Upgrade Guide
SAP Business Planning and Consolidation 7.0
version for the Microsoft platform

Target Audience

- Application Consultants
- Technical Consultants

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Document History

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

Version	Date	Description
1.0	2008-07-31	Initial Version.
2.0	2009-02-13	Updated for SP03.
2.01	2009-04-17	Minor update to the Introduction regarding manually upgrading the client components when upgrading from a release prior to 7.0 SP00.
2.02	2009-05-05	The migration tool can only be provided as a service offering from an SAP certified partner.
3.0	2009-05-14	Updated for SP04.
3.1	2009-05-29	Removed 4.2 migration information. For more information, see the Introduction, step 4. Removed some version-specific information.
3.2	2010-03-09	In “Migrate Application Sets from Version 5.0 or 5.1”, added information on saving and restoring the table tblAppLock.
3.3	2010-03-19	In “Migrate Application Sets from Version 5.0 or 5.1”, in step 9, corrected the query to restore the contents of the table tblAppLock.
3.4	2010-05-07	In “Introduction”, updated the contact details.
3.5	2010-05-24	In “Introduction”, further update to the contact details.

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1 Introduction

This guide provides instructions on how to upgrade to the latest support package of Business Planning and Consolidation 7.0, and how to migrate your application sets.

The term **upgrade** refers to the process of overwriting your existing software with a newer version of the software. You can perform an upgrade if you already have version 7.0 SP0 or later installed and you are staying on the same version of SQL. If these conditions do not apply to you, you must perform a full install. See the installation guide for the support package you are upgrading to at `http://service.sap.com/instguidesEPM-BPC` ▶ *7.0, version for the Microsoft Platform* ◀.

The term **migrate** refers to the process of moving your application set model and data from one version to another. You must migrate after performing an upgrade, or if you are installing a newer version of the software that has fundamental changes (such as technology platform or underlying table structure changes) or from a different software altogether (such as moving from SAP SRC to SAP Business Planning and Consolidation).

The upgrade guide includes the following topics:

- Upgrading your software from 7.0 SP00 (or later) to the latest support package (see *Upgrade to the Latest 7.0 Support Package* [page 7])
- Migrating your 7.0 application sets (see *Migrate Application Sets from 7M SP00 and later* [page 9])
- Migrating your 5.0 and 5.1 application sets (see *Migrate Application Sets from Version 5.0 or 5.1)* [page 11]

About Upgrading from OutlookSoft 4.2

This document does not include instructions on upgrading or migrating from OutlookSoft 4.2.

For additional information regarding upgrading or migrating from OutlookSoft 4.2 to subsequent releases, contact one of the Migration Offices as follows:

- In the Americas, contact Tom Chelednik (E-Mail: `tom.chelednik@sap.com`).
- In EMEA and APJ, contact Miguel Gonzalez (E-Mail: `miguel.gonzalez@sap.com`).

About Upgrading from 5.0 or 5.1

This document includes information about migrating your application sets from 5.0 or 5.1 to 7.0 or later, but does not include instructions on upgrading your software.

To upgrade your software from 5.0 or 5.1, you must perform a full install by uninstalling then reinstalling your Business Planning and Consolidation server and client software. For information, see the corresponding installation guide at `http://service.sap.com/instguidesEPM-BPC` ▶ *7.0, version for the Microsoft Platform* ◀.

About Upgrading from SQL Server 2005 to 2008

This document does not include instructions on upgrading your software if you are switching from SQL Server 2005 to 2008. To upgrade your software from a SQL Server 2005 platform to a SQL Server 2008 platform, you must perform a full install by uninstalling then reinstalling your Business Planning and Consolidation server and client software. For information, see the corresponding installation guide at http://service.sap.com/instguidesEPM-BPC *7.0, version for the Microsoft Platform*. Note that when upgrading to SQL Server 2008, you must create customized dtsx packages to be compatible with SQL 2008. If your system uses packages from ApShell, copy the packages from Apshell after upgrading to SQL 2008. For more information, see SAP Note 1294591.

After installing the software, you can use this guide migrate your application sets from the applicable version.

2 Upgrade to the Latest 7.0 Support Package

Follow these procedures to upgrade your servers and client machines to the latest Business Planning and Consolidation support package when running 7.0 SP00 or later on a SQL Server 2005 system.
If you need to do a full installation, see the installation guide corresponding to this release at `http://service.sap.com/instguidesEPM-BPC` ▶ *7.0, version for the Microsoft Platform* ↵.

NOTE

SAP support packages are cumulative, meaning they include all fixes and updates in previous support packages and any patches between them.

Procedure

Installing the Server

To install the *server* portion of the support package, perform these steps on both the Application server and Web server:

1. Go to SAP Service Marketplace Software Distribution Center at `http://service.sap.com/swdc` and follow this path: ▶ *Download* → *Support Packages and Patches* → *Entry by Application Group* → *SAP Application Components* → *SAP BPC for Microsoft* → *SAP BPC 7.0 FOR MICROSOFT* → *SAP CPM BPC 7.0 M* → *Win32* ↵.
2. Select the ZIP file for the latest support package, and download it.
3. Uncompress the ZIP file.
4. Locate the **BPC Setup** folder and copy it to the Application and Web server.
5. Exit all Windows programs.
6. From the BPC Setup folder, run **StartUp.exe**.
7. Follow the instructions provided.

Installing the Client Components

There are three ways the *client portion* of the latest support package can be installed:

- Users can start Business Planning and Consolidation and go to the Client Software Center page (available from the Launch page), and install BPC Office or BPC Administration.
- If users have a previous version of the client installed, enable the *Client Auto Update* option in Server Manager. The applicable client component is installed when the user connects to the server.
- Push the client components to users' computers using the SMS client installation. It is available on the Service Marketplace Software Distribution Center at `http://service.sap.com/swdc`. Follow this path: ▶ *Download* → *Support Packages and Patches* → *Entry by Application Group* → *SAP Application*

Components → *SAP BPC for Microsoft* → *SAP BPC 7.0 FOR MICROSOFT* → *SAP CPM BPC SMS 7.0 M* → *Win32* ↵.

Installing the Language Pack

This release supports Chinese, Czech, Danish, Dutch, Finnish, French, German, Hungarian (available in SP04), Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Russian, Slovak, Spanish, and Swedish on Application servers and Web servers with an English operating system.

To install the *language pack* of the corresponding support package, complete the server installation as described above, then perform these steps on both the Application server and Web server:

1. Go to SAP Service Marketplace Software Distribution Center at `http://service.sap.com/swdc` and follow this path: *Download* → *Support Packages and Patches* → *Entry by Application Group* → *SAP Application Components* → *SAP BPC for Microsoft* → *SAP BPC 7.0 FOR MICROSOFT* → *SAP CPM BPC LANGU 7.0 M* → *Win32* ↵.
2. Select the ZIP file for the desired language pack and download it.
3. Uncompress the ZIP file.
4. Locate the BPC Setup folder and copy it to the Application and Web server.
5. Exit all Windows programs.
6. From the BPC Setup folder, run **StartUp.exe**, and follow the instructions provided

NOTE

If you use a Japanese, Chinese, Korean, Czech, Hungarian, Polish, Slovak, or Russian version of Business Planning and Consolidation, you must select the appropriate language in the *Language for Non-Unicode Programs* dropdown list within *Regional and Language Options* on your application and web servers.

3 Migrate Application Sets from 7M SP00 and later

To migrate application sets from 7M SP00 or later, perform these steps on each application set.

Procedure

1. In the Administration Console, choose *Modify Application* without selecting any options. This applies several fixes related to business rules and send governor.
2. **If you are migrating to 7M SP04 only:** When members are added to or deleted from a secured dimension by scheduled dimension processing, the security for member access is applied. You must apply this change in one of the following ways (see SAP Note 1326502):
   - Copy Admin_MakeDim.dtsx from \\<*FileServer*>\..\WebFolders\ ApShell\<*Application*>\DataManager\PackageFiles\Examples to \\<*FileServer*>\..\WebFolders\< *Application Set*>\<*Application*>\DataManager\PackageFiles\Examples.
   - Modify the Admin_MakeDim package using the Modify Package option in Data Manager, and add the following two package scripts:
     1. PROMPT(RADIOBUTTON, %SECURITY%, "Process Security after creating the dimension",1,{"Yes","No"},{"1","0"})
     2. TASK(ADMIN_MakeDim, BSECURITYPROCESS, %SECURITYPROCES%)

   

   NOTE

   If you use customized packages, you must apply this change using the second method listed above.
3. **If you are migrating to 7M SP04 only:** The By Users and By Account journal reports now contain the Remark field. If you have already used a journal, you have to create the journal again through the Journal Wizard in the Administration Console. See SAP Note 1309969.
4. The following migration steps apply to support packages before SP04. If you performed these migration steps when upgrading to a previous support package, you do not need to do them for SP04.

   If you have **not** performed these steps before, do them now:
   - To support the Excel 2007 file format for dimension member sheets, BPC Administration asks for the Excel file format for the dimension member sheet whether Excel 2007 format or not. Once you set this value, you cannot change it through the Administration console. See SAP Note 1265872.

- To use the new packages for importing data with an Excel 2007 and Access 2007 file, you should copy them from the WebFolder of ApShell to the desired application folder of your application set. See SAP Note 1289927.

  The following items are provided in the new packages:
  - Import Access2007 into Fact Table.dtsx
  - Import Access2007.dtsx
  - Import Excel2007 into Fact Table.dtsx
  - Import Excel2007.dtsx

  The path where the packages exist is *WebFolder\ApShell\[Application]\DataManager\PackageFiles\Examples*.
- If you need to upgrade SQL 2005 dtsx packages to SQL 2008, customized packages must be created in SQL 2008 BIDS (Business Intelligence Development Studio). To do this, copy BPC Task DLLs for SQL 2008 to the Task folder under SQL 2008 BIDS installed. If your system uses packages provided from ApShell, copy packages from ApShell after upgrading to SQL 2008. See SAP Note 1294591.
- To use the fixed OwnershipCalculation package, you should copy the file OwnershipCalculation.dtsx from BPC *Data\Webfolders\ApShell\Ownership\DataManager\PackageFiles\Examples* to the location of the desired application set. See SAP Note 1284231.
- If you already have Team profile security reports, update existing reports by choosing the Publish By Team report within Web Administration. See SAP Note 1281223.
- If you have an Offline report template, you should execute *Make Online* and *Take Offline* again to apply fixes related to the Offline report template. See SAP Note 1280117.
- If you have seen an ambiguous column name when running the Journal report, you have to rerun *Create Journal template* from the Admin console to upgrade the Journal report. See SAP Note 1299217.

NOTE

Starting with BPC 7.0M SP03, the following actions no longer require you to select *Process Application* when modifying an application (see SAP Note 1284857):

- Applying the SIGNED_DATA_FORMAT application parameter
- Applying newly created or modified stored procedures

4 Migrate Application Sets from Version 5.0 or 5.1

For the 5.0 or 5.1 application set migration, you must perform the following steps on each application set.

Prerequisites

You have OutlookSoft 5.0 SP2 (or later, including version 5.1), installed. (This means you have build 5.0.477 or later installed.)

Procedure

1. Back up the `tblAppLock` table if it contains work status records. If you have work status records for members in a hierarchy other than the one specified in the APPROVALORG parameter, you may lose all work status data upon logging on to the BPC Admin Console for the first time.

   

   NOTE

   If you are unsure as to whether or not you have these data types, check the `tblAppLock` table for work status data.

   There is a new BaseHierarchy column that defines the base hierarchy of a dimension for use with work status. BaseHierarchy is added in WorkStatus Setting to support multiple hierarchies and is used to flag the specific hierarchy of the WorkStatus dimension instead of APPROVALORG in the tblDefaults table. To set or view the BaseHierarchy column, choose the work status settings for an appplication within the Administration module.

   To back up `tblAppLock`, where `App` is the application name:

   1. Open SQL Server Management Studio and connect to the data engine.
   2. Highlight the SQL Application set database node, right-click and select *New Query*.
   3. Execute the following query:

      ```
      select * into tblAppLock_save from tblAppLock;
      ```

   4. Expand the application set database and highlight the table `tblAppLock_save`.
   5. Right-click and select *Design*.
   6. On the right panel, add the column `TimeID`.
   7. In *Data Type* enter `nvarchar(20)`.
   8. Select the *Allow Nulls* option.
   9. Close the items, and choose *Yes* to save the changes.
   10. From the SQL Application set database node, right-click and select *New Query*.
   11. Execute the following query:

```
update t set t.TimeID=m.TIMEID from mbrTime as m,tblAppLock_save as t where
m.ID=t.TIME;
```

2. To apply the new Time-type dimension schema, you must do the following to each Time-type dimension in the AppSet:
   1. Log on to the Administration Console.
   2. Select *Dimension Library*, then select a Time-type dimension.
   3. From the action pane, choose *Maintain dimension property* → *Modify dimension property*.
      In this step, the ISBEGINNING property is added to the dimension. (In a later step, you will need to add it to the Time dimension member sheet.)
   4. If the message, *This dimension must be processed because the InApp property has been changed for* **DIMENSION_NAME** appears, choose *OK*.
   5. Open the Time-type dimension member sheet by selecting *Maintain dimension members*.
   6. Add the column *ISBeginning* to the Time-type dimension member sheet.
   7. In the *Process Dimensions* dialog box, select the *Process members from member sheet* check box and select the *Full Process* check box.
3. For each YTD application, do the following:
   1. In BPC Administration (Web Admin Tasks), add the application parameter **YTDInputTimeHir**. Set the value to the Time dimension hierarchy to which you would like to send data (such as **H1** or **H2**).
      If you do not add the parameter, you can send data only to the time members of the first hierarchy (since the default value of the parameter is **H1**).
   2. In the Time dimension member sheet, enter **1** in the *ISBEGINNING* property for the periods that correspond to the beginning of a year, such as Q1 or January. Do this for all Time dimensions that incorporate YTD calculations.
      In case of parent level members, enter **1** in the property for starting period members (Total, Q1 and JAN).
      In case of base-level members, enter **1** in the property for starting period members and for members of other hierarchies whose TIMEID is the same as one of the YTD input hierarchies.

      EXAMPLE

      Consider a case in which **2008.JAN** of the YTD input hierarchy and **2007.FY.NOV** in another hierarchy are both using the same TIMEID (such as **20080100**). In this case, the *ISBEGINNING* value of both **2008.JAN** and **2007.FY.NOV** would be **1**.

      Set the property value to **0** (or blank) for all other periods.
4. If a Time-type dimension has multiple hierarchies, observe following guidelines:
   1. For performance reasons, we recommend using a maximum of three hierarchies in the Time-type dimension.
   2. The level of each hierarchy can be a different structure, but the top level and base level should be the same between hierarchies.

3. If the Time-type dimension is one of the work status dimensions and has multiple hierarchies, a hierarchy of approval should be set in work status settings of the Admin Console. If you do not set the hierarchy, the first occurrence of a Time-type dimension will be the approval hierarchy for work status.

5. The MeasureFormula table is created (rather than the tblFormula and tblYTDFormula tables) when you process dimensions. Because the custom measure is not copied to the MeasureFormula table, you will need to create a custom measure for the MeasureFormula table.
6. To apply fixes, execute the following procedure:
   1. Log on to the Administration Console.
   2. From the navigation pane, choose *Application*, and then select each application.
   3. Select *Modify application* from the action pane, select *Process Application options*, and then select *Modify Application*.
7. To run the Management Console feature, change *Authentication and access control* of the *ManagementConsole* virtual directory in IIS from *Integrated Windows authentication* to *Basic Authentication*. You can find the virtual directory in the Application server. The option can be found in IIS on the *Directory Security* tab of the virtual directory property.

   

   NOTE

   For information about logging on to Management Console in a network load balancing environment, see SAP Note 1294085.
8. To view the log in the Management Console, enable the ODBC log IIS website.
   1. Configure SQL Server for mixed authentication mode:
      1. Access the context menu of the server name in Management Studio.
      2. On the *Security* tab, select the *SQL Server and Windows Authentication mode* radio button.
   2. Create an SQL login for IIS.
      1. In the context menu of the *Security* → *Logins* icon, choose *New Login*.
      2. Create a login name and select *SQL Server authentication*.
      3. Enter the password and set the default database to *AppServer*.
      4. On the *User Mapping* tab, give the user access to AppServer and make it a DBO.
      5. Set the *db_owner* role.
   3. In IIS Manager of the Application server, in the context menu of the website which is installed on BPC 7 M, choose*Properties*.
      1. On the *Web Site* tab, select *ODBC Logging* from the *Active Log format* field.
      2. Choose *Properties*.
   4. Check the user ID and password of the system DSN that was created by the installation package.
      1. *DSN name* is `BPC_ManagementDSN`.
      2. *Table* is `BPCLog`
      3. Enter the *Username* and *Password* for the SQL user you created earlier in this procedure.
      4. Choose *OK*.

5. Run the ODBC Data Source Administrator.
   1. On the *System DSN* tab, choose *Configure*.
   2. In the *Microsoft SQL Server DSN Configuration* dialog box, ensure that the correct server is selected. Enter data as required and choose *Next*.
   3. In the *Microsoft SQL Server DSN Configuration* dialog box:
      - Select *With SQL Server authentication using a login ID and password entered by the user*.
      - Enter the *Username* and *Password* for the SQL user you created earlier in this procedure.
      - Choose *Next*.
   4. In the *Microsoft SQL Server DSN Configuration* dialog box:, verify the information that appears and choose *Next*.
   5. Choose *Finish*.

9. To restore the contents of the `tblAppLock` table, from the SQL Application set database node, right-click and choose *New Query*. Execute the following queries, replacing `App` with the application name.
   1. `select * into tbl_temp from tblAppLock_save` where 1=0;
   2.
```
insert into tbl_temp (statuscode, Category, Entity, TimeID, Time,
UpdateBy ,lastupdate)
(select 2, a.Category, a.Entity, a.TimeID, a.Time, 'XXXX' ,max(a.lastupdate)
from tblAppLock_save a , tblAppLock_save b
Where a.category=b.category
and a.entity=b.entity
and a.timeid=b.timeid
and a.Time=b.Time
GROUP BY A.Category, A.Entity, A.TimeID, A.Time
HAVING count(*)>1);
```
   3.
```
update tbl_temp
set statuscode = (select distinct statuscode from tblAppLock_save b where
tbl_temp.category=b.category
and tbl_temp.entity=b.entity
and tbl_temp.timeid=b.timeid
and tbl_temp.Time=b.Time
and tbl_temp.lastupdate = b.lastupdate),
updateby= (select distinct updateby from tblAppLock_save b where
tbl_temp.category=b.category
and tbl_temp.entity=b.entity
and tbl_temp.timeid=b.timeid
and tbl_temp.Time=b.Time
and tbl_temp.lastupdate = b.lastupdate)
```
   4. `insert into tblAppLock`

```
select * from tbl_temp;
```

5. `drop table tbl_temp;`

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	■ Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. ■ Cross-references to other documentation or published works
Example	■ Output on the screen following a user action, for example, messages ■ Source code or syntax quoted directly from a program ■ File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

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