Installation and Configuration Guide

CUSTOMER

SAP Hybris Marketing Release 1605
Document Version: 1.01 – October 25, 2016

Installation and Configuration Guide 1605

Content

Document History

Before you start, make sure you have the latest version of this document. You can find the latest version at the following location:

http://service.sap.com/mkt

The following table provides an overview of the most important document changes. If the information you are looking for is not described in this guide or if you find something described incorrectly, please send an email to mailto:saphybrismarketingfeedback@sap.com and we'll update this guide.

Table 1: Document History

Version	Date	Description
1.0	2016-11-21	Initial version for SAP Hybris Marketing 1605 (1.2 SP02)
1.01	2016-10-25	Chapter added: • *Document History* Chapter adapted: • 14.2.1, *Prerequisites* (*Configuring the SAP Web Dispatcher*): One SAP Web Dispatcher parameter corrected

1 Introduction

This installation guide describes how to install the high-performance application *SAP Hybris Marketing* on premise. The application can also be operated in the SAP HANA Enterprise Cloud.

1.1 About this Document

This guide applies to consultants and system administrators who intend to install one or more of the components of *SAP Hybris Marketing*. It covers both the technical side (how installation is done) and the functional side (for example, customizing activities).

- **Constraints**:
  This guide provides you with the main application-specific installation and configuration steps. The installation and configuration of the underlying SAP HANA platform and the required SAP NetWeaver ABAP AS system are not described in this installation guide in particular, but in separate documentation, referenced where necessary.
- **Considerations**:
  - The sections and instructions in this guide are relevant for all above mentioned components unless otherwise expressly indicated.
  - Access to the separate solutions is managed via the corresponding authorization roles. For more information about activating roles, see Generating Authorization Profiles for the User Interface [page 64].
  - Before starting the installation make sure that you are aware of all required installation steps that have to be executed before the actual installation of the application. The prerequisites are mentioned in this document.

1.2 Feedback

We'd really like to know what you think of the quality, structure or content of this guide. Please send your feedback to us at mailto:saphybrismarketingfeedback@sap.com.

1.3 Licenses of SAP Hybris Marketing

SAP Hybris Marketing contains the following licenses that can be purchased separately:

- SAP Hybris Marketing Data Management (mandatory)

- SAP Hybris Marketing Insight
- SAP Hybris Marketing Segmentation
- SAP Hybris Marketing Recommendation
- SAP Hybris Marketing Planning
- SAP Hybris Marketing Acquisition

Any licensing of *SAP Hybris Marketing* includes the marketing platform SAP Hybris Marketing Data Management. In addition, the common objects Target Group, Campaign, Interaction, Export Definition, Predictive Model, and User Lists are always available regardless of the purchased license.

For a brief description of the *SAP Hybris Marketing* licenses and the corresponding applications, see the SAP Help Portal at:

http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing*

http://help.sap.com/saphelp_mkt122/helpdata/en/38/4cec689d514199bff6b2837a5482c8/frameset.htm

1.4 Integration

SAP Hybris Marketing is based on the SAP HANA appliance software, in particular the SAP HANA database, and SAP NetWeaver 7.5.

The SAP HANA database must be available and configured with the latest revision of the current support package before starting the actual installation of *SAP Hybris Marketing*. You can check the exact support package and revision levels required in the *Preconditions* section of Release Information Note 1885803.

For more information about how to receive the latest revision of the SAP HANA database, see the *SAP HANA Master Update Guide* at:

http://help.sap.com/hana_appliance *Installation and Upgrade Information* > *SAP HANA Update Guides*

(http://help.sap.com/hana/SAP_HANA_Master_Update_Guide_en.pdf)

In addition, if you plan to use SAP ERP and/or SAP CRM as source system to operate your marketing, sales and/or service business, the following releases are proposed for the different solutions:

Table 2:

SAP Hybris Marketing License	SAP ERP	SAP CRM
SAP Hybris Marketing Insight	6.0 or higher (mandatory)	7.01 (SP04 plus SAP Note 1995798) or higher (optional)
SAP Hybris Marketing Segmentation on SAP ERP Accounts	6.0 or higher (mandatory)	7.01 (SP04 plus SAP Note 1995798) or higher (optional)
SAP Hybris Marketing Segmentation on SAP CRM Business Partners	6.0 or higher (optional)	7.01 (SP04 plus SAP Note 1995798) or higher (mandatory)

SAP Hybris Marketing License	SAP ERP	SAP CRM
SAP Hybris Marketing Data Management	6.0 or higher (optional)	7.01 (SP04 plus SAP Note 1995798) or higher (optional)
SAP Hybris Marketing Recommendation	6.0 or higher (mandatory)	

The solutions *SAP Hybris Marketing Acquisition* and *SAP Hybris Marketing Planning* do not use SAP ERP or SAP CRM data.

Browser Recommendations

For a recommendation concerning the appropriate browser platform to run the application, refer to the Product Availability Matrix (PAM) at:

http://support.sap.com/pam under `SAP HYBRIS MARKETING`

1.5 SAP Notes for Installation

The Release Information Note (RIN) contains general installation information concerning *SAP Hybris Marketing*.

> **Note**
>
> Ensure that you have carefully read the RIN before you implement the included SAP Notes. The RIN contains information about the exact point in time for the implementation of every included SAP Note:
>
> - Before the import of the support package
> - Before executing the technical configuration
> - After executing the technical configuration
> - SAP Note only relevant for a certain solution scope

If there is additional information or updates to the installation process described in this installation and configuration guide, you find the corresponding information in the SAP Notes mentioned below in the table.

Make sure that you have the up-to-date version of each SAP Note, which you can find on the SAP Service Marketplace at: http://support.sap.com/notes.

Table 3:

SAP Note Number	Title	Description
Release Information Note 1885803	RIN SAP Hybris Marketing (formerly SAP Customer Engagement Intelligence)	Contains information and references in the context of applying *SAP Hybris Marketing*

SAP Note Number	Title	Description
Note 1863478	Release strategy for the ABAP add-on SAP_CUAN 110	Besides the SAP Product Availability Matrix (PAM), this note contains important information about the **installation package** *SAP Hybris Marketing*, including the **material number** for the package, and a list of required support packages.
Note 2075269	Follow Up Tasks after Client Copy	Contains information about the actions to be carried out after client copy
Note 2076331	Follow Up Tasks after System Copy	Contains information about the actions to be carried out after system copy

2 Technical System Landscape

SAP Hybris Marketing is based on the following components:

- SAP HANA 1.0, SPS11
- SAP NetWeaver 7.50, SP03 (including SAP NetWeaver Gateway and SAP NetWeaver UI Extension)
- SAP Business Suite Foundation (SAP_BS_FND) 7.48, SP01

> **Note**
>
> Some applications such as *Customer Journey Insight*, are SAP Fiori apps. All SAP Fiori apps are directly deployed on the *SAP Hybris Marketing* server.

All these components are embedded in the SAP Fiori launchpad that is based on HTML5 (SAPUI5). Some administrative tasks, such as Customizing tasks, are also based on the traditional SAP GUI technology, which is not explicitly shown in Figure 1. Figure 1 gives an example of a possible technical system landscape for *SAP Hybris Marketing*, which includes the use of SAP ERP and SAP CRM data.

The communication of the front-end components with the back end, which is an SAP NetWeaver 7.5 application server, is based on HTTPS. The Web applications are embedded in a shell that ensures secure session management. All servers run behind the firewall.

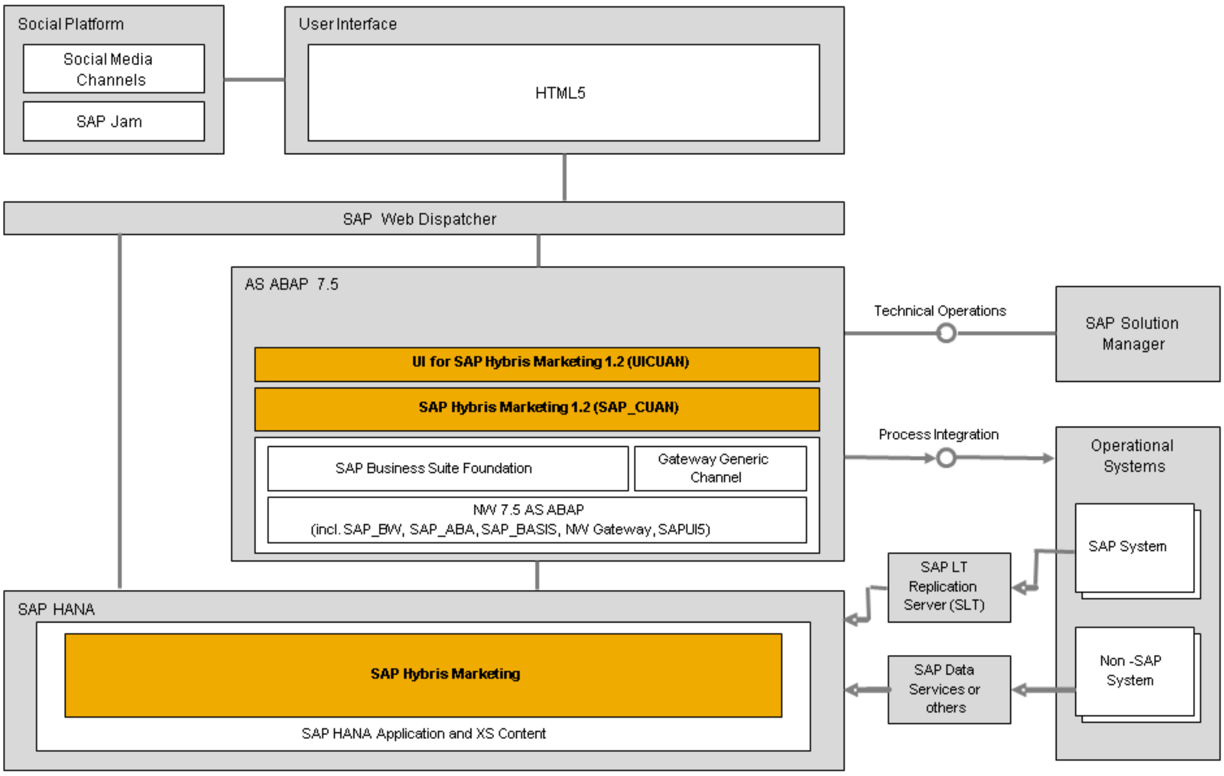
The requests of the stateless Web applications to the back end are based on OData (read and write) using HTTPS.

The main reused components of the application server are those of SAP NetWeaver 7.5, for example, user management, authentication, and authorization. SAP Gateway handles the requests from the front end through OData channel services.

The underlying database for *SAP Hybris Marketing* is SAP HANA 1.0. To leverage the capabilities of the SAP HANA database, parts of the segmentation, search capabilities, and analysis are performed directly on the database using stored procedures and SAP HANA information models, such as calculation views, attribute views, and analytical views. All access to the database is done through the SAP NetWeaver 7.5 application server using OpenSQL or the ABAP Database Connectivity (ADBC) interface of ABAP to the SAP HANA database. Only the user management of SAP NetWeaver is required and only a technical user within the SAP HANA database is required for the access.

Data from SAP ERP, for example, and other SAP components can be replicated to *SAP Hybris Marketing* with the SAP LT replication framework. For more information about the tables that are required for the usage of *SAP Hybris Marketing* in connection with SAP ERP or SAP CRM, and need to be configured in SAP LT, see the *Appendix* section of this document. Results for *SAP Hybris Marketing* can be sent to SAP CRM. For other deployment options of *SAP Hybris Marketing* with SAP ERP and SAP CRM, see Deployment Scenarios [page 14].

The SAP NetWeaver role and authorization framework is used with *SAP Hybris Marketing*.



More Information

For more information about the SAP HANA database system landscape, see the SAP Help Portal at:

http://help.sap.com/hana_platform Security English SAP HANA Security Guide

(http://help.sap.com/hana/SAP_HANA_Security_Guide_en.pdf)

For more information about the technical system landscape, see the resources listed in the following table.

Table 4:

Topic	Guide/Tool	Quick Link on SAP Service Marketplace or SDN
High availability	High Availability for SAP Solutions	http://scn.sap.com/docs/DOC-7848
Technical landscape design	See applicable documents	http://sdn.sap.com/irj/sdn/landscape-design

Topic	Guide/Tool	Quick Link on SAP Service Marketplace or SDN
Security	See applicable documents	http://scn.sap.com/community/security http://help.sap.com/mkt *Security Information*

3 Deployment Scenarios

SAP Hybris Marketing can use SAP ERP data from SAP ERP 6.0 or higher and SAP CRM data from enhancement package (EHP) 1 for SAP CRM 7.0 SP04 (plus SAP Note 1995798) or higher. Several deployment options are available. Your decision for a certain deployment option depends on the release of your source system and the *SAP Hybris Marketing* applications that you want to run. The table below shows which data is mandatory for each solution.

For recommendations concerning the appropriate system landscape to run the application, refer to the Product Availability Matrix (PAM) at http://support.sap.com/pam under *SAP HYBRIS MARKETING* > *Related Links*.

Table 5:

SAP Hybris Marketing Application	SAP ERP	SAP CRM
Data Management	optional	optional
Insight - Marketing Executive Dash-board	optional	optional
Insight - Relationship Analysis Sales, Stratification, Margin Decomposition	**mandatory**	optional
Insight - Relationship Analysis Presales	optional	**mandatory**
Segmentation on SAP ERP Accounts	**mandatory**	optional
Segmentation on SAP CRM Accounts	optional	**mandatory**
Segmentation on contact of third party data	optional	optional
Recommendation	optional	optional
Planning	optional	optional
Acquisition	optional	optional

3.1 Scenario A: Standalone Deployment

SAP Hybris Marketing Segmentation and *SAP Hybris Marketing Data Management* can be used without SAP ERP or SAP CRM data. Third-party data to be used in these applications can be replicated to the SAP HANA database or imported to the *SAP Hybris Marketing* system with different tools:

- For the replication of your third-party data, you can use one of the SAP HANA data provisioning tools described in the SAP HANA Master Guide under:

  http://help.sap.com/hana_appliance *Installation and Update* *SAP HANA Master Guide* (http://help.sap.com/hana/SAP_HANA_Master_Guide_en.pdf)
- For the import of your third-party data to your *SAP Hybris Marketing* system, you can use one of the inbound interfaces for data upload, described in the Data Management Upload Interfaces guide under:

  http://help.sap.com/mkt *Configuration and Deployment Information* *Data Management Upload Interfaces*
  http://service.sap.com/%7Esapidb/012002523100012509712016E/

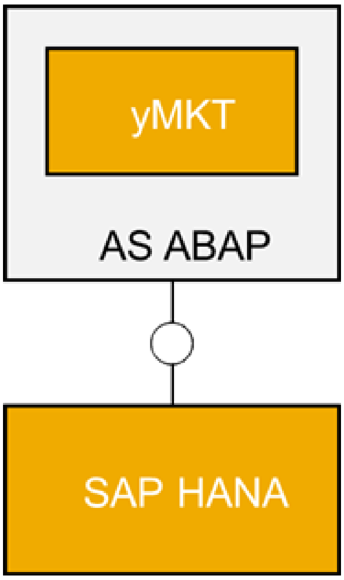


Figure 1: Standalone Deployment

3.2 Scenario B: Hub-Deployment with Separate SAP HANA System

You can deploy *SAP Hybris Marketing* in a side-by-side approach. This means that the application runs on a separate application server with a separate SAP HANA database. In this case the data is replicated from your source system into the SAP HANA database with the SAP Landscape Transformation Replication Server (SAP LT).

Using separate deployment and data replication ensures that there is no incident or disruption in your production source systems, since the application does not directly access your production data. Replication also allows your SAP HANA-based application to work with data even if your production systems do not use SAP HANA.

For more information about the data replication, see section 6 of the Installation guide at http://help.sap.com/mkt *Installation and Upgrade Information* > *Installation* > *Installation Guide*.

In this scenario, you can, in addition, upload third-party data to your *SAP Hybris Marketing* system by using one of the inbound interfaces for data upload, described in the Data Management Upload Interfaces guide under:

http://help.sap.com/mkt *Configuration and Deployment Information* > *Data Management Upload Interfaces*

http://service.sap.com/%7Esapidb/012002523100012509712016E/

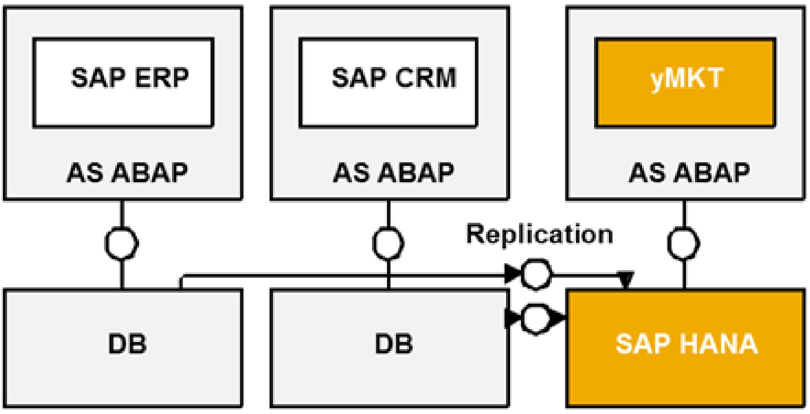


Figure 2: Hub-Deployment with Separate SAP HANA System

The following table shows the minimum required releases:

Table 6:

SAP ERP	SAP CRM
SAP ERP 6.0	EHP1 for SAP CRM 7.0 SP04 plus SAP Note 1995798

3.3 Scenario C: Hub-Deployment with Shared SAP HANA System of SAP Business Suite

SAP Hybris Marketing can be deployed in parallel with SAP Business Suite applications on the same SAP HANA database. In this case *SAP Hybris Marketing* shares the SAP HANA database with one SAP ERP, one SAP CRM, or one SAP S/4HANA system, reading SAP ERP, SAP CRM, or SAP S/4HANA data directly without replication.

> **Note**
>
> In this scenario, ensure that you have carefully read and considered SAP Note 1826100 as it contains more information about this deployment.

In this scenario, you can, in addition, upload third-party data to your *SAP Hybris Marketing* system by using one of the inbound interfaces for data upload, described in the Data Management Upload Interfaces guide under:

http://help.sap.com/mkt > *Configuration and Deployment Information* > *Data Management Upload Interfaces*

http://service.sap.com/%7Esapidb/012002523100012509712016E/

If you decide to deploy *SAP Hybris Marketing* in such a deployment scenario, you have the following options:

- You can deploy *SAP Hybris Marketing* on the same SAP HANA database as your SAP ERP system if your SAP ERP system is minimum an EHP6 for SAP ERP 6.0 on SAP HANA. In addition, if you require to use SAP CRM business data as well, you can replicate this data from your SAP CRM system into the same SAP HANA database. This means that the *SAP Hybris Marketing* system is deployed with a shared SAP HANA database of SAP ERP, whereas SAP CRM runs on a separate database, as shown in scenario B.

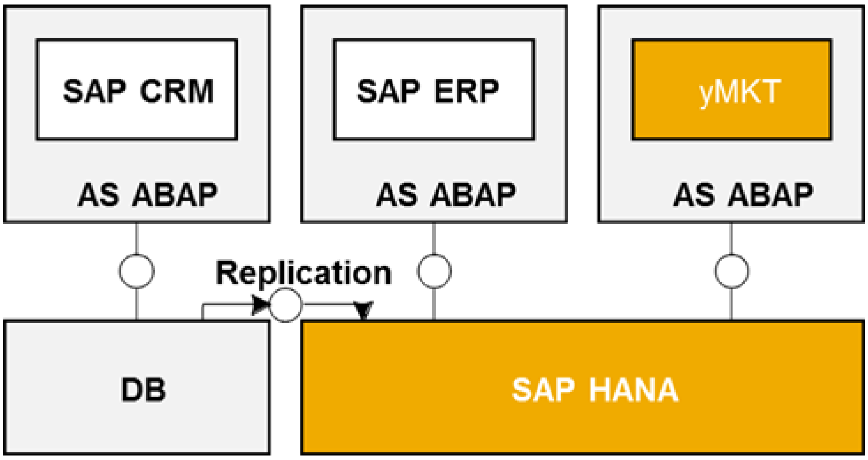


Figure 3: Hub-Deployment with Shared SAP HANA System of SAP ERP

The following table shows the minimum required releases:

Table 7:

SAP ERP	SAP CRM
EHP6 for SAP ERP 6.0 on SAP HANA	EHP1 for SAP CRM 7.0 SP04 plus SAP Note 1995798
EHP7 for SAP ERP 6.0	EHP1 for SAP CRM 7.0 SP04 plus SAP Note 1995798

- You can deploy *SAP Hybris Marketing* on the same SAP HANA database as your SAP CRM system if your SAP CRM system is minimum an EHP2 for SAP CRM 7.0 on SAP HANA. In addition, if you require to use SAP ERP business data as well, you can replicate this data from your SAP ERP system into the same SAP HANA database. This means that the *SAP Hybris Marketing* system is deployed with a shared SAP HANA database of SAP CRM, whereas SAP ERP runs on a separate database, as shown in scenario B.

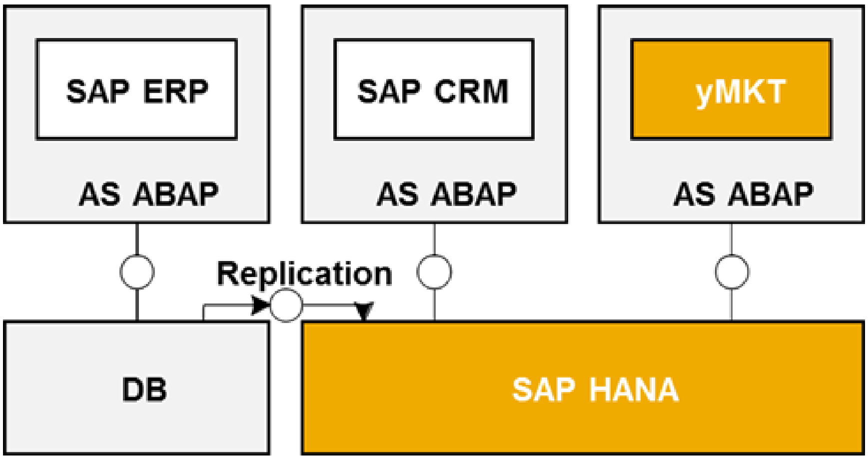


Figure 4: Hub-Deployment with Shared SAP HANA System of SAP CRM

The following table shows the minimum required releases:

Table 8:

SAP ERP	SAP CRM
SAP ERP 6.0	EHP2 for SAP CRM 7.0 on SAP HANA SP01 plus SAP Note 1996523
SAP ERP 6.0	EHP3 for SAP CRM 7.0

- You can deploy *SAP Hybris Marketing* on the same SAP HANA database as your SAP S/4HANA system. In addition, if you require to use SAP CRM or SAP ERP business data as well, you can replicate this data from your SAP CRM or SAP ERP system into the same SAP HANA database. This means that the *SAP Hybris Marketing* system is deployed with a shared SAP HANA database of SAP S/4HANA, whereas SAP CRM or SAP ERP runs on a separate database, as shown in scenario B.

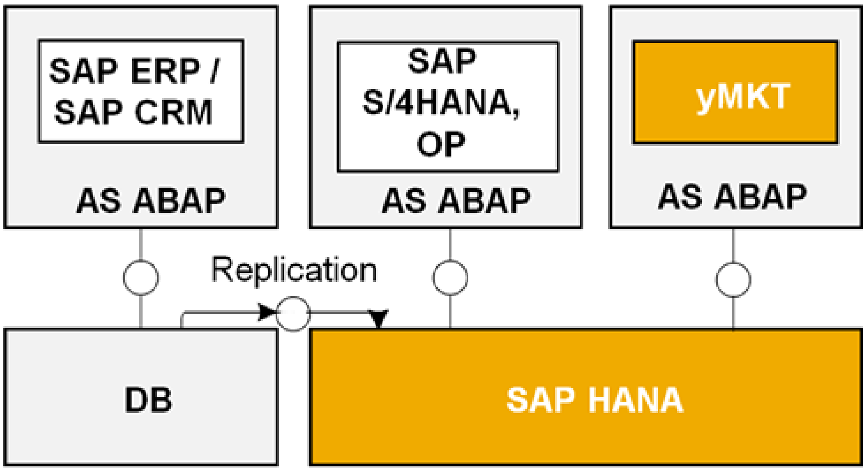


Figure 5: Hub-Deployment with Shared SAP HANA System of SAP S/4HANA

3.4 Scenario D: Hub-Deployment with Shared SAP HANA System of Other Application

SAP Hybris Marketing can be deployed on an SAP HANA database that is already used for applications which are listed in SAP Note 1661202 – *Support for Multiple Applications on SAP HANA*. If you require to use SAP ERP or SAP CRM business data as well, you can replicate this data into the same SAP HANA database.

This deployment scenario is not separately pointed out in this installation guide. If you require to replicate data refer to the deployment process for scenario B; if you do **not** require to replicate data refer to the deployment process for scenario A.

In this scenario, you can, in addition, upload third-party data to your *SAP Hybris Marketing* system by using one of the inbound interfaces for data upload, described in the Data Management Upload Interfaces guide under:

http://help.sap.com/mkt *Configuration and Deployment Information* › *Data Management Upload Interfaces*

http://service.sap.com/%7Esapidb/012002523100012509712016E/

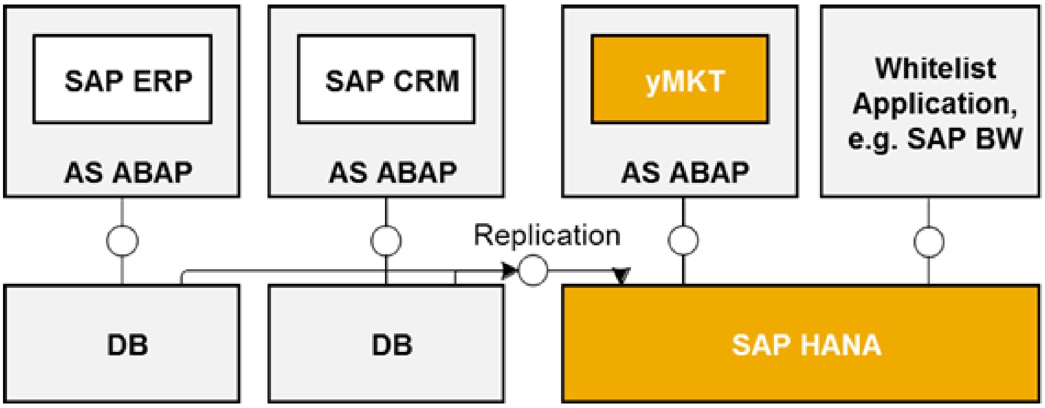


Figure 6: Hub-Deployment with Shared SAP HANA System of Other Application

4 Development and Production Systems

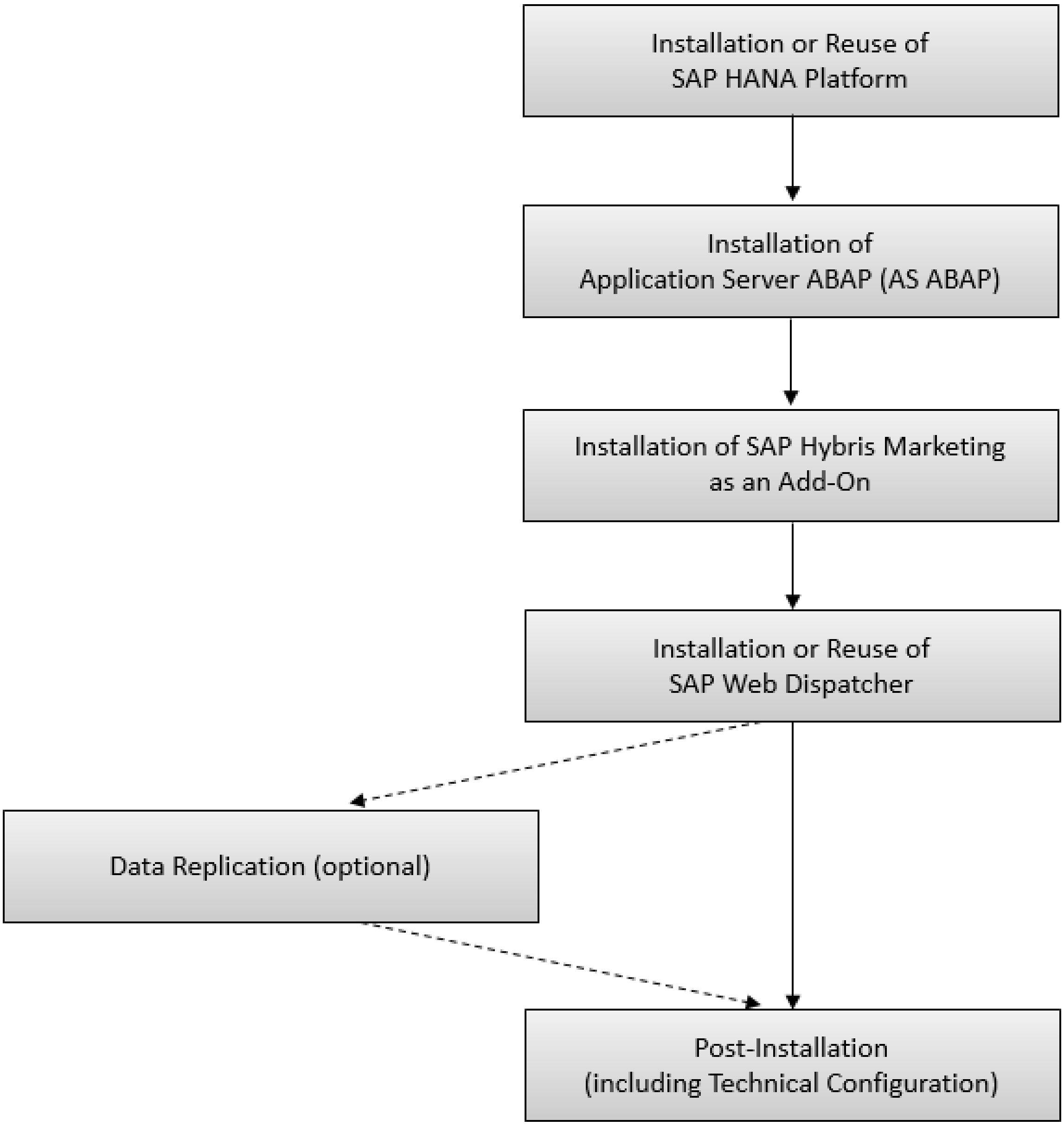
We recommend that you install or update first in a development system. After testing, you may begin installation in your production system.

> **Note**
>
> Certain tasks are only carried out in the development system (see Creating Development Package [page 46]). These tasks generate repository objects and Customizing objects that are imported into the production system at a later point in time (see Applying Technical Configuration Artifacts to Production System [page 61]).

5 Installation

This section explains how the base installation of *SAP Hybris Marketing* on premise is to be executed. *SAP Hybris Marketing* can also be operated in the SAP HANA Enterprise Cloud. Since *SAP Hybris Marketing* runs on an SAP NetWeaver AS ABAP system with SAP HANA as the primary and only database, you must set up the database first. The SAP NetWeaver AS ABAP system will be installed on this SAP HANA database in a second step.

The following flow chart illustrates the sequence of the installation process according to the various sections of this installation guide.



5.1 Installation of the SAP HANA Platform

As an appliance, SAP HANA uses software components from SAP optimized for proven hardware provided by SAP's hardware partners. Therefore, the components of SAP HANA can only be installed by certified hardware partners on validated hardware running a specific operating system.

To ensure that your SAP HANA appliance is optimally prepared for use with your application, you should consider the following topics.

5.1.1 Correct Sizing of the SAP HANA Database

For help in determining SAP HANA sizing for *SAP Hybris Marketing*, see the *Sizing Guide for SAP Hybris Marketing* on the Service Market Place at:

http://service.sap.com/sizing *Sizing Guidelines* > *Database and Technology* > *SAP In-Memory Computing*.

(http://service.sap.com/%7Esapidb/011000358700000373142013E)

Another option is to use the web-based Quick Sizer at http://service.sap.com/quicksizing.

5.1.2 Installing the SAP HANA Database

For information about the installation and configuration of the SAP HANA database follow the instructions in the corresponding master and installation guides. You find both documents under http://help.sap.com/hana_platform *Installation and Upgrade Information*:

- *SAP HANA Master Guide*: http://help.sap.com/hana/SAP_HANA_Master_Guide_en.pdf
- *SAP HANA Server Installation Guide*: http://help.sap.com/hana/SAP_HANA_Server_Installation_Guide_en.pdf

5.1.3 Updating to Higher Revisions of the SAP HANA Database

SAP ships SAP HANA Support Package revisions, which contain latest capabilities in SAP HANA. As your current installation might not contain the latest revision, you must update your SAP HANA database accordingly. Check the Release Information Note (RIN) for *SAP Hybris Marketing* 1885803 to find information about the minimum SAP HANA revision required for *SAP Hybris Marketing*.

You can find the RIN under http://support.sap.com/notes. Enter the number of the RIN in the corresponding field in the upper right corner of the screen.

For information about the SAP HANA update, see the SAP HANA Master Update Guide at:

http://help.sap.com/hana_platform ▶ *Installation and Upgrade Information* ▶ *SAP HANA Update Guides* ▶ *SAP HANA Master Update Guide* ◀

http://help.sap.com/hana/SAP_HANA_Master_Update_Guide_en.pdf

5.1.4 Installing the SAP HANA Application Function Library (AFL)

An SAP HANA system consists of the SAP HANA server and additional components like the *Application Function Library (AFL)*. *SAP Hybris Marketing* requires this library. Therefore install the library as described in section *Managing SAP HANA System Components* of the *SAP HANA Administration Guide* under http://help.sap.com ▶ *SAP HANA Platform* ▶ *System Administration* ▶ *SAP HANA Administration Guide* ◀.

(http://help.sap.com/saphelp_hanaplatform/helpdata/en/10/c5148560354ac98f1b098cb2bbf03a/content.htm)

5.2 Installation of Application Server ABAP (AS ABAP)

> **Note**
>
> Your application runs only on a SAP NetWeaver system that is installed with SAP HANA as the primary and only database system. Other types of database systems are not supported.

The *SAP Hybris Marketing* application is based on an SAP NetWeaver 7.5 application server (AS). The AS ABAP installation is executed using the software provisioning manager, a tool that is part of the software logistics toolset (SL Toolset). The SL Toolset is a product-independent delivery channel that delivers up-to-date software logistics tools. The software provisioning manager performs software provisioning processes such as installation, deinstallation, or system copy.

To install this AS ABAP, follow the procedure described below.

5.2.1 Standard Installation of SAP NetWeaver 7.5

To install SAP NetWeaver AS ABAP Release 7.5, follow the instructions in the installation guide for your operating system (*SAP Systems Based on the Application Server ABAP of SAP NetWeaver on <Your Operating System>: SAP HANA Database Using Software Provisioning Manager 1.0*). You can find the appropriate guide on the SAP Help Portal at:

http://help.sap.com/nw75 ▶ *Installation and Upgrade Information* ▶ *Installation Guides* ▶ *Installation* ▶ *Plan and Install* ▶ *Installation - SAP NetWeaver 7.5-based Systems* ▶ *Download Page* ▶ *SAP HANA Database* ▶ *<Your Operating System>* ▶ *ABAP* ◀

(https://service.sap.com/~sapidb/011000358700000828172012E ▶ SAP HANA Database ▶ <Your Operating System> ▶ ABAP ▶)

Note

Ensure that the time zone of the ABAP server and the server of the SAP HANA database match.

Caution

Ensure that you execute the installation procedure in two steps:

1. During the installation planning, select **SPS01** (not SPS02 or SPS03) of SAP NetWeaver basis component `SAPK-75001INSAPBASIS`, and execute the installation procedure.
2. Once you completed the installation, repeat the procedure and select **the latest available SPS** of basis component `SAP_BASIS 750`. Execute the installation once again.

For background information, see SAP Note 2158103.

5.3 Installing SAP Hybris Marketing as an Add-On

The deployment of the *SAP Hybris Marketing* application is executed with the Software Update Manager (SUM), a tool of the Software Logistics Toolset (SL Toolset). The SUM is a multi-purpose tool that supports various processes, such as performing a release upgrade, installing enhancement packages, applying support package stacks, or updating single components. The SUM requires a stack configuration file as well as all software files for the installation. All files are provided by the maintenance optimizer, a tool being part of the *SAP Solution Manager* that plays a central role for a successful upgrade and update of SAP product systems. To ensure a successful installation, follow the steps below.

Note

Make sure you use *SAP Solution Manager 7.1*, Support Package 05 or higher, as lower versions do not support SAP HANA scenarios.

5.3.1 Running the Maintenance Optimizer

The maintenance optimizer in *SAP Solution Manager* calculates and downloads the required software files and creates the stack configuration file.

SAP Hybris Marketing requires the latest support package of SAP NetWeaver 7.5. You have already completed the standard installation of SAP NetWeaver in section Installation of Application Server ABAP (AS ABAP) [page 25].

The maintenance optimizer ensures that the update of the standard installation to the required support package level and the installation of *SAP Hybris Marketing* is done in one single stack configuration. As *SAP Hybris Marketing* requires some additional components such as SAP Business Suite Foundation, the maintenance optimizer also ensures that all required components are automatically identified and provided for installation with the add-on.

When using the maintenance optimizer transaction, select *SAP Hybris Marketing* as add-on. Under product *SAP Hybris Marketing* two software components are listed: *Hybris Marketing* and *Smart Business Hybris MKT*. If you want to use analytical SAP Fiori apps, also select component *Smart Business Hybris MKT*.

For information on how to run a maintenance optimizer transaction, see chapter 6, *Executing a Maintenance Optimizer Transaction*, in the following guide in the SAP Community Network at:

http://wiki.scn.sap.com/wiki/display/SM/Maintenance+Tools%3A+Maintenance+Planner+and+Maintenance+Optimizer *Section "Guides"* > *Maintenance Planning Guide for SAP Solution Manager 7.1 SP05*

(https://service.sap.com/~sapdownload/011000358700000639422012E)

5.3.2 Running the Software Update Manager

The Software Update Manager takes the result of the maintenance optimizer, the stack configuration file and the software files, and installs *SAP Hybris Marketing*.

For the concrete steps to be executed, see the SAP Service Marketplace at:

http://service.sap.com/sltoolset *Software Logistics Toolset 1.0* > *Documentation* > *System Maintenance* > *Updating SAP Systems Using Software Update Manager 1.0*

(https://service.sap.com/~sapidb/011000358700000890302012E)

> **Note**
>
> If you install the *SAP Hybris Marketing* add-on on SAP NetWeaver or you initially install EHP3 for SAP CRM 7.0, use the resource-minimized update strategy (see section 3.9, *Update Strategy Parameter*, of the above mentioned document).

5.4 Installing the SAP Web Dispatcher

SAP Hybris Marketing comprises both ABAP-based applications and SAP HANA Extended Application Services (SAP HANA XS) applications. For this reason, *SAP Hybris Marketing* requires an SAP Web Dispatcher due to the same origin policy of browsers.

> **Note**
>
> If you already use an SAP Web Dispatcher in your systemlandscape, you can reuse it for *SAP Hybris Marketing* purposes. For the required configuration, see Configuring the SAP Web Dispatcher [page 40].

To install the SAP Web Dispatcher, follow the instructions under http://help.sap.com/nw75 *Installation and Upgrade Information* > *Additional Installation Information* > *Installation - Standalone Engines* > *Installation: Web Dispatcher for SAP NetWeaver 7.1 or Higher* > *<Your Operating System>*

For Microsoft Windows:

https://service.sap.com/~sapidb/011000358700000877232012E

For Unix:

https://service.sap.com/~sapidb/011000358700000851902012E

For IBM i:

https://service.sap.com/~sapidb/011000358700000877242012E

Integrating SAP Hybris Marketing User Interfaces via IFrame in other Systems (for example, CRM)

When an *SAP Hybris Marketing* user interface is integrated into other systems via IFrame, the system only accepts requests from a shared origin (same origin policy). This means that integrated systems need to use the same host and port.

As a result, you have to either:

- Set up *SAP Hybris Marketing* and your SAP CRM system with the same port and host, **or**
- Set up a Web Dispatcher.

5.5 Installing the SAP Online Documentation

SAP currently provides an HTML-based solution for the online documentation, including the Application Help, Glossary, Implementation Guide (IMG), and Release Notes. You can display the documentation with a Java-compatible Web browser on all front-end platforms supported by SAP.

Prerequisite

You have installed and set up the SAP Library in the SAP NetWeaver system on which the application runs. For more information, see the installation guide at the SAP Service Market Place:

http://service.sap.com/instguides *SAP NetWeaver* > *SAP NetWeaver 7.5* > *Installation* and then in the table at the bottom of the page *4 – Installation – Clients* > *Installation: SAP Library*

(https://service.sap.com/~sapidb/011000358700000862942012E)

5.6 Installing SAPUI5 Tools and ABAP Development Tools

If you want to enhance or change the user interface of *SAP Hybris Marketing*, then you must install the required development tools, which are the SAPUI5 Tools integrated development environment (IDE) and the SAPUI5 Team Provider, on each client. With the installation of these tools, you also install the ABAP Development Tools.

For detailed information about the installation process, see the master guide for user interface add-ons for SAP NetWeaver on the SAP Service Marketplace at:

http://service.sap.com/instguides › *SAP NetWeaver* › *User Interface Add-On for SAP NetWeaver* › *Master Guide for UI Add-On for SAP NetWeaver SPS 07* ›

(https://service.sap.com/~sapidb/011000358700000436252013E)

> **Note**
>
> *SAP Hybris Marketing* is based on SAPUI5 version 1.20. You may possibly install a newer patch version of version 1.20. In this case, your SAPUI5 Tools IDE displays a message stating that your IDE and back-end version do not match. Ignore this message.

5.7 Implementation of SAP Notes Listed in Release Information Note

To complete the installation process, you must implement all SAP Notes listed in the Release Information Note (RIN) for *SAP Hybris Marketing*, number 1885803 that have not been implemented before.

You can find the RIN under http://support.sap.com/notes, entering the RIN number in the corresponding field on the screen.

To install the SAP Notes in the RIN, do the following:

1. Log on to the back-end SAP NetWeaver system as an administrator. You can log on to the production client of the application; installing SAP Notes is a client-independent procedure.
2. Use transaction `SNOTE` to install the SAP Notes in the RIN.

6 Data Replication

> **Note**
>
> This section is relevant only if you have decided to deploy *SAP Hybris Marketing* separately from your source system using one of the hub-deployment approaches.
>
> For more information about the various deployment scenarios, see Deployment Scenarios [page 14].

6.1 Installation of SAP Landscape Transformation Replication Server

To install and set up trigger-based data replication, follow the instructions in the following installation guide in the SAP Help Portal at:

http://help.sap.com/hana_options_replication ▸ *Installation Guide – Trigger-Based Data Replication Using SAP LT Replication Server for SAP HANA* ▸ *Installation and Upgrade Information* ◂

(http://help.sap.com/hana/SAP_HANA_Installation_Guide_Trigger_Based_Replication_SLT_en.pdf)

> **Recommendation**
>
> SAP recommends to use at minimum the SAP Landscape Transformation Replication Server version 2.0 SP05 for *SAP Hybris Marketing*.

6.1.1 Connection Setup between SAP Hybris Marketing and SAP LT Replication Server

1. Log on to your SAP LT Replication Server system.
2. Enter transaction `PFCG`, and copy the role `SAP_IUUC_REPL_REMOTE`. You must enhance the role by the following authorizations:
   - **Authorization Object**: `S_RFC`
     - *Activity*: **`16 (Execute)`**
     - *Name of RFC to be protected*: `SDTB`, `SDIFRUNTIME`
     - *Type of RFC to be protected*: `FUGR`
   - **Authorization Object**: `S_RFC`
     - *Activity*: **`16 (Execute)`**
     - *Name of RFC to be protected*: `SCSI_GET_SYSTEM_INFO`

        - *Type of RFC to be protected*: FUNC
    - **Authorization Object**: S_DMIS
        - *Activity*: 02 (Change)
        - *MBT PCL Scenario*: SLOP
        - *MBT PCL Processing Role Level*: **PACKAGE**

    For more information about the maintenance of authorization profiles, see the SAP Help Portal at: http://help.sap.com/nw75 > *Application Help* > *Function-Oriented View* > *Security* > *Identity Management* > *User and Role Administration of Application Server ABAP* > *Reference Documentation for User and Role Administration* > *Organization Without the Profile Generator* > *Creating and Maintaining Authorizations/ Profiles Manually* > *Maintaining Authorizations and Their Values* (http://help.sap.com/saphelp_nw75/helpdata/en/4c/a289f2d4233b9ee10000000a42189b/content.htm)
3. Generate the profile of your role and leave transaction PFCG.
4. Enter transaction SU01 and create a user with your new role. You use this user in the RFC destination between your *SAP Hybris Marketing* system and the SAP LT Replication Server.
5. Log on to your *SAP Hybris Marketing* system.
6. Enter transaction SM59, and choose the *Create* menu option in the *Edit* menu to create a new ABAP connection between your *SAP Hybris Marketing* system and your SAP LT Replication Server.
7. Enter your name for the RFC destination. Enter all required information and use the user you created in step 4.
8. Confirm your entries and save the RFC destination. Test the RFC destination using the connection test.

6.1.2 Connection Setup between SAP Hybris Marketing and SAP Source System

During the installation of SAP Landscape Transformation Replication Server you have installed the SAP Landscape Transformation add-on on your SAP source system. To enable the replication between your *SAP Hybris Marketing* system and your SAP source system, you must create an RFC destination. To do so, execute the following steps:

1. Log on to your SAP source system.
2. Enter transaction PFCG, and copy the role SAP_IUUC_REPL_REMOTE. You must enhance the copied role by the following authorizations:
    - **Authorization Object**: S_RFC
        - *Activity*: 16 (Execute)
        - *Name of RFC to be protected*: SDTB, SDIFRUNTIME
        - *Type of RFC to be protected*: FUGR

    For more information about the maintenance of authorization profiles, see the SAP Help Portal at: http://help.sap.com/nw75 > *Application Help* > *Function-Oriented View* > *Security* > *Identity Management* > *User and Role Administration of Application Server ABAP* > *Reference Documentation for User and Role Administration* > *Organization Without the Profile Generator* > *Creating and Maintaining Authorizations/ Profiles Manually* > *Maintaining Authorizations and Their Values* (http://help.sap.com/saphelp_nw75/helpdata/en/4c/a289f2d4233b9ee10000000a42189b/content.htm)
3. Generate the profile of your role and leave transaction PFCG.

4. Enter transaction `SU01` and create a user with your new role. You use this user in the RFC destination between your *SAP Hybris Marketing* system and your SAP source system.
5. Log on to your *SAP Hybris Marketing* system.
6. Enter transaction `SM59`, and choose the *Create* menu option in the *Edit* menu to create a new ABAP connection between your *SAP Hybris Marketing* system and your SAP source system.
7. Enter your name for the RFC destination. Enter all required information and use the user you created in step 4.
8. Confirm your entries and save the RFC destination. Test the RFC destination using the connection test.

6.1.3 Basic Configuration of Data Replication

You must create a basic configuration for all source systems from which you want to replicate data to your *SAP Hybris Marketing* system. To do so, follow the instructions in section *Creating a Configuration* of the Application Operations Guide for SAP Landscape Transformation Replication Server. You find this Application Operations Guide on the SAP Help Portal at:

http://help.sap.com/hana_options_replication ▶ *System Administration and Maintenance Information* ▶ *Application Operations Guide – Trigger-Based Data Replication Using SAP LT Replication Server for SAP HANA* ◀

(http://help.sap.com/hana/SAP_Landscape_Transformation_for_SAP_HANA_Operations_Guide_en.pdf)

The technical configuration (see Technical Configuration Steps [page 47]) automatically adjusts this configuration and adds the required tables (See also the Replicated Tables sections in the Appendix [page 137]).

7 Post-Installation

After you have installed all the components that you need to run the *SAP Hybris Marketing* application and have implemented all SAP Notes from the RIN 1885803, carry out the following technical configuration steps. You find these steps listed in the following sections.

Caution

- Make sure that you carry out the following post-installation steps in the same client in which you want to run the *SAP Hybris Marketing* application.
- The sequence of the post-installation steps reflected by the following sections depends on the role of system, in which you execute the installation: The sequence in the development system differs from the sequence in the production system.
  For more information, see the graphic below.

Note

During the following post-installation process executed in your development system, transport orders are created, which contain generated objects and customizing entries. While some of the orders are created automatically by the *Technical Configuration Wizard*, you need to create other orders manually. After testing, the transport orders are imported into the productive system in a specific sequence (see Applying Technical Configuration Artifacts to Production System [page 61]). When you carry out the installation in the production system, the wizard automatically skips the tasks that no longer need to be carried out, due to the import of transport orders from the development system.

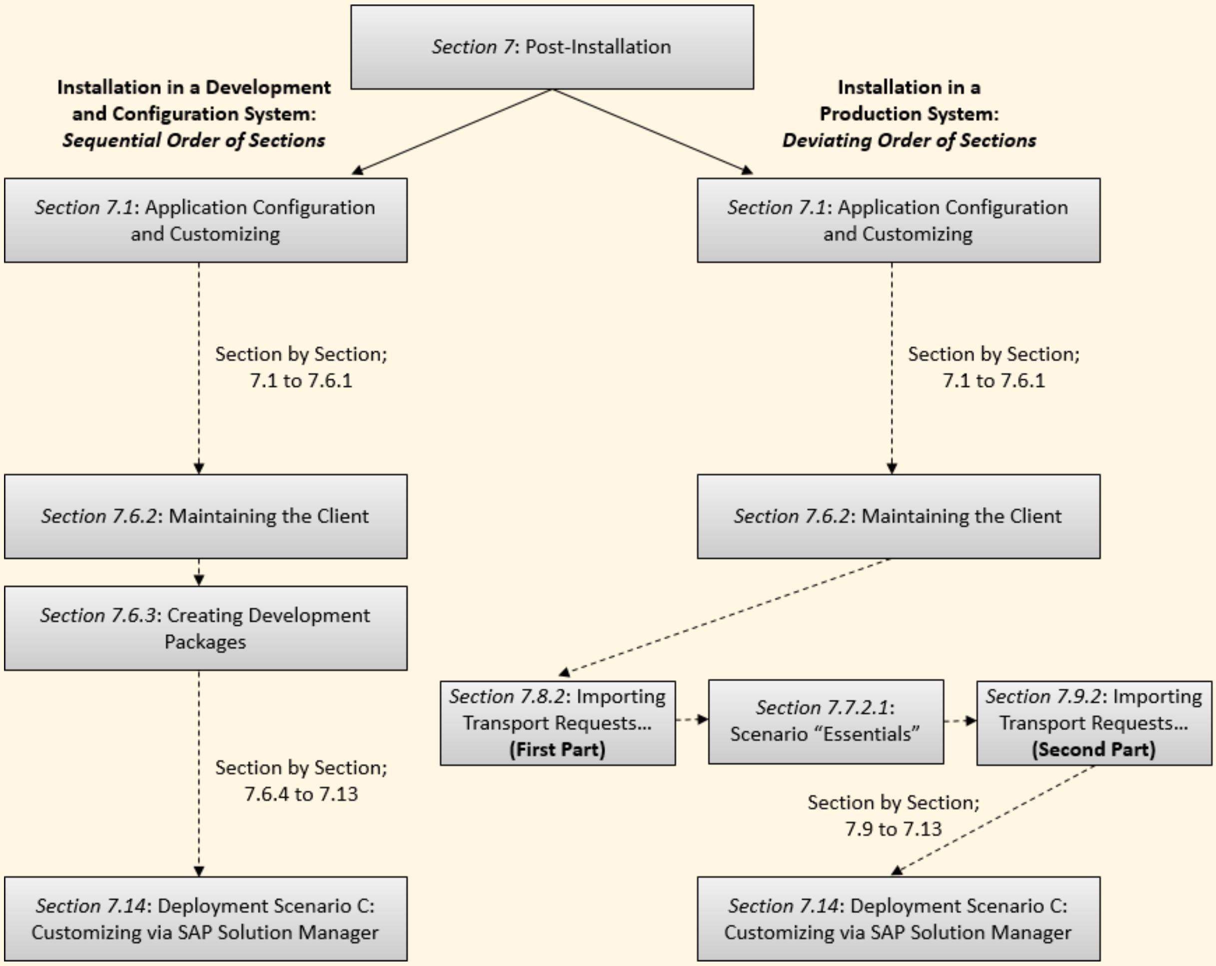


Figure 7: Post-Installation Process Flow for Development and Production Systems

7.1 Information Required for Post-Installation

In order to avoid delays in the post-installation process, we recommend that you collect as many of the following details as you can, before you start:

- Technical name of systems you are integrating with
- Users with access to those systems
- SAP HANA
- Transport layer for transport requests

7.2 Application Configuration and Customizing

> **Note**
>
> If you are using deployment scenario C (Scenario C: Hub-Deployment with Shared SAP HANA System of SAP Business Suite [page 17]), skip this section.

7.2.1 Initial Customizing Adjustment

With the installation of *SAP Hybris Marketing* (see Installing SAP Hybris Marketing as an Add-On [page 26]), Customizing is installed only in client 000 of your SAP NetWeaver system. To ensure the availability of all relevant Customizing in your productive client, we recommend to create this client via client copy from client 000. During the client copy process, select a copy role, which ensures that Customizing is copied.

> **Note**
>
> Ensure that the *SAP Hybris Marketing* add-on is installed before executing the client copy. If the *SAP Hybris Marketing* add-on is not installed the Customizing to be copied is not available.

For more information, see the SAP Help Portal under:

http://help.sap.com/nw75 › *System Administration and Maintenance Information* › *Technical Operations for SAP NetWeaver* › *Administration of Application Server ABAP* › *Change and Transport System* › *BC - Client Copy and Transport (BC-CTS-CCO)* › *Client Copier*

http://help.sap.com/saphelp_nw75/helpdata/en/4d/7ce15219a00f88e10000000a42189b/content.htm

7.2.2 Customizing via SAP Solution Manager

You execute the configuration for *SAP Hybris Marketing* with the help of SAP Solution Manager 7.1, SP05 or higher. In your Solution Management system, you can find the corresponding business scenario group, named *SAP Hybris Marketing* under *Applications Powered by SAP HANA* in TA `SOLAR01`.

> **Note**
>
> Make sure that you implemented `ST ICO 150_700 SP046` to access the required content.

More Information

- For an introduction to the use of the SAP Solution Manager content, see the SAP Help Portal at: http://help.sap.com/crm702 *SAP Enhancement Package 2 for SAP CRM 7.0* > *Configuration and Deployment Information* > *SAP Solution Manager Content* (http://help.sap.com/content/documentation/solutionmanager/DISPLAYSOLMANCONTENT.pdf)
- For detailed information on executing application configuration via SAP Solution Manager, see the SAP Help Portal at:
  http://help.sap.com/solutionmanager71 *Application Help* > *SAP Solution Manager 7.1 SPS14* > *SAP Solution Manager* > *Solution Implementation* > *Implementation/Upgrade Work Center* > *Business Blueprint* (http://help.sap.com/saphelp_sm71_sp14/helpdata/en/45/f6da633a292312e10000000a11466f/content.htm)

7.3 Configuring the SAP HANA Database

7.3.1 Configuring SSL for SAP HANA XS Engine

Set up secure communication between Web-based clients and *SAP HANA Extended Application Services*. The document *How to Configure SSL for SAP HANA XS Engine Using SAP Crypto Libraries* can serve as an example for this setup. You can download the document from the SAP Community Network (SCN) at: https://scn.sap.com/docs/DOC-47434.

You must establish a trust relationship between your AS ABAP server and your SAP HANA database later on. For this reason, you either export the certificate of your SAP HANA server or the Certificate Authority (CA) root certificate, which has been used to sign the SAP HANA server certificate. Provide the certificate to the AS ABAP administrator who performs the SSL setup of the AS ABAP system.

> **Recommendation**
>
> You can display and copy the certificates of the SAP HANA server to the file by connecting your internet browser to the address *https://<host name of SAP HANA server>:43<instance number>*, and choosing the lock symbol in the address bar.
>
> For more information, see SAP Note 1094342.

7.3.2 SAP HANA User for Technical Configuration

During the technical configuration of *SAP Hybris Marketing*, several actions must be executed on the SAP HANA database which require different authorizations. To ensure that all of these authorizations are available, run the following script to create a user with sufficient authorization for carrying out the *SAP Hybris Marketing* technical configuration on the SAP HANA database.

> **Note**
>
> The SAP HANA authorizations required during business usage are granted to the AS ABAP user (`SAP<SID>`).
>
> You can deactivate the user after successful completion of the technical configuration for the installation of *SAP Hybris Marketing*. You must reactivate the user again when performing technical configuration such as scoping at a later point in time or upgrade.

Proceed as follows:

1. Log on to the SAP HANA studio with the `SYSTEM` user.
2. Open the *SQL console*.
3. Copy the script below into the *SQL console*. If there are more than one, choose the correct database connection.
4. Choose *Execute (F8)*.
5. Check the log to see if all steps were carried out successfully.

> **Note**
>
> - If you want to copy and paste the SQL statements below, ensure that all blank characters are copied accurately.
> - After running the script, you must ensure the following:
> -
>   - Check if every single statement is successfully executed.
>   - Log off and log back on again in order to change the initial password.

```
CREATE USER TC_USER PASSWORD Initial1234;
-- object privileges
GRANT EXECUTE ON "GRANT_ACTIVATED_ROLE" TO TC_USER WITH GRANT OPTION;
GRANT EXECUTE ON "REVOKE_ACTIVATED_ROLE" TO TC_USER WITH GRANT OPTION;
GRANT EXECUTE ON "GRANT_PRIVILEGE_ON_ACTIVATED_CONTENT" TO TC_USER WITH GRANT
OPTION;
GRANT EXECUTE ON "REVOKE_PRIVILEGE_ON_ACTIVATED_CONTENT" TO TC_USER WITH GRANT
OPTION;
GRANT EXECUTE ON "GRANT_APPLICATION_PRIVILEGE" TO TC_USER WITH GRANT OPTION;
GRANT EXECUTE ON "REVOKE_APPLICATION_PRIVILEGE" TO TC_USER WITH GRANT OPTION;
GRANT EXECUTE ON "GRANT_SCHEMA_PRIVILEGE_ON_ACTIVATED_CONTENT" TO TC_USER WITH
GRANT OPTION;
GRANT EXECUTE ON "REVOKE_SCHEMA_PRIVILEGE_ON_ACTIVATED_CONTENT" TO TC_USER WITH
GRANT OPTION;
GRANT EXECUTE ON "AFL_WRAPPER_GENERATOR" TO TC_USER WITH GRANT OPTION;
GRANT EXECUTE ON "AFL_WRAPPER_ERASER" TO TC_USER WITH GRANT OPTION;
GRANT SELECT ON SCHEMA "_SYS_REPO" TO TC_USER WITH GRANT OPTION;
GRANT UPDATE, SELECT ON "_SYS_XS"."SQL_CONNECTIONS" TO TC_USER;
-- system privileges
GRANT "CREATE R SCRIPT" TO TC_USER WITH ADMIN OPTION;
GRANT "CREATE STRUCTURED PRIVILEGE" TO TC_USER WITH ADMIN OPTION;
GRANT "CREATE SCHEMA" TO TC_USER WITH ADMIN OPTION;
GRANT "ROLE ADMIN" TO TC_USER WITH ADMIN OPTION;
GRANT "DATA ADMIN" TO TC_USER WITH ADMIN OPTION;
GRANT "USER ADMIN" TO TC_USER WITH ADMIN OPTION;
CALL
_SYS_REPO.GRANT_ACTIVATED_ROLE('sap.hana.xs.admin.roles::RuntimeConfAdministrator',
 'TC_USER');
CALL
_SYS_REPO.GRANT_ACTIVATED_ROLE('sap.hana.xs.admin.roles::SQLCCAdministrator',
'TC_USER');
```

7.3.3 Authorization Settings for Deployment Scenario C: Hub-Deployment with Shared SAP HANA System of SAP Business Suite

> **Note**
>
> You follow the instructions in this section if you have decided to run deployment scenario C, *Hub-Deployment with Shared SAP HANA System of SAP Business Suite*. If you have chosen deployment scenario C, carry out the following steps. If not, proceed with section 7.4.

7.3.3.1 Authorization Enhancement for _SYS_REPO User

Check if user `_SYS_REPO` has `SELECT` authorization on your embedded SAP ERP or SAP CRM system:

1. Log on to the SAP HANA studio with a user that is allowed to view the authorizations of user `_SYS_REPO`, for example, the `SAP<SID>` user of your embedded SAP ERP or SAP CRM system.
   If you are familiar with the SQL Console you can run the following command:

   ```
   SELECT DISTINCT PRIVILEGE, IS_GRANTABLE, IS_VALID FROM SYS.EFFECTIVE_PRIVILEGES
   WHERE USER_NAME = '_SYS_REPO' AND SCHEMA_NAME = '<schema name of your embedded
   SAP ERP or SAP CRM> ' AND PRIVILEGE = 'SELECT' AND IS_GRANTABLE = 'TRUE' AND
   IS_VALID = 'TRUE'
   ```

   If you get a result, the user `_SYS_REPO` is allowed to select data from the schema of your embedded SAP ERP or SAP CRM system.
2. If you are not familiar with the SQL Console choose the *Modeler* perspective in the upper right corner.
3. In the *Navigator* section on the left, expand the folder of your SAP HANA database.
4. Expand the corresponding *Security* folder and the *Users* folder.
5. Double-click the `_SYS_REPO` user.
6. On the *Granted Roles* tab check if role `ABAP_SYS_REPO` is assigned. If the role is assigned, double click the role. The role will be opened in a new tab.
7. Navigate to *Object Privileges* tab. Check that the schema of your embedded deployed SAP ERP or SAP CRM system is displayed and marked as *Grantable to others*.

If you cannot find the `SELECT` authorization for your embedded deployed SAP ERP or SAP CRM system add the following authorizations to the `_SYS_REPO` user of your *SAP Hybris Marketing* system:

1. Log on to the SAP HANA studio with the `SAP<SID>` user of your embedded deployed SAP ERP or SAP CRM system.
2. Choose the *Modeler* perspective in the upper right corner.
3. In the *Navigator* section on the left, expand the folder of your SAP HANA database.
4. Expand the corresponding *Security* folder and the *Users* folder.
5. Double-click the `_SYS_REPO` user.
6. In the center section, choose the *Object Privileges* tab, and choose the + pushbutton.
7. In the following *Select Catalog Object* dialog box, search for the schema of your embedded deployed SAP ERP or SAP CRM system.

8. Select the privilege *SELECT* and the corresponding *Grantable to Others* option.
9. Save the `_SYS_REPO` user.

The *SELECT* authorization is required for SAP HANA content activation. The `_SYS_REPO` user is a system user that actually activates the SAP HANA content regardless of which user started the activation. The user takes all models and creates the corresponding runtime objects. After having activated all models the `_SYS_REPO` user grants read access to the activated models to the user that started the activation. For this reason, the *Grantable to Others* option is required.

More Information

For more information about granting privileges to users, see the SAP HANA Developer Guide under *Setting Up Roles and Authorizations → Privileges → Granting Privileges to Users*. See the SAP Help Portal at:

http://help.sap.com/hana_appliance *Development and Modeling* *SAP HANA Developer Guide*

(http://help.sap.com/hana/SAP_HANA_Developer_Guide_en.pdf)

7.4 Profile Parameter Settings

SAP Hybris Marketing requires several profile parameter settings, for example, to set up HTTPS connections.

After you have set the required profile parameters, restart your system to make the parameter changes effective.

7.4.1 Configuring HTTPS

We recommend to realize the communication of the SAP Web Dispatcher (see section Installing the SAP Web Dispatcher [page 27]) with the SAP NetWeaver system via HTTPS.

To prepare the system for HTTPS communication, log on with the User for Application Setup [page 43], go to transaction `RZ10`, and configure an HTTPS port in the instance profile of the system.

The following example shows how these parameters may be set:

Example

```
icm/server_port_1 = PROT=HTTPS, PORT=443$$
```

For more information, see the SAP Help Portal at:

http://help.sap.com/nw75 *Application Help* *Function-Oriented View* *Application Server* *Application Server Infrastructure* *Components of SAP NetWeaver Application Structure* *Internet Communication Manager (ICM) - SAP NetWeaver* *Administration of the ICM-SAPNetWeaver* *ICM Parameters -Reference for ABAP and Java*

(http://help.sap.com/saphelp_nw75/helpdata/en/26/4e0677f391432fb0af513731bbf58d/content.htm).

7.4.2 Configuring the Secure Sockets Layer Protocol

To secure HTTP connections to and from the SAP NetWeaver system you use the Secure Sockets Layer (SSL) protocol.

To configure SSL, follow the instructions of the documentation in the SAP Help Portal at:

http://help.sap.com/nw75 *Application Help* › *Function-Oriented View* › *Security* › *Network and Transport Layer Security* › *Transport Layer Security on the AS ABAP* › *Configuring the AS ABAP to Support SSL*

(http://help.sap.com/saphelp_nw75/helpdata/en/49/23501ebf5a1902e10000000a42189c/content.htm)

Note

You can check whether the SAP Cryptographic Library software is already installed in your system by doing the following:

1. Go to transaction `STRUST`.
2. Choose *Environment* › *Display SSF_Version*. If the system response shows that the `SAPCRYPTOLIB` is installed, then you can skip the installation step for the Cryptographic Library in the documentation cited above.

7.5 Configuring the SAP Web Dispatcher

To configure the SAP Web Dispatcher you must set up a few communication channels. To do so, proceed as follows.

Communication Between SAP Web Dispatcher and Clients

To configure the communication between clients (for example, your browser) and the SAP Web Dispatcher, follow the instructions under http://help.sap.com/fiori_bs2013 *System Landscape Required for SAP Fiori* › *Setup of SAP Fiori System Landscape with SAP HANA Database* › *Communication Channels* › *Communication Between Client and SAP Web Dispatcher* › *Configuring Communication Channel between Clients and SAP Web Dispatcher*.

(http://help.sap.com/fiori_bs2013/helpdata/en/f8/0f4453d2e57425e10000000a44176d/content.htm)

As a result, your SAP Web Dispatcher will support HTTPS connections. Keep your HTTPS port in mind.

Communication Between SAP Web Dispatcher and AS ABAP

To configure the communication between the SAP Web Dispatcher and the *SAP Hybris Marketing* AS ABAP server, follow the instructions in sections *Defining Routing Rules for SAP Web Dispatcher and ABAP Front-End*, *Defining Routing Rules for SAP Web Dispatcher and ABAP Backend*, and *Configuring Trust Between SAP Web Dispatcher and ABAP Servers* under http://help.sap.com/fiori_bs2013 *System Landscape Required for SAP Fiori* > *System Landscape* > *Setup of Fiori System Landscape with SAP HANA Database* > *Communication Channels* > *Communication Between SAP Web Dispatcher and ABAP Servers*.

(http://help.sap.com/fiori_bs2013/helpdata/en/49/e243539b47e344e10000000a423f68/content.htm)

Your *SAP Hybris Marketing* server is the AS ABAP front-end and back-end server.

Communication Between SAP Web Dispatcher and SAP HANA XS

To set up communication between the SAP Web Dispatcher and SAP HANA Extended Application Services, follow the instructions under http://help.sap.com/fiori_bs2013 *System Landscape Required for SAP Fiori* > *System Landscape* > *Setup of Fiori System Landscape with SAP HANA XS* > *Communication Channels* > *Communication Between SAP Web Dispatcher and SAP HANA XS*.

(http://help.sap.com/fiori_bs2013/helpdata/en/49/e243539b47e344e10000000a423f68/content.htm)

> **Note**
>
> The communication paths for communication between the SAP Web Dispatcher and the SAP HANA Extended Application Services must be disjunct to be paths for communication between the SAP Web Dispatcher and the *SAP Hybris Marketing* AS ABAP server.

When you define the routing rules between SAP Web Dispatcher and SAP HANA Extended Application Services, add `/sap/hana-app` and `/sap/ui5` as a routing rule.

During configuration a number of changes are made to the SAP Web Dispatcher profile. The following list shows a sample profile after configuration.

Example

Sample Code

```
SAPSYSTEMNAME = WEB
SAPSYSTEM = 02
INSTANCE_NAME = W02
DIR_CT_RUN = $(DIR_EXE_ROOT)$(DIR_SEP)$(OS_UNICODE)$(DIR_SEP)linuxx86_64
DIR_EXECUTABLE = $(DIR_CT_RUN)
DIR_PROFILE = $(DIR_INSTALL)/profile
_PF = $(DIR_PROFILE)/WEB_W02_mo-29b02f1eb
SETENV_00 = DIR_LIBRARY=$(DIR_LIBRARY)
SETENV_01 = LD_LIBRARY_PATH=$(DIR_LIBRARY):%(LD_LIBRARY_PATH)
SETENV_02 = SHLIB_PATH=$(DIR_LIBRARY):%(SHLIB_PATH)
SETENV_03 = LIBPATH=$(DIR_LIBRARY):%(LIBPATH)
SETENV_04 = PATH=$(DIR_EXECUTABLE):%(PATH)
#-----------------------------------------------------------------------
# Accessibility of Message Server
#-----------------------------------------------------------------------
rdisp/mshost = mo-29b02f1eb
ms/http_port = 8100
#-----------------------------------------------------------------------
# Configuration for medium scenario
#-----------------------------------------------------------------------
```

```
icm/max_conn = 500
icm/max_sockets = 1024
icm/req_queue_len = 500
icm/min_threads = 10
icm/max_threads = 50
mpi/total_size_MB = 80
#-----------------------------------------------------------------------
# SAP Web Dispatcher Ports
#-----------------------------------------------------------------------
icm/server_port_0 = PROT=HTTP,HOST=mo-29b02f1eb,PORT=81$$
icm/server_port_1 = PROT=HTTPS,HOST=mo-29b02f1eb,PORT=82$$
icm/HTTP/admin_0 = PREFIX=/sap/admin,DOCROOT=$(DIR_DATA)$(DIR_SEP)
icmandir,AUTHFILE=$(icm/authfile),PORT=81$$;82$$
#-----------------------------------------------------------------------
# Start Web Dispatcher
#-----------------------------------------------------------------------
_WD = wd.sap$(SAPSYSTEMNAME)_$(INSTANCE_NAME)
Execute_00 = local rm -f $(_WD)
Execute_01 = local ln -s -f $(DIR_EXECUTABLE)/sapwebdisp$(FT_EXE) $(_WD)
Start_Program_00 = local $(_WD) pf=$(_PF)
SETENV_05 = SECUDIR=$(DIR_INSTANCE)/sec
wdisp/ping_protocol = https
wdisp/group_info_protocol = https
wdisp/url_map_protocol = https
ssl/ssl_lib = /usr/sap/WEB/SYS/exe/nuc/linuxx86_64/libsapcrypto.so
ssl/server_pse = /usr/sap/WEB/W02/sec/sapssls.pse
icm/HTTPS/verify_client = 0
ssl/client_pse = /usr/sap/WEB/W02/sec/sapssls.pse
wdisp/ssl_encrypt = 1
wdisp/ssl_auth = 2
wdisp/ssl_cred = /usr/sap/WEB/W02/sec/sapssls.pse
icm/HTTPS/forward_ccert_as_header = true
wdisp/system_conflict_resolution = 1
wdisp/add_clientprotocol_header = 1
wdisp/handle_webdisp_ap_header = 1
wdisp/add_xforwardedfor_header = true
wdisp/system_0 = SID=NW1, NR=01, MSHOST=mo-29b02f1eb.mo.sap.corp, MSPORT=8100,
 SRCURL=/sap/opu;/sap/bc;/sap/public;/sap/es;/sap/cuan;/sap/ushell_config
wdisp/system_2 = SID=HNA, EXTSRV=https://mo-02d2d957f.mo.sap.corp:4300,
 SRCURL=/sap/hba;/sap/hana;/sap/hana-app;/sap/ui5;/sap/ead;/sap/bi
```

Restart of SAP Web Dispatcher

After you have made these changes, restart your SAP Web Dispatcher.

7.6 Prerequisites in AS ABAP System

Before you carry out the technical configuration, you need to do the following:

- Allow system changes to the relevant clients
- Create development packages (development and configuration system only)

7.6.1 User for Application Setup

For the technical configuration of *SAP Hybris Marketing*, system settings must be changed and application setup steps must be performed. You therefore need an application user that can carry out the following tasks:

- Change **client settings**.
- Create a **development package**.
- Start the **technical configuration**, which sets up the application environment that is, for example, relevant for the activation of ICF services.
- Set profile **parameters**.

To ensure an error-free configuration procedure, the user in the production client of your AS ABAP system needs the following set of roles.

Table 9:

Role	You need to
`Z_RT_GW_USER`	Create the role, then assign it to the application setup user.
`SAP_MARKETING_TECHNICAL_CONF`	Assign it to the application setup user
`SAP_BC_CTS_ADMIN`	Assign it to the application setup user.
`SAP_BC_WEBSERVICE_ADMIN_TEC`	Change the role, then assign it to the application setup user.
`SAP_BC_DB_ADMIN`	Change the role, then assign it to the application setup user.
`SAP_BC_BASIS_ADMIN`	Change the role, then assign it to the application setup user.
`SAP_CEI_KUA`	If you want to use *SAP Smart Business, executive edition* for running the Marketing Executive Dashboard or the Lead Dashboard (see Configuring SAP Smart Business, executive edition [page 79]), copy this role, then assign it to the application setup user.

In the following, you find information about how to create a specific user with the required roles.

Proceed as follows:

Create Role Z_RT_GW_USER

In order to start external services, you first need to create a new single role and clear your cache:

1. Go to transaction `PFCG` and create a new role.
2. Choose the *Change Authorization Data* pushbutton in the *Maintain Authorization Data and Generate Profiles* section on the *Authorizations* tab.
3. When entering the *Change Role: Authorizations* screen you are provided with a list of templates. Select the following template: `/IWFND/RT_GW_USER`. Choose *Adopt References*.
4. You see a yellow light for the *Cross-application Authorization Objects* node. Drill down to *Check at Start of External Services* > *Check at Start of External Services* by expanding the corresponding nodes.

5. Open *Program, transaction or function* in edit mode. In the dialog box that appears, select `TADIR Service` and then choose the *Full Authorization* pushbutton. Save your entries.
6. Choose the *+ Manually* pushbutton, add the `S_USER_GRP` authorization object, and choose *Continue*.
7. Under the *Basis: Administration* node, expand the *User Master Maintenance: User Groups* (`S_USER_GRP`))node.
8. Set the following values for the *User Master Maintenance: User Groups* (`S_USER_GRP`) authorization object:
    1. Open *Activity* (`ACTVT`) in edit mode and choose the *Full authorization* pushbutton. Save your entries.
    2. Open *User group in user master maintenance* (`CLASS`) in edit mode and choose the *Full authorization* pushbutton. Save your entries.
9. Choose the *+ Manually* pushbutton, add the `/UI2/CHIP` authorization object, and choose *Continue*.
10. Under the *Basis: Administration* node, expand the *Page Building Service: CHIP* node.
11. Set the following values for the *Page Building Service: CHIP* (`/UI2/CHIP`) authorization object:
    1. Open *Web Dynpro ABAP: CHIP ID* (`/UI2/CHIP`) in edit mode and set the value to `X-SAP-UI2*`. Save your entries.
    2. Open *Activity* (`ACTVT`) in edit mode and check the value `06` (*Delete*). Save your entries.
12. Generate a profile for the authorizations.

Change Standard Roles

Make changes to the following roles:

- Role `SAP_BC_WEBSERVICE_ADMIN_TEC`:
    1. Call up role `SAP_BC_WEBSERVICE_ADMIN_TEC` in transaction `PFCG` in change mode.
    2. Switch to the *Authorizations* tab and choose the *Change Authorization Data* pushbutton under *Maintain Authorization Data and Generate Profiles* .
    3. Expand node *Basis: Administration*, then node *SOAP Runtime: Web Service Provider Configuration* (authorization object `S_SRT_CF_P`). In field *Activity*, add the value **`01`** (*Create*).
    4. Save the changes and generate the profile.
- Role `SAP_BC_DB_ADMIN` must be enhanced by the authorization for table access:
    1. Call up role `SAP_BC_DB_ADMIN` in transaction `PFCG` in change mode.
    2. Switch to the *Authorizations* tab and select the *Change Authorization Data* pushbutton under *Maintain Authorization Data and Generate Profiles* .
    3. Expand the *Basis: Administration* node, then expand the *Table Access via Generic Standard Tools* node (authorization object `S_TABU_NAM`). In field *Activity*, add the values **`02`** (*Change*) and **`03`** (*Display*).
    4. Regenerate the profile. Check if a user comparison is required.
- Role `SAP_BC_BASIS_ADMIN` must be enhanced by the authorization to access the *Trust Manager* for SSL setup purposes:
    1. Call up role `SAP_BC_BASIS_ADMIN` in transaction `PFCG` in change mode.
    2. Switch to the *Authorizations* tab and choose the *Change Authorization Data* pushbutton under *Maintain Authorization Data and Generate Profiles*.
    3. Expand the *Cross-application Authorization Objects* node, then expand the *Transaction Code Check at Transaction Start* node.
    4. Choose the *+ Manually* pushbutton. Enter the authorization object `S_TCODE` and choose *Execute*.
    5. Now choose the *Edit* pushbutton next to the transaction code you just created.

6. In field *'From'*, enter **STRUST**, then save.
7. Regenerate the profile. Check if a user comparison is required.

Create a User for Application Setup and Assign the Relevant Roles

Before you assign a single role to a user you have to ensure that its role profile is generated.

To do this, call up the role in transaction PFCG in change mode, switch to the *Authorizations* tab and choose the *Change Authorization Data* pushbutton under *Maintain Authorization Data and Generate Profiles*. Then choose the pushbutton *Generate*.

For more information about profile generation, see the SAP Help Portal at:

http://help.sap.com/nw75 *Application Help* > *Function-Oriented View* > *Security* > *Identity Management* > *User and Role Administration of Application Server ABAP* > *Configuration of User and Role Administration* > *Role Administration* > *Role Administration Functions* > *Generating Authorization Profiles*

(http://help.sap.com/saphelp_nw75/helpdata/en/73/9317502c729d38e10000000a44176d/content.htm)

> **Note**
>
> Remember to also generate profiles for the single roles included in composite role SAP_MARKETING_TECHNICAL_CONF.

Now, create a user for application setup and assign the following roles.

1. Go to transaction SU01 to create a new user.
2. Assign the following roles
   - Z_RT_GW_USER
   - SAP_MARKETING_TECHNICAL_CONF (composite role)
   - SAP_BC_CTS_ADMIN
   - SAP_BC_WEBSERVICE_ADMIN_TEC
   - SAP_BC_DB_ADMIN
   - SAP_BC_BASIS_ADMIN

You can lock the users after successful configuration of *SAP Hybris Marketing*. The user is needed again when you carry out an upgrade of *SAP Hybris Marketing*.

7.6.2 Maintaining the Client

SAP Hybris Marketing uses Operational Data Provisioning (ODP) for the access of SAP HANA content. For the configuration of ODP within your development and configuration system, you must allow system changes on the relevant clients. To do so, proceed as follows:

1. Log on to the system with the user that you have created in section User for Application Setup [page 43].
2. Execute transaction SCC4 for client maintenance. Ensure that a logical system is assigned to the client that will be used for *SAP Hybris Marketing*.

For more information on logical system assignment, see the SAP Help Portal at: http://help.sap.com/nw75 ▸ Application Help ▸ Function-Oriented View ▸ Security ▸ Identity Management ▸ User and Role Administration of Application Server ABAP ▸ Configuration of User and Role Administration ▸ Central User Administration ▸ Setting Up Central User Administration ▸ Setting Up Logical Systems ▸ (http://help.sap.com/saphelp_nw75/helpdata/en/b4/b0b13bb3acef3ce10000000a11402f/content.htm)

3. Set the field *Cross-Client Object Changes* to *No changes to cross-client Customizing objects*.

Then, ensure that the system changes become effective in the BW namespaces:

1. Go to transaction `SE03`.
2. Choose ▸ *Administration* ▸ *Set System Change Option* ▸. Set the *Global* setting to modifiable.
3. Set the attribute *Modifiable* for the namespaces `/BIC/` and `/BI0/`.
4. Set your own namespaces to *Modifiable* by setting component `LOCAL` and customer name spaces to *Modifiable*.

For more information, see the SAP Help Portal at:

http://help.sap.com/nw75 ▸ Application Help ▸ Function-Oriented View ▸ Application Server ▸ Application Server ABAP ▸ Administration of Application Server ABAP ▸ Change and Transport System ▸ Transport Organizer (BC-CTS-ORG) ▸ Requirements for Working with the Transport Organizer ▸ Setting the System Change Option ▸

(http://help.sap.com/saphelp_nw75/helpdata/en/57/38de9b4eb711d182bf0000e829fbfe/content.htm)

For general information about *Namespaces and Naming Conventions*, see the SAP Help Portal at:

http://help.sap.com/nw75 ▸ Application Help ▸ Function-Oriented View ▸ Application Server ▸ Application Server ABAP ▸ Administration of Application Server ABAP ▸ Change and Transport System ▸ Namespaces and Naming Conventions (BC-CTS-NAM) ▸

(http://help.sap.com/saphelp_nw75/helpdata/en/2a/6b0afe547a11d189600000e829fbbd/content.htm)

In your productive system, you must also ensure that system changes to software component `LOCAL` are allowed:

1. Execute transaction `SE03`.
2. Choose ▸ *Administration* ▸ *Set System Change Option* ▸. Set the *Global Setting* to *Modifiable* in order to be able to set component `LOCAL` to modifiable.
3. Set the component `LOCAL` to *Modifiable*. All other components and name spaces can be set to *Not modifiable*.

7.6.3 Creating Development Packages

You can skip this step if your system is a production system that is supplied with transports from a development and configuration system.

If your system is a development and configuration system, you need to create two separate development packages for the following content:

- Generated OData services
- BI content.

The development requests need to be transported through your system landscape.

To create the development packages, proceed as follows:

1. Log on to the system with the user for application setup that you have created in section User for Application Setup [page 43].
2. Create a workbench request for transports to the productive system (see Releasing and Transporting Requests [page 61]). Enter the workbench request created in step 2 when prompted.
3. Execute transaction `SE80` and choose the entry *Package* in the dropdown box to the left. Enter a name for the new package for generated OData services, then press the enter key. In the following dialog box, confirm that you want to create a new package. Enter a short description and a transport layer. Confirm your entries.
4. Repeat step 3, this time creating a package for activated BI content.

7.7 Technical Configuration Steps

SAP Hybris Marketing requires several technical configuration steps that need to be carried out after installation.

We recommend that you first complete the technical configuration in your development and configuration system, then in the productive system.

> **Note**
>
> As some of the optional components such as SAP HANA Rules Framework (HRF) or *SAP Smart Business, executive edition* must be installed before the execution of the actual technical configuration, the installation description of these components is also located in this section.

7.7.1 Installation of the SAP HANA Rules Framework (HRF)

The SAP HANA rules framework (HRF) allows you to manage and automate business decisions based on rules and rule services.

Within *SAP Hybris Marketing*, HRF is used for the following options:

- **Scoring Based on SAP HANA Rules Framework in SAP Hybris Data Management**:
  HRF helps you to manage your heuristic scoring models.
  For more information, see Scoring Based on SAP HANA Rules Framework (HRF) [page 73].
- **Rule-based Tasks in SAP Hybris Marketing Recommendation**:
  - HRF is used in the *Manage Recommendations* app, for example, to re-rank and filter rules.
  - HRF is used in the *Manage Offer Recommendations* app.
    For more information, see Configuring Recommendation [page 90].

If you want to use one of the options above, proceed as follows:

Installing the SAP HANA Rules Framework

You must install the SAP HANA rules framework separately on the SAP HANA database of your application. For the required version of HRF, see the release information note (RIN) for *SAP Hybris Marketing*, 1885803. For the installation procedure, see the *SAP HANA Rules Framework Installation Guide*. Since you have already installed SAP HANA, you can omit *Installing the SAP HANA Appliance Software* in this guide.

You can find this guide under: http://service.sap.com/instguides ▸ *SAP In-Memory Computing* ▸ *SAP HANA Rules Framework* ▸ *SAP HANA Rules Framework 1.0 Inst. & Upgrade Guide* ◂.

(https://service.sap.com/~sapidb/012002523100001842442016E)

Settings in Technical Configuration Wizard

To use the above mentioned options based on HRF, you must ensure to make the following settings in the technical configuration wizard (see Using the Technical Configuration Wizard [page 52]):

- **Scoring Based on SAP HANA Rules Framework in SAP Hybris Data Management**:
  On the *Scope Selection* screen, select the option *SAP Rule-Based Scoring* in the *Optional Solution Scope* section.
- **"Manage Recommendations" App**:
  On the *Scope Selection* screen, select *Recommendation (optional)* in the *Licensed SAP Hybris Marketing Applications* section. In addition, select the option *SAP Rule-Based Product Recommendations* in the *Optional Solution Scope* section.
- **"Offers" App**:
  On the *Scope Selection* screen, select *Recommendation (optional)* in the *Licensed SAP Hybris Marketing Applications* section.
  If you want to use rules that have been created in the *Manage Offer Recommendations* app (see below), in the OData service `CUAN_OFFER_DISCOVERY_SRV` to display the best offers to customers in the *Offers* app, you select, in addition, the option *SAP Rule-Based Hybris Marketing Offer Recommendations* in the *Optional Solution Scope* section.
- **"Manage Offer Recommendations" App**:
  On the *Scope Selection* screen, select *Recommendation (optional)* in the *Licensed SAP Hybris Marketing Applications* section.
  In addition, you have the following options:
  - If you want to include *SAP Hybris Marketing* offers only in *Manage Offer Recommendations*, select the option *SAP Rule-Based Hybris Marketing Offer Recommendations* in the *Optional Solution Scope* section.
  - If you want to include offers from *SAP Promotion Management for Retail* (PMR) in *Manage Offer Recommendations*, select the options *SAP Customer Activity Repository* **and** *SAP Rule-Based PMR Offer Recommendation* in the *Optional Solution Scope* section.
  - You have the option to combine offers from *SAP Promotion Management for Retail* (PMR) with offers created in *SAP Hybris Marketing*. While the *SAP Hybris Marketing* offers contain the visual content such as pictures and texts, the PMR offers contain the process-relevant part such as products, prices, and discounts. You can build recommendation rules on the combined set of attributes of both of the objects. If you want to use this option, select the options *SAP Customer Activity Repository* **and** *SAP Rule-Based Hybris Marketing PMR Offer Recommendation* in the *Optional Solution Scope* section.

  > **Note**
  >
  > We recommend to select only one of the options for offer recommendation at a time, as the options are self-contained and do not build on each other.

> **Note**
>
> If you **do not** select one of the HRF options while running the technical configuration wizard during the initial setup of *SAP Hybris Markting*, and you want to install and configure HRF at a later point in time, you can add the technical configuration for HRF manually after installation.
>
> For more information, see Scoping at a Later Point in Time [page 57].

7.7.2 Installation of SAP Smart Business, executive edition

SAP Smart Business, executive edition is a native SAP HANA application.

Within *SAP Hybris Marketing*, *SAP Smart Business, executive edition* is the basis for the following applications:

- *Lead Dasboard*, an application available for marketing experts in the *Lead Management* business group.

  > **Note**
  >
  > *Lead Management* is available only if you have set up the integration with *SAP Cloud for Customer* (see Prerequisites for SAP Cloud for Customer Integration [page 50]) and *SAP Hybris Marketing Insight* is active.

- *Marketing Executive Dashboard*, an application available for marketing executives in the *Marketing - Executive Dashboard* business group.
  The *Marketing Executive Dashboard* contains key performance indicators (KPI), which allow marketing executives to review the success of marketing investments, and gain an overview of KPI attainment and marketing performance benchmarks.

  > **Note**
  >
  > The *Marketing Executive Dashboard* is available only if *SAP Hybris Marketing Insight* is active.

If you want to use one of the options above, proceed as follows:

Installing SAP Smart Business, executive edition

For installation and initial configuration of the latest version, follow the installation guide under:

http://help.sap.com/sbee ▶ *Installation and Upgrade Information* ▶ *Installation Guide* ▶ *Installation and Upgrade Guide* ▶ *Chapter 2.5 Installing SAP Smart Business, executive edition* ◀.

(https://service.sap.com/~sapidb/012002523100002164802015E)

> **Note**
>
> You must ensure the following:
>
> - You have installed the latest version of *SAP Smart Business, executive edition*.

- You have applied the latest configuration file for the *Marketing Executive Dashboard* and/or the *Lead Dashboard* for *SAP Smart Business, executive edition*.

Settings in Technical Configuration Wizard

To use the above mentioned options based on *SAP Smart Business, executive edition*, you must ensure to make the following settings in the technical configuration wizard (see Using the Technical Configuration Wizard [page 52]):

For the *Lead Dashboard*:

- **Insight (Optional)**:
  On the *Scope Selection* screen, select the option *Insight (Optional)* in the *Licensed SAP Hybris Marketing Applications* section.
- **SAP Cloud for Customer Integration**:
  On the *Scope Selection* screen, select the option *SAP Cloud for Customer Integration* in the *Integration Scenarios* section.

For the *Marketing Executive Dashboard*:

- **Insight (Optional)**:
  On the *Scope Selection* screen, select the option *Insight (Optional)* in the *Licensed SAP Hybris Marketing Applications* section.
- **Marketing Executive Dashboard**:
  On the *Scope Selection* screen, select the option *Marketing Executive Dashboard* in the *Optional Solution Scope* section.

  Note

  If you **do not** select one of the *SAP Smart Business, executive edition* options while running the technical configuration wizard during the initial setup of *SAP Hybris Markting*, and you want to install and configure *SAP Smart Business, executive edition* at a later point in time, you can add the technical configuration for *SAP Smart Business, executive edition* manually after installation.

  For more information, see Scoping at a Later Point in Time [page 57].

7.7.3 Prerequisites for SAP Cloud for Customer Integration

If you want to integrate *SAP Hybris Marketing* with *SAP Cloud for Customer*, you have to carry out a few manual steps described below.

Note

In addition to the steps described below, make sure that you select the option *SAP Cloud for Customer Integration* in section *Integration Scenarios* of the *Scope Selection* screen of the technical configuration wizard (see Using the Technical Configuration Wizard [page 52]).

> **Caution**
>
> As the integration of *SAP Cloud for Customer* is based on an integration system, you must ensure that this integration system is set up before you execute the technical configuration (this means, before selecting the *SAP Cloud for Customer* integration in the technical configuration wizard or in task list `CUAN_INITIAL_SETUP`).

Setting up SAP Process Integration System or SAP HANA Cloud Integration System

You have two options concerning your integration system:

- *SAP Process Integration* (PI), an on premise solution
  The minimum required release is SAP PI 7.3 with OData adapter `PIADAPTERS02_7-20012293.SCA`.
- *SAP HANA Cloud Integration* (HCI), a cloud solution

For information about how to set up the *SAP Process Integration* system, see the corresponding integration guide on SAP Service Marketplace at:

http://service.sap.com/cloud4customer *INTEGRATION: SAP Hybris Marketing and C4C via PI*

(https://service.sap.com/~sapidb/012002523100006975392016E)

For information about how to set up the *SAP HANA Cloud Integration* system, see the corresponding integration guide on SAP Service Marketplace at:

http://service.sap.com/cloud4customer *INTEGRATION: SAP Hybris Marketing and SAP C4C via HCI*

(https://service.sap.com/~sapidb/012002523100006975402016E)

Lead Management

With the integration of *SAP Cloud for Customer*, you are also provided with the *Lead Management* business group in *SAP Hybris Marketing*.

Lead management integrates the business process between marketing and direct or indirect sales channels, to drive higher-value opportunities through improved demand creation, execution, and opportunity management. It comprises all measures a company takes to convert potential buyers and interested persons to real buyers.

For more information about lead management, see the application help for *SAP Hybris Marketing* at:

http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing Applications* > *Lead Management*

http://help.sap.com/saphelp_mkt122/helpdata/en/59/a7a72bf2d0479e9fc0509811250ac2/frameset.htm

For the configuration of the *Lead Dashboard* application within the *Lead Management* business group, see Configuring SAP Smart Business, executive edition [page 79].

7.7.4 Using the Technical Configuration Wizard

The technical configuration wizard helps you carry out the main bulk of technical steps needed after you have installed *SAP Hybris Marketing*.

> **Note**
>
> Before you carry out the technical configuration, you need to restart the system.

On the initial screen you provide the following information:

- Which applications you have licensed.
  Depending on your selected licensed applications, you are provided with additional options in the *Optional Solution Scope* section. The following table lists the additional options together with corresponding manual configuration steps.

  > **Note**
  >
  > Some of the manual configuration steps serve as a prerequisite for the corresponding step in the technical configuration wizard. For example, in *Acquisition*, you have to set up your email service provider before you can enter the corresponding credentials in the according wizard step.
  >
  > For more information about the additional manual configuration steps, see the corresponding link in the table.

  Table 10:

Licensed Application	Depending Option	Depending Suboption	Additional Manual Configuration Steps
Acquisition	*Text Messaging Integration*		See section Setting up Text Messaging [page 128].
	Mobile Service Integration		See section Setting up SAP Mobile Service for Email [page 127].
	Amazon Email Management Integration		See section Setting up the Email Service Provider [page 125].
	SAP Product Content Management for Digital Asset Management		See section Setting up the Integration of Digital Asset Management Systems [page 130].
	Open Text Management for Digital Asset Management		See section Setting up the Integration of Digital Asset Management Systems [page 130].

Licensed Application	Depending Option	Depending Suboption	Additional Manual Configuration Steps
Recommendation	*SAP Rule-Based Product Recommendations*		See Configuring Offer Management [page 91]. For additional information about the setup option, see Installation of the SAP HANA Rules Framework (HRF) [page 47].
	SAP Rule-Based Hybris Marketing Offer Recommendations		See Configuring Offer Management [page 91]. For additional information about the setup option, see Installation of the SAP HANA Rules Framework (HRF) [page 47].
	SAP Customer Activity Repository		See Configuring Offer Management [page 91]. For additional information about the setup option, see Installation of the SAP HANA Rules Framework (HRF) [page 47].
		SAP Rule-Based PMR Offer Recommendations	See Configuring Offer Management [page 91]. For additional information about the setup option, see Installation of the SAP HANA Rules Framework (HRF) [page 47].
		SAP Rule-Based Hybris Marketing PMR Offer Recommendations	See Configuring Offer Management [page 91]. For additional information about the setup option, see Installation of the SAP HANA Rules Framework (HRF) [page 47].
Insight	*Marketing Executive Dashboard*		See Configuring SAP Smart Business, executive edition [page 79].

- What integration scenarios apply (if any).
- In which kind of system you run the wizard.
  In the *Role of System* field, you have the following options:
  - *Dev. System*: If you run the wizard in a development or configuration system (such as an integration system), the system creates objects according to your settings in the wizard and writes them to a transport request.
  - *Prod. System*: If you run the wizard in a production system (such as a consolidation system), the system does not create any objects according to your settings in the wizard, but the system is capable to import objects via a transport request from a development or configuration system.
  - *Local System*: If you run the wizard in another system (such as a demo system), the system creates objects according to your configuration settings in the wizard, but does **not** write them to a transport request.

> **Caution**
>
> Note that changing the *Role of System* entry is not possible anymore once you have started the technical configuration.
>
> For example, if you configured the system as a demo system you cannot convert it into a development or production system. These system types would need to be created from scratch.

> **Note**
>
> Ensure that the selected system type matches with the corresponding entries in transaction `SCC4` (field *Client role* and related entries):
>
> - If you select *Dev. System* in field *Role of System*, the entry in the *Client role* field (transaction `SCC4`) must be other than *Production*.
> - If you select *Prod. System* in field *Role of System*, the entry in the *Client role* field (transaction `SCC4`) must be other than *Customizing*.

Once you have made your scope selection settings, you are guided through the post-installation steps in the correct sequence for your particular constellation.

The following is an extract of the steps that are automatically carried out when you use the technical configuration wizard:

- **Users** needed for post-installation steps are created automatically (where possible)
- **Workbench requests** are created.
- Technical steps needed to **integrate** with SAP CRM systems, SAP ERP systems, or to *SAP Cloud for Customer* **systems** are carried out (where applicable).
- **BI content** and **OData services** are activated.
- **Full text indexes** are generated.
- If technical configuration **task lists** exist that need to be carried out, these are automatically triggered.

> **Note**
>
> To speed up the post-installation process and to avoid errors, we strongly recommend that you use the technical configuration wizard.

To start the technical configuration wizard, run transaction `CUAN_INITIAL_SETUP` with the user for application setup (see section User for Application Setup [page 43]).

If you are not able to use the technical configuration wizard due to, for example, authorization restrictions, you can fall back on the expert mode (see section Technical Configuration - Expert Mode [page 137]). In this case, you will need to carry out all steps manually, without tool assistance.

7.7.5 Parameters Set by the Technical Configuration Wizard

The technical configuration wizard sets the following parameters automatically:

Users and Passwords

Table 11:

User and Password for	System
Background jobs	ABAP
SAP HANA rules framework	SAP HANA
Remote Function Calls	SAP HANA
Technical Tasks in XS	SAP HANA

> **Note**
>
> You can make changes to users and passwords in transaction `SU01`.
>
> You can make changes to profiles and authorization settings in transaction `PFCG`.

Transport Requests

Table 12:

Customizing Requests	• Common Customizing Activities • Customizing for OData Services based on BI • Product Recommendation
Workbench Requests	• BI Activation and OData Service Generation • Repository Objects for OData Services based on BI

> **Note**
>
> The transport requests must be released manually and imported in a predefined sequence. For details, see Releasing and Transporting Requests [page 61].

Background Jobs Run Once for the Initial Load

The following background jobs are run once for the initial load:

Table 13:

Background Job Name	Program Name	For these Applications / Integration Scenarios
CUAN_IC_EXTR_FULL_CRM	CUAN_IC_MASTERDATA_EXTR_FULL	SAP CRM
CUAN_IC_EXTR_FULL_ERP	CUAN_IC_MASTERDATA_EXTR_FULL	SAP ERP
CVI_FMD_SD_INITIAL	CUAN_CVI_LOAD_FMD_SD	*Insights*
CUAN_C4C_INIT	CUAN_CFC_INTERACTION	Integration with *SAP Cloud for Customer*

Background Jobs Run Regularly

The following background jobs are set up to run regularly:

Table 14:

Background Job Name	Program Name	For these Applications / Integration Scenarios	Default Frequency
CUAN_IC_EXTR_DELTA_CRM	CUAN_IC_MASTERDATA_EXTR_DELT	SAP CRM	every 15 minutes
CUAN_IC_EXTR_DELTA_ERP	CUAN_IC_MASTERDATA_EXTR_DELT	SAP ERP	every 15 minutes
CUAN_IA_TA_EXTR_DELTA	CUAN_IC_MASTERDATA_EXTR_DELT	all	every 5 minutes
CAMPAIGN_LISTENER	CUAN_MKT_EXEC_LISTENER	*Acquisition*	every 1 minute
CVI_FMD_SD_DELTA	CUAN_CVI_LOAD_FMD_SD	*Insights*	weekly
CUAN_PRED_MODEL	CUAN_PRED_MODEL_UPD	*Insights*	hourly
GSEG_SYNC_DS_TEXTS	GSEG_SYNC_DS_TEXTS	*Segmentation*	daily
GSEG_FREE_RESOURCES	GSEG_FREE_RESOURCES	*Segmentation*	every 3 days
CUAN_C4C_DELTA	CUAN_CFC_INTERACTION	Integration with *SAP Cloud for Customer*	every 6 hours
CUAN_CPG_GET_EXT_DATA	CUAN_CPG_GET_EXT_DATA	Campaign - Facebook Integration	every 240 minutes

SAP_CUAN_PAID_SEARCH_KPI	CUAN_HCI_ADWORDS_KPI_READ	Campaign – Paid Search Integration	every 3hours

> **Note**
>
> You can change the frequency in which these jobs are run in transaction `SM37`.

7.8 Scoping at a Later Point in Time

If you did not select an application, an integration scenario, or an optional solution scope item during the initial setup process in the technical configuration wizard, you have the option to configure this item at later point in time. This section describes the required steps to execute for the different items.

7.8.1 Configuring Licensed Applications at a Later Point in Time

If you did not require to set up one of your licensed *SAP Hybris Marketing* applications with the initial setup of *SAP Hybris Markting*, or if you purchased a licensed application at a later point in time, you have the option to set up the application by doing the following:

- Go to transaction `STC01` and execute the individual task list for the required application (see table below) with the user you created in section User for Application Setup [page 43].
  Follow the instructions that appear on the screen. See the task list documentation for details about the tasks that are carried out. All relevant parameters for the technical configuration are described in the report documentation of the parameter screen.
- Carry out the manual steps described in the corresponding sections of this guide (see table below).

> **Note**
>
> You have different options to set up the applications:
>
> - Set up the application without the indicated depending optional scope items.
> - Set up the complete application including all optional scope items.
> - Set up one or more required scope items only.
>
> If a separate task list for a scope item is to be executed this is indicated in the table.

> **Caution**
>
> In some cases, a few manual steps must be executed before running the task list as the resulting parameters are required as input for the task list setup.

Table 15:

Licensed Application	Depending Optional Scope Items	Task List	Additional Manual Steps
Acquisition	• Text Messaging • Mobile Service Integration • Amazon Email Management Integration • SAP Product Content Management for Digital Asset Management • Open Text Management for Digital Asset Management	`CUAN_SETUP_CA`	See Configuring Acquisition [page 108].
Planning		`CUAN_SETUP_AMP`	See Configuring Planning [page 96].

Recommendation	• SAP Rule-Based Product Recommendations
	• SAP Rule-Based Hybris Marketing Offer Recommendations
	• SAP Customer Activity Repository
	  ○ SAP Rule-Based PMR Offer Recommendation
	  ○ SAP Rule-Based Hybris Marketing PMR Offer Recommendation
		`CUAN_SETUP_PRI`
		
		For setting up the SAP HANA rules framework, you must execute task list `CUAN_SETUP_HRF` in addition (see Configuring Optional Solution Scope Items at a Later Point in Time [page 60]).
			See Configuring Recommendation [page 90].

Insight	Marketing Executive Dashboard Lead Dashboard	`CUAN_SETUP_CVI` • For setting up the *Marketing Executive Dashboard*, you must execute task list `CUAN_SETUP_CMO_DASHBOARD` in addition. • For setting up the *Lead Dasboard*, you must execute task list `CUAN_SETUP_LEAD_MANAGEMENT` in addition.	See Configuring Insight [page 79].

7.8.2 Configuring Integration Scenarios at a Later Point in Time

7.8.2.1 Task List CUAN_SETUP_ERPCONTENT - Integration of SAP ERP Data at a Later Point in Time

If you initially did not choose SAP ERP data, and you require to use SAP ERP data at a later point in time, you need to execute transaction `STC01` in addition. This transaction contains the task list `CUAN_SETUP_ERPCONTENT` including the corresponding tasks for SAP ERP. Initially, all tasks are indicated as mandatory. Based on your parameter entries in the first task, *Define Parameters for Technical Configuration*, the system considers which tasks can be skipped. The documentation attached to each task describes the function of the task in detail.

7.8.2.2 Task List CUAN_SETUP_CRMCONTENT - Integration of SAP CRM Data at a Later Point in Time

If you initially did not choose SAP CRM data, and you require to use SAP CRM data at a later point in time, you need to execute transaction `STC01` in addition. This transaction contains the task list `CUAN_SETUP_CRMCONTENT` including the corresponding tasks for SAP CRM. Initially, all tasks are indicated as mandatory. Based on your parameter entries in the first task, *Define Parameters for Technical Configuration*, the system considers which tasks can be skipped. For details, see the individual task documentation.

7.8.2.3 Integration of SAP Cloud for Customer at a Later Point in Time

If you did not require to set up the integration with *SAP Cloud for Customer* with the initial setup of *SAP Hybris Markting*, that is with executing the technical configuration wizard or task list `CUAN_INITIAL_SETUP`, you have the option to do this at a later point in time by doing the following:

1. Carry out the manual steps described in section Prerequisites for SAP Cloud for Customer Integration [page 50].
2. Go to transaction `STC01` and execute task list `CUAN_SETUP_LEAD_MANAGEMENT` with the user you created in section User for Application Setup [page 43].
   Follow the instructions that appear on the screen. See the task list documentation for details about the tasks that are carried out. All relevant parameters for the technical configuration are described in the report documentation of the parameter screen.

> **Note**
>
> If you have activated the integration with *SAP Cloud for Customer* during the initial setup of *SAP Hybris Marketing* without selecting *SAP Hybris Marketing Insight*, the dashboard within the *Lead Dashboard* application in the *Lead Management* business group is not available on the user interface.

To activate the dashboard at a later point in time, go to transaction STC01 and execute task list CUAN_SETUP_LEAD_MANAGEMENT. To display the whole *Lead Dashboard* application, ensure that a copy of standard role SAP_CEI_LEAD_DASHBOARD is assigned to the corresponding user.

For more information about authorization roles, see section *Authorization* in the *SAP Hybris Marketing* security guide at http://help.sap.com/mkt *Security Information*.

https://service.sap.com/%7Esapidb/012002523100007357012016E/

7.8.3 Configuring Optional Solution Scope Items at a Later Point in Time

If you initially did not select one of the following optional solution scope items, you have the option to set it up by executing the following steps.

SAP Rule-Based Scoring

If you did not select the optional solution scope item *SAP Rule-Based Scoring* during the initial setup of *SAP Hybris Marketing*, you proceed as follows:

- Follow the instructions in section Installation of the SAP HANA Rules Framework (HRF) [page 47], that is:
  1. Create an RFC destination for technical configuration.
  2. Install HRF.
- Start the technical configuration for the HRF integration, by logging on to your *SAP Hybris Marketing* system with the user for application setup (see section User for Application Setup [page 43]). Enter transaction STC01 and start task list CUAN_SETUP_HRF. Follow the instructions that appear on the screen.

  Note

  When you run the task list, we recommend that you use the *SAP HANA Rules Framework User* and *XS User* proposed by the system. You can define your own passwords for these users in this context.

Marketing Executive Dashboard

If you did not select the optional solution scope item *Marketing Executive Dashboard* during the initial setup of *SAP Hybris Marketing*, you proceed as follows:

- Follow the instructions in section Installation of SAP Smart Business, executive edition [page 49].
- Start the technical configuration for SAP Smart Business, executive edition, by logging on to your *SAP Hybris Marketing* system with the user for application setup (see section User for Application Setup [page 43]). Enter transaction STC01 and start task list CUAN_SETUP_CMO_DASHBOARD. Follow the instructions that appear on the screen.

7.9 Applying Technical Configuration Artifacts to Production System

In your development and configuration system, the technical configuration wizard automatically creates transport requests with repository and Customizing objects (see Parameters Set by the Technical Configuration Wizard [page 55]).

To make the artifacts - created during technical configuration in the development system - available in the production system, you must carry out the following two steps:

- In the development and configuration system, release the transport requests.
- In the production system, import the transport requests in a specific sequence and execute the technical configuration

7.9.1 Releasing Transport Requests in Development System

To release the transport requests in your **development system**, proceed as follows:

1. Log on to the **development** system with the User for Application Setup [page 43].
2. Go to transaction `SE09` and release and transport the following requests in the following sequence:
    1. Workbench Request created manually for the development packages (see Creating Development Packages [page 46]).
    2. Customizing Request: *Common Customizing Activities*
    3. Customizing Request: *Product Recommendation*
    4. Workbench Request: *Repository Objects for OData Services based on BI*
    5. Customizing Request: *Customizing for OData Services based on BI*
    6. Workbench Request: *BI Activation and OData Service Generation*

7.9.2 Importing Transport Requests and Executing Technical Configuration in Production System

After you have carried out the technical configuration and released the relevant transport orders in your development system, you need to import the requests and execute the technical configuration in the **production system**.

Proceed as follows in the **production system**:

1. Log on to the **production** system with the User for Application Setup [page 43].
2. Go to transaction `STMS_IMPORT` and import the requests listed above in the specified sequence:
    1. Workbench Request created manually for the development packages (see Creating Development Packages [page 46]).
    2. Customizing Request: *Common Customizing Activities*
    3. Customizing Request: *Product Recommendation*

   4. Workbench Request: *Repository Objects for OData Services based on BI*
   5. Customizing Request: *Customizing for OData Services based on BI*
3. Execute the technical configuration wizard in the **production system** (see section Using the Technical Configuration Wizard [page 52]).
4. Import the following request:
   - Workbench Request: *BI Activation and OData Service Generation*

> **Note**
>
> When importing the transports into the production system, ensure that the client-specific Customizing is transported to the client, in which you execute the technical configuration.

7.10 Initial Setup of SAP Fiori

Set up the administrator role as well as the end user role for SAP Fiori by following the instructions described on the SAP Help Portal in the following two sections:

http://help.sap.com/fiori_bs2013 > *Configuration of SAP Fiori Infrastructure* > *Configuration Information* > *Setup of SAP Fiori Launchpad* > *Assign Administrator Role for SAP Fiori Launchpad to Administrator User*.

(http://help.sap.com/fiori_bs2013/helpdata/en/38/ca4353c7b9f663e10000000a44450e5/content.htm?frameset.htm)

http://help.sap.com/fiori_bs2013 > *Configuration of SAP Fiori Infrastructure* > *Configuration Information* > *Setup of SAP Fiori Launchpad* > *Assign Role with Launchpad Start Authorization to End Users*.

(http://help.sap.com/fiori_bs2013/helpdata/en/26/cf4353c7b9f663e10000000a44450e5/content.htm?frameset.htm)

Now go to to transaction `PFCG`, create a new role (for example **`ZCHIP_FOUNDATION`**) and add the following authorizations

Table 16:

Authorization Object	Web Dynpro ABAP	Activity
`/UI2/CHIP`	`X-SAP-UI2-CHIP*`	03
`/UI2/CHIP`	`X-SAP-UI2-PAGE*`	03,16
`S_PB_CHIP`	`X-SAP-UI2-CHIP*`	03

Table 17:

Authorization Object	Activity	Package	Object Name	Object Type	Authorization Group ABAP / 4 Program

S_DEVELOP	03	*	X-SAP-UI2-CHIP*	*	*
S_DEVELOP	03, 16	*	X-SAP-UI2-PAGE*	*	*
S_DEVELOP	03	/UI2/SERVICES_PB_UTIL_700	/UI2/*	WDCC	*

Table 18:

Authorization Object	Activity	Request Type
S_TRANSPRT	03	*

Generate the profile. Now assign the new role to all your business and administration users.

7.11 Defining a Virus Scan Profile

In order to adhere to security standards, we recommend that you use a virus scanner. The scanner performs checks in various *SAP Hybris Marketing* applications. For example, the scanner checks the HTML code of emails in *SAP Hybris Marketing Acquisition*.

By default, the virus scanning is switched on in the SAP NetWeaver Gateway, and as a result, you need to maintain the corresponding profile in the customizing of the virus scanning. For information about how to define a profile, see the Security Guide at:

http://help.sap.com/mkt *Security Information* under *Virus Scan Profile (ABAP)*.

You can switch on, or switch off the virus scanner in the SAP NetWeaver Gateway using transaction /IWFND/VIRUS_SCAN, or using the *SAP Customizing Implementation Guide* > *SAP NetWeaver* > *Gateway* > *OData Channel* > *Administration* > *General Settings* > *Define Virus Scan Profiles*.

Note

SAP strongly recommends to keep the virus scan switched on.

Note

Make sure that you complete this customizing step as part of the installation process.

7.12 Generating Authorization Profiles for the User Interface

In *SAP Hybris Marketing* several composite roles are provided that give you access to the *SAP Hybris Marketing* applications. These composite roles include all single roles that are necessary to run the corresponding solution.

The following table lists the available composite roles by business roles:

Table 19:

Business Role	**Composite Role Name**	**Description**
Marketing Experts	`SAP_MARKETING_EXPERT`	General access to *SAP Hybris Marketing*
	`SAP_MARKETING_SEGMENTATION`	Access to applications belonging to *Segmentation*
	`SAP_MARKETING_CAMPAIGNS`	Access to applications belonging to *Acquisition*
	`SAP_MARKETING_SPEND_MGMT_PROG`	Access to applications belonging to *Planning*
	`SAP_MARKETING_RECOMMEND_EXPERT`	Access to applications belonging to *Recommendations*
	`SAP_MARKETING_INSIGHT`	Access to applications belonging to *Insight*
	`SAP_MARKETING_DATA_MANAGEMENT`	Access to applications belonging to *Data Management*
Marketing Managers	`SAP_MARKETING_MANAGER`	General Access to *SAP Hybris Marketing*
	`SAP_MARKETING_PLANNING`	Access to *Planning*
Marketing Executives	`SAP_MARKETING_EXECUT_DASHBOARD`	General Access to *SAP Hybris Marketing*
Business Analysts	`SAP_MARKETING_RECOMMENDATION`	Access to applications belonging to *Recommendations*
Administrator - Marketing	`SAP_MARKETING_BUS_ADMIN_USER`	Access to applications for key user and administrative tasks
Installation / Upgrade Team Members	`SAP_MARKETING_TECHNICAL_CONF`	Contains all roles needed to run the technical configuration tasks of the installation and upgrade process
User Administrator - Marketing	`SAP_MARKETING_USER_ADMIN`	Access for user administrators
Sales Representative	`SAP_SALES_REP_MKT_INFO`	Access to applications for sales representatives

To initially generate an authorization profile in your AS ABAP system and assign it to a user, you have to copy the required composite role including the single roles (depending on your purchased *SAP Hybris Marketing* solutions) and configure the copies of all roles according to your requirements.

1. Log on to your AS ABAP system and go to transaction `PFCG`.
2. For example, if you purchased the *Segmentation* price list component, enter `SAP_MARKETING_SEGMENTATION` in the *Role* field and choose the *Copy* pushbutton.
   A dialog box appears.
3. Enter a self-defined name for your role and choose the *Copy all* pushbutton.
4. In the following dialog box, choose the *Yes* pushbutton to copy the related single roles and assign them to the composite role.
5. In the following dialog box, select all single roles. Enter suitable names for each role in the *New Role* column.
6. Back on the *Role Maintenance* screen, choose the *Change* pushbutton.
7. Choose the *Roles* tab, and access the first new role by double-clicking it.
8. Choose the *Authorizations* tab, switch to *Edit* mode, and choose the *Propose Profile Name* pushbutton in the *Information About Authorization Profile* section.
   The system enters a profile name and a profile text.
9. Choose the *Change Authorization Data* pushbutton in the *Maintain Authorization Data and Generate Profiles* section.
10. On the *Change Role: Authorizations* screen, maintain authorizations to suit your requirements.
11. To generate the authorization profile, choose the *Generate* menu option from the *Authorizations* menu or choose the *Generate* pushbutton.
12. Repeat step 7 to 11 for all new roles in your composite role.

    > **Note**
    >
    > If you create a copy of another composite role (as you purchased more than one *SAP Hybris Marketing* solution), be aware that some of the included single roles may already have been copied.

    > **Note**
    >
    > These steps do not apply to roles for which a profile cannot be generated because they do not contain any authorization data, for example, business catalog roles such as `SAP_CEI_KUA_FLP`.

13. All required authorizations roles are described in the *SAP Hybris Marketing* Security Guide at http://help.sap.com/mkt *Security Information* under *Authorizations*.
    https://service.sap.com/%7Esapidb/012002523100007357012016E/
14. Assign your copied composite role to the users in transaction `SU01`.

> **Note**
>
> If you purchase additional licenses, you need to adapt your roles accordingly.

7.13 Generating the URL for Displaying the User Interface

> **Caution**
>
> All previous steps have to be completed successfully before you can start with this step.

You create a start URL and distribute it to all potential end users as follows: `https://<fully qualified domain name of your SAP Web Dispatcher>:<HTTPS Port of SAP Web Dispatcher>/sap/bc/ui5_ui5/ui2/ushell/shells/abap/FioriLaunchpad.html?sap-client=<Client>&sap-ushell-config-url=/sap/ushell_config/CEC_MKT.json#Shell-home`

From the AS ABAP system, you can launch the user interface using transaction `START_CEI`.

> **Note**
>
> If you face issues opening the user interface, you can run transaction `CUAN_TC_CHECK` to check all system configuration steps for correctness.

Logout Screen for the SAP Fiori Launchpad

By default, the *SAP Hybris Marketing* front-end system redirects you to a standard page, when you log out of the system.

If you want your users who log out of the system to be redirected to another page such as the SAP Fiori default log in page, follow the instructions described in the following documentation on the SAP Help Portal:

http://help.sap.com/nw75 ▶ *Application Help* ▶ *UI Technologies in SAP NetWeaver with SAP_UI 750* ▶ *SAP Fiori Launchpad* ▶ *Setting Up the Launchpad* ▶ *Configuring Logout* ▶ *Configure a Logout Screen for the SAP Fiori Launchpad (Optional)* ◀

(http://help.sap.com/saphelp_nw75/helpdata/en/8e/b10085b029478c8498fba3bc35ef60/content.htm)

Creating a Custom Configuration File

The launchpad configuration file `?sap-ushell-config-url=/sap/ushell_config/CEC_MKT.json` delivered by SAPcontains parameters for the launchpad. For example, it prevents business users from the following:

- Changing the application by creating an own personalization
- Showing or hiding business groups

If you want to adapt the launchpad configuration, you can create your own configuration file without adapting the file delivered by SAP. For more information, see the SAP Library at:

http://help.sap.com/nw75 ▶ *Application Help* ▶ *UI Technologies in SAP NetWeaver with SAP_UI 750* ▶ *SAP Fiori Launchpad* ▶ *Setting Up the Launchpad* ▶ *Configuring the Launchpad* ▶ *Setting Parameters in a Launchpad Configuration File* ◀

(http://help.sap.com/saphelp_nw75/helpdata/en/2c/616173d5354fd69a904cbc296792e2/content.htm)

For general information about about the levels of the launchpad, see the SAP Library at:

http://help.sap.com/nw75 ▶ *Application Help* ▶ *UI Technologies in SAP NetWeaver with SAP_UI 750* ▶ *SAP Fiori Launchpad* ▶ *Setting Up the Launchpad* ▶ *Configuring the Launchpad* ◀

(http://help.sap.com/saphelp_nw75/helpdata/en/98/cb0b6355094b2e91a0e6de030cd4ea/content.htm)

7.14 Deployment Scenario C: Adjusting Customizing

If you are **not** using deployment scenario C, you may skip this section. Refer to section Application Configuration and Customizing [page 35] instead. If you are using deployment scenario C, follow the steps below.

If you are using deployment scenario C, you now need to ensure the availability of all relevant Customizing in your productive client. To do so, follow the instructions of the documentation on the SAP Help Portal at:

http://help.sap.com/nw75 *Application Help* > *Function-Oriented View* > *Application Server* > *Application Server ABAP* > *Other Services* > *Services for Administrators* > *Customizing (BC-CUS)* > *Customizing Cross-System Tools (BC-CUS-TOL)* > *Customizing Cross-System Viewer*

(http://help.sap.com/saphelp_nw75/helpdata/en/4d/ad61acbd316d57e10000000a42189e/content.htm)

In particular, you need to ensure that Customizing is maintained for the following components:

- *SAP NetWeaver Gateway* under *SAP NetWeaver* > *Gateway* in the SAP Reference Implementation Guide (IMG) (transaction `SPRO`).
- *Reusable Objects and Functions for BOPF Environment* under *Cross-Application Components* > *Processes and Tools for Enterprise Applications* > *Reusable Objects and Functions for BOPF Environment* in the SAP Reference IMG.
- *SAP Hybris Marketing* under the same name in the SAP Reference IMG.

> **Caution**
>
> Do not start a customizing copy at this point, as this would cause all your settings to be overwritten.

7.15 Deployment Scenario C: Customizing via SAP Solution Manager

Skip this section if you are **not** using deployment scenario C (see Scenario C: Hub-Deployment with Shared SAP HANA System of SAP Business Suite [page 17]).

You execute the configuration for *SAP Hybris Marketing* with the help of SAP Solution Manager 7.1, SP05 or higher. In your Solution Management system, you can find the corresponding business scenario group, named *SAP Hybris Marketing* under *Applications Powered by SAP HANA* in TA `SOLAR01`.

> **Note**
>
> Make sure that you implemented `ST ICO 150_700 SP046` to access the required content.

More Information

- For an introduction to the use of the SAP Solution Manager content, see the SAP Help Portal at: http://help.sap.com/crm702 › *SAP Enhancement Package 2 for SAP CRM 7.0* › *Configuration and Deployment Information* › *SAP Solution Manager Content* (http://help.sap.com/content/documentation/solutionmanager/DISPLAYSOLMANCONTENT.pdf)
- For detailed information on executing application configuration via SAP Solution Manager, see the SAP Help Portal at:
  http://help.sap.com/solutionmanager71 › *Application Help* › *SAP Solution Manager 7.1 SP05* › *SAP Solution Manager* › *Solution Implementation* › *Implementation/Upgrade Work Center* › *Business Blueprint* (http://help.sap.com/saphelp_sm71_sp08/helpdata/en/45/f6da633a292312e10000000a11466f/frameset.htm)

8 General Configuration Settings in SAP Hybris Marketing

8.1 Setting up Integration with SAP Jam

You have the option to integrate various parts of *SAP Hybris Marketing* with the collaboration platform SAP Jam. The integration with SAP Jam is available for the following licenses and applications:

- **Data Management** (*Sentiment Engagement*):
  You can use SAP Jam as a data source for *Sentiment Engagement*, which allows you to filter, analyze, and process posts from SAP Jam. In addition, you can create SAP Jam groups directly from the *Sentiment Engagement* user interface.
- **Acquisition:**
  - *Campaign Management*:
    You can store campaign-related information in corresponding SAP Jam groups to support online communication such as discussions with other sales people about your campaign.
  - *Campaign Management (Paid Search)*:
    You can share paid search campaign data with an existing group on SAP Jam to collaborate with other marketing experts. The post on SAP Jam will include a link to the specific paid search campaign you are sharing and the external marketing campaign associated with it.
- **Planning** (*My Marketing Budget*):
  You can share planning data with an existing group on SAP Jam to collaborate with other marketing managers. The post on SAP Jam will include a link to the *My Marketing Budget* application.
- In addition, you must set up the integration with SAP Jam if you want to use the share function which is available in some SAP Fiori applications. This function allows the user to send posts to the feed of any SAP Jam group.

To set up the integration with SAP Jam, you need to carry out the following steps:

- Set up the connection with SAP Jam:
  - For a description of how to connect SAP Jam with AS ABAP systems, see the SAP Library at:
    http://help.sap.com/netweaver *UI add-on for SAP NetWeaver* > *UI add-on 2.0 for SAP NetWeaver* > *Application Help* > *Social Media Integration* > *Information for Administrators* > *Configuration*
    (http://help.sap.com/saphelp_uiaddon10/helpdata/en/1c/8f86d5fe634a28b1da186a5fd87f81/content.htm)
  - You find the relevant steps in the SAP NetWeaver implementation guide (IMG) (transaction `SPRO`) under *SAP NetWeaver* > *Application Server* > *Basis Services* > *Collaboration* > *SAP Jam Integration*.
- Carry out the customizing steps specified under *SAP Hybris Marketing* > *General Settings* > *Integration* > *Define Settings for Integration of SAP Jam*.
- In addition, for the use in *Sentiment Engagement*, you have to carry out the Customizing steps specified under *SAP Hybris Marketing* > *Data Management* > *Sentiment Engagement*.

Note

You can only access the *Collaboration* menu path if you have activated the business function `BC_SRV_STW_03` (*Enable Social Media ABAP Integration 3*) in customizing under *Activate Business Functions* > *ENTERPRISE_BUSINESS_FUNCTIONS*.

9 Configuring Data Management

This section is relevant for all *SAP Hybris Marketing* applications.

With *SAP Hybris Marketing Data Management*, you can analyze contact data from various sources (such as SAP ERP, SAP CRM as well as external data sources such as social media) in order to gain a deeper insight into your contacts' sentiments and interests. Based on this information, you can create contact target groups and identify follow-up actions.

9.1 Sentiment Engagement (Optional)

Sentiment Engagement allows you to filter, analyze, and process data that has been harvested from external data sources such as social networks.

> **Note**
>
> The use of information originating from social networks and other data sources must be checked in the individual case against the background of all applicable laws and regulations (e.g. on data protection) and individual rules (e.g. for the relevant data source). SAP does not accept any liability for the use of the application by its customers.

Since the setup requirements for collecting external data will always vary greatly depending between individual customers and countries, data harvesting is not part of the *SAP Hybris Marketing Data Management* application.

9.1.1 Setting up Data Harvesting

Prerequisites

In order to set up Sentiment Engagement, you need to carry out the steps below.

Ensure that the following Customizing entries have been made under *SAP Hybris Marketing* > *Data Management*:

- *Interaction Contacts* > *Define Settings for Social Media Integration*
  Enter the *Social Media Channel Codes* that you want to use in the *Sentiment Engagement* application (for example, **FB**).
- *Interactions* > *Define Communication Media*
  Enter the *Communication Media* that you need (for example, **FB**).

> **Note**
>
> Every *Communication Medium* that you want to use in the *Sentiment Engagement* application must correspond to a *Social Media Channel Code*.

And for these *Communication Media*:

- *Interactions* › *Assign Interaction Types and Communication Media to Channels*
  Assign the *Communication Media* that you have created to the *Interaction Type* `SOCIAL_POSTING` and the *Interaction Channel* `SOCIAL`.

Importing Social Posts

You first have to import the data that you want to analyze to your *SAP Hybris Marketing* system. Social posts are imported as interactions of interaction type `SOCIAL_POSTING` (see the corresponding Customizing setting above).

The import is realized using one of the following data upload interfaces:

- OData service `CUAN_IMPORT_SRV`
- RFC function module `CUAN_CE_INTERACTIONS_POST` or `CUAN_CE_INTERACTIONS_POST_FLAT`
- Web service `CUANPOSTINTERACTIONS`

The regular background job `CUAN_IA_TA_EXTR_DELTA` that you have scheduled during technical configuration (see *Background Jobs Run Regularly* in section Parameters Set by the Technical Configuration Wizard [page 55]) ensures that the imported interactions are updated by sentiments and tags according to the results of *SAP HANA Text Analysis*.

For more information about the import of interactions, see the corresponding sections for interactions in the Data Management Upload Interfaces guide for *SAP Hybris Marketing* under:

http://help.sap.com/mkt › *Configuration and Deployment Information* › *Data Management Upload Interfaces*

http://service.sap.com/%7Esapidb/012002523100007328802016E/

9.1.2 Setting up SMTP for Post Groups (Send Email to Me)

As a prerequisite for the usage of the post group action *Send Email to Me* (see the corresponding Customizing path below), you must set up the SMTP configuration for SAPconnect. To do so, proceed as follows:

1. Make the configuration settings for email exchange between your AS ABAP system and any SMTP (Simple Mail Transfer Protocol) mail server. For more information, see the *Quick Guide for SMTP Configuration* on SAP Help Portal at:
   http://help.sap.com/nw75 › *Application Help* › *Function-Oriented View* › *Application Server* › *Application Server ABAP* › *Other Services* › *Services for Business Users* › *SAPconnect (BC-SRV-COM)* › *Quick Guide to SMTP Configuration*
   http://help.sap.com/saphelp_nw75/helpdata/en/49/e5e6a986420896e10000000a421937/content.htm.

2. Make the required settings in Customizing for *SAP Hybris Marketing* under *Data Management* > *Sentiment Engagement* > *Create Action ID for Post Groups*. The `EMAIL2ME` (*Send Email to Me*) action must be active.

9.2 Scoring

Scores are calculated KPIs that help your end users to make assumptions about the future actions and decisions of an account, a contact, consumer, or prospect. Scores are displayed in a separate facet of the fact sheets on the user interface and can be used within *Segmentation*.

9.2.1 Scoring Including SAP Predictive Analytics

SAP Predictive Analytics allows for an automated training of predictive models, which reduces the effort of the business analyst, and provides best results.

To enable the usage of *SAP Predictive Analytics* as an implementation method, an installation of *SAP Automated Predictive Library (APL)* on SAP HANA is required. The integration setup of *SAP Predictive Analytics* with *SAP Hybris Marketing* is not part of the *SAP Hybris Marketing* delivery.

If you have installed SAP HANA SPS09, you can use the *APL* for an easier and more convenient setup installation.

For details on how to install the APL, go to http://help.sap.com/pa *Development Information* > *APL Reference Guide*.

(https://service.sap.com/~sapidb/012002523100013455472015E/)

9.2.2 Scoring Based on SAP HANA Rules Framework (HRF)

You have the option of integrating the SAP HANA rules framework (HRF) to help manage your heuristic scoring models. With this feature, your business analysts can create heuristic scoring models by defining the score calculation directly on the user interface using an intuitive rules expression language.

A prerequisites for using this option is an installed HRF:

- If you followed the instructions in section Installation of the SAP HANA Rules Framework (HRF) [page 47] during the initial setup of *SAP Hybris Marketing*, you can skip this step.
- If not, you follow the instructions in section Scenario C: Hub-Deployment with Shared SAP HANA System of SAP Business Suite [page 60].

9.2.3 Predictive Model Training Based on [nu]-Support Vector Machine (R)

If you want to use [nu]-Support Vector Machine (R) for the training of a predictive model, you need to integrate R with the SAP HANA database. For more information about how to enable the embedding of R code in the SAP HANA database, see the SAP HANA R Integration Guide at:

http://help.sap.com/hana_platform/ *References* › *R Integration Guide*

http://help.sap.com/hana/SAP_HANA_R_Integration_Guide_en.pdf

9.3 Web Shop Personalization Based on Customer Segments

You can integrate *SAP Hybris Marketing* with release 5.3 of the *Hybris Commerce Suite*, to personalize your Web shop based on customer segments. You do this by defining tactical customer segments in *Segmentation*, which leads to a personalized shopping experience in *Hybris commerce*.

The Web shop designer who works in the Hybris design environment calls up a list of campaigns resulting from the customer segments defined in *Segmentation*. The designer implements the personalization for the Web shop, which can range from layout and featured products to promotional pricing, for example.

This feature is enabled via the OData service `CUAN_COMMON_SRV`: The Hybris content management system (*Hybris CMS Cockpit*) calls the *SAP Hybris Marketing* system during design time via this service to search for customer segments and, therefore, campaigns that are available for assignment to customer segment rules.

During runtime, that is when a user logs on to the *Hybris commerce* platform, the *Hybris commerce* system calls the *SAP Hybris Marketing* system via the OData service to establish which campaign and, therefore, to which customer segment the login user is assigned. With this information the corresponding customer segment rules as defined in *Hybris CMS Cockpit* are derived and the web shop is personalized accordingly.

In order to use the appropriate level of authorization when accessing information in *SAP Hybris Marketing* from the *Hybris Commerce Suite*, we recommend that you carry out the following steps:

1. Copy the single role `SAP_CEI_ECOMMERCE_INTEGRATION` using transaction `PFCG`.
2. Assign the new copied role to the technical user specified for accessing *SAP Hybris Marketing* from the *Hybris Commerce Suite*.

The integration setup of the *Hybris Commerce Suite* with *SAP Hybris Marketing* is not part of the *SAP Hybris Marketing* delivery. You can implement the setup on a project basis.

For more information, see the SAP Hybris Marketing documentation at: https://wiki.hybris.com/display/release5/SAP+hybris+Marketing+Integration

9.4 Customer Journey Insight

Customer Journey Insight allows you to view customer journeys. A journey is a sequence of events performed by a customer over time through various media, such as social, Web and phone, for example, clicked ads, opened emails, and confirmed Web searches. Marketing managers can explore journeys that lead to a certain event performed by a customer, such as a buy, an abandoned shopping cart, or a conversion.

You can view customer journey data, such as all customers taking the same journey, the number of times a specific journey is taken, and the top journeys by percentage. You can filter customer journeys based on date range, touchpoints, top journey percentage, events, interaction types, target group, and granularity.

In addition, you are provided with the option to create target groups of identified contacts for further processing in campaigns or promotion activities.

9.4.1 Setting up Customer Journey Insight

Before you start with the configuration for *Customer Journey Insight*, ensure that you have carried out the steps described in the following section:

- Initial Setup of SAP Fiori [page 49] [page 62]

To set up *Customer Journey Insight*, carry out the following steps:

1. Carry out the customizing steps specified under *SAP Hybris Marketing* under *Data Management*.
   Ensure that you make all the required settings for interaction contacts, origins of contact ID, communication media, interaction types, interaction channels, and that you assign the interaction types and communication media to channels. Specifically, these need to be done in the following customizing steps:
   - *Data Management* > *Interaction Contacts* > *Define Origins of Contact ID*
   - *Data Management* > *Interactions* > *Define Communication Media*
   - *Data Management* > *Interactions* > *Define Interaction Types*
   - *Data Management* > *Interactions* > *Define Interaction Channels*
   - *Data Management* > *Interactions* > *Assign Interaction Types and Communication Media to Channels*
2. Define interaction interests on the user interface, in the *Interaction Interests* application within the *Business Administration* business group.
3. Upload the necessary data including interactions and interaction contacts. Ensure that there are some interaction contacts and interactions available in your system, otherwise the chart will be empty.
4. Define events on the user interface, in the *Customer Journey Events* application within the *Business Administration* business group (see Setting up Customer Journey Events [page 76]).
   Enter the events and assign the interactions you want to use to these events. Save your entries.
5. To enable users to use *Customer Journey Insight*, assign your copies of the following `PFCG` roles to AS ABAP users:
   - `SAP_CEI_SCI_FLP` (business catalog role)
   - `SAP_CEI_TG_INI` (for creating, filtering and viewing target groups; included in composite role `SAP_MARKETING_DATA_MANAGEMENT`)
   - `SAP_CEI_CJI` (for accessing *Customer Journey Insight*; included in composite role `SAP_MARKETING_DATA_MANAGEMENT`)
   - `SAP_CEI_CJI_EVENTS` (for accessing *Customer Journey Events*; included in composite role `SAP_MARKETING_BUS_ADMIN_USER`)
   - `SAP_CEI_HOME` (for personalization purposes)

9.4.2 Setting up Customer Journey Events

Customer Journey Events, located in the *Business Administration* business group, allows business administrators to define events for customer journeys. An event can be any outcome of a customer journey, such as a buy, an abandoned shopping cart, or a conversion.

To enable business administrators to use *Customer Journey Events*, assign your copies of the following PFCG roles to the corresponding AS ABAP users:

- SAP_CEI_KUA_FLP (business catalog role)
- SAP_MARKETING_BUS_ADMIN_USER (for accessing all applications for key user and administrative activities)
- SAP_CEI_CJI_EVENTS (for accessing *Customer Journey Events*; included in composite role SAP_MARKETING_BUS_ADMIN_USER)

  > **Note**
  >
  > Ensure that the OData service CUAN_ODATA_CJI_SRV is added to your copy of role SAP_CEI_CJI_EVENTS. For a description of how to add an OData service manually, see the upgrade guide for *SAP Hybris Marketing*, section *Adding an OData Service to a Role* under *General Adaptations in SAP Hybris Marketing* > *New OData Services in Single Roles* at:
  >
  > http://help.sap.com/mkt > *Installation and Upgrade Information* > *Upgrade Guide*
  >
  > http://service.sap.com/%7Esapidb/012002523100012510072016E/

- SAP_CEI_HOME (for personalization purposes)

9.5 Configuring Commerce Integration

9.5.1 Generating Interactions from the Tracking of Unknown Web Site Visitors

You can use the results of the visitors tracking in Hybris Commerce Suite Web shops as interactions in *SAP Hybris Marketing*. Based on the clicks of visitors, the *Business Event Extension* of the Web shop generates a set of events, and sends it to the *SAP Event Stream Processor* (ESP). From the ESP, the events are converted to *SAP Hybris Marketing* interactions

To find out how to set up the required components, see *Integration with Hybris Webshop* on the Help Portal at:

http://help.sap.com/mkt > *Configuration and Deployment Information* > *More Information*

http://service.sap.com/%7Esapidb/012002523100012509702016E/

9.6 Setting up Applications for Data Import for Analytics

The following applications are available in the *Import Data* business group and allow you to import data for analytic purposes in the *Marketing Executive Dashboard*:

- *Import Data for Analytics* allows you to upload KPI data records.

  > **Note**
  >
  > You can find example data for the available KPIs (see Configuring SAP Smart Business, executive edition [page 79]) on the SAP Community Network (SCN) at: http://scn.sap.com/docs/DOC-65033).

- *Competitors* allows you to import competitor data such as the competitor's market share via CSV upload.
- *Audiences* allows you to import audience data such as a group or a segment of customers via CSV upload.

Assign Users to Roles

To enable administrators in marketing to upload analytic data, you have to assign their AS ABAP users to your copy of the following roles:

For *Import Data for Analytics*:

- `SAP_CEI_KUA_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
- `SAP_CEI_IMPORT_ANALYTICS` (back-end role; included in composite role `SAP_MARKETING_BUS_ADMIN_USER`)
- `SAP_CEI_HOME` (for personalization purposes)

For *Competitors*:

- `SAP_CEI_KUA_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
- `SAP_CEI_COMPETITORS` (back-end role; included in composite role `SAP_MARKETING_BUS_ADMIN_USER`)
- `SAP_CEI_HOME` (for personalization purposes)

For *Audiences*:

- `SAP_CEI_KUA_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
- `SAP_CEI_AUDIENCES` (back-end role; included in composite role `SAP_MARKETING_BUS_ADMIN_USER`)
- `SAP_CEI_HOME` (for personalization purposes)

9.7 Setting up Application "Business User Administration"

The application *Business User Administration* in the *Business Administration* business group allows marketing user administrators to create business users in the *SAP Hybris Marketing* system, for example, business users in the context of *SAP Smart Business, executive edition* (see Setup for SAP Hybris Marketing Business Users [page

82]). The user administrator can only use this app, if his or her user is assigned to your copy of the following roles:

- `SAP_CEI_KUA_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
- `SAP_CEI_USER_HANDLING` (back-end role; included in composite role `SAP_MARKETING_USER_ADMIN`)
- `SAP_CEI_HOME` (for personalization purposes)

10 Configuring Insight

The settings described in this section are only relevant if you want to run *SAP Hybris Marketing Insight*.

10.1 Configuring SAP Smart Business, executive edition

The following applications within *SAP Hybris Marketing* are based on *SAP Smart Business, executive edition*:

- *Lead Dashboard*, an application available for marketing experts in the *Lead Management* business group.

  > Note
  >
  > *Lead Management* is available only if you have set up the integration with *SAP Cloud for Customer* (see Prerequisites for SAP Cloud for Customer Integration [page 50]).

- *Marketing Executive Dashboard*, an application available for marketing executives in the *Marketing Executive* business group.
  The *Marketing Executive Dashboard* contains key performance indicators (KPI), which allow marketing executives to review the success of marketing investments, and gain an overview of KPI attainment and marketing performance benchmarks.
  You are provided with a range of KPIs for the *Marketing Executive Dashboard*.
  The following KPIs are available:
  - Contact Conversion
  - Sentiment Media Mix
  - Leads
  - Opportunities
  - Sales Forecast
  - Revenue
  - Return on Marketing Investment (ROMI)
  - Sales Pipeline
  - Converted Pipeline
  - Pipeline Acceleration
  - Market Share
  - Net Promoter Score
  - Web Visits
  - Web Downloads
  - Brand Awareness
  - Planned Budget, Planned and Actual Spend for Current and Last Year

  > Note
  >
  > - The KPIs are delivered as templates. You might need to adjust them to better meet your business requirements.

- The KPIs, and the descriptions of the measures and dimensions are only available in English.

> **Note**
>
> Some of the configuration steps described in this section serve as a prerequisite for entries in the technical configuration wizard. Depending on your business requirements, make sure that you select the corresponding options in the technical configuration wizard.
>
> For an overview about the available options and the corresponding prerequisites, see Using the Technical Configuration Wizard [page 52].

10.1.1 Installing SAP Smart Business, executive edition

You have installed *SAP Smart Business, executive edition* before executing the initial technical configuration.

If you skipped the installation procedure before executing the initial technical configuration, follow the instructions under Installation of SAP Smart Business, executive edition [page 49].

Adding Technical Configuration for SAP Smart Business, executive edition at a Later Point in Time

If you **did not** select *SAP Smart Business, executive edition* while running the technical configuration wizard during the initial setup of *SAP Hybris Markting* (see Using the Technical Configuration Wizard [page 52]), you must add the technical configuration for *SAP Smart Business, executive edition* after installing it.

For more information, see Configuring Licensed Applications at a Later Point in Time [page 57].

10.1.2 User Configuration for SAP Smart Business, executive edition

For the use of *SAP Smart Business, executive edition*, you must set up a user environment that creates a corresponding SAP HANA user for every AS ABAP user.

Creating SAP HANA User for Configuration of SAP Smart Business, executive edition

1. Log on to the SAP HANA studio with the `SYSTEM` user and choose the *SAP HANA Administration Console* perspective under menu *Window* > *Open Perspective*.
2. In the *Navigator* section on the left, expand the folder of your SAP HANA database.

3. Expand the corresponding Security folder, select the *Users* folder, and choose the menu item *New User* from the context menu. The *User* view appears.
4. Enter a name for the user (**ABAP_HANA_USER_ADMIN**, for example) and a password.
5. On the *Granted Roles* tab, choose the + pushbutton. In the following *Select Catalog Object* dialog box, search for sap.hana-app.cuan.common.roles::XSUserAdmin. Select it in the *Matching Items* field, and confirm your entry.
6. Save the user. Role PUBLIC is automatically assigned to your new user.
7. Open the SQL Console and run the following command:

```
ALTER USER ABAP_HANA_USER_ADMIN DISABLE PASSWORD LIFETIME
```

Creating Database Connection for User Creation

To set up a database connection to the SAP HANA database, proceed as follows:

1. Log on to the system with the user that you have created in section User for Application Setup [page 43].
2. Go to transaction DBCO and choose the *New Entry* pushbutton.
3. Enter a user-defined name in field *DB Connection*.
4. Enter **HDB** in field *DBMS (Database Management System)* to indicate that you are establishing a database connection to a SAP HANA database.
5. Enter the name of the user that you have just created in the preceding section (*Creating SAP HANA User for Configuration of SAP Smart Business, executive edition*) in field *User Name* and the corresponding password in field *DB Password*.
6. Enter **<ServerNumber>:3<InstanceNumber>15** (for example, *ld9719:30215*) in field *Connection Info* and take a note of this info for further processing in technical configuration.
7. Save your entries.

Maintaining System Settings for User Management in DBMS (Client-Specific)

1. Log on to the system with the user that you have created in section User for Application Setup [page 43].
2. Go to transaction SM30.
3. Enter **USR_DBMS_SYSTEM** in field *View/Table* and choose the *Maintain* pushbutton.
4. On the next screen, create a new entry and enter the following parameters:
   - The database connection that you have created in section *Creating Database Connection for User Creation* (see above).
   - The current client.
5. Save the entry.

As a result, for each ABAP user you create, a corresponding SAP HANA user is created automatically. If you have already created your business users for *SAP Hybris Marketing*, do the following:

1. Go to transaction SA38 and run report RSUSR_DBMS_USERS. Enter all AS ABAP business users and select *Create and Map DBMS Users* in the *Function Selection* section. Execute the report
2. To check if your creation was successful you can open one of your users in transaction SU01. On the tab *DBMS*, you see a DBMS user and the information that a DBMS user exists.

10.1.3 Exchange of Certificates Between SAP HANA and AS ABAP

To be able to use SAP Single Sign-On in connection with logon tickets to log on to *SAP Smart Business, executive edition*, you must exchange the corresponding certificates between the SAP HANA database and your *SAP Hybris Marketing* AS ABAP system.

To do so, proceed as follows:

1. Log on to the SAP HANA XS Administration console under `https://<your server>:<your HTTPS port>/sap/hana/xs/admin` with a SAP HANA user that is assigned the role `sap.hana.xs.admin.roles::TrustStoreAdministrator`.
2. From the menu in the upper left corner, select *Trust Manager*.
3. In the *Trust Store* list, select *SAPLOGON*.
4. In the *Trust Store* details to the right, select the *Certificate List* tab.
5. Choose the *Import Certificate* pushbutton to import the AS ABAP certificate.
6. To complete the process, you must restart the SAP HANA Extended Application Services (SAP HANA XS). To do so, proceed as follows:
   1. Log on to the SAP HANA studio with the `SYSTEM` user and choose the *SAP HANA Administration Console* perspective under menu *Window* > *Open Perspective*.
   2. In the navigation section to the right, choose the context menu of your system.
   3. In the appearing section with system details to the left, select the *Landscape* tab.
   4. In the context menu of the table entry with value *xsengine* in column *Service*, choose *Stop*.
   5. To restart, choose *Start* from the context menu of the same table entry.

10.1.4 Setup for SAP Hybris Marketing Business Users

To create marketing users for *SAP Hybris Marketing* you are provided with the application *Business User Administration* (see Setting up Application "Business User Administration" [page 77]). To create marketing users that are allowed to access the *Marketing Executive Dashboard* or the *Lead Dashboard*, proceed as follows:

1. For the *Marketing Executive Dashboard*, copy the composite role `SAP_MARKETING_EXECUT_DASHBOARD` and its single roles to customer roles.
2. For the *Lead Dashboard*, copy the composite role `SAP_MARKETING_INSIGHT` and its single roles to customer roles.
3. By default, the application creates all SAP HANA users with SAP Logon Ticket authentication. If you want to restrict the role selection in this application to marketing roles only, open transaction `SM30` and maintain view `CUANV_UM_ROLES`. Enter the marketing roles, to which the role selection of the application is to be restricted.
4. Create a user for *SAP Hybris Marketing Business User Administration*, and assign your copy of composite role `SAP_MARKETING_USER_ADMIN`.

10.1.5 Creation of SAP Hybris Marketing Business Users

To create a business user within *SAP Hybris Marketing*, follow these steps:

1. Open *SAP Hybris Marketing* through the following URL: `https://<webdispatcher_host>:<webdispatcher_port>/sap/bc/ui5_ui5/ui2/ushell/shells/abap/FioriLaunchpad.html?sap-client=<Client>&sap-ushell-config-url=/sap/ushell_config/CEC_MKT.json#Shell-home`.
2. Log on with the user for *SAP Hybris Marketing Business User Administration* from Setup for SAP Hybris Marketing Business Users [page 82].
3. Open the *Business User Administration* application and create *SAP Hybris Marketing* business users. Assign your copy of composite role `SAP_MARKETING_EXECUT_DASHBOARD` or `SAP_MARKETING_INSIGHT`, respectively (see section Setup for SAP Hybris Marketing Business Users [page 82]).
4. When the *SAP Hybris Marketing* business users open *SAP Hybris Marketing*, they find the dashboard as follows:
   - The *Marketing Executive Dashboard* within business group *Marketing - Executive Dashboard*
   - The *Lead Dashboard* within business group *Lead Management*

10.1.6 Optional: Modeling Instance Authorizations for Restricted User Access

If you want to prevent your business users from seeing all data in the *Marketing ExecutiveDashboard* or in the *Lead Dashboard*, you can model instance authorizations (for example, to restrict data by country) with the help of analytic privileges. Analytic privileges in the SAP HANA database are used to grant different users access to different portions of data in the same view depending on their business role. SAP has delivered an example analytic privilege, which you find in the SAP HANA database under *Content* > *sap* > *hana-app* > *cuan* > *mkteff* > *Analytic Privileges* > *AP_CMO_COUNTRY_TMP*.

You will need the SAP HANA developer guide, which you can find at:

http://help.sap.com/hana_platform *Development Information* > *SAP HANA Developer Guide*

(http://help.sap.com/saphelp_hanaplatform/helpdata/en/34/29fc63a1de4cd6876ea211dc86ee54/frameset.htm)

To create your own analytic privilege, proceeds as follows:

1. Log on to your SAP HANA system with the SAP HANA user for technical configuration (see section SAP HANA User for Technical Configuration [page 36]).
2. Create a new repository package as described in the *SAP HANA Developer Guide* under *Setting Up Your Application* > *Maintaining Repository Packages* > *Create a Repository Package* ().
3. Create a new analytic privilege as described in the *SAP HANA Developer Guide* under *Setting Up Roles and Privileges* > *Create Analytic Privileges*. You can use the following pre-delivered analytic privileges as templates:
   - For *Marketing Executive Dashboard*: `sap.hana-app.cuan.mkteff.internal::AP_CMO_KPI_S4H`
   - For *Lead Dashboard*: `sap.hana-app.cuan.lm.internal::AP_LM_KPI_S4H`

In the section *Reference Models*, add the SAP HANA information model to which you want to apply access restrictions. The following information models are available:
For the *Marketing Executive Dashboard*:

Table 20:

SAP Smart Business, executive edition Data Source	SAP HANA Information Models	Package
Contact Conversion	`CA_CE_IC_CONTACT_ANALYSIS`	`sap.hana-app.cuan.mkteff`
Sentiment Media Mix	`CA_SE_INTERACTION_ANALYSIS`	`sap.hana-app.csan.common`
Marketing Executive Dashboard – KPI Values	`CA_D_CMO_KPI_VALUES`	`sap.hana-app.cuan.mkteff.XSAPP`
Marketing Executive Dashboard - KPI Values Over Time	`CA_D_CMO_KPI_VALUES_OVER_TIME`	`sap.hana-app.cuan.mkteff.XSAPP`
Marketing Planning: Budget vs Spend	`CA_MKT_PLANNED_BUDGET_AND_COSTS_TEXT`	`sap.hana-app.cuan.amp`
Web Downloads	`AN_CMO_WEB_DOWNLOADS`	`sap.hana-app.cuan.mkteff.ext`
Web Visits	`AN_CMO_WEB_VISITS`	`sap.hana-app.cuan.mkteff`

For the *Lead Dashboard*:

Table 21:

SAP Smart Business, executive edition Data Source	SAP HANA Information Models	Package
Lead Dashboard – KPI Values	`CA_LM_IA_KPI`	`sap.hana-app.cuan.lm.internal`
Lead Dashboard – Item of Interests	`CA_LM_LEAD_PER_IOI`	`sap.hana-app.cuan.lm.internal`
Lead Dashboard – Stages per Month/ Year	`CA_LM_LEAD_STAGE`	`sap.hana-app.cuan.lm.internal`
Lead Dashboard – Stages per Day	`CA_LM_LEAD_STAGE_DAYS`	`sap.hana-app.cuan.lm.internal`
Lead Dashboard – Current Stages	`CA_LM_LEAD_STAGE_CURRENT`	`sap.hana-app.cuan.lm.internal`

In the section *Associated Attributes Restrictions* the column is defined on which the instance check should be executed. In the example delivered with *SAP Hybris Marketing*, column `LAND1`, which represents a country, is taken into account.
In the section *Assign Restrictions*, you define the values that need to be checked when the instance authorization is carried out. You can define either fixed filter values or determine the values using a filter procedure. A procedure has the advantage that you have to create less analytic privileges and roles.

Performance depends on the logic of the procedure. You can find detailed information on filter procedures in the SAP HANA developer guide at:

Setting up Roles and Privileges > *Create Analytic Privileges* > *Example: Create an Analytic Privilege with Dynamic Value Filter*

(http://help.sap.com/saphelp_hanaplatform/helpdata/en/b5/08f2d6a35a4059b7505afb7a3682df/content.htm)

The example delivered with *SAP Hybris Marketing* uses the procedure `sap.hana-app.cuan.mkteff/PR_XMLBASED_FILTER_FOR_COUNTRY` to determine the values for the field `Country` from the authorization object `CRA_CUNTR` from the AS ABAP user assigned to the SAP HANA user.

> **Caution**
>
> Do not assign the analytic privilege directly to the users. It will be assigned to a role in the next step.

4. Create a new role as described in the SAP HANA developer guide under:
   Setting Up Roles and Privileges > *Create a Design-Time Role*.
   Now add your analytic privilege to that role.
5. Log on to the *SAP Hybris Marketing* system with the user that you have created in section SAP HANA User for Technical Configuration [page 36].
6. Go to transaction `SA38` and run report `RSUSR_DBMS_USERS`. Enter all AS ABAP business users. Choose the *Select DBMS Roles* pushbutton in the *DBMS Role Selection* section and choose your new role. Select *Assign DBMS Roles* in the *Function Selection* section. Execute the report.

10.2 Creating SAP CRM Business Transactions

If you use SAP CRM as a source system, you can create activities directly in the SAP CRM source system from your *SAP Hybris Marketing* system.

This function is based on the enhancement spot `CUAN_CRM_CREATE_1O` (*Trigger Creation of CRM Activity*) to implement the BAdI `CUAN_CRM_CREATE_ONEORDER_ACT` (*Create Business Transactions*). This BAdI includes a standard implementation.

If you want to enhance the standard implementation, create your own implementation on the basis of the standard. In addition, consider SAP Note 1784897.

For more information, see the document Create SAP CRM Business Transactions on the SAP Service Marketplace at http://service.sap.com/mkt:

http://service.sap.com/%7Esapidb/012002523100007328302016E/

10.3 Importing Data from External Source to "Margin Decomposition"

With the Web service `CUAN_ANALYTIC_FND` (to be accessed in your AS ABAP system under transaction SEGW), you can import analytical data from any external source into the *Margin Decomposition* application of *SAP Hybris Marketing Insight*.

In particular, you can import the amount and the document currency of the invoicing account for each of the following decomposition groups in *Margin Decomposition*:

- Gross Revenue
- Invoice Discounts
- Accrued Discounts
- CoGS
- Direct Costs
- Invoice Surcharges

The data can also be provided on the granularity of decomposition subgroups, for example, to show reporting results for different types of invoice discounts.

> **Note**
>
> You can also use the Web service to integrate Controlling data from SAP ERP (`CO-PA`).

In addition, the data records are to be provided together with values (for IDs and codes) for characteristics/ dimensions such as the following:

- Customer Group
- Industry Code
- Sales Organization
- Country
- Region of Country
- Distribution Channel
- Division
- Sales Group
- Sales Office
- Sales District
- Product
- Product Group
- Product Category

> **Note**
>
> The needed master data or Customizing information for the dimensions values must be already part of *SAP Hybris Marketing* by means of a connected SAP ERP system.

11 Configuring Segmentation

The settings described in this section are only relevant if you want to run *SAP Hybris Marketing Segmentation*.

11.1 Dialog Work Processes

To achieve optimal performance, *SAP Hybris Marketing Segmentation* parallelizes requests in the ABAP application server as well as in the SAP HANA database. Therefore you must configure a suitable number of dialog work processes. The number of dialog work processes depends on the number of frequent *SAP Hybris Marketing Segmentation* users. A frequent user works, for example, every day for several hours in the system. The minimum number of processes that the application requires is 25.

To configure the number of dialog work processes, follow the description in SAP Note 39412.

➜ Recommendation

SAP recommends the following number of dialog work processes per number of frequent users:

Table 22:

Frequent Users	≤ 10	25	50	75
Dialog Work Processes	25	30	65	90

11.2 Geospatial Segmentation (Optional)

This function allows viewing the distribution of geolocations on a map (for example, the distribution of customers in a region) and creating new segments based on areas defined on a map (radius or polygon).

- If you use the standard segmentation profile *All Consumers (SCI)*, this function is automatically available for the *Geolocation* attribute.
- If you want to use this function with one of your own custom segmentation profiles, you need to ensure that your attribute universe provides the necessary geolocation information (for details, see chapter *Setting up the Geospatial Segmentation and Map Preview* of the extensibility guide under:

  https://help.sap.com/mkt ▶ *Configuration and Deployment Information* ▶ *Extensibility Guide* ◀).
  http://service.sap.com/%7Esapidb/012002523100007329212016E/

Access to Map Provider

To use geospatial segmentation, you need both map visualization and geocoding services.

The default configuration will use *here.com* for map visualization and OpenStreetMap for geocoding.

You can change the configuration for the geo-coding service under Customizing: *SAP NetWeaver* > *UI Technologies* > *SAP Visual Business* > *Maintain Application Definition*. The relevant application name is `GSEG_GEOSPATIAL`.

If you keep the default configuration, you need to check the following points:

- **Map Visualization**
  The user's browser will need access to the internet domain *here.com*. The domain provides the map data that is used in the geospatial segmentation option. Check, whether the users in question have access to this domain and consider the implications of communicating with servers outside your firewall.
  For more information, see the *SAP Hybris Marketing* Security Guide at https://help.sap.com/mkt *Security Information* > *Security Guide* > *Network and Communication Security* > *Communication Destinations*.
  https://service.sap.com/%7Esapidb/012002523100007357012016E/
- **Geocoding Services**
  The application server will need access to the internet domain *nominatim.openstreetmap.org*. For more information on how to do that, go to http://help.sap.com/netweaver *User interface add-on 2.0 for SAP NetWeaver* > *Application Help* > *Choose your language* > *SAP Visual Business* > *Setting up SAP Visual Business"* > *-> Configuring SAP Visual Business* > *Allowing External Geo-Coding Service Calls*
  (http://help.sap.com/saphelp_uiaddon20/helpdata/en/5d/ef8651437dfc53e10000000a44538d/content.htm).
  For more information, such as changing the default configuration of geocoding, see the installation and configuration guide for Visual Business underhttp://help.sap.com/visualbusiness21 *Installation and Upgrade Information*.
  (https://service.sap.com/~sapidb/011000358700000544602013E)

11.3 SAP Hybris Marketing Integration with SAP Consumer Insight 365

> **Note**
>
> To use this integration, you must have licensed and set up *SAP Hybris Marketing Segmentation* (see Configuring Segmentation [page 87]).

If you productively use *SAP Hybris Marketing* as well as *SAP Consumer Insight 365* you have the option to take advantage of the integration of these products. By using the location planning or catchment features of *SAP Consumer Insight 365*, the integration provides you with the automatic creation of a segmentation model in *SAP Hybris Marketing Segmentation*.

For more information about the implementation of the integration, see the corresponding guide on SAP Service Marketplace at:

http://service.sap.com/mkt ▶ *Installation Guide SAP Consumer Insight 365* ▶

http://service.sap.com/%7Esapidb/012002523100007328302016E/

12 Configuring Recommendation

The settings described in this section are only relevant if you want to run *SAP Hybris Marketing Recommendation*.

With *SAP Hybris Marketing Recommendation* you can build different product recommendation model types from various sources (such as *SAP ERP*, *SAP Hybris Marketing Data Management*, as well as external data sources such as social media) in order to provide a recommendation. This recommendation can be consumed by various applications such as a web shop or an interaction contact.

In addition, *Recommendation* includes the Offer Management applications *Offers* and *Manage Offer Recommendations*.

For more information about performance and load balance, see SAP Note 2264072.

Adding Technical Configuration for Recommendation at a Later Point in Time

A prerequisite for configuring *Recommendation* is the corresponding technical configuration.

If you **did not** select *Recommendation* while running the technical configuration wizard during the initial setup of *SAP Hybris Markting* (see Using the Technical Configuration Wizard [page 52]), you must add the technical configuration for *Recommendation* before configuring it.

For more information, see Scoping at a Later Point in Time [page 57].

12.1 Post-Installation Steps

12.1.1 Adapting Customer Channels for New Integration Scenarios

Customer channels for which SAP does not provide an integration scenario must be adapted to consume recommendations models using one of the following:

- Remote Function Call (RFC)
- OData service

For more information, go to http://help.sap.com/mkt. Choose a release and then *Configuration and Deployment Information* > *Extensibility Guide* > *Recommendation*.

12.1.2 Configuring Offer Management

> **Note**
>
> Some of the configuration steps described in this section serve as a prerequisite for entries in the technical configuration wizard. Depending on your business requirements, make sure that you select the corresponding options in the technical configuration wizard.
>
> For an overview about the available options and the corresponding prerequisites, see Using the Technical Configuration Wizard [page 52].

Offer Management provides you with the following applications:

- The app *Offers* allows you to create, release, and put offers on hold. During creation, you define a validity period and define the offer content. This can be both a picture and a text.
  If you want to manage rule-based tasks in *SAP Hybris Marketing*, the SAP HANA rules framework must be installed (see Installation of the SAP HANA Rules Framework [page 47]).
  In addition, you can use an interface to generate offers from external systems.
- With the app *Manage Offer Recommendations*, you are provided with a rule-based offer finding option.
  The app is based on the SAP HANA rules framework. Depending on your settings during technical configuration setup (see Installation of the SAP HANA Rules Framework [page 47]), the app can include offers created in the *Offers* app or offers from *SAP Promotion Management for Retail*.

> **Note**
>
> Before you start configuring Offer Management, ensure that you have carried out the steps described in section Initial Setup of SAP Fiori [page 62].

12.1.2.1 Setting up Application "Offers"

To set up the *Offers* application, assign your copy of the following role to the AS ABAP users of your marketing managers or experts:

- `SAP_CEI_OFFER_APP` (back-end role; included in composite role `SAP_MARKETING_RECOMMEND_EXPERT`)

By assigning the role, the users are given the following authorizations:

Table 23:

Authorization Object	`HPA_OBJECT`
Object Name (`HPA_OBJ`)	`CUAN_OFFER`, `CUAN_TARGET_GROUP`
Activity	*Display*

Table 24:

Authorization Object	`HPA_MKT_AR`

Object Name (HPA_OBJ)	CUAN_INITIATIVE, CUAN_INTERACTION, CUAN_OFFER
Activity	*Display*

> **Note**
>
> The standard role SAP_CEI_OFFER_APP includes an authorization check at instance level for marketing areas. The marketing areas are defined in Customizing for *SAP Hybris Marketing* under *Planning* > *General Settings* > *Define Marketing Areas*. If a user assigned to a copy of SAP_CEI_OFFER_APP tries to access an object instance for a particular marketing area, the system checks whether they are allowed to access that area.

In addition, you have to assign your copies of the following roles to the AS ABAP users of your marketing experts:

- SAP_CEI_ROF_FLP (business catalog role; no copy required - you can assign the delivered standard role)
- SAP_CEI_HOME (for personalization purposes)

Enabling the OData API for E-Commerce Integration

To display suitable offers to customers, the public OData service API CUAN_OFFER_DISCOVERY_SRV can be used to make offers available in an e-commerce scenario, for example in the *SAP Hybris Commerce* Web shop.

For more information about the OData API, see the *Extensibility Guide* on the SAP Help Portal at:

http://help.sap.com/mkt > *Configuration and Deployment Information* > *Extensibility Guide* > *Displaying Offers in a Web Shop Using a Public OData Service*

http://service.sap.com/%7Esapidb/012002523100007329212016E/

To enable the OData API for e-commerce integration, you need to assign the technical AS ABAP user that is used to communicate between the e-commerce suite, such as *SAP Hybris Commerce*, and the *SAP Hybris Marketing* back-end system to the following role:

- SAP_CEI_OFFER_PUBLIC_API

After you have assigned the role, the user should have the following authorizations:

Table 25:

Authorization Object	HPA_OBJECT
Object Name (HPA_OBJ)	CUAN_OFFER
Activity	*Display*

Table 26:

Authorization Object	S_SERVICE

Program, transaction or function module name	• `0AC639FB8EBFB4F9FBEA65AF56B546 R3TR IWSV CUAN_OFFER_DISCOVERY_SRV 0001` • `F06EB29134F3DA0EE136BA140613FB R3TR IWSG ZCUAN_OFFER_DISCOVERY_SRV_0001`
Type of Check Flag and Authorization Default Values	`Hash Value for TADIR Object`

Enabling the OData API for Offer Import

You are provided with the public OData API `CUAN_OFFER_IMPORT_SRV` to import offers from any third-party system to your *SAP Hybris Marketing* system. To enable the OData API for offer import, you need to assign the technical AS ABAP user that is used to communicate between the legacy system and the *SAP Hybris Marketing* back-end system to the following role:

- `SAP_CEI_OFFER_IMPORT_API`

For more information about the public OData API `CUAN_OFFER_IMPORT_SRV`, see http://help.sap.com/mkt *Installation and Upgrade Information* > *Master Guide* > *Appendix* > *API Reference* > *Import of Offers Using an OData Service*.

http://service.sap.com/%7Esapidb/012002523100007329202016E/

After you have assigned the role, the user should have the following authorizations:

Table 27:

Authorization Object	`HPA_OBJECT`
Object Name (`HPA_OBJ`)	`CUAN_OFFER`
Activity	• *Display* • *Change*

Table 28:

Authorization Object	`HPA_OBJECT`
Object Name (`HPA_OBJ`)	`HPA_USER`
Activity	• *Display*

Table 29:

Authorization Object	`S_SERVICE`
Program, transaction or function module name	• `649DCCE8465AA4448AC9617AECEE27 R3TR IWSV CUAN_OFFER_IMPORT_SRV 0001` • `9B46720527408B9E1F11D1A881D0FA R3TR IWSG ZCUAN_OFFER_IMPORT_SRV_0001`

Type of Check Flag and Authorization Default Values	Hash Value for TADIR Object

12.1.2.2 Setting up Application "Manage Offer Recommendations"

The *Manage Offer Recommendations* app is based on the SAP HANA rules framework. For this reason, as a prerequisite for using the app, you need to follow the steps described in section Using Rule-Based Tasks [page 95].

In addition, you have to assign the following role to the AS ABAP users of your marketing experts:

- SAP_CEI_RECO_MKT_OFFER (back-end role; included in composite role SAP_MARKETING_RECOMMEND_EXPERT)

After you have assigned the role, the user should have the following authorizations:

Table 30:

Authorization Object	HPA_OBJECT
Object Name (HPA_OBJ)	PROD_RECO_RUNTIME
Activity	• *Display* • *Change*

Table 31:

Authorization Object	S_SERVICE
Program, transaction or function module name	• BFEC7A2EF5E9DC425B0A52F413DAD7 • CB8C95D3F8063D9DF121A571A16BBB
Type of Check Flag and Authorization Default Values	Hash Value for TADIR Object

Table 32:

Authorization Object	S_RFC
Activity	*Execute*
Name (Whitelist) of RFC object	• PROD_RECO_GET_RECOMMENDATIONS • PROD_RECO_GET_RECO_BY_SCENARIO • PROD_RECO_POST_IA_FOR_SCENARIO • PROD_RECO_POST_INTERACTION
Type of RFC object to which access	*Function Module*

Table 33:

Authorization Object	CRA_COUNTR
Activity	• *Display* • *Change*

Table 34:

Authorization Object	RECO_RTGET
Activity	*Read*

In addition, you have to assign your copies of the following roles to the AS ABAP users of your marketing experts:

- SAP_CEI_ROF_FLP (business catalog role; no copy required - you can assign the delivered standard rolee)
- SAP_CEI_HOME (for personalization purposes)

12.2 Using Rule-Based Tasks

Rule-based tasks are used in the *Manage Recommendations* app (for example, to do a re-rank of a result from a previous step) as well as in the *Manage Offer Recommendations* app. Rules can also be used to find the best offer using an OData service. For more information, see Setting up Application "Offers" [page 91], section *Enabling the OData API for E-Commerce Integration*.

To use rule-based tasks, it is required to have the SAP HANA rules framework installed. To do so, follow the steps described in section Installation of the SAP HANA Rules Framework [page 47].

In addition, make sure that:

- SAP HANA rules framework activation plug-in is activated
- SAP HANA user SAP_COM_2002_<SAP SID>_<Client> has all package privileges on the package system system-local.prodreco.hrf.
- If you want to run the recommendation scenarios *SAP Rule-Based Product Recommendations* (see section Using the Technical Configuration Wizard [page 52]), make sure that SAP HANA user SAP_COM_2002_<SAP SID>_<Client> has object privilege *SELECT* and *EXECUTE* on data base schemas SAP_CUAN_APPL and on physical data base schema of authoring schema SAP_CUAN_ERP.
- If you want to run one of the recommendation scenario *SAP Rule-Based Product Recommendations* or *SAP Rule-Based PMR Offer Recommendations* (see section Using the Technical Configuration Wizard [page 52]), make sure that SAP HANA user SAP_COM_2002_<SAP SID>_<Client> has object privilege *SELECT* and *EXECUTE* on data base schemas SAP_CUAN_APPL, on physical data base schema of authoring schema SAP_CUAN_ERP, and on physical data base schema of authoring schema SAP_CUAN_CAR.

13 Configuring Planning

The settings described in this section are only relevant if you want to run *SAP Hybris Marketing Planning*.

With *SAP Hybris Marketing Planning*, marketing managers can plan budgets, programs, and spends in *My Marketing Budget*; marketing experts can plan campaigns and spends in a simple and intuitive way in applications belonging to the *Spend Management* business group. Marketing managers can view programs and the corresponding campaigns that are assigned to the programs, and assign and remove campaigns to programs in the *Programs* application. Marketing managers and marketing experts can have a complete overview of ongoing and planned marketing activities in the *My Marketing Calendar* application.

Adding Technical Configuration for Planning at a Later Point in Time

A prerequisite for configuring *Planning* is the corresponding technical configuration.

If you **did not** select *Planning* while running the technical configuration wizard during the initial setup of *SAP Hybris Markting* (see Using the Technical Configuration Wizard [page 52]), you must add the technical configuration for *Planning* before configuring it.

For more information, see Scoping at a Later Point in Time [page 57].

13.1 Setting up "My Marketing Budget"

> **Note**
>
> Before you start with the configuration for *My Marketing Budget*, ensure that you have performed the steps described in the following section:
>
> - Initial Setup of SAP Fiori [page 62]

To allow marketing managers to plan a budget according to their organization's requirements, you configure how budget planning is performed by defining a planning model and setting up the authorization for budget planning in Customizing for *SAP Hybris Marketing* (see below). A planning model has a hierarchical structure that can have both standard and custom dimensions for which budget can be planned. Dimensions can be as follows:

- Standard dimensions:
  - Brand
  - Market
  - Country
  - Region
  - Audience

- Custom dimensions:
  Other dimensions for which marketing managers can plan budget. Custom dimensions are defined in Customizing for *SAP Hybris Marketing* (see below).

When you define a planning model, you assign a dimension to a level in the hierarchy. You must have at least two levels in your planning model. A budget is allocated to the dimension at the first level of the hierarchy. The marketing manager plans a budget for the dimensions at the other levels of the hierarchy.

For more information, see SAP Library for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing Applications* > *Planning* > *Budget Planning*

fhttp://help.sap.com/saphelp_mkt122/helpdata/en/d0/af5b548640043de10000000a441470/content.htm

To set up budget planning, ensure that you make the following Customizing settings:

1. If custom dimensions are going to be used for budget planning, define them in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Custom Dimensions*.
2. If you defined custom dimensions, upload data for them in the system from a comma-separated value (CSV) file using the *Import Data* application in the *Import Data* business group.
3. If brand is going to be used as a dimension for budget planning, upload brand data in the system from a CSV file using the *Import Data* application in the *Import Data* business group.
4. If country is going to be used as a dimension for budget planning, define countries in Customizing for *SAP NetWeaver* under *General Settings* > *Set Countries*.
5. If region is going to be used as a dimension for budget planning, assign regions to countries in Customizing for *SAP NetWeaver* under *General Settings* > *Set Countries* > *Insert Regions*.
6. If market is going to be used as a dimension for budget planning, make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *General Settings* > *Define Markets*.
7. If audience is going to be used as a dimension for budget planning, maintain the audience data using the *Import Data* application in the *Import Data* business group.
8. If budget planning is going to be done for different media types, make the required settings in Customizing for *SAP Hybris Marketing* under *General Settings* > *Define Media Types*.
   If a plan uses a planning model for which media type is enabled, and no images or icons are defined for the media types, the media type descriptions are shown in the axis of the chart. If only an image is defined for a media type, the image is shown in the axis of the chart. If only an icon is defined for a media type, the icon is shown in the axis of the chart. If both an image and an icon are defined for a media type, only the image is shown in the axis of the chart.

   > **Note**
   >
   > It is not mandatory to use media type for campaigns. However, if budget is planned for different media types, it is mandatory that all campaigns that are assigned to programs and are funded by that budget have media type assigned. Otherwise, if such campaigns have actual spend data, the actual spend cannot be shown in *My Marketing Budget*. We recommend that you create a media type, such as other or miscellaneous, and assign it to campaigns so that actual spend data for this media type can be shown in *My Marketing Budget*.

9. To define planning models that are going to be used for budget planning, make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Planning Models*.

10. To set up user authorization for budget planning, do the following:
    1. Make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *General Settings* > *Define Marketing Areas*.
    2. Make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Areas of Responsibility*.
    3. Assign marketing areas and areas of responsibility to roles and then assign users to the roles using the *Role Maintenance* (`PFCG`) transaction.
11. To define the currency that is going to be used for budget planning and spend management, make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *General Settings* > *Set Currency*.
12. If you defined custom dimensions or if you want to change the labels for the standard dimensions and measures, make the required settings in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Labels for Dimensions and Labels*.

For more information, see:

- SAP Library for *SAP Hybris Marketing* on SAP Help Portal at:
  http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing Applications* > *Data Management* > *Importing Data*
  (http://help.sap.com/saphelp_mkt122/helpdata/en/ca/b5295390b2363ee10000000a423f68/content.htm)
- SAP Library for *SAP Hybris Marketing* on SAP Help Portal at:
  http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing Applications* > *Planning* > *Authorization Examples for Budget Planning, Programs, and Marketing Spend Management*
  (http://help.sap.com/saphelp_mkt122/helpdata/en/a5/d4845400082357e10000000a44176d/content.htm)

Uploading Data for "My Marketing Budget"

If the planning model you have defined includes brand information, you need to upload brands in the system. You upload brand data from a comma-separated value (CSV) file using the *Import Data* application in the *Import Data* business group.

For more information, see SAP Library for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt *SAP Hybris Marketing Applications* > *Data Management* > *Importing Data*

(http://help.sap.com/saphelp_mkt122/helpdata/en/ca/b5295390b2363ee10000000a423f68/content.htm)

To access the *Import Data* application, the user must be assigned a copy of the following role:

- `SAP_MARKETING_BUS_ADMIN_USER`

To upload brands, the user must have the following authorization object assignments:

Table 35:

Authorization Object	Object Name (HPA_OBJ)	Activity (ACTVT)
HPA_OBJECT	HPA_BRAND	02 (Change)

Table 36:

Authorization Object	Object Name (HPA_OBJ)	Action Name (HPA_ACTION)	Activity (ACTVT)
HPA_ACTION	HPA_BRAND	IMPORT_BRANDS	16 (Execute)

For more information, see the security guide for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt *Security Information*

https://service.sap.com/%7Esapidb/012002523100007357012016E/

If you want to use custom dimensions, you proceed as follows:

1. Define the custom dimensions in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Custom Dimensions*. You can define a maximum of 10 custom dimensions. The technical object name for each dimension is CUAN_CUSTOM_DIMENSION_(SAP technical ID of custom dimension from 01 to 10). The mapping from the dimension ID and the technical ID is done automatically. For example, you have defined a custom dimension with the ID *MyDimension*. It will be mapped to the technical ID CUAN_CUSTOM_DIMENSION_01.
2. Assign the custom dimensions to the planning model dimensions in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Planning Model*.
3. Upload the custom dimension values in the system from a CSV file using the *Import Data* application in the *Import Data* business group.

To access the *Import Data* application, the user must be assigned a copy of the following composite role:

- SAP_MARKETING_BUS_ADMIN_USER

To upload custom dimension values, the user must have the following authorization object assignments:

Table 37:

Authorization Object	Object Name (HPA_OBJ)	Activity (ACTVT)
HPA_OBJECT	CUAN_CUSTOM_DIMENSION (SAP technical ID of custom dimension from 01 to 10)	02 (Change)

Table 38:

Authorization Object	Object Name (HPA_OBJ)	Action Name (HPA_ACTION)	Activity (ACTVT)
HPA_ACTION	CUAN_CUSTOM_DIMENSION (SAP technical ID of custom dimension from 01 to 10)	IMPORT_CUSTOM_DIMENSIO N	16 (Execute)

For more information, see the security guide for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt ▶ *Security Information* ▶.

https://service.sap.com/%7Esapidb/012002523100007357012016E/

Setting up the Authorization for "My Marketing Budget"

1. Define the marketing areas in Customizing for *SAP Hybris Marketing* under ▶ *General Settings* ▶ *Define Marketing Areas* ▶.
2. Define the areas of responsibility in Customizing for *SAP Hybris Marketing* under ▶ *Planning* ▶ *Budget Planning* ▶ *Define Areas of Responsibility* ▶.
3. Assign areas of responsibility to users in transaction `PFCG`.
4. The users must be assigned a copy of the `SAP_CEI_AMP` role with the following start authorization settings:

Table 39:

Authorization Object	Object Name (`HPA_OBJ`)	Activity (`ACTVT`)
`HPA_OBJECT`	`CUAN_BUDGET_PLANNING`	○ **02** (Change) ○ **03** (Display)

5. Assign instance authorization to users as follows:

Table 40:

Authorization Object	Object Name (`HPA_OBJ`)	Area of Responsibility ID (`RSPAREA_ID`)	Activity (`ACTVT`)
`HPA_RSP_AR`	`CUAN_BUDGET_PLANNING`	Area of responsibility ID as defined in Customizing for *SAP Hybris Marketing* under ▶ *Planning* ▶ *Budget Planning* ▶ *Define Areas of Responsibility* ▶	**02** (Change)

For more information about the authorization object, see the security guide for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt ▶ *Security Information* ▶

(https://service.sap.com/%7Esapidb/012002523100007357012016E/)

Setting Up the Map Visualization

The *My Marketing Budget* application does not come with a pre-configured map. To set up your map, follow the steps in the SCN blog on SAP Visual Business:

http://scn.sap.com/docs/DOC-59547

For more information, see the SAP Visual Business documentation on the SAP Help Portal at:

http://help.sap.com/visualbusiness21

13.2 Setting up "Programs"

Programs are containers for marketing activities. Marketing managers propose how much to be spent on marketing activities.

Setting Up the Authorization for Programs

1. The users must be assigned a copy of the `SAP_CEI_PROGRAM` role with the following start authorization settings:

   Table 41:

Authorization Object	Object Name (`HPA_OBJ`)	Activity (`ACTVT`)
`HPA_OBJECT`	`CUAN_PROGRAM`	○ **02** (Change) ○ **03** (Display)

2. Assign instance authorization to users as follows:

   Table 42:

Authorization Object	Object Name (`HPA_OBJ`)	Marketing Area ID (`MKTAREA_ID`)	Activity (`ACTVT`)
`HPA_MKT_AR`	`CUAN_PROGRAM`	One of the marketing areas as defined in Customizing for *SAP Hybris Marketing* under *General Settings* > *Define Marketing Areas*	○ **02** (Change)

3. Assign the authorization for funding assignment as follows:

Table 43:

Authorization Object	Object Name (HPA_OBJ)	Area of Responsibility ID (RSPAREA_ID)	Activity (ACTVT)
HPA_RSP_AR	CUAN_BUDGET_PLANNING	Area of responsibility ID as defined in Customizing for *SAP Hybris Marketing* under *Planning* > *Budget Planning* > *Define Areas of Responsibility*	◦ **02** (Change) ◦ **03** (Display)

For more information about the authorization objects, see the security guide for SAP Hybris Marketing on SAP Help Portal at:

http://help.sap.com/mkt *Security Information*

https://service.sap.com/%7Esapidb/012002523100007357012016E/

13.3 Setting up Spend Management

Before you start with the configuration for the applications belonging to spend management (*My Marketing Spend - Quick Entry*, *My Marketing Spend - Details*), ensure that you have carried out steps described in section Initial Setup of SAP Fiori [page 62].

To set up spend management apps, you need to carry out the following steps:

Set up Spend Types

1. In Customizing, go to *SAP Hybris Marketing* > *Planning* > *Spend Management* > *Define Spend Types*.
2. Enter the spend types you want to use.
3. Save and close the transaction.

Assign Users to Roles for Spend Management

To enable marketing managers/experts to use the spend management apps *My Marketing Spend - Quick Entry* and *My Marketing Spend - Details*, you need to assign your copies of the following PFCG roles to their AS ABAP users:

- One of the following business catalog roles (no copy required - you can assign the delivered standard role):
  - For managers: SAP_CEI_PLG_FLP
  - For experts: SAP_CEI_SMP_FLP
- For managers: SAP_CEI_MSM_SM_APP (back-end role; included in composite role SAP_MARKETING_PLANNING)
- For experts: SAP_CEI_MSM_QE_APP and SAP_CEI_MSM_SM_APP (backend roles; included in composite role SAP_MARKETING_SPEND_MGMT_PROG)
- SAP_CEI_HOME (for personalization purposes)

Add Authorization for Approval of Spends

1. Log on to your *SAP Hybris Marketing* system and call up transaction PFCG.
2. In order to authorize users to approve spends, you need to assign the following activities to the following authorization objects in your copies of the SAP standard roles SAP_CEI_MSM_QE_APP and SAP_CEI_MSM_SM_APP.

   Table 44:

Authorization Object	Action Name (HPA_ACTION)	Object Name (HPA_OBJ)	Activity
HPA_ACTION	APPROVE_SPEND	CUAN_MARKETING_SPEND	16 (Execute)
HPA_OBJECT	--	CUAN_INITIATIVE, CUAN_MARKETING_SPEND, CUAN_VALUE_HELPS, HPA_USER	○ 02 (Change) ○ 03 (Display)

   To assign the activities to the authorization objects in your copies of the SAP standard roles, proceed as follows:
   1. Go to transaction PFCG and call up your copy of SAP standard role SAP_CEI_MSM_QE_APP in change mode.
   2. Switch to the *Authorizations* tab.
   3. Choose the *Change Authorization Data* pushbutton.
   4. Expand the node *Cross-application Authorization Objects*.
   5. Add the missing activities based on the table above.
   6. Save your changes and generate the profile.
   7. Repeat steps 1 to 6 for your copy of SAP standard role SAP_CEI_MSM_SM_APP.

Activate SAP ERP PS Integration for Cost Collection

- To enable cost tracking for marketing spends in SAP ERP activate one of the BAdI implementations of the *BAdI: Outbound System Integration for Cost References* in Customizing under *SAP Hybris Marketing* > *Planning* > *Spend Management*.
- If you have activated multiple BAdI implementations, we recommend that you use filter options to distinguish between different campaign categories so that for one campaign category one implementation is processed. With this option, you can create project WBS elements in different systems and avoid to generate multiple projects and WBS elements for the same campaign.
  If you activated the BAdI implementation *Marketing Spends Actuals - Create Projects and WBS Elements (ES)*, which is based on Enterprise Services, you have also to establish a logical port. For more information, see also the documentation of the Customizing activity *BAdI: Outbound System Integration for Cost References*.
  As a prerequisite you have maintained a logical port in the target SAP ERP system using the *SOA Manager*. In the transaction `SOAMANAGER` under *Service Administration* > *Web Service Configuration* you have configured the following services as SSL (https) connection and with the same service and binding name `CUAN_MSM_PROJECT`:
  - `ProjectERPCreateRequestConfirmation_In_V1` (internal name `ECC_PROJECTERPCRTRC1`)
  - `ProjectERPByIDQueryResponse_In_V1` (internal Name `ECC_PROJECTERPIDQR1`)
  - `ProjectERPUpdateRequestConfirmation_In` (internal name `ECC_PROJECTUPDRC`)

  As a next step run task list `CUAN_MSM_SETUP_PS_INTEGRATION` as follows:
  1. Log on to your *SAP Hybris Marketing* AS ABAP system with the application setup user. For more information, see User for Application Setup [page 43].
  2. Go to transaction `STC01`.
  3. Execute task list `CUAN_MSM_SETUP_PS_INTEGRATION`.

Assign Marketing Area to Project Profile

1. In Customizing, go to *SAP Hybris Marketing* > *Planning* > *Spend Management* > *Assign Marketing Area to Project Profile*. (Defined in SAP ERP Customizing under *Project System* > *Structures* > *Operative Structures* > *Work Breakdown Structure (WBS)* > *Create Project Profile*)
2. Enter a *Project Profile ID* from SAP ERP PS to which you would like to assign a *Marketing Area*.
3. Select the *Project Profile ID* and select the *Folder* `Assign Marketing Area`
4. Choose *New Entries* to assign a new *Marketing Area*.

Maintain Project and WBS Element Prefix for SAP ERP

1. In Customizing, go to *SAP Hybris Marketing* > *Planning* > *Spend Management* > *Maintain Project and WBS Element Prefix for ERP*.
2. Create a first entry and enter **`Prefix for ERP Project`** as well as **`WBS Prefix`**. (Defined in SAP ERP Customizing under *Project System* > *Structures* > *Operative Structures* > *Work Breakdown Structure*

(WBS) ▸ *Project Coding Mask* ▸ *Define Project Coding Mask* ▸). These prefixes must not have any masks assigned in SAP ERP.

Upload Actual and Committed Spend from External System

You can use one of the following ways to upload actual and committed spend:

- Using a report.
  Go to transaction `SE38` (*Program Execution*) and run program `CUAN_MSM_UPLOAD_ACTUAL`. You upload actual and committed spend from a file. For more information about the required file format, see the report documentation.
- Using the `CUAN_ACTUAL_IMPORT_SRV` OData service.
  For detailed information about how to use the OData service for the upload of actual spend, see section *Import of Actual Spend Using an OData Service* in the *SAP Hybris Marketing* Master Guide under:
  http://help.sap.com/mkt ▸ *Installation and Upgrade Information* ▸ *Master Guide* ▸
  (http://service.sap.com/%7Esapidb/012002523100007329202016E/)
- Using a CSV file in the *Import Data* application within the *Import Data* business group.
  To access the *Import Data* application, the user must be assigned a copy of the role `SAP_MARKETING_BUS_ADMIN_USER`.

The report, as well as the OData service, and the import using the CSV file, log either a success or an error message. The log is displayed once the report is executed. You can also find all log messages using the transaction *Analyze Application Log* (`SLG1`) transaction, entering the parameters `CUAN_IMPORT` as an object and `CUAN_ACTUAL_IMPORT` as a subobject.

13.4 Setting up "My Marketing Calendar"

My Marketing Calendar is an application that marketing managers and experts can use to see an overview of all marketing-related activities for which they are responsible during selected time ranges. The focus here is on aggregated KPIs and how they are influenced by marketing activities in the corresponding time context.

My Marketing Calendar aggregates and displays data from different *SAP Hybris Marketing* applications. To use the full functionality (all charts in the *My Marketing Calendar* app show data), the following solutions should be enabled:

- Segmentation
- Planning

In addition, you are provided with the *Subscribe to Campaign Calendar* function. This calendar service for subscription can be used with native calendar applications on devices that support the ICS format. The calendar events contain detailed information about the corresponding campaigns.

Before you start with the configuration *My Marketing Calendar*, ensure that you have carried out steps described in section Initial Setup of SAP Fiori [page 62].

To set up the *My Marketing Calendar* app, carry out the following steps:

1. To enable marketing managers/experts to use the *My Marketing Calendar* app, you need to assign your copies of the following PFCG roles to their AS ABAP users:
   - One of the following business catalog roles (no copy required - you can assign the delivered standard role):
     - For managers: `SAP_CEI_PLG_FLP`
     - For experts: `SAP_CEI_SMP_FLP`
   - `SAP_CEI_MKT_CAL_APP` (back-end role; included in composite role `SAP_MARKETING_MANAGER` for managers and in composite role `SAP_MARKETING_SPEND_MGMT_PROG` for experts)
   - `SAP_CEI_HOME` (for personalization purposes)

   The users should now have the following authorizations:

   Table 45:

Authorization Object	`HPA_OBJECT`
Object Name (`HPA_OBJ`)	`CUAN_INITIATIVE, CUAN_INTERACTION, CUAN_MARKETING_CALENDAR, CUAN_MARKETING_SPEND,CUAN_PROGRAM, CUAN_VALUE_HELPS, HPA_USER`
Activity	*Display*

   Table 46:

Authorization Object	`HPA_MKT_AR`
Object Name (`HPA_OBJ`)	`CUAN_INITIATIVE, CUAN_INTERACTION, CUAN_MARKETING_CALENDAR, CUAN_MARKETING_SPEND, CUAN_PROGRAM`
Activity	*Display*

   Note

   The standard role `SAP_CEI_MKT_CAL_APP` includes an authorization check at instance level for marketing areas. The marketing areas are defined in customizing under *SAP Hybris Marketing* under *Planning* > *General Settings* > *Define Marketing Areas*. If a user assigned to a copy of `SAP_CEI_MKT_CAL_APP` tries to access an object instance for a particular marketing area, the system checks whether they are allowed to access that area.

2. Configure your ABAP system to access the SAP Web Dispatcher as follows:
   1. Log on to your *SAP Hybris Marketing* system with the user for application setup.
   2. Call up transaction `SE16` and enter table `HTTPURLLOC`.
   3. Press *Create Entries*.
   4. Create an entry with the following parameters:
      - *SORT KEY:* `MCAL`
      - *PROTOCOL:* `HTTPS`
      - *APPLICATN:* `/SAP/CUAN/CUAN_MKTCAL_ICS`

- *HOST:* Enter the fully qualified domain name of your SAP Web Dispatcher that matches the *Common Name* in your SSL certificate.
- *PORT:* Enter the HTTPS port.
- Save your entry.

5. Create an entry with the following parameters:
   - *SORT KEY:* `NAVT`
   - *PROTOCOL:* `HTTPS`
   - *APPLICATN:* `/SAP/BC/UI5_UI5/SAP/CUAN_NAV_TO`
   - *HOST:* Enter the fully qualified domain name of your SAP Web Dispatcher that matches the *Common Name* in your SSL certificate.
   - *PORT:* Enter the HTTPS port.
   - Save your entry.
6. Integrate the marketing calendar as an internet calendar into your calendar application (supporting the ICS format). For more information about this step, see the documentation of your calendar application. You can use the *Subscribe to Campaign Calendar* function to transfer campaigns to your calendar application. This works with all calendar applications (such as Microsoft Outlook) that support ICS format. If you select this function, a mail opens in your email program containing a link which you can copy and use once in your calendar application. The campaigns that are matching the filter criteria applied in the marketing calendar (before running the *Subscribe* function) are then transferred to your calendar application.

3. Configure the SAP Visual Business by following the steps in the SAP Visual Business documentation: http://help.sap.com/visualbusiness21 ▸ *Installation and Upgrade Information* ▸ *Installation and Configuration Guide* ◂ (https://service.sap.com/~sapidb/011000358700000544602013E)

> **Note**
>
> There is also an SCN blog on the subject:
>
> http://scn.sap.com/docs/DOC-59547

14 Configuring Acquisition

The settings described in this section are only relevant if you want to run *SAP Hybris Marketing Acquisition*.

> **i Note**
>
> To install *Acquisition*, you must first install *Segmentation* (see Configuring Segmentation [page 87]).

Adding Technical Configuration for Acquisition at a Later Point in Time

A prerequisite for configuring *Acquisition* is the corresponding technical configuration.

If you **did not** select *Acquisition* while running the technical configuration wizard during the initial setup of *SAP Hybris Marketing* (see Using the Technical Configuration Wizard [page 52]), you must add the technical configuration for *Acquisition* later on.

For more information, see Scoping at a Later Point in Time [page 57].

14.1 General Settings

14.1.1 Setting up Integration with Facebook (Optional)

In *SAP Hybris Marketing*, you can create Facebook custom audiences for your marketing target groups to be used in either one-time or periodic campaigns. You can also create and track the success and actual spend of your Facebook campaigns. Optionally, you might want to run a campaign on Facebook without targeting a custom audience. In this case, you can run the success tracking scenario as stand alone.

Prerequisites

Before you begin, a few things need to be done:

Table 47:

In Facebook	In the *SAP Hybris Marketing* Back-End
• You must ensure the application (app) and all its live features are available to the general public. • Add the *Authorized Ad Account ID* to the application you are working with. • Look up the application ID (*App ID*) and client secret (*App Secret*) in Facebook for later use when configuring the OAuth 2.0 Client.	• Ensure the required role: `SAP_CUSTOMER_ANALYTICS_ADMIN` (single) is included in composite role `SAP_CEI_TECHNICAL_CONF`

Back-End Configuration for Integration with Facebook

1. Configure an OAuth 2.0 client:
   - From the *SAP Easy Access* menu, start the transaction `OA2C_CONFIG`.
     This will open the *OAuth 2.0 Client Configuration* in a Web browser. Alternatively, you can open the URL with:
     `https://<host>:<port>/sap/bc/webdynpro/sap/oa2c_config?sap-language=EN&sapclient=<client>`.
   - From the *OAuth 2.0 Clients* window, choose *Create*, select `FACEBOOK` from the client profile drop-down menu and enter the client identification (*App ID*) number you received during registration of the application with Facebook.
   - Enter the following scenario-specific *Target Endpoint*:
     `/sap/bc/ui5_ui5/sap/CUAN_NAV_TO/index.html#CUAN_TI_F_INI_MKT_AUTOMATION_ENDPOINT`.
     The target endpoint entered on your ABAP application server is used to redirect the browser of the end user after completing the authorization process.
   - Under *General Settings*, enter the *Client Secret* (*App Secret*) information you received during registration of the application with Facebook and press **`Enter`** to confirm the entry.
   - From the *Scopes* tab page, verify that `FACEBOOK` is displayed in the profile table, and `Ads Management` and `Public Profile` are listed in the *Scopes* table.
   - Save the OAuth 2.0 Client configuration.
2. Maintain Facebook application settings:
   - As in step 1 from the *OAuth 2.0 Client* (transaction `OA2C_CONFIG`) window, copy the *Redirection URI* into the clipboard.
   - Add it to Facebook under *App settings* › *Advanced* › *Valid OAuth redirect URIs*. This will make your OAuth 2.0 client known to the OAuth 2.0 authorization server on Facebook.
3. Configure proxy settings:
   Access to the internet from the AS ABAP system is made possible through a proxy server. If not yet configured, please configure your proxy server settings.

Although proxy settings may be active, the HTTPS protocol might not have a proxy listed. If so, add the SAP proxy `8080`.

4. Configure Secure Socket Layer (SSL) settings:

> **Note**
>
> You will need a user assigned the role `SAP_BC_BASIS_ADMIN`. For more information, see section User for Application Setup [page 43].

> **Note**
>
> As of January 1, 2016, the following certificate is required Please refer to SAP Note 2250699 for information about the Facebook certificate required for use beginning with January 1, 2016 in the following steps.

   - Go to https://www.facebook.com and click on the lock symbol next to the URL to get the site information.
   - Locate the certificate as indicated in the SAP Note above and export it to a file.
   - Start transaction `STRUST` in *SAP Easy Access* menu and switch to change mode.
   - Choose *PSE SSL Client Anonymous*.
   - From the *Certificate* area, choose *Import Certificate* and import the saved Facebook certificate file.
   - Choose *Add to Certificate List* and save the PSE file.
     The AS ABAP will now trust SSL servers whose identity is confirmed by this certificate.

5. Activate the *FB* campaign category in Customizing from *Define Campaign Categories* > *Assign Actions to Categories*.

14.1.2 Setting up Integration with Paid Search (Optional)

The integration of *SAP Hybris Marketing* with Paid Search provides you with the following options:

- From the *Campaign* overview screen on the user interface, you can create marketing campaigns that correspond to a paid search campaign in Google AdWords, Yahoo Gemini, or Bing Ads using the *Create Paid Search Campaign* pusbbutton.
- From the *Campaign* overview screen, you can open a paid search campaign by selecting it in the overview list, and display key performance indicators (KPIs) either retrieved from Google AdWords or manually uploaded (for Google, Yahoo, and Bing campaigns).
- From the *My Marketing Calendar* app (in the *Campaign Management* or the *Spend Management* business groups), you can open a paid search campaign by selecting it in the campaign calendar view.
- From the *Import Data* app (in the *Import Data* business group), you can upload campaign KPIs using the *Paid Search KPIs* option.
- When *SAP Hybris Marketing Planning* is active, you can plan spends for paid search campaigns and open these campaigns by selecting the correponding campaign ID in the *My Marketing Spend - Details* app (*Spend Management* business group). You can also see the cost of the campaign in the *Spend* view.

Before you start with the configuration for the Paid Search integration, carry out the following steps Customizing for *SAP Hybris Marketing* (transaction SPRO):

- Under *General Settings* > *Define Media Types*:

Table 48:

Media Type	Media Type Description	SAPUI5 Icon Name
PAID_SEARCH	Paid Search	search

- Under *Data Management* > *Interactions* > *Define Communication Media*:

Table 49:

Communication Medium	Communication Medium Description	Media Type ID
BING_ADS	Bing Ads	PAID_SEARCH
GOOGLE_ADS	Google Ads	PAID_SEARCH
_YAHOO_ADS	Yahoo! Ads	PAID_SEARCH

- Upload an image for each of the entries above, with the logo of the specific communication medium that will show on the Paid Search and the *Campaigns* screens by selecting an entry and choosing *Upload Image*.
- Under *Campaigns* > *Campaign* > *Define Categories and Actions* in the *Define Campaign Categories* view:

Table 50:

Category ID	Category Name	Category Tooltip	Is Active	Perm. Hldng	Process Type
PS	Paid Search	Campaigns for creating and linking to paid search campaigns executed on search platforms such as Google, Bing , Yahoo	Yes	Ignore Marketing Permission	Paid Search

To access the *Campaign Management* business group and the *Paid Search* application, the user must be assigned a copy of the following roles:

- SAP_CEI_CPM_FLP (business catalog role; no copy required - you can assign the delivered standard role)
- SAP_CEI_TG_INI (back-end role; included in composite role SAP_MARKETING_DATA_MANAGEMENT)
- SAP_CEI_HOME (for personalization purposes)

For more information, see *Paid Search and SAP HANA Cloud Integration* at:

http://service.sap.com/mkt > *Paid Search and SAP HANA Cloud Integration*

http://service.sap.com/%7Esapidb/012002523100007328732016E/

Uploading Data for Paid Search KPIs

KPIs for Google AdWords campaigns are retrieved automatically from Google via the scheduled background job SAP_CUAN_PAID_SEARCH_KPI. This job is scheduled to run on a regular basis to always have the most up to date KPIs for your Google AdWords campaigns.

You can also manually upload KPIs for paid search campaigns. You upload paid search KPI data from a comma-separated value (CSV) file using the *Import Data* application in the *Import Data* business group.

For more information, see SAP Library for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt *Application Help* > *SAP Hybris Marketing Applications* > *Data Management* > *Importing Data Using a CSV File Upload*

(http://help.sap.com/saphelp_mkt122/helpdata/en/ca/b5295390b2363ee10000000a423f68/content.htm)

To access the *Import Data* application, the user must be assigned a copy of the following role:

- SAP_MARKETING_BUS_ADMIN_USER

To upload paid search KPIs, the user must have the following authorization object assignments:

Table 51:

Authorization Object	Object Name (HPA_OBJ)	Activity (ACTVT)
HPA_OBJECT	CUAN_INITIATIVE	02 (Change)

Table 52:

Authorization Object	Object Name (HPA_OBJ)	Action Name (HPA_ACTION)	Activity (ACTVT)
HPA_ACTION	CUAN_INITIATIVE	UPDATE_EXTERNAL_REPORTING_DATA	16 (Execute)

For more information, see the security guide for *SAP Hybris Marketing* on SAP Help Portal at:

http://help.sap.com/mkt *Security Information*

https://service.sap.com/%7Esapidb/012002523100007357012016E/

14.1.3 Setting up Integration with SAP CRM (Optional)

Enhanced integration of *SAP Hybris Marketing* with SAP CRM offers the following options:

- From *Campaign* > *Automation*, you can use an action to create leads, tasks, or call lists in *SAP CRM*.
- For a campaign, you can display success measures that are based on the call lists, and tasks created in SAP CRM.
- In the *Marketing Executive Dashboard*, the leads created in SAP CRM are displayed as key figures.

For more information, see the SAP CRM Integration checklist under http://service.sap.com/mkt *Checklist for the Integration Setup with SAP CRM*

http://service.sap.com/%7Esapidb/012002523100007328722016E/

14.1.4 Setting up Call Center Integration (Optional)

SAP Hybris Marketing provides you with the option to integrate call centers in your campaign execution.

You have the following integration options:

- Integration with *SAP Cloud for Customer* (see Setting up Call Center Integration with SAP Cloud for Customer [page 113])
- Integration with *SAP Contact Center* or an external call center (see Setting up Call Center Integration with SAP Contact Center or External Call Centers [page 114])
- Integration with *SAP CRM Interaction Center* (see Setting up Integration with SAP CRM (Optional) [page 112] and Installation of SAP Landscape Transformation Replication Server [page 30])

14.1.4.1 Setting up Call Center Integration with SAP Cloud for Customer

> Note
>
> - As a prerequisite for the call center integration with *SAP Cloud for Customer*, you must have carried out the steps described in section Prerequisites for SAP Cloud for Customer Integration [page 50].
> - If SAP Hybris Marketing is integrated with SAP CRM or SAP ERP, these systems must also be connected to the SAP Cloud for Customer systems. This ensures that the replication of customers and business transactions, such as leads or opportunities is consistent.

You are provided with the option to trigger *SAP Cloud for Customer* call qualifications to the *SAP Cloud for Customer* system directly from a campaign in your *SAP Hybris Marketing* system. A standard action for campaigns is available to do so. These call qualifications are handled as marketing leads in *SAP Cloud for Customer*.

Assigning Standard Action to Campaign Category

To activate this function, you must assign the standard action `CALL_QUALIFICATION` (*Trigger C4C Call Qualification*) to a campaign category in Customizing for *SAP Hybris Marketing* (transaction `SPRO`) under *Campaigns* > *Campaign* > *Define Campaign Categories and Actions*. This is already assigned to the campaign category *CIC - Call Center* in the standard SAP system or you assign the action `CALL_QUALIFICATION` to the required category as follows:

1. Select the required category to which you want to assign the action `CALL_QUALIFICATION` in the *Define Campaign Categories* view.
2. Choose the *Assign Actions to Categories* view.

3. Choose *New Entries*.
4. Choose the action `CALL_QUALIFICATION` from the value help for the *Action ID* field and confirm your entry
5. Enter any required text in the *Action Button Tooltip* and *Button Tooltip* fields if you want to override the action button text and button tooltip that is specified directly in the action. This override is valid in the context of this category/action relationship only.

As a result, the new action is available for new campaigns with this category.

Check Permission to Contact in SAP Hybris Marketing

According to the Customizing settings you have made, when the action to create the call list is executed in SAP Hybris Marketing, the system checks whether permission to make contact by telephone is available. Check this setting in Customizing for *SAP Hybris Marketing* under *Campaigns* > *Campaign* > *Define Campaign Categories and Actions*. Choose *Define Campaign Categories* followed by the category `CIC`. If the value *Ignore Marketing Permission* has not been selected for the *Category Type*, the system checks whether permission to make contact is available when the action to create the leads (CALL_QUALIFICATION) is executed.

14.1.4.2 Setting up Call Center Integration with SAP Contact Center or External Call Centers

Integration with SAP Contact Center

File Export for SAP Contact Center

You can export call center requests to *SAP Contact Center* directly from a campaign in your *SAP Hybris Marketing* system. A new standard action for campaigns has been provided for this.

This will create a CSV file that can be imported to *SAP Contact Center*. To activate this function, you must assign the new standard action `EXPORT_TO_CC` (Create Exp. File for *SAP Contact Center*) to a campaign category in Customizing for *SAP Hybris Marketing* (transaction `CEI_IMG`) under *Campaign* > *Campaigns* > *Define Campaign Categories and Actions*. This is already assigned to the campaign category *CIC - Call Center* in the standard SAP system, or you can assign the action `EXPORT_TO_CC` to the required category as follows:

1. Select the required category to which you want to assign the action `EXPORT_TO_CC` in the *Define Campaign Categories* view.
2. Choose the *Assign Actions to Categories* view.
3. Choose *New Entries*.
4. Choose the action `EXPORT_TO_CC` from the value help for the *Action ID* field and confirm your entry
5. Enter any required text in the *Action Button Tooltip* and *Button Tooltip* fields if you want to override the action button text and button tooltip that is specified directly in the action. This override is only valid in the context of this category/action relationship.

This results in the new action being available for new campaigns of this category.

As a default, the CSV file is created in the application server directory defined by the `DIR_HOME` directory parameter. You can see the value of this parameter in the transaction `AL11`. If you want the CSV file to be written to a different application server directory, you can do this as follows:

1. Call the transaction `FILE`.
2. Create a logical file path definition, such as `Z_SAP_CONTACT_CENTER`, and assign the directory to which you want the file to be written as a physical path to it, using a syntax group appropriate for your application server file system.
3. Open the logical file name definition `CALL_CENTER_CSV` and enter the name of your logical path definition in field *Logical Path*.
4. Save and exit.

So that it can be imported to *SAP Contact Center*, the CSV file created by the action has to be transferred from the file system for the *SAP Hybris Marketing* application server to the file system for *SAP Contact Center*. You should schedule an appropriate job (such as FTP) to do this periodically. This file can be imported to *SAP Contact Center* using the System Configurator (SC). For more information about SAP Contact Center, see http://help.sap.com/contact-center.

Check Permission to Contact in SAP Hybris Marketing

According to the Customizing settings you have made, when the action to create the call list is executed in SAP Hybris Marketing, the system checks whether permission to make contact by telephone is available. Check this setting in Customizing for *SAP Hybris Marketing* under *Campaigns* > *Campaign* > *Define Campaign Categories and Actions*. Choose *Define Campaign Categories* followed by the category `CIC`. If the value *Ignore Marketing Permission* has not been selected for the *Category Type*, the system checks whether permission to make contact is available when the action (such as *Create Export File for SAP Contact Center* - `EXPORT_TO_CC`) is executed to create the CSV file.

Import of Call Results from SAP Contact Center

You can import call results from *SAP Contact Center* to your *SAP Hybris Marketing* system.

You can export CSV files with call results from *SAP Contact Center* to the System Configurator (SC). Following this, the CSV file that contains the call results has to be transferred from the file system for the *SAP Contact Center* to the file system for the *SAP Hybris Marketing* application server. You should schedule an appropriate job (such as FTP) to do this periodically.

Once the file is available on the application server, it can be imported to *SAP Hybris Marketing*. You can do this using a new report `CUAN_CC_UPLOAD_CSV` that can be scheduled periodically.

To do so, you have to create a variant of the selection screen for the report.

1. Call transaction `SE38` and execute the report `CUAN_CC_UPLOAD_CSV`.
2. Leave the default value `SAP_CC` in the parameter *Call Center*.
3. Enter the directory from where the call result files are read in the parameter *Upload Files from Directory*.
4. Leave the default value **.csv* in the parameter *Upload Files with Name Pattern*.
5. Optionally enter the directory to which the process call result files are to be archived in the parameter *Archive Files to Directory*.
6. Save the variant by choosing *Go to* > *Variants* > *Save as Variant...*.

Integration with External Call Centers

If you want to connect a call center other than *SAP Contact Center* to *SAP Hybris Marketing* using CSV files, see SAP Note 2182902 - *How-To Configuration Guide - Execute SAP Hybris Marketing Campaigns using an external Call Center*.

14.1.5 Setting up Landing Pages

In *Acquisition*, you are provided with the *Landing Pages* application. This app allows you to design landing pages to collect interaction contact and marketing permission data. The content of the app is also included in the *Content Studio* application.

For security and performance reasons, you must deploy the landing pages that you have created using this app, on your Web server available to make them available to the internet. The Web server must send the collected data to the *SAP Hybris Marketing* server using the OData service `CUAN_CONTENT_PAGE_RESULT_SRV`. The service saves the data and triggers follow-on actions.

Implementation of the landing pages includes the following parts:

- Deploying the files on your Web server
- Implementing the Web server in order to forward the results to the *SAP Hybris Marketing* system

Assign Users to Roles

A marketing expert can only use *Landing Pages*, if his or her user is assigned to your copy of the following roles:

- `SAP_CEI_CPM_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
- `SAP_CEI_CONTENT_PAGES` (back-end role; included in composite role `SAP_MARKETING_CAMPAIGNS`)
- `SAP_CEI_HOME` (for personalization purposes)

Configuration steps related to the *SAP Hybris Marketing* server require a user which has your copy of the following role assigned:

- `SAP_CEI_CONTENT_PAGE_RSLT` (back-end role; included in composite role `SAP_MARKETING_CAMPAIGNS`)

> **Note**
>
> Your copy of the latter role is also required for testing newly created landing pages.

14.1.5.1 Deploying the Landing Page

The source code (HTML) for every landing page you design must be downloaded via the user interface and deployed on your Web server.

In addition, you can download a style sheet (CSS) and a JavaScript file. You must adapt the JavaScript file according to your requirements and your system setup. This step is required for your initial system setup and allows you to deploy the CSS and JavaScript files. You do not need to adapt these files again until you perform an upgrade to a new release. Adapting the files when you upgrade ensures that you can avail of new features.

By default, the HTML file tries to load both files with the names `sapContentPage.css` and `sapContentPage.js` from the same folder in which the HTML file is located. If you want to adjust those names or the file paths you must change the HTML file content.

14.1.5.2 Adjusting the JavaScript File

After downloading the JavaScript file you must adjust the Web service path written in the file.

The base is the path for the OData service on the *SAP Hybris Marketing* server:

- `/sap/opu/odata/sap/CUAN_CONTENT_PAGE_RESULT_SRV`

You must adjust this path according to the Web server implementation (see section Implementing the Result OData Service [page 117]).

When a user opens a landing page, the path is loaded via a `HTTP HEAD` request in order to fetch a CSRF token. Further data requests are sent to the result path which is added to the base path. The result path can be adjusted or left empty in the JavaScript file. The default path `ResultHeaders` describes the OData service entity used for the results.

You are not required to perform any implementation for the front end. The JavaScript that is delivered is capable of collecting the user input independently. It is possible to adapt and enhance the landing page HTML file that is generated, but you must ensure you preserve the integrity of the standard structure.

14.1.5.3 Implementing the Result OData Service

You must implement your Web server in a way that makes it capable of receiving the requests of the landing page JavaScript files and forwarding them to the *SAP Hybris Marketing* server. By default, the requests are ready for the result OData service `CUAN_CONTENT_PAGE_RESULT_SRV` and do not need to be adjusted.

> **Note**
>
> In some usage scenarios, the request data must be enhanced to enable all features. To do this, you must decode the JSON payload string and add the appropriate attributes before encoding the JSON string again for the OData service.

The actual implementation depends on the technology and development language that you use in your company. See an example implementation in PHP below.

> **Caution**
>
> **The following code is an example implementation. SAP does not take responsibility if you use it in your productive system.**

Example

Sample Code

```
<?php
/**
 * This class is an example implementation of a PHP based landing page
integration.
 * Note: This is a template, which is used at your own risk.
 */
class LandingPageIntegration
{
    /**
     * The BasePath is the URL for the system including the landing page result
OData service.
     *
     * @var string
     */
    const BASE_PATH = "https://<server>:<port>/sap/opu/odata/sap/
CUAN_CONTENT_PAGE_RESULT_SRV/";
    /**
     * The ResultHeadersPath is the name of the ResultHeaders entity which is
used for processing the landing page results.
     *
     * @var string
     */
    const RESULT_HEADERS_PATH = "ResultHeaders";
    /**
     * The credentials are used for authenticating on the system.
     * This is usually a dedicated system or communication user with the
integration role assigned.
     *
     * @var string
     */
    const CREDENTIALS = "USERNAME:PASSWORD";
    /**
     * The cookies are remembered between consecutive OData requests to implement
the session handling and security measures of the SAP Gateway.
     *
     * @var string
     */
    private $cookies = "";
    /**
     * The X-CSRF-Token is required for the OData service communication and must
be fetched before it is possible to perform any changing requests such as 'POST'.
     *
     * @var string
     */
    private $xCsrfToken = null;
    /**
     * This method is the main entry point for processing the requests received
landing page.
     */
    public function execute()
    {
        session_start();

        switch ($_SERVER["REQUEST_METHOD"]) {
            case "POST":
                $this->handlePostRequest();
                break;
        }
    }
    /**
     * POST requests must be forwarded to the system and the responses must be
passed to the client to ensure correct landing page integration.
```

```
     */
    private function handlePostRequest()
    {
        // first fetch the x-csrf-token
        $this->fetchXCsrfToken();

        // read the POST data sent by the landing page
        $requestBody = @file_get_contents("php://input");
        $requestData = json_decode($requestBody);

        // enhance the request data with session id, IP address and campaign id
        $requestData->SessionId = session_id();
        $requestData->IpAddress = $_SERVER["REMOTE_ADDR"];
        $requestData->CampaignId = "";

        // add the concat information for identification
        $requestData->ContactFacets = $this->getContactFacets();

        // send the prepared request data to the system
        $requestString = json_encode($requestData);
        $response = $this->sendHttpRequest("POST", $this::BASE_PATH .
$this::RESULT_HEADERS_PATH, $requestString);

        // print the response
        echo $response;
    }
    /**
     * The landing page OData service supports contact identification using
ContactIdOrigin and ContactId value pairs.
     * This example reads the corresponding values of the session data.
     *
     * @return stdClass[]
     */
    private function getContactFacets()
    {
        $contactIdOrigin = null;
        $contactId = null;
        if (isset($_SESSION["CONTACT_ID_ORIGIN"])) {
            $contactIdOrigin = $_SESSION["CONTACT_ID_ORIGIN"];
        }
        if (isset($_SESSION["CONTACT_ID"])) {
            $contactId = $_SESSION["CONTACT_ID"];
        }

        $contactFacets = array();

        if ($contactIdOrigin && $contactId) {
            // build contact facet with IdOrigin and Id
            $contactFacet = new stdClass();
            $contactFacet->IdOrigin = $contactIdOrigin;
            $contactFacet->Id = $contactId;
            array_push($contactFacets, $contactFacet);
        }

        return $contactFacets;
    }
    /**
     * Send a 'HEAD' request to fetch the required X-CSRF-Token from the OData
service.
     * If the HEAD request fails, a 'GET' request is performed.
     */
    private function fetchXCsrfToken()
    {
        $this->sendHttpRequest("HEAD", $this::BASE_PATH, null);
        if (! $this->xCsrfToken) {
            // HEAD request failed -> fallback using GET
            $this->sendHttpRequest("GET", $this::BASE_PATH, null);
        }
```

```
    }
    /**
     * This method performs a synchronous HTTP request and returns its response.
     *
     * @param string $method
     *            The HTTP method (e.g. 'HEAD', 'POST')
     * @param string $path
     *            The URL for the request
     * @param string $body
     *            The request payload (POST data)
     * @return string The response
     */
    private function sendHttpRequest($method, $path, $body)
    {
        // first create stream context
        $context = $this->createStreamContext($method, $body);

        // perform http request
        $response = file_get_contents($path, false, $context);

        if ($response === false) {
            // request failed - print error for analysis
            echo error_get_last();
        }

        // process response headers
        $this->readResponseHeaders($http_response_header);

        // return response
        return $response;
    }
    /**
     * This method creates a stream context, which is used for the HTTP request.
     * It configures the context for the authorization, content-type, cookies,
and x-csrf-token.
     *
     * @param string $method
     *            The HTTP method
     * @param string $body
     *            The request payload (POST data)
     * @return resource The stream context
     */
    private function createStreamContext($method, $body)
    {
        // basic authorization uses base64 encoded credentials
        $credentials = base64_encode($this::CREDENTIALS);

        // build http request headers
        $headers = array(
            "Authorization: Basic " . $credentials,
            "Accept: application/json",
            "Content-Type: application/json"
        );

        if ($this->cookies) {
            // add remembered cookies
            array_push($headers, "Cookie: " . $this->cookies);
        }

        // add x-csrf-token header for fetching or using the already fetched token
        $xCsrfToken = ($this->xCsrfToken ?: "Fetch");
        array_push($headers, "x-csrf-token: " . $xCsrfToken);

        // build complete options array
        $options = array(
            "http" => array(
                "header" => $headers,
                "method" => $method,
```

```
                "content" => $body,
                "ignore_errors" => true,
                "max_redirects" => 0
            )
        );

        // return stream context using the built options
        return stream_context_create($options);
    }
    /**
     * This method processes the HTTP response headers in order to read the 
fetched X-CSRF-Token and cookies
     *
     * @param array $responseHeaders
     */
    private function readResponseHeaders($responseHeaders)
    {
        // loop response headers
        foreach ($responseHeaders as $responseHeader) {
            // split header name from value
            $parts = explode(" ", $responseHeader);

            // handle response header based on name
            switch ($parts[0]) {
                case "x-csrf-token:":
                    // save fetched x-csrf-token
                    $this->xCsrfToken = $parts[1];
                    break;
                case "set-cookie:":
                    // set received cookies
                    $this->cookies .= $parts[1];
                    break;
            }
        }
    }
}
// initialize the integration class and start the processing
$landingPageIntegration = new LandingPageIntegration();
$landingPageIntegration->execute();
```

System User Authentication

The result OData service `CUAN_CONTENT_PAGE_RESULT_SRV` can only be called by users with the corresponding authorization. For this reason, your Web server implementation must include a user authentication containing a technical user with role `SAP_CEI_CONTENT_PAGE_RSLT` assigned.

The example PHP script above shows the authentication via an HTTP header named *Authorization* using *Basic* authentication (user/password).

Contact Identification

The landing pages integration offers different ways to identify the Web user who visits the landing page. The following usage scenarios are supported:

- **Scenario A**: The Web user is anonymous (unknown)

For this scenario, you must implement a session handling (see below, section *Session Handling*) in order to fully track the user on the landing page.

- **Scenario B**: The Web user has accessed the landing page using a tracking link in an *SAP Hybris Marketing* email.
  Scenario B does not require any additional implementation effort. The landing page script performs the required actions autonomously. If the landing page is accessed using a *SAP Hybris Marketing* email, the link contains a tracking ID that is sent along with the data requests. This ID is used to identify the user that received the email.
- **Scenario C**: The Web user is logged in on your Web site and can be identified via his or her user account data.
  For scenario C, you must provide the necessary information to identify the user on the *SAP Hybris Marketing* system. For this purpose, you must enhance the request that is built by the landing page with contact facets.
  The property `ContactFacets` of the request entity `ResultHeader` can contain an array of contact facet objects that comprise an `IdOrigin` and an `Id`. You must fill these fields with the information used to identify the contact in *SAP Hybris Marketing*.
  An example for the `IdOrigin` is `EMAIL`. An example for the `Id` is a contact email address such as *mail@domain.com*.
  The example PHP script above tried to set a contact facet by reading the data in the current session.

Prefill Contact Data

When a Web user who accesses a landing page is identified, it is possible to prefill data for the *Input* and *Permission* elements on the landing page. Selecting the *Prefill Contact Data* checkbox allows the landing page elements to be filled with data for the identified contact, which is maintained in the *SAP Hybris Marketing* system.

To support the prefill of contact data, the Web server implementation needs to pass the response data from the *SAP Hybris Marketing* system to the landing page (web client) that initiated the request. The *SAP Hybris Marketing* system provides all necessary data for landing pages with the *Prefill Contact Data* setting. There is no additional effort for the implementation, apart from the forwarding of response data.

Session Handling

You must implement a session handling on your Web server to track an unknown Web user visiting a landing page.

To do so, you must add a `SessionId` to the object `ResultHeader` of the landing page request:

Once the Web user has entered his or her data and clicked the *Submit* pushbutton, the OData service of the *SAP Hybris Marketing* system uses this ID to create a contact record for this user and, in addition, to create and store the corresponding user interactions for the landing page visit. Using the `SessionId`, the OData service is able to map both interactions, the submission of data and the access of the landing page, as both requests include the same `SessionId`.

The example PHP script above includes the starting of a session and the setting of the `SessionId` for requests.

Optional Attributes

In order to complete the landing page integration, you can enhance the OData requests with the following optional attributes:

- *IPAddress*
  The IP address of the web client visiting a landing page can be saved in order to have additional evidence that the user submitted the landing page, and gave marketing permissions and contact data.
- *CampaignId*
  The campaign ID can be supplied to connect the interactions created out of the landing page to a specific *SAP Hybris Marketing* campaign. If the landing page is opened with a URL parameter `sap-campaign-id` with its value set to the ID, it is automatically added to all landing page requests. This connection will also be created if the landing page is opened out of a *SAP Hybris Marketing* email sent as part of a campaign.

14.2 Configuring Campaigns

The configuration of campaigns requires a few manual steps that are described in this section.

> Note
>
> Some of the configuration steps described in this section serve as a prerequisite for entries in the technical configuration wizard. Depending on your business requirements, make sure that you select the corresponding options in the technical configuration wizard.
>
> For an overview about the available options and the corresponding prerequisites, see Using the Technical Configuration Wizard [page 52].

14.2.1 Prerequisites

Customizing

You did all necessary steps in Customizing under *SAP Hybris Marketing* > *Campaigns* > *Campaign*.

In addition, we recommend that you also check the following:

- You are provided with two options about how the export file is stored in the back end. For more information, see *SAP Hybris Marketing* > *Campaigns* > *Export Definitions* > *Define Global Settings for Export Definition*.
  In addition, you can restrict the access to the export file using authorization object `HPA_FILE`.
- If you want to enable the final release of campaigns by the marketing manager, you have to activate the advanced status management for campaigns under *SAP Hybris Marketing* > *Campaigns* > *Campaign* > *Activate Advanced Status Management*.

If the advanced status management is activated, the marketing expert can set the campaign to *To Be Released* and the marketing manager then can release the campaign, for example, in the *Release Campaigns* application.

- To use SAP Jam within campaigns you have made the according settings under *SAP Hybris Marketing* > *General Settings* > *Integration* > *Define Settings for Integration of SAP Jam*.
  In addition, you need a valid user for SAP Jam.

Define Interaction Interests

If required, you have defined the necessary interests on the user interface in the *Interaction Interests* application in the *Business Administration* business group.

Authorization for CSV Export

For exporting campaign data to CSV, you have to make sure that the following parameters are maintained in authorization object *Authorization for File Access* (`S_DATASET`) in the back-end system (transaction `PFCG`, role `SAP_CEI_KUA`):

PROGRAM: **`CUAN_INI_ACCOUNT_DATA_TO_FILE`**

ACTVT: **`Read, Write`**

FILENAME: **`*`**

Configuring the SAP Web Dispatcher

For the tracking services to run as required, define a routing rule for the tracking and bounce ICF services `/sap/public/cuan/link` and `/sap/public/cuan/bounce`. They need to be routed to the ABAP backend servers where the corresponding ICF services run.

For the tracking services to run as required, extend the SAP Web Dispatcher profile of your publicity accessible web dispatcher as follows:

1. Enter the port number to be used to access the SAP Web Dispatcher for the tracking services: `icm/server_port_<port_enum> = PROT=HTTPS,PORT=43<xx>, VCLIENT=0`
   - `<port_enum>` is used to enumerate the port number entries in the profile. It determines the order in which these entries are searched for. As soon as the first valid entry is found, the web dispatcher stops searching and uses that entry.
   - `<xx>` defines the last digits of the port number used.
2. Enter the system and URL of the backend system running the tracking services: `wdisp/system_<sys_enum> = SID=<SID>, EXTSRV=https://<hostname>:<port>, SRCSRV=*:<port_number>`

- <sys_enum> is used to enumerate the system entries in the profile. It determines the order in which these entries are searched for. As soon as the first valid entry is found, the web dispatcher stops searching and uses that entry.
- <SID> defines the ID of the SAP system that the services are running on.
- <host_name> and <port> define the host name and port that must be used to access the tracking services.
- <port_number> defines the complete port number defined above in the entry `icm/server_port_<port_enum>`

> ⚠ Caution
>
> For the tracking services it is essential that you disable the client verification at the SAP Web Dispatcher.
>
> - **Disabling client verification for all ports**
>   The following code line in the sample profile disables client verification for all ports: `icm/HTTPS/verify_client = 0`
> - **Disabling client verification for a specific port**
>   If certain application parts require client authentication, you can disable the client verification at port level. This is done by adding `VCLIENT=0` to the code line that specifies the SAP Web Dispatcher port in question. In the sample profile, for example, you would have to make the following changes:
>   - Take out the following code line from section 'Start Web Dispatcher': `icm/HTTPS/verify_client = 0`
>   - Change the following code line in section 'SAP Web Dispatcher Ports' from: `icm/server_port_1 = PROT=HTTPS,HOST=mo-29b02f1eb,PORT=82$$` to: `icm/server_port_1 = PROT=HTTPS,HOST=mo-29b02f1eb,PORT=82$$, VCLIENT=0`

14.2.2 Setting up Amazon Email Service Provider

In order to set up the Amazon email service provider, several parameters have to be adjusted in:

- Amazon service for emails, notifications and queues
- SAP Customizing

Prerequisites

The following prerequisites exist for setting up Amazon as an email service provider:

- You are familiar with the basics of the *Amazon Service for Emails, Notifications and Queues*:
  - `aws.amazon.com/de/documentation/ses/`
  - `aws.amazon.com/de/documentation/sns/`
  - `aws.amazon.com/de/documentation/sqs/`
- You have an Amazon Web Service Account for the Simple Email Service (SES) using `http` (not `smtp`)

- The *Amazon Service for Emails, Notifications and Queues* have been configured correctly. To do this, go into the *Amazon Management Console* and prepare the following:
  1. Configure a verified sender email address. You will need this when you define a sender profile later on.
  2. For the verified sender email address, edit the *Notification Configuration* and create a new Amazon SNS topic, so that bounces and complaints create notifications. Give the new topic the same name as the feedback queue.
  3. In the *Sender Notification Configuration*, assign the SNS topic and disable *Email Feedback Forwarding*.
  4. In the SQS console, create a new queue with the same name you gave the feedback queue in technical configuration.
  5. Subscribe the new queue to the SNS topic you created earlier.
- You have set an account up at Amazon and got the following parameters during the set-up:
  - *Amazon Access Key ID* (hash string)
  - *Secret Access Key* (hash string)
  - *Feedback Queue Path*
    The *Feedback Queue Path* is the last individual portion of the queue URL at Amazon. For example, the path from `https://sqs.eu-west-1.amazonaws.com/NNNNNNNNNNNN/ABC` is `/NNNNNNNNNNNN/ABC`.

> **Note**
>
> Note that you will need these parameters again during the *Technical Configuration*.

For more details on setting up the Amazon side, see the following links:

- Sending: http://docs.aws.amazon.com/ses/latest/DeveloperGuide/before-you-begin.html
- Notifications: http://docs.aws.amazon.com/ses/latest/DeveloperGuide/configure-sns-notifications.html
- Queue: http://docs.aws.amazon.com/AWSSimpleQueueService/latest/SQSDeveloperGuide/sqssubscribe.html

Change and Test Provider Credentials

On the user interface, in the *Provider Credentials* application of the *Segmentation and Campaign Configuration* business group, you as a business administrator can test and change your provider credentials for AMAZON SES.

Import Amazon SES SSL Certificates in the Trust Store

1. Download SSL Certificates for your AMAZON SES target host by using the following URLs (you can also download the SSL certificate by opening the target host URLs in your internet browser and downloading the SSL certificate):
   - Certificate for sending: *https://email.eu-west-1.amazonaws.com*
     https://email.eu-west-1.amazonaws.com
   - Certficate for the bouncing queue: *https://sqs.eu-west-1.amazonaws.com*
     https://sqs.eu-west-1.amazonaws.com

> **Note**
>
> The links above do not work in all browsers. Use an appropriate browser to open the links.

2. Import the certificate into the PSE as described in *Creating the Anonymous SSL Client PSE*. You find this topic under http://help.sap.com/nw75 > *Application Help* > *Function-Oriented View* > *Security* > *Network and Transport Layer Security* > *Transport Layer Security on the AS ABAP* > *Configuring the SAP NetWeaver AS for ABAP to Support SSL* > *Creating the Anonymous SSL Client PSE*.
   http://help.sap.com/saphelp_nw75/helpdata/en/49/26af8639242583e10000000a421937/content.htm
3. Set SSL to *Active* for RFC destinations `AMAZONMAIL` and `AMAZONBOUNCE`.
4. Select the certificate list to which you uploaded the certificates.
5. Test the `AMAZONMAIL` RFC destination. If you receive an HTTP response code `404`, then the set up is correct.

Check Report for Configuration Settings

With the check report `CUAN_MKT_EXEC_CHECK_CONFIG` you can check your configuration settings for sending emails.

14.2.3 Setting up SAP Mobile Service for Email

SAP Mobile Service for Email is an additional or alternative option to the Amazon service (see Setting up the Email Service Provider [page 125]) for sending out emails in a campaign. To set up SAP Mobile Service, proceed as follows.

Prerequisites

- Before you start, make yourself familiar with the *SAP Mobile Service for Email* under http://www.sap.com > *Solutions* > *Browse Platform and Technology* > *Mobile Technology* > *Messaging Services* > *Operator Services*
  (http://www.sap.com/pc/tech/mobile/software/solutions/mobile-services/operator-services.html).
  You need an account with *SAP Mobile Service for Email* for sending emails using http service call.
  To access the *SAP Mobile Service for Email* http service, you must populate the externally visible IP address of your server to *SAP Mobile Service for Email* know what is, so that it can be added to the whitelist of allowed callers for your account. If you are using a proxy for sending, you must populate the external IP address of the proxy.
- You have a *User* and a *Password* as well as a *URL* resp. a *Path Prefix* from *SAP Mobile Service for Email*.

Change and Test Provider Credentials

On the user interface, in the *Provider Credentials* application of the *Segmentation and Campaign Configuration* business group, you as a business administrator can test and change your provider credentials for *SAP Mobile Service for Email*.

Import Mobile Service for Email SSL Certificates in the Trust Store

1. Download SSL certificates for your *SAP Mobile Service for Email* target host by using the following URL (you can also download the SSL certificate by opening the target host URL in your internet browser and downloading the SSL certificate):
   https://multichannel-pp.sapmobileservices.com/email/
   https://multichannel-pp.sapmobileservices.com/email/

   Note

   The link above do not work in all browsers. Use an appropriate browser to open the link.
2. Import the certificate into the PSE as described in *Creating the Anonymous SSL Client PSE*. You find this topic under http://help.sap.com/nw75 › *Application Help* › *Function-Oriented View* › *Security* › *Network and Transport Layer Security* › *Transport Layer Security on the AS ABAP* › *Configuring the SAP NetWeaver AS for ABAP to Support SSL* › *Creating the Anonymous SSL Client PSE*.
   http://help.sap.com/saphelp_nw75/helpdata/en/49/26af8639242583e10000000a421937/content.htm
3. Set SSL to *Active* for RFC destinations `MSMAIL`.
4. Select the certificate list to which you uploaded the certificates.
5. Test the `MSMAIL` RFC destination. If you receive an HTTP response code `500` with a response body containing a JSON string, then the set up is correct.

14.2.4 Setting up Text Messaging

To set up text messaging, proceed as follows.

Prerequisites

- Before you start, make yourself familiar with the *SAP SMS 365* service. Either contact *sapmobileservices@sap.com* or see http://www.sap.com › *Solutions* › *Browse Platform and Technology* › *Mobile Technology* › *Messaging Services* › *Enterprise Services* › *SAP SMS 365*.
  (http://www.sap.com/pc/tech/mobile/software/solutions/mobile-services/enterprise-services.html)
  You need an account with *SAP SMS 365* for sending text messages using http service call.
  To access the *SAP SMS 365* http service, you must populate the externally visible IP address of your server to *SAP SMS 365* know what is, so that it can be added to the whitelist of allowed callers for your account. If you are using a proxy for sending, you must populate the external IP address of the proxy.

- If you want to receive delivery feedback (text messages delivered to handset or delivery failed), you have to open a port in your firewall for inbound calls from the *SAP SMS 365* server. You have to provide an externally visible host name and port for this connection. This should already be set up in section Prerequisites [page 123], *Configuring the SAP Web Dispatcher*, above for tracking and also applies here.
- You have a *User* and a *Password* as well as a *URL* resp. a *Path Prefix* (such as `https://ms-pp.sapmobileservices.com/cmn/<accountid>/<accountid>.sms` whereas */cmn/<accountid>/<accountid>.sms* is the path prefix) from Sybase.

Change and Test Provider Credentials

On the user interface, in the *Provider Credentials* application of the *Segmentation and Campaign Configuration* business group, you as a business administrator can test and change your provider credentials for *SAP SMS 365*.

Import SAP SMS 365 SSL Certificates in the Trust Store

1. Download SSL Certificates for your *SAP SMS 365* target host by using the following URL (you can also download the SSL certificate by opening the target host URL in your internet browser and downloading the SSL certificate):
   https://sms-pp.sapmobileservices.com/cmn/
   https://sms-pp.sapmobileservices.com/cmn/

   > **Note**
   >
   > The link above do not work in all browsers. Use an appropriate browser to open the link.

2. Import the certificate into the PSE as described in *Creating the Anonymous SSL Client PSE*. You find this topic under http://help.sap.com/nw75 *Application Help* › *Function-Oriented View* › *Security* › *Network and Transport Layer Security* › *Transport Layer Security on the AS ABAP* › *Configuring the SAP NetWeaver AS for ABAP to Support SSL* › *Creating the Anonymous SSL Client PSE*.
   http://help.sap.com/saphelp_nw75/helpdata/en/49/26af8639242583e10000000a421937/content.htm
3. Set SSL to *Active* for RFC destination `SMSSAP`.
4. Select the certificate list to which you uploaded the certificates.
5. Test the `SMSSAP` RFC destination. If you receive an HTTP response code `400`, then the set up is correct.

Check Report for Configuration Settings

With the check report `CUAN_MKT_EXEC_CHECK_CONFIG` you can check your configuration settings for sending text messages.

14.2.5 Setting up Trigger-Based Campaigns

To enable trigger-based campaigns, carry out the following steps:

1. Activate the business configuration set (BC set) `CEI_ADT_MO` within transaction `SCPR20`.
   Select a mode and activate it.
2. Now you should see the additional entry *Define Segmentation Profiles* in Customizing under *SAP Hybris Marketing* > *Segmentation*.
   There you should now find the segmentation profile `SAP_INTERACTION_TPIK`.
3. Activate the required campaign trigger such as `SHOP_CART_ABANDONED` for the trigger-based campaign *Abandoned Shopping Cart* in Customizing under *SAP Hybris Marketing* > *Campaigns* > *Campaign* > *Activate*.

14.2.6 Setting up the Integration of Digital Asset Management Systems

Digital Asset Management (DAM) systems provide catalogs of digital images, videos, documents, music etc. Digital assets can be searched easily by keywords. With the integration of DAM systems you can directly access images for use in static image links in an email. SAP delivers standard settings for the following DAM systems:

- Hybris Product Content Management
- OpenText Media Manager

Typically the systems are activated and the credentials are set during the execution of the Technical Configuration. You can call up transaction `ME_DAM` to change the activation status and set the credentials afterwards.

If a system was activated with transaction `ME_DAM`, its RFC destination has to be set up manually.

If a system was activated during Technical Configuration, its empty RFC destination is created either with name `CEI_ME_DAM_HYBRIS` or with name `CEI_ME_DAM_OPENTEXT`, depending on the DAM system activated. Afterwards, the RFC destination has to be configured manually.

To perform this manual step, start transaction *Configuration of RFC Connections* (`SM59`) and choose *HTTP Connections to External Server*.

RFC Destination CEI_ME_DAM_HYBRIS for Hybris Product Content Management

Go to *Technical Settings* and maintain

- *Target Host* : host name of the Hybris PCM system
- *Service No.* : port number for the API calls (i.e. 9001 for http and 9002 for https)
- *Path Prefix* : **`/rest/v1/<site>/products/`** with **`<site>`** being the BaseSite.uid property of the website (see Hybris PCM documentation).

Go to *Logon & Security* and maintain

- *Logon Procedure* : Choose *Do Not Use a User* or *Basic Authentication with User and Password* depending on the configuration of the DAM system
- *Security Options* : Choose *SSL Inactive* or *SSL Active with SSL Certificate* depending on the configuration of the DAM system

Go to *Special Options*

- *HTTP Cookies*: Set *Accept Cookies* to *Yes (All)*

RFC Destination CEI_ME_DAM_OPENTEXT for OpenText Media Manager

Go to *Technical Settings* and maintain

- *Target Host* : host name of the OpenText system
- *Service No.* : port number for the API calls (i.e. 80 for http and 443 for https)
- *Path Prefix* : none

Go to *Logon & Security* and maintain

- *Logon Procedure* : Choose *Do Not Use a User*
- *Security Options* : Choose *SSL Inactive* or *SSL Active with SSL Certificate* depending on the configuration of the DAM system

Go to *Special Options*

- *HTTP Cookies*: Set *Accept Cookies* to *Yes (All)*.

14.3 Configuring "My Marketing Calendar"

If you did not carry out this step already as a part of *Configuring Planning*, configure the marketing calendar as described in Setting up "My Marketing Calendar" [page 105].

15 Configuring Manager-Related Tasks

The following apps are available to managers:

- Release target groups
- Release campaigns

15.1 Setting up "Release Target Groups"

To set up the *Release Campaigns* application, you need to carry out the following steps:

- **Activate Advanced Status Management**
  1. In Customizing, go to *SAP Hybris Marketing* > *Segmentation* > *Target Group* > *Activate Advanced Status Management*
  2. Select *Activate Advanced Status Management* and, if desired, *Enable Editing of Target Group*. Save your entries.
  3. In Customizing, go to *SAP Hybris Marketing* > *General Settings* > *Set Up Quick Filter Tiles* and enable a quick filter *To Be Released* for the target group list. Save your entries.
- **Assign Users to Roles**
  To enable managers to use the *Release Target Group* app, you need to assign your copies of the following `PFCG` roles to their AS ABAP users:
  - `SAP_CEI_REL_FLP` (business catalog role; no copy required - you can assign the delivered standard role)
  - `SAP_CEI_CUAN_MK_TG_REL_APP` (back-end role; included in composite role `SAP_MARKETING_MANAGER`)
  - `SAP_CEI_HOME` (for personalization purposes)

15.2 Setting up "Release Campaigns"

To set up the *Release Campaigns* application, you need to carry out the following steps:

- **Activate Advanced Status Management**
  1. In Customizing, go to *SAP Hybris Marketing* > *Campaigns* > *Campaign* > *Activate Advanced Status Management*
  2. Select *Activate Advanced Status Management*, then save your entry.
  3. In Customizing, go to *SAP Hybris Marketing* > *General Settings* > *Set Up Quick Filter Tiles* and enable a quick filter *To Be Released* for the campaign list. Save your entries.
- **Assign Users to Roles**

To enable managers to use the *Release Campaigns* app, you need to assign your copies of the following PFCG roles to their AS ABAP users:

- SAP_CEI_REL_FLP (business catalog role; no copy required - you can assign the delivered standard role)
- SAP_CEI_CUAN_MK_INI_REL_APP (back-end role; included in composite role SAP_MARKETING_MANAGER)
- SAP_CEI_HOME (for personalization purposes)

16 SAP Hybris Marketing Integration with SAP Fraud Management

If you productively use *SAP Hybris Marketing* as well as *SAP Fraud Management* you have the option to take advantage of the integration of these products. By using the detection methods of *SAP Fraud Management*, the integration offers the automatic creation of an alert in *SAP Fraud Management* in case of a deviation in number or evaluation of interactions such as a post in Sentiment Engagement.

For more information about the implementation of the integration, see the corresponding guide on the SAP Service Marketplace at:

http://service.sap.com/mkt *SAP Fraud Mgmt. Integration with SAP Hybris Marketing*

http://service.sap.com/%7Esapidb/012002523100007329142016E/

17 Frequently Asked Questions

- **Can I install SAP Hybris Marketing on any database and access SAP HANA using a secondary database connection?**
  SAP Hybris Marketing runs on an SAP NetWeaver AS ABAP system with SAP HANA database as primary and only database. During the installation of *SAP Hybris Marketing* SAP HANA content is unpacked to the SAP HANA database. This content is used for accessing SAP ERP, SAP CRM as well as *SAP Hybris Marketing* data.
- **How is the SAP ERP and SAP CRM data accessed?**
  SAP ERP and SAP CRM data is stored in separate database schemas in the SAP HANA database. *SAP Hybris Marketing* delivers SAP HANA information models that join together data from these separate database schemas. The application accesses the data through these SAP HANA models. As the database schema name is unique in your system, a schema mapping from SAP's authoring schema to your schema name is defined during the technical configuration of *SAP Hybris Marketing*.
  For more information about SAP HANA schema mapping, see the SAP HANA Modeling Guide at:
  http://help.sap.com/hana_appliance ▸ *Modeling Information* ◂
  (http://help.sap.com/hana/SAP_HANA_Modeling_Guide_for_SAP_HANA_Studio_en.pdf)
- **What is the name of the database schema of my SAP ERP and SAP CRM data?**
  If you replicate data (see Scenario B: Hub-Deployment with Separate SAP HANA System [page 15]) through SAP LT replication server the name of the SAP HANA database schema is your SAP LT configuration name. If you run deployment scenario C, *Hub-Deployment with Shared SAP HANA System of SAP Business Suite*, your database schema name is `SAP<SID>` while `<SID>` is the system ID of your SAP ERP or SAP CRM system.
- **Do I have to set up HTTPS?**
  You have to set up HTTPS as *SAP Hybris Marketing* does not allow HTTP calls.
- **Do I have to set up a Web Dispatcher?**
  You have to set up a Web Dispatcher as *SAP Hybris Marketing* integrates ABAP and SAP HANA
- **Do I need to set up a BW Client? Do I have to set up the BW Client for all solutions? Can I use a BW client in another system?**
  You have to set up a BW client in your *SAP Hybris Marketing* system regardless of the *SAP Hybris Marketing* solution you have licensed. The application uses the operational data provisioning (ODP) to directly access SAP HANA information models. For ODP, you only need to perform minimal configuration of the BW in your application system. You do not need to set up a Data Warehouse. Replication of the data to a BW system is not necessary.

18 SAP Notes for Installation and Upgrade

If there is additional information to the installation process as described in this guide, you find the new information in the following SAP Note or SAP Notes.

Make sure that you have the current version of each SAP Note, which you can find on the SAP Service Marketplace at http://support.sap.com/notes.

Table 53:

SAP Note Number	Title	Description
Release Information Note 1885803	RIN SAP Hybris Marketing	Contains information and references in the context of applying *SAP Hybris Marketing*
Note 1863478	Release strategy for the ABAP add-on SAP_CUAN 110	Besides the SAP Product Availability Matrix (PAM), this note contains important information about the **installation package** for *SAP Hybris Marketing*, including the **material number** for the package, and a list of required support packages.
Note 2075269	Follow Up Tasks after Client Copy	Contains information about the actions to be carried out after client copy
Note 2076331	Follow Up Tasks after System Copy	Contains information about the actions to be carried out after system copy
Note 2072589	Installing and Configuring SAP Fiori Apps for SAP CEI on a central Fiori Frontend Server	Contains information about the installation and configuration of SAP Fiori apps for *SAP Hybris Marketing* on a central SAP Fiori front-end server

Final Implementation of SAP Notes

The Release Information Note (RIN) is the central note containing general installation/upgrade information on *SAP Hybris Marketing*.

Make sure that you have implemented all notes that are listed in the RIN. For more information about the sequence of the note implementation, see SAP Notes for Installation [page 9].

19 Appendix

19.1 Technical Configuration - Expert Mode

If you are not able to use the *Technical Configuration Wizard* (Using the Technical Configuration Wizard [page 52]), you can use the *Technical Configuration Expert Mode* to carry out the steps manually.

To use the expert mode, call up transaction `STC01` and execute task list `CUAN_INITIAL_SETUP`. To call the parameter screen, select the last task in the list and then click on the *Change Parameters* icon (column *Parameter*)

19.2 Replicated Tables in SAP Hybris Marketing Data Management

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Data Management*, the following tables are replicated via data replication:

Table 54:

SAP ERP (A - TO)	(TB - TS)
ADCP	TBRCT
ADR2	TB003
ADR3	TCURC
ADR6	TCURF
ADRC	TCURN
ADRP	TCURR
BUT000	TCURT
BUT021_FS	TCURV
BUT050	TCURX
BUT051	TPFKT
BUT100	TSABT
CRMKUNNR	TSAD2T
CRMPARNR	TSAD3T
HRP1001	TSAD4
KNA1	
KNVK	
NDBSMATG16	
T005T	
T005U	
T016	
T016T	

Table 55:

SAP CRM (A - CO)	(CR - CRM)	(D - T)
ADCP	CRMC_ACT_CAT_ASS	DD07L
ADR2	CRMC_INDUSTRY	DD07T
ADR3	CRMC_INDUSTRY_T	HRP1001
ADR6	CRMC_PROC_TYPE	QPCT
ADRC	CRMC_PROC_TYPE_T	QPGT
ADRP	CRMD_BRELVONAE	T006
BUT000	CRMD_DHR_ACTIV	T006A
BUT020	CRMD_DHR_HEADOPP	TB003
BUT021_FS	CRMD_DHR_HSLSORD	TB911
BUT050	CRMD_DHR_ISLSORD	TB913
BUT051	CRMD_DHR_LEAD	TCURC
BUT052	CRMD_MKTHV_MC	TCURF
CGPL_HIERARCHY	CRMD_MKTHV_MC_TC	TCURN
CGPL_PROJECT	CRMD_MKTTG_TG_EA	TCURR
CGPL_TEXT	CRMD_MKTTG_TG_H	TCURT
COMC_PR_TYPE_T	CRMD_ORDERADM_H	TCURV
COMM_HIERARCHY	CRMD_ORDERADM_I	TCURX
COMM_HIERARCHYT	CRMD_ORDER_INDEX	TSAD3
COMM_PRODUCT	CRMM_BUT_FRG0041	
COMM_PRPRDCATR	CRM_MKTPL_ATTR	

19.3 Replicated Tables in SAP Hybris Marketing Segmentation

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Segmentation*, the following tables are replicated via data replication:

Table 56:

SAP ERP (A - K	(N - TB)	(TC - TV)
ADCP	NDBSMATG16	TCURC
ADR2	PA0105	TCURF
ADR3	T005T	TCURN
ADR6	T005U	TCURR
ADRC	T016	TCURT
ADRP	T016T	TCURV
BUT000	T151	TCURX
BUT021_FS	T151T	TVGRT
BUT050	T171T	TVKBT
BUT051	TB003	TVKOT
BUT100	TBRCT	TVTWT
CRMKUNNR		
CRMPARNR		
HRP1001		
KNA1		
KNB1		
KNVK		
KNVP		
KNVV		

Table 57:

SAP CRM (A - CO)	(CRMC_C - CRMC_P)	(CRMC_S - H)	(T)
ADCP	CRMC_ACT_CAT_ASS	CRMC_SOURCE	QPCT
ADR2	CRMC_CON_PHASE_T	CRMC_SOURCE_T	QPGT
ADR3	CRMC_DISTCHAN	CRMD_DHR_ACTIV	T002T
ADR6	CRMC_DISTCHAN_T	CRMD_DHR_HEADOPP	T005T
ADRC	CRMC_DIVISION	CRMD_DHR_HSLSORD	T005U
ADRP	CRMC_DIVISION_T	CRMD_DHR_ISLSORD	T006
BUT000	CRMC_INDUSTRY	CRMD_DHR_ITEMOPP	T006A
BUT020	CRMC_INDUSTRY_T	CRMD_DHR_LEAD	TB002
BUT021_FS	CRMC_OPPIMPOR	CRMD_MKTHV_MC	TB003
BUT050	CRMC_OPPIMPOR_T	CRMD_MKTHV_MC_TC	TB003T
BUT051	CRMC_PARTNER_FCT	CRMM_BUT_FRG0041	TB004T
BUT052	CRMC_PARTNER_FT	CRM_MKTPL_ATTR	TB024
BUT100	CRMC_PHASE_T	CRM_STACOM_ATTR	TB027T
CPGL_HIERARCHY	CRMC_PROC_TYPE	CRM_STACOM_TEXT	TB028T
CGPL_PROJECT	CRMC_PROC_TYPE_T	DD07L	TCURC
COMC_PR_TYPE_T		DD07T	TCURF
COMM_CATEGORY		HRP1000	TCURN
COMM_CATEGORYT			TCURR
COMM_IL_PRDBP			TCURT
COMM_PRODUCT			TCURV
COMM_PRSHTEXT			TCURX
			TJ30
			TJ30T
			TSAD3
			TSAD3T

19.4 Replicated Tables in SAP Hybris Marketing Acquisition

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Acquisition*, the following tables are replicated via data replication:

Table 58:

SAP ERP
TB003

Table 59:

SAP CRM
TB003
QPCT
QPGT

19.5 Replicated Tables in SAP Hybris Marketing Recommendation

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Recommendation*, the following tables are replicated via data replication:

Table 60:

SAP ERP
ADCP
ADR2
ADR3
ADR6
ADRC
ADRP
BUT000
BUT021_FS
BUT051
BUT100
CRMKUNNR
CRMPARNR
KNA1
KNVK
MAKT
MARA
MARD
T023
T023T
T179
T179T
TB003
TPTMT
TVMS
TVTW
TVTWT

SAP ERP
VBAK
VBAP
WRF_BRANDS

Table 61:

SAP CRM (A - CR)	(CR - CRM)
ADCP	CRMD_MKTHV_MC
ADR2	CRMD_MKTHV_MC_TC
ADR3	CRMM_BUT_FRG0041
ADR6	CRM_MKTPL_ATTR
ADRC	TB003
ADRP	
BUT000	
BUT051	
BUT052	
CGPL_HIERARCHY	
CGPL_PROJECT	

19.6 Replicated Tables in SAP Hybris Marketing Insight

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Insight*, the following tables are replicated via data replication:

Table 62:

SAP ERP (A - T0)	(T1 - TK)	(TS - TVM)	(TVT - V)
ADCP	T151	TSPA	TVTW
ADR2	T151T	TSPAT	TVTWT
ADR3	T171	TVAG	TVV1
ADR6	T171T	TVAGT	TVV1T
ADRC	T179	TVAKT	TVV2
ADRP	T179T	TVBUR	TVV2T
BUT000	T685	TVFKT	TVV3
BUT021_FS	T685T	TVFS	TVV3T
BUT050	TB003	TVFST	TVV4
BUT051	TB910	TVGRT	TVV4T
BUT100	TB911	TVKBT	TVV5
CRMKUNNR	TB912	TVKGR	TVV5T
CRMPARNR	TB913	TVKO	VBAK
CVI_CUST_LINK	TBRCT	TVKOT	VBAP
DD04T	TCURC	TVLS	VBKD
DD07T	TCURF	TVLST	VBRK
HRP1001	TCURN	TVM1	VBRP
KNA1	TCURR	TVM1T	VBUK
KNVK	TCURT	TVM2	VBUP
KNVP	TCURV	TVM2T	
KNVV	TCURX	TVM3	
KONV	TKEB	TVM3T	
MAKT	TKEBT	TVM4	
NDBSMATG16	TKEF	TVM4T	
PA0105	TKEFE	TVM5	
T001	TKUKL	TVM5T	
T005T	TKUKT		

SAP ERP (A - T0)	(T1 - TK)	(TS - TVM)	(TVT - V)
T005U T006 T006A T016 T016T T023 T023T			

Table 63:

SAP CRM (A - CRMC_C)	(CRMC_D - CRMC_S)	(CRMD - CRM_S)	(D - T)
ADCP	CRMC_DISTCHAN	CRMD_CHM_CLASS	DD07L
ADR2	CRMC_DISTCHAN_T	CRMD_DHR_HEADOPP	DD07T
ADR3	CRMC_DIVISION	CRMD_DHR_HSLSORD	HRP1000
ADR6	CRMC_DIVISION_T	CRMD_DHR_ISLSORD	HRP1001
ADRC	CRMC_INDUSTRY	CRMD_DHR_ITEMOPP	SCPRIO
ADRP	CRMC_INDUSTRY_T	CRMD_DHR_LEAD	SCPRIOT
BUT000	CRMC_LEAD_QL	CRMD_MKTHV_MC	T002T
BUT020	CRMC_LEAD_QL_T	CRMD_MKTHV_MC_TC	T005T
BUT021_FS	CRMC_LEAD_TYPE	CRMM_BUT_CONTNO	T005U
BUT050	CRMC_LEAD_TYPE_T	CRMM_BUT_CUSTNO	T006
BUT051	CRMC_OPPIMPOR	CRMM_BUT_FRG0041	T006A
BUT052	CRMC_OPPIMPOR_T	CRMM_TERRITORY	TB002
CGPL_HIERARCHY	CRMC_PHASE_T	CRMM_TERRITORY_T	TB003
CGPL_PROJECT	CRMC_PROC_TYPE	CRMM_TERRITORY_V	TB004T
COMC_PR_TYPE_T	CRMC_PROC_TYPE_T	CRM_MKTPL_ATTR	TB024
COMM_CATEGORY	CRMC_SOURCE	CRM_STACOM_ATTR	TB027T
COMM_CATEGORYT	CRMC_SOURCE_T	CRM_STACOM_TEXT	TB028T
COMM_PRODUCT			TCURC
COMM_PRSHTEXT			TCURF
CRMC_ACT_CATEGOR			TCURN
CRMC_ACT_CAT_T			TCURR
CRMC_CHM_PROG_T			TCURT
CRMC_CHM_STATU_T			TCURV
CRMC_CHM_TYPE_T			TCURX
CRMC_CON_PHASE_T			TJ30T
			TSAD3

19.7 Replicated Tables in SAP Hybris Marketing Planning

If you use SAP ERP and/or SAP CRM as source systems in *SAP Hybris Marketing Planning*, the following tables are replicated via data replication:

Table 64:

SAP ERP (A - TK)
COBK
COEP
COOI
PRPS
TB003
TKA01

Table 65:

SAP CRM (A - TK)
TB003

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Flot (Versions: 0.7 and 0.8.1)

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gridster.js (Version: 0.1.0)

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d3–cloud (Version: 1.0.1)

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D3.js (Versions: 3.5.3 and 2.9.6)

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TestSwarm

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GeoJSON

(http://eric.clst.org/Stuff/USGeoJSON)

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NicEdit (Version: 0.9r24)

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cal-heatmap (Version: 3.3.10)

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world.geo.json

(https://github.com/johan/world.geo.json)

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noUISlider (Version: 7.0.9)

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d3-plugins (Version: master-44c77c570b)

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