central Search onto the Portal Desktop

Procedure

The Business Package for SAP CRM 7.0 including SAP enhancement package 1 contains an iView for the central search in CRM. This iView is in the package on the page *Today* in the workset *Home* of the CRM User. You can drag this iView onto the portal desktop under the tool area.

Typographic Conventions

Example	Description
<Example>	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>”.
► Example → Example ◀	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
http://www.sap.com	Textual cross-references to an internet address
/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, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

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Documentation in the SAP Service Marketplace

You can find this document at the following address: <http://service.sap.com/instguides>

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