Upgrade Master Guide
SAP Customer Relationship Management 7.0

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Typographic Conventions

Example	Description
`<Example>`	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, "Enter your `<User Name>`".
▶ *Example* → *Example* ↵	Arrows separating the parts of a navigation path, for example, menu options
Example	Emphasized words or expressions
`Example`	Words or characters that you enter in the system exactly as they appear in the documentation
`http://www.sap.com`	Textual cross-references to an internet address
`/example`	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
123456	Hyperlink to an SAP Note, for example, SAP Note 123456
Example	■ Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. ■ Cross-references to other documentation or published works
`Example`	■ Output on the screen following a user action, for example, messages ■ Source code or syntax quoted directly from a program ■ File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, `SELECT` and `INCLUDE`
`EXAMPLE`	Keys on the keyboard

Document History

⚠️ **CAUTION**

Before you start the implementation, make sure you have the latest version of this document. You can find the latest version on SAP Service Marketplace `http://service.sap.com/instguides`.

The following table provides an overview on the most important document changes:

Version	Date	Description
1.0	2008-11-21	First version – no changes
1.10	2009-05-04	Results from reviews and messages incorporated
1.20	2009-07-03	Results from manual ELF validation and various messages incorporated Software units for *Lead-to-Cash* and *Segmentation and List Management* changed Terminology changed from CRM Web Client UI to Web Client UI
1.30	2009-07-23	Changes made in sections on migration of accounts and contacts (deep BOL regeneration)
1.40	2010-06-18	Various minor changes
1.50	2011-03-18	■ SAP Note 1565886 added to the list of SAP Notes, and to the *Segmentation* sections in the *Migration to SAP CRM 7.0* chapter ■ All references to SAP NetWeaver Search and Classification (TREX) 7.0 updated to SAP NetWeaver Search and Classification (TREX) 7.1
1.60	2011-07-11	■ Information about the applications that can run on a hub system with SAP NetWeaver 7.3 added to the section *Upgrade at a Glance* ■ SAP Note 1468349 added to the list of SAP Notes
1.70	2013-04-23	■ Updated hyperlinks and navigation paths throughout ■ Added section on *Workflows for Objects* in the chapter *Workflow Inbox*
1.80	2013-04-25	SAP Note 1635858 added to the list of SAP Notes
1.90	2013-07-31	Removed chapter *SAP CRM Business Scenarios*. For information about SAP CRM business scenarios, see SAP Solution Manager.

Table of Contents

1   About this Document

This Upgrade Master Guide for SAP Customer Relationship Management 7.0 provides a central starting point for the technical **upgrade of SAP CRM**. In this guide, you can find cross-scenario upgrade information as well as scenario-specific information.

> 💡 **NOTE**
>
> The technical **implementation** of SAP CRM is described in the documentation *Master Guide – SAP CRM 7.0*. You can find it on SAP Service Marketplace at ▶ `http://service.sap.com/instguides` ↵.
>
> The functional migration from SAP CRM 4.0 and 5.0 to SAP CRM 7.0 is described in section *Migration to SAP CRM 7.0* [page 21]. The description takes the new user interface WebClient UI into account and covers the migration from SAP GUI and People-Centric UI (PC UI) to the WebClient UI. A technical upgrade to the new UI is not possible.

Use this Upgrade Master Guide to obtain an overview of the upgrade of the involved software units and scenarios from a technical perspective. The Upgrade Master Guide helps you decide which software units you have to upgrade by taking into account the dependencies between the software units. It refers you to the required detailed documentation, in particular:

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

For a general overview of available SAP documentation, see *The Main SAP Documentation Types* [page 95].

If you need further information during your planning process that is not covered by the Upgrade Master Guide, see *Links to Related Information* [page 94] in the appendix.

Main Sections

The Upgrade Master Guide consists of the following main sections:

- *SAP CRM Upgrade Overview* [page 11]

  Upgrade at a Glance [page 11] provides you with an overview of major changes regarding components and technology. In *Upgrade of Involved Software Units* [page 15], you can find information about upgrade options and procedures for the SAP CRM software units. The software units are divided into logical groups, for example, CRM Core.

The section *Overall Upgrade Sequence* [page 18] depicts the order in which you must perform the upgrades.

■   *Solution-Wide Topics* [page 73]

This section provides information about topics relevant for the whole CRM system landscape, for example, about shared systems for monitoring and support.

■   Appendix

In this section, references to the required information sources are provided:

- A list of all documents mentioned in the Upgrade Master Guide
- A list of all SAP Notes mentioned in the Upgrade Master Guide
- A list of links to SAP Service Marketplace information resources

⚠ **CAUTION**

Make sure you have the latest version of the Upgrade Master Guide by checking SAP Service Marketplace before starting the installation. The Upgrade Master Guide is regularly updated on SAP Service Marketplace at `http://service.sap.com/instguides`.

Constraints

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

Send Us Your Feedback

If you have feedback about this guide, contact us at `crm.documentation@sap.com`.

2 SAP CRM Upgrade Overview

2.1 Upgrade at a Glance

SAP NetWeaver Prerequisites

SAP CRM 7.0 is based on SAP NetWeaver 7.0. Therefore, SAP CRM 7.0 uses SAP NetWeaver 7.0 capabilities.

> 💡 **NOTE**
>
> SAP CRM ABAP 7.0 (BBPCRM) SAPKU70001 (SAP CRM 7.0 SP01) is a prerequisite to run an SAP CRM 7.0 system.
>
> SAP CRM 7.0 SP01 is compatible with the following 2 SAP NetWeaver releases:
>
> - SAP NetWeaver 7.0
> - EHP1 for SAP NetWeaver
>
> If you have installed SAP NetWeaver 7.0, you can keep this NetWeaver release for early adoption reasons and install or upgrade to SAP CRM 7.0. However, we recommend that you install or upgrade to EHP1 for SAP NetWeaver to benefit from the new SAP NetWeaver functions.

Installation Options with SAP NetWeaver 7.3 (for Java Hubs)

For SAP Business Suite applications as of SAP Business Suite 7 that are based on an Application Server Java and on hub systems, you can install these applications on SAP NetWeaver 7.3. You can also change from your current release to SAP NetWeaver 7.3. Changing means upgrading or updating. The following approaches for system landscapes for SAP NetWeaver 7.3 are possible:

- Upgrading to SAP NetWeaver 7.3 works for hub systems.
- Embedded deployment continues to work only for SAP NetWeaver 7.0x releases and their enhancement packages (this means, for example, for SAP NetWeaver 7.00, SAP NetWeaver 7.01, and SAP NetWeaver 7.02).

For more information about the technical background, see SAP Note 1468349. There you can find a list of all the Java hubs that you can install on SAP NetWeaver 7.3.

For information about the upgrade process of CRM Web Channel 7.0 on CRM 7.0 to SAP NetWeaver 7.3, see ▐ http://service.sap.com/instguides → *SAP Business Suite Applications* → *SAP CRM* → *SAP CRM 7.0* → *Upgrade* → *Upgrade Guide — CRM Web Channel 7.0 on NW7.3* ↵.

Upgrade and Migration

You can upgrade SAP CRM 4.0, 5.0, 5.2, and SAP CRM 2007 (SP00) to SAP CRM 7.0 but have to keep the following points in mind:

- To upgrade from SAP CRM 5.2 and SAP CRM 2007 to SAP CRM 7.0, you can use the standard upgrade tools.
- To upgrade from SAP CRM 4.0 or 5.0, you can use the standard tools only for some components, for example, the CRM Application Server. For most of the components, including the WebClient UI, an upgrade is not possible. They must be migrated (see *Migration to SAP CRM 7.0* [page 21]).

Procedures and Tools

The upgrade involves different procedures and tools:

- The CRM Application Server ABAP is upgraded with the system switch upgrade procedure performed by the **upgrade program SAPup**. For more information, see the documentation *Upgrade Guide – SAP CRM 7.0 ABAP*.
  The same procedure applies to all other ABAP-based systems, such as SAP Supply Chain Management Server (SAP SCM), SAP NetWeaver Business Warehouse (SAP NetWeaver BW), or SAP ERP. However, there are separate upgrade guides for each of these components with application-specific contents.
- A **new upgrade procedure for Java applications** based on SAP NetWeaver 7.0 Application Server Java is available. This procedure automates many steps and thus facilitates the upgrade. For more information, see the documentation *Upgrade Guide – SAP CRM 7.0 Java*.
- If you want to install new CRM Java Components based on SAP NetWeaver 7.0 Application Server Java, you must install them on a standalone system using **SAPinst**. For more information, see the documentation *Installation Guide – SAP CRM 7.0 on <Operating System>: <Database>*.
- There are **special upgrade procedures**, for example, for CRM Mobile Client Components.

Overview of Components

The following figure gives you a rough overview of components that you can upgrade, for example, from SAP CRM 5.0 to SAP CRM 7.0:
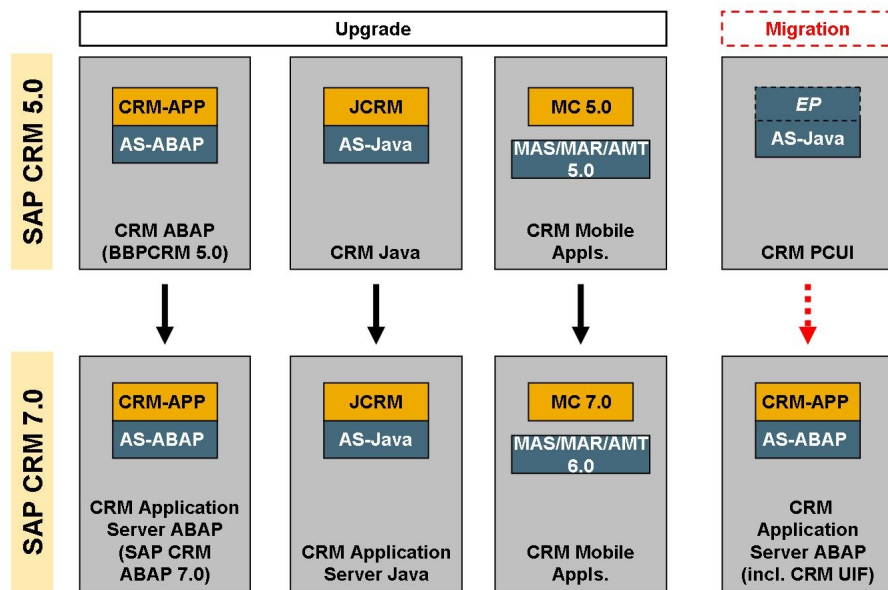
Figure 1: Upgrading from SAP CRM 5.0 to SAP CRM 7.0

The following table shows in a condensed form the successors to the SAP CRM 4.0, 5.0, 5.2, or SAP CRM 2007 components and the action that has to be taken to upgrade to SAP CRM 7.0:

SAP CRM 4.0 or Higher	SAP CRM 7.0	Action
CRM Application Server ABAP 4.0, 5.0, 5.2, 2007	CRM Application Server ABAP 7.0	Upgrade
CRM Java Components 5.0	CRM Java Components 7.0	Upgrade
CRM Web Channel	Part of CRM Java Components 7.0	Upgrade to CRM Java Components 7.0 (including upgrade to SAP NetWeaver AS Java 7.0)
Business Package for SAP CRM	Not available	No upgrade possible/migration of content
SAP Workforce Management	SAP Workforce Management	Upgrade
Mobile Infrastructure (Mobile Engine Server and Client)	SAP NetWeaver 7.0 Mobile Infrastructure	Upgrade
Mobile Sales for Handheld 4.0	Mobile Sales for Handheld 5.0	Upgrade
Search and Classification (TREX) 6.0 / 6.1	SAP NetWeaver Search and Classification (TREX) 7.1	Upgrade/migration
CRM WebChannel Application Components 4.0, 5.0, and 5.2	Part of CRM Java Components 7.0	Upgrade to CRM Java Components 7.0 (including upgrade to SAP NetWeaver AS Java 7.0)
MapBox 4.0	As of SAP CRM 5.0 SP09, all the functions that MapBox makes available for data conversion were integrated into the CRM Server.	You do not require a separate Java-based MapBox installation for groupware integration and no upgrade action is required.

SAP CRM 4.0 or Higher	SAP CRM 7.0	Action
		NOTE You can easily migrate the Java-based MapBox to the ABAP-based MapBox with transaction MIGRATE after upgrading to SAP CRM 7.0.
Groupware Connector 4.0	Groupware Connector 4.0 SP14	Update
SAP Content Server 6.10/6.20/6.30	SAP Content Server 6.40	Upgrade
SAP GUI 6.20/6.40	SAP GUI 7.10	Upgrade

2.2 Upgrade Paths

An upgrade of the CRM Application Server is supported for the following source releases:

■ SAP CRM 4.0

■ SAP CRM 5.0

■ SAP CRM 5.2

■ SAP CRM 2007

The following minimum support package levels are required for the upgrade:

■ SAP CRM 4.0 (with and without Service Industry Add-On) to SAP CRM 7.0

   ● BBPCRM 400 SP06

   ● SAP_ABA, SAP_BASIS SP12

   ● Service Industry Add-On SP00

■ SAP CRM 5.0 to SAP CRM 7.0

   ● BBPCRM 500 SP01

   ● SAP_ABA, SAP_BASIS, SAP_BW SP04

■ SAP CRM 5.2 to SAP CRM 7.0

   ● BBPCRM 520 SP00

   ● SAP_ABA, SAP_BASIS, SAP_BW SP04

■ SAP CRM 2007 to SAP CRM 7.0

   ● BBPCRM 600 SP00

   ● SAP_ABA, SAP_BASIS, SAP_BW SP04
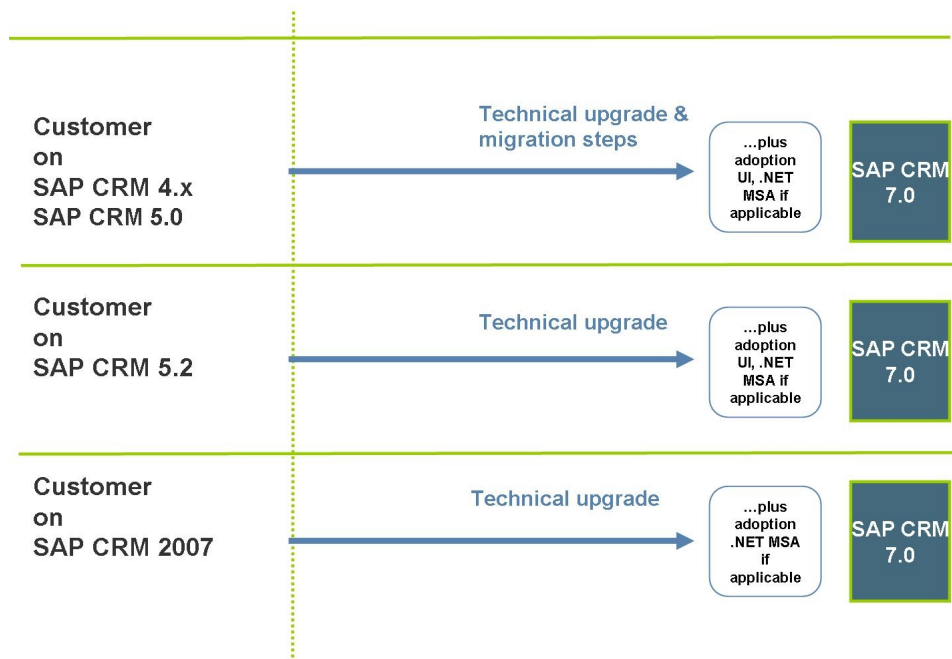
Figure 2: Paths for Upgrading to SAP CRM 7.0

2.3 Upgrade of Involved Software Units

For a detailed description of the involved software units, see the Master Guide for SAP CRM 7.0 on SAP Service Marketplace at `https://service.sap.com`/crm-inst. The following section contains information about upgrade specifics only.

CRM Core

CRM Application Server ABAP, CRM Application Server Loyalty, and CRM Application Server Java

For the upgrade to CRM Application Server ABAP 7.0, the source releases 4.0, 5.0, 5.2, and 2007 are supported.

If you want to perform a Unicode conversion, you have to do it before or after the upgrade. The Unicode conversion is independent of the CRM server upgrade. For more information, see SAP Service Marketplace at `http://service.sap.com/Unicode@SAP`.

> 💡 **NOTE**
>
> The CRM Web Channel application has not been integrated into the new WebClient UI. This application uses its own user interface based on Java. For more information about CRM Web Channel and accessing this application, see the installation guides for SAP CRM 7.0 at `http://service.sap.com/instguides`.

SAP NetWeaver Portal and Business Package

SAP NetWeaver Portal is not delivered with SAP CRM 7.0. However, with this release you can integrate the WebClient UI into an already installed SAP NetWeaver Portal (part of SAP NetWeaver 7.0). The

required content is delivered in business package components BP SAP CRM 7.0 (technical name: BP_CRM50).

The business packages for the releases SAP CRM 3.1, 4.0, and 5.0 cannot be used in SAP CRM 7.0, because they only run in the People-Centric UI (PC UI). In SAP CRM 7.0, the PC UI is no longer supported. You can upload the business roles created in the WebClient UI to SAP NetWeaver Portal. However, you cannot reuse the business roles that you have created in the PC UI.

To use the new WebClient UI technology, appropriate SAP NetWeaver components must be changed for the CRM UI framework on which this UI technology is based. Therefore, you cannot immediately import SAP NetWeaver support packages. Before doing so, you must make a Conflict Resolution Transport (CRT) available that protects the CRM-specific changes in the SAP NetWeaver components from being overwritten.

CRM Mobile Client Component

You need to upgrade CRM Mobile Client 5.0 to CRM Mobile Client 7.0 using the standard upgrade tools.

Standalone Components

SAP Content Server

SAP CRM 7.0 uses SAP Content Server 6.40. If you have a previous version installed, you can upgrade to SAP Content Server 6.40 by using the setup program. During the upgrade, the old version is deinstalled.

Groupware Connector

SAP CRM 7.0 uses Groupware Connector 4.0, that is, the same version as in SAP CRM 4.0. An upgrade is provided from the previous release.

MapBox

As of SAP CRM 5.0 SP09, all the functions that MapBox makes available for data conversion were integrated into SAP NetWeaver Application Server ABAP.

You do not require a separate Java-based MapBox framework and you can easily migrate groupware integration data to the ABAP-based MapBox using a migration tool (transaction MIGRATE). For more information, see SAP Help Portal at ▌▶ http://help.sap.com → *SAP Customer Relationship Management → Data Exchange and Mobile Technologies → CRM Integration Services → Groupware Integration Guide → Server-Based Groupware Integration → Migration of GWI Data to the ABAP-Based MapBox* ↵.

Search and Classification (TREX)

For some scenarios, you can continue using Search and Classification 6.1. Other scenarios require the latest version, SAP NetWeaver Search and Classification 7.1. An upgrade procedure is available to upgrade from release 6.1 to 7.0, and from release 7.0 to 7.1.

Tealeaf RealiTea

The upgrade from previous releases is a deinstallation and new installation of the software. You can download the current version from SAP Service Marketplace at ▶ http://service.sap.com/swdc → *Download* → *Support Packages and Patches* → *Search for Support Packages and Patches* ◀. Enter **Tealeaf** and start the search. You can find the program in the result list.

cProjects for Standalone Installation

Customers who run an SAP R/3 4.6C or SAP R/3 Enterprise system and have SAP Business Suite and SAP ERP licenses are entitled to participate in the SAP ERP 6.0 Ramp-Up to install or upgrade to Collaboration Projects (cProjects) 4.00 on a separate server (standalone installation).

The usage of the full SAP ERP 6.0 offering is optional for cProjects customers. The technical upgrade of SAP R/3 to SAP ERP 6.0 is not mandatory for cProjects customers. cProjects 4.00 can communicate with SAP R/3 4.6C or SAP R/3 Enterprise systems; however, the full scope of integration can only be achieved with SAP ERP 6.0.

cProjects is shipped to the customers together with the SAP ERP 6.0 software package. The following items are needed to install/upgrade cProjects:

- SAP NetWeaver 7.0
- CPRXRPM 400 SP11

Application Systems

SAP R/3, SAP R/3 Enterprise, or SAP ERP

The latest release is SAP ERP 6.0 EHP4. You can also integrate previous releases of SAP R/3, SAP R/3 Enterprise, or SAP ERP, depending on the scenarios you use. As of SAP CRM 4.0, you can also run SAP CRM without any ERP back end in a standalone configuration. However, there are some restrictions regarding the overall business functions that you have to consider during the planning phase.

SAP ERP 6.0 EHP4 contains all the interfaces to be connected to SAP CRM, that is, no R/3 plug-in is required.

For more information about the release strategy, see SAP Service Marketplace at http://service.sap.com/r3-plug-in.

SAP SCM Server

SAP Supply Chain Management Server (SAP SCM Server) comprises tools for real-time planning and decision support. For example, SAP SCM Server performs product availability checks for telesales orders (mandatory in the Interaction Center) and in Field Sales or CRM Web Channel.

SAP SCM Server is upgraded with the standard SAP upgrade procedure for ABAP systems.

SAP NetWeaver Business Warehouse

Depending on your business processes, you can either integrate SAP NetWeaver 7.0 Business Warehouse (SAP NetWeaver BW) or SAP Business Information Warehouse (SAP BW) 3.5 or 3.1.

The upgrade to SAP NetWeaver BW is performed with the standard SAP upgrade procedure for ABAP systems. The source releases SAP BW 3.0B, 3.1, and 3.5 are supported. You have to include the BI Content add-on in the upgrade.

We recommend these versions:

■   Recommended BW version: SAP_BW 7.01 (EHP1 for SAP NetWeaver 7.0)
■   Recommended BI Content version: BI CONT 7.04

(BI CONT 7.04 dependencies: SAP NetWeaver 7.0 SP16 minimum/SP17 recommended (including SAP_BW SP18) or EHP 1 for SAP NetWeaver 7.0 SP02 (including SAP_BW 7.01 SP 02))

2.4 Overall Upgrade Sequence

This section lists the steps (installation, technical configuration, application configuration) required to upgrade SAP CRM business scenarios.

You can upgrade all other software units mentioned below in parallel. However, dependencies can exist between some of the subcomponents that belong to a larger software unit. For example, CRM Mobile Client Component consists of several subcomponents to which a specific upgrade sequence applies. These dependencies are explained in the corresponding component upgrade guides.

> **NOTE**
>
> For documentation referenced in the following table, see *List of Documentation* [page 93].

Step	Action [Required Documentation]	Remark / Subsequent Step
1	Installation of **SAP Solution Manager 7.0** and ST-ICO 150_700 or upgrade to this version [*Master Guide SAP Solution Manager 7.0*] [*Upgrade Guide – SAP Solution Manager 7.0*]	You need SAP Solution Manager to generate a key that you have to enter during the SAP CRM server upgrade. Without this key, you cannot perform the SAP CRM server upgrade.
2	Update of the **front-end software** [*Installation Guide – SAP Frontend*]	You can upgrade the front-end software as soon as you receive the upgrade package. For information about supported SAP GUI releases, see SAP Note 147519.
3	Upgrade of **CRM Application Server ABAP 7.0** [*Upgrade Guide – SAP CRM Server 7.0*]	/
4	Upgrade of **CRM Application Server Java**	/
5	Upgrade of **SAP NetWeaver Search and Classification (TREX)** [*Upgrade - TREX 6.1 to TREX 7.0*] [*Upgrade - TREX 7.0 to TREX 7.1*]	/
6	Installation or upgrade of **SAP NetWeaver liveCache** [*Installation Guide – SAP NetWeaver 7.0 liveCache*] [*Upgrade Guide – SAP NetWeaver 7.0 liveCache Technology*]	/
7	Upgrade of **Groupware Connector:**	/

Step	Action [Required Documentation]	Remark / Subsequent Step
	[*Installation Guide — Groupware Connector*]	
8	Upgrade of **SAP Content Server 6.40** SAP Content Server 6.40 is used with SAP CRM 7.0. If you run previous versions of the SAP Content Server, see the documentation *Installation Guide — SAP Content Server 6.40* for upgrade instructions.	/
9	Deinstallation of the old Tealeaf release and installation of **Tealeaf RealiTea 4.5** You can download the Tealeaf software from SAP Service Marketplace at ▶ http://service.sap.com/swdc → *Download* → *Support Packages and Patches* → *Search for Support Packages and Patches* ◀. Enter `Tealeaf` and start the search. You can find the program in the results list. The installation documentation is part of the Tealeaf software package.	/
10	Upgrade of **SAP NetWeaver Business Warehouse** [*Upgrade Guide — SAP NetWeaver 7.0 Business Intelligence*]	/
11	Upgrade of **SAP SCM Server** [*Upgrade Guide — SAP SCM Server 5.0*]	/

3 Migration to SAP CRM 7.0

This documentation describes the functional migration from SAP CRM 4.0 and SAP CRM 5.0 to SAP CRM 7.0, taking the new user interface WebClient UI into account.

> **NOTE**
>
> In SAP CRM 7.0, SAP GUI is only supported for administrative tasks. The People-Centric UI (PC UI) is no longer supported. For more information, see SAP Note 1118231.
>
> ■ If you upgrade from SAP CRM 4.0 or 5.0 to SAP CRM 7.0, a technical upgrade is available, but an automatic UI migration of customer-specific UIs (including the underlying UI-related coding) is not possible.
>
> ■ If you upgrade from SAP CRM 5.2 or 2007 to SAP CRM 7.0, an upgrade is available and the customer-specific UIs remain intact and unchanged.

This document covers the migration from SAP GUI and People-Centric UI (PC UI) to the new WebClient UI and consists of two sections:

■ Migration from SAP CRM 4.0 to SAP CRM 7.0

This section describes functional enhancements and restrictions in SAP CRM 7.0 compared with SAP CRM 4.0.

> **NOTE**
>
> This section does not provide a complete inventory of functional changes between SAP CRM 4.0 and SAP CRM 7.0. If you require detailed information about the changes between these releases, you can do the following:
>
> ● See the release notes for SAP CRM 4.0 (see SAP Service Marketplace at ▶ http://service.sap.com/releasenotes → *SAP Solutions* → *SAP Customer Relationship Management* → *Release Notes SAP CRM 4.0 (incl. SP08)* ◀)
>
> ● See the functional enhancements and restrictions listed in the section *Migration from SAP CRM 4.0 to SAP CRM 7.0* [page 23].

■ Migration from SAP CRM 5.0 to SAP CRM 7.0

This section describes functional enhancements and restrictions in SAP CRM 7.0 compared with SAP CRM 5.0.

> **NOTE**
>
> This section does not provide a complete inventory of functional changes between SAP CRM 5.0 and SAP CRM 7.0. If you require detailed information about the changes between these releases, you can do the following:

- See the release notes for SAP CRM 5.0 (see SAP Service Marketplace at ▶ `http://service.sap.com/releasenotes` → *SAP Solutions* → *SAP Customer Relationship Management* → *Release Notes SAP CRM 5.0 (SP 07)* ↵.

- See the functional enhancements and restrictions listed in the section *Migration from SAP CRM 5.0 to SAP CRM 7.0* [page 42]

What Are the Main Upgrade Activities?

The upgrade to SAP CRM 7.0 consists of the following activities:

- Technical upgrade

  The technical upgrade is covered by the upgrade guide for SAP CRM 7.0.

  You can find this guide on SAP Service Marketplace at ▶ `http://service.sap.com/crm-inst` → *SAP CRM 7.0* → *Upgrade* ↵.

- Application component upgrade

  The component upgrade is covered by the upgrade guide for SAP CRM 7.0.

  You can find this guide on SAP Service Marketplace at ▶ `http://service.sap.com/crm-inst` → *SAP CRM 7.0* → *Upgrade* ↵.

- Functional migration

  The functional migration from SAP GUI and People-Centric UI (PC UI) to WebClient UI is covered in this document.

How is the Migration Information Structured?

The migration information from the different key capabilities is based on the same template containing the following sections:

- Functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0 and SAP CRM 5.0
- Functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0 and SAP CRM 5.0
- Migration activities, including SAP Notes that you need to refer to

> 💡 **NOTE**
>
> For most of the business transactions, you need to apply SAP Note 1037748, which describes how to display fields in the WebClient UI that have been enhanced in Easy Enhancement Workbench (EEW).
>
> For more information about the browsers that support SAP CRM 7.0, see SAP Note 1278645.

> ⬆ **RECOMMENDATION**
>
> Use a higher memory threshold if you run business scenarios that need more memory space. For standard business scenarios, we recommend a memory threshold of 70 MB. For business scenarios in marketing or trade promotion management, we recommend a memory threshold of 100 MB. You can enter the memory threshold in Customizing for *Customer Relationship Management* under ▶ *UI Framework* → *Technical Role Definition* → *Define Technical Profile* ↵.

3.1 Migration from SAP CRM 4.0 to SAP CRM 7.0

3.1.1 Master Data

3.1.1.1 Accounts and Contacts

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Accounts	Not available	Introduction of a life cycle stage for the account; the fields on the user interface depend on the user's selection. **EXAMPLE** If you select *Prospect*, you see different fields and assignment blocks to those you see if you select *Customer*.
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	The generation of BOL and WebClient UI requires a deep regeneration as well as the update of generated coding. This is triggered by starting the wizard for the enhancement again and running through all steps without making any changes. **NOTE** Do not click the *Generate* button instead since this will produce syntax errors in generated coding.
UI enhancements	SAP GUI, PC UI	Label positioning is possible using configuration. You can display and hide additional fields from a pool of fields of the business object.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	Business data toolset (BDT) not supported (not reusable) in SAP CRM 7.0; therefore, field and screen modification has changed.
Postal validation	SAP GUI, PC UI	If a customer uses third-party software for postal validation, the implementation of interfaces for postal validation pop-ups is necessary.

Migration Activities

Field-Like and Table-Like Enhancements

Regeneration is necessary for generation of BOL and WebClient UI.

UI Enhancements

Modification-free configuration with the UI configuration tool

New Enhancement Spots

To implement account and contact functionality in the WebClient UI, you can use the new enhancement spots CRM_UIU_BP_ENHANCEMENT and CRM_BUPA_IL_SEARCH, which include business add-ins (BAdIs) for the WebClient UI. You find these BAdIs in Customizing for *Customer Relationship Management* under ▶ *Master Data → Business Partner → Accounts and Contacts → Business Add-Ins* ◀.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
999092	Field and screen modification
1017763	Pop-ups for postal validation

3.1.1.2 Products, Product Hierarchies, Objects, Partner/ Product Ranges

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Maintenance transaction	SAP GUI	As in PC UI, maintenance is split for the different types of products: ■ Products (common search for product type material and service, but maintenance of material only) ■ Service ■ Warranty ■ Competitor products ■ Objects

Enhancing Products

■ To enhance products in the WebClient UI, you can use the following business add-ins (BAdIs) in Customizing for *Customer Relationship Management* under ▶ *Master Data → Products → Business Add-Ins* ◀:
  - BAdI: Maintenance of Additional Data in Product BOL (CRM_PRODIL_ADD_DATA)
  - BAdI: Enhancements in WebClient UI for Products (CRM_PRODIL_UIU_BADI)

■ To enhance standard searches with search parameters for fields in set types, see SAP Note 1026956.

■ To add important fields to the header area of the WebClient UI and make them visible at first glance, see SAP Note 1088910.

■ UI generation of customer-specific relationships
   The appropriate BOL layer entries can be generated; the views need to be manually developed and integrated into the product application.

> **NOTE**
>
> For more information about how to add new fields and set types, see SAP Library for Customer Relationship Management at ▷ *Master Data → Products → Concepts → Set Types and Attributes → Definition of Set Types and Attributes/Creating UI Configuration for Set Types* ◁.

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Restrictions for Products

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Concept of inactive products	SAP GUI	No longer supported To block a product for business transactions, you need to set the status to *locked*; inactive products need to be set to *active* in SAP GUI, before they can be changed in the WebClient UI.
Display of related business documents (BDocs)	SAP GUI	No longer supported
Recategorization of products	SAP GUI	Only available in SAP GUI
Display data for date/time in the past (this does not refer to change documents)	SAP GUI	No longer supported The change history allows a detailed view of the changes.
UI generation of relationships between products and business partner/product	SAP GUI	BOL entries are generated for the WebClient UI; the user interface is not generated.

Restrictions for Product Hierarchies

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Definition of default values and value restrictions with regard to the maintenance of product categories	SAP GUI	The new template functionality can be used to define default values on category level; to define value restrictions, values can only be set in the attribute definition.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
1026475	UI layout ■ In SAP CRM 7.0, only those relationships that are explicitly assigned to the categories are visible in the UI. In SAP GUI, combined screens exist. > **EXAMPLE** > You access product HT-001. In the *Accessories* screen, a subscreen is included that shows the accessories of HT-001. A second subscreen is included that shows the products to which HT-001 is an accessory. In SAP CRM 7.0, such screens are displayed as two separate assignment blocks, which have to be assigned explicitly to the categories.

Note Number	Short Description
	■ Since the WebClient UI does not support tab pages, the assignment of views and positions is no longer evaluated.

3.1.2 Sales

3.1.2.1 Sales Order Management, CRM Billing

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Price change approval workflow	Not available	New function
Credit analyst workbench	Not available	New function
Package quotation	Not available	New function

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Inquiry processing	SAP GUI	Not available
Partial transaction processing (sales order, sales quotation, and sales contract)	SAP GUI	Not available
Combination of quotation and order items in one document	SAP GUI	Not available
Incentive and commission management	SAP GUI, PC UI	Not available
Reference objects on sales order item level	SAP GUI	Not available in WebClient UI
Partners on sales order item level	SAP GUI	Ship-to party, payer, and bill-to party are available in the business context (assignment blocks *Shipping* and *Billing*); no separate assignment block for *Parties Involved*.

3.1.2.2 Opportunities, Listings, Territory Management, Organizational Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Activity Management: Dependency of transaction type and related categories	SAP GUI, PC UI	New Customizing for categories is necessary.
Activity management: subsequent assignment	SAP GUI, PC UI	Additional Customizing for transaction type is required (object relationship profile).

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Activity management: interaction history	SAP GUI, PC UI	New Customizing is necessary.
E-mail integration: one-to-one collaboration	SAP GUI, PC UI	Additional Customizing for groupware integration is necessary.
Quotation and order management: multiple promotions	SAP GUI, PC UI	Additional Customizing is necessary.
Quotation and order management: credit rating check	SAP GUI, PC UI	Additional Customizing is necessary.
Contract management: sales agreements	SAP GUI, PC UI	New Customizing is necessary.
Listings	SAP GUI, PC UI	New Customizing is necessary.

3.1.2.3 Account Planning

In SAP CRM 4.0, account planning was not available in SAP GUI and PC UI.

More Information

Mobile Sales []

3.1.2.4 Mobile Sales

In Mobile Sales, a code migration from VBA 6.0 to VB.Net was introduced from SAP CRM 4.0 to SAP CRM 5.0.

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Quotation and order management	Mobile client	Additional Customizing is necessary.
Quotation and order management: rough stock information	Mobile client	Additional Customizing is necessary.
Quotation and order management: sales-area dependent transaction types	Mobile client	Additional Customizing is necessary.
Quotation and order management: cockpit	Mobile client	Additional Customizing is necessary.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Account planning	Mobile client	The account planning data persists only in SAP NetWeaver Business Warehouse (BW); there is no data present on the CRM server. There is also no automatic conversion of previous account plans created in SAP CRM 4.0; these account plans are only accessible via reporting.

3.1.3 Service

Enhancements

The following table shows functional enhancements in all service transactions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Role concept	SAP GUI, PC UI	The *Service Professional* role combines the functions of the former *Service Manager* and *Service Representative* roles.
Multilevel categorization	SAP GUI, PC UI	Used in all service transactions
Screen sequence control	SAP GUI	Screen sequence control is no longer supported; new unified way to customize the WebClient UI.

Restrictions

There are no functional restrictions in the service transactions in SAP CRM 7.0 compared with SAP CRM 4.0.

Migration Activities

Multilevel Categorization

In SAP CRM 4.0 (SAP GUI and PC UI), users could use subject codes to classify the header and items of service transactions. In SAP CRM 7.0, the use of subject codes is no longer supported. Instead, you need to create categorization schemas. A categorization schema is a hierarchical structure that can be defined flexibly within the category modeler. It can be created for the following applications:

- Cases
- Complaints
- Returns
- In-house repairs
- Service orders
- Service order quotations
- Service order templates
- Service confirmations
- Warranty claims

A subject profile is then assigned to the categorization schema. When you create the different nodes of a hierarchy structure, the subject codes that are available within the subject profile that you have assigned to the schema need to be mapped to these nodes.

> ⚠ **CAUTION**
>
> If you implement Mobile Service in SAP CRM 7.0, the categorization schemas are not supported on the client; instead, the previous use of subject codes is still supported. To avoid inconsistencies between CRM mobile and CRM online, **all** subject codes that are part of the subject profile assigned to the categorization schema of a specific application need to be mapped to a node in the schema.

3.1.3.1   Complaints and Returns, In-House Repair Orders

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Search for complaints, returns, and in-house repairs	SAP GUI, PC UI	User-defined search variants are now available.
Maintenance transaction	SAP GUI, PC UI	The three types are now divided into three applications that provide optimized UI configuration: complaints, returns, and in-house repairs.
Advanced search for reference documents	SAP GUI	The search for reference documents covers both internal and external document types.

Restrictions

In this area, there are no functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0.

3.1.3.2   Service Orders, Service Contracts, Warranty Claim Processing

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Restrictions for Service Orders, Service Contracts, and Warranty Claim Processing

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Item hierarchy tree	SAP GUI, PC UI	Not supported
Service monitor	SAP GUI	Only supported in SAP GUI
Action monitor	SAP GUI	Only supported in SAP GUI
Subject codes	SAP GUI, PC UI	Not supported; subject code catalogs have been replaced by the category modeler.

Restrictions for Service Orders and Service Contracts

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Service order quotations	SAP GUI, PC UI	Converting service order quotations to service orders by using statuses is not supported; to create a service order from a service order quotation, a follow-up transaction needs to be created.

Restrictions for Service Contracts

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Service level agreement (SLA) profile administration	SAP GUI, PC UI	The administration transaction (CRMD_SERV_SLA) *Maintain Availability and Response Times* remains in SAP GUI.

3.1.3.3 Case Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Case closing	SAP GUI, PC UI	In cases, you can now close assigned business transactions; Customizing tables are available to define rules for when and how a case closing starts the closing of the dependent transactions.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Action monitor	SAP GUI	Only supported in SAP GUI

3.1.3.4 Mobile Service

In Mobile Service, a code migration from VBA 6.0 to VB.Net was introduced from SAP CRM 4.0 to SAP CRM 5.0.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Product service letter (PSL)	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 online
Usage-based billing (UBB)	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 online
Object structure	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 online
Assignments	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 online
Multilevel categorization	Mobile client	Used in all service transactions in SAP CRM 7.0 online; the former use of subject codes is still supported only on the mobile client.

Migration Activities

Product Service Letter

Remove the relevant product service letter titles and fields from the mobile client.

Usage-Based Billing

Remove the relevant usage-based billing titles and fields from the mobile client.

Object Structure

Remove the relevant object structure titles and fields from the mobile client.

Assignments

Remove the relevant assignment titles and fields from the mobile client.

Multilevel Categorization

For more information about multilevel categorization, see *Service* [].

3.1.4 Marketing

3.1.4.1 Marketing Plans and Campaigns

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Customizing	Not available	Status profile, action profile, and communication medium are assigned as default values in Customizing.
Campaign execution	Not available	All assigned segments are transferred to channel (for example, e-mail) when you click *Start*.
Enhancement spot CRM_MKTPL with several BAdIs	Not available	Based on the introduction of a new object layer architecture, new BAdIs have been introduced: ■ The BAdIs CRM_MKTPL_OL_APP and BCRM_MKTPL_OL_OBJ replace BAdI CRM_MKTPL. ■ The new BAdI CRM_MKTPL_OL_ASG allows you to build enhancements for assignments. ■ The new BAdI CRM_MKTPL_SEARCH allows you to build enhancements for the search.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP 4.0	4.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_MKTPL	SAP GUI, PC UI	Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is no longer supported. It is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ. The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.
BAdI CRM_MKTPL, method AUTHORITY CHECK	PC UI	The method AUTHORITY_CHECK is no longer used for the result list for performance reasons; you can either use the Access Control Engine (ACE) or BAdI method CHANGE_QUERY_RESULT in CRM_MKTPL_SEARCH instead.

Function in SAP 4.0	4.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore; it has been replaced by BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
Business Warehouse (BW) reports	SAP GUI, PC UI	BW reports assigned to planning profile groups are not evaluated anymore for marketing plans and campaigns.
Customizing	SAP GUI	The Customizing settings for column number, column width, and text width for distributions are not evaluated anymore.
ERP integration	SAP GUI, PC UI	The ERP integration type *Online* is not available anymore. Only the ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	The standard Customizing for planning profile groups has changed: ■ Workflow profiles from 4CO1 and 4CO2 removed ■ Business partner planning profile moved from 4MKT to 4CP1 ■ Planning profile group SAP1 removed ■ New key performance indicator (KPI) removed
Key figure planning	SAP GUI, PC UI	Old style key figure planning in SAP List Viewer (ALV) is not supported anymore.
Budgeting	SAP GUI	Top-down budgeting in Microsoft Excel is not supported anymore.
Success key measure planning	SAP GUI, PC UI	Success key measure planning is not supported anymore.
Hierarchy	SAP GUI, PC UI	The creation of a campaign or campaign elements below campaign elements is no longer possible.
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available (BOL/GENIL exists, but no UI component).
Search function	SAP GUI, PC UI	Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.

3.1.4.2 Segmentation

Migration Activities

To display target group members, you need to adapt business add-in CRM_MKTTG_SEG_MEM_EX.

> **EXAMPLE**
>
> See method SELECT_TG_MEMBER_DETAILS of class
> CL_DEF_IM_CRM_MKTTG_SEG_MEM_EX for variable value FLT_VAL = '51'.

As of SAP CRM 7.0, ranges for certain number range objects must be created manually in each client that uses the segmentation application. For more information, see SAP Note 1565886.

3.1.4.3   External List Management

Migration Activities

Mapping formats created in earlier releases need to be migrated before they can be used in SAP CRM 7.0. Transport of mapping formats is not included in the application anymore. Instead, you need to use the marketing export tools in SAP GUI.

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
976438	Migration of existing mapping formats
1025569	Copying new mapping formats

3.1.4.4   Mail Forms

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Letter as direct channel	SAP GUI	Letter is no longer supported as a direct channel; sending letters should be performed via export channel.
PDF format	SAP GUI	PDF format is no longer supported.
Mail templates	SAP GUI	Mail templates are no longer supported.
Address administration	SAP GUI, PC UI	Automatic address administration via address node is no longer supported.

Migration Activities

Since SAP Smart Forms are not technologically supported for mail forms anymore, you can no longer use existing mail forms. Therefore, you need to create new mail forms.

3.1.4.5   Trade Promotion Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Customizing	SAP GUI	Status profile and action profile are assigned as default values in Customizing.

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Customizing	SAP GUI	Customizing for *Define Parameters for BI Analysis* was adapted for the WebClient UI.
Product hierarchy promotion	Not available	Promotions can be planned for product category, product group, or product segment without the need to explode to the product level.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_MKTPL	SAP GUI, PC UI	Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is not supported any longer; it is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ. The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.
BAdI CRM_MKTPL, method AUTHORITY_CHECK	PC UI	The method AUTHORITY_CHECK is no longer called for the result list; no workaround is possible at the moment; use Easy Enhancement Workbench (EEW) instead. Trade promotion management uses Access Control Engine (ACE) to filter search results.
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore. It has been replaced by the BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
ERP integration	SAP GUI, PC UI	ERP integration type *Online* is not available anymore. Only ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	Delivery Customizing for planning profile groups has been changed; the new key performance indicator (KPI) has been removed.
Key figure planning	SAP GUI, PC UI	Old-style key figure planning in SAP List Viewer (ALV) is no longer supported.
Budgeting	SAP GUI	Top-down budgeting in Microsoft Excel is no longer supported.
Success key measure planning	SAP GUI, PC UI	Success key measure planning is no longer supported.
Hierarchy	SAP GUI, PC UI	Creation of trade promotions or trade promotion elements below trade promotion elements is no longer possible. An existing marketing project cannot be assigned to another marketing project (only to a link in the

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
		parent field, but there is no *Add* button in the hierarchy).
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available.
Search function	SAP GUI, PC UI	Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.
Copy function	SAP GUI, PC UI	The advanced copy function has been enhanced compared to SAP CRM 5.0.
Mass change	PC UI	Mass change options have been enhanced compared to SAP CRM 5.0.
Trade promotion execution	SAP GUI, PC UI	The execution function is limited to the activity.
Customer defaults	PC UI	The promotional calendar is no longer supported.

3.1.5 Interaction Center

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Standard responses	SAP GUI	■ New standard response editing page in the *IC Manager* role ■ Insert agent signatures using attributes in mail form tool
Alerts	SAP GUI	■ New alert editing tool in the *IC Manager* role (WebClient UI) instead of in the Customizing activity ■ Alerts are now part of the new intent-driven interaction guidance.
Rule modeler 💡 **NOTE** The rule modeler is available as of SAP CRM 4.0 Add-On for Service Industries.	PC UI	■ New application for rule modeler in WebClient UI ■ New program CRM_RULE_TRANS to transport rule policies and rules
Category modeler 💡 **NOTE** The category modeler is available as of SAP CRM 4.0 Add-On for Service Industries.	PC UI	New application for category modeler in WebClient UI
Interactive scripting	IC WebClient UI	Navigation concept has changed
Activity clipboard	IC WebClient UI	■ Customizing has been enhanced for more flexibility

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
		■ The clipboard now offers a customizable number of columns and supports up to five columns.
Intent-Driven Interaction (IDI) 💡 **NOTE** The IDI is available as of SAP CRM 5.1.	Not available	■ Intent-driven interaction guidance ■ Interaction modeling and evaluation
Account identification	IC WebClient UI	■ Address validation and duplicate check ■ *Do not contact* indicator available in *More Fields* link ■ Index-based search ■ Mixed B2B and B2C account identification ■ Option to search and create related business partner (BP) for identified account ■ iBase search is no longer the only view that can be embedded into the right-hand side of the account identification page. Customizing is now available to integrate iBase or other components.
Product	IC WebClient UI	■ Product registration allows the integration of objects. ■ Product search and result list enhanced ■ Product search based on product catalog
Multichannel communication	IC WebClient UI	■ Dual tone multifrequency tones (DTMF) enabled ■ Display and maintenance of contact-attached data ■ Pushing ERMS e-mails to agents enabled ■ Monitoring statistics from multiple telephony systems ■ Presence-availability of agents when transferring interactions ■ Simple telephony integration ■ IC toolbar now supports icons.
Interaction record	IC WebClient UI	Allow auto or manual dialog boxes if the interaction record has multiple organizational units and partners based on the Customizing settings
ERP sales order	IC WebClient UI	Listing is added to the product proposal BAdI for IC ERP sales order.
Service order/service ticket/lead	IC WebClient UI	■ Dialog box for organizational data selection ■ Order can be created without first confirming an account ID
Complaint/sales order/lead	IC WebClient UI	Automatic dialog boxes can be configured for organizational unit selection and partner selection.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Scratch pad	IC WebClient UI	Scratch pad needs to be closed before importing content.
Alerts	IC WebClient UI	No default alerts are provided.
Launch transaction	PC UI	PC UI-based launch transaction is no longer supported.
Service ticket	IC WebClient UI	There is a service message view that has not yet been implemented.

Migration Activities

Rule Modeler

Complex PC UI-based value help is no longer supported. This has been replaced by value help based on ABAP search help. If you have enhanced the rule repository with your own attributes or actions, you need to adjust your coding to support ABAP search help.

Simple PC UI-based value help is no longer supported. By default, this is now displayed as dropdown list boxes. If you have enhanced the rule repository with your own attributes or actions and do not want to use dropdown list boxes for specific value help, you need to adjust your coding to use ABAP search help.

Interactive Scripting

Recreate SAP CRM 4.0 scripts that used navigation in SAP CRM 7.0.

Custom Views and Controllers

Custom views and controllers from SAP CRM 4.0 do not work with the SAP CRM 7.0 framework. Recreate all custom views and their corresponding controllers in the component workbench (transaction BSP_WD_CMPWB).

Standard Responses

Recreate all standard responses with the new editor.

Alerts

Recreate alerts with the new editing tool. No standard alerts are delivered with SAP CRM 7.0.

Launch Transaction

Regenerate the launch transaction in transaction CRMC_UI_ACTIONWZ.

Activity Clipboard

Make Customizing settings for the activity clipboard in the new view cluster CRMC_UI_CLIP.

Navigation Bar

Make Customizing settings for the navigation bar in transaction CRMC_UI_NBLINKS.

IC Profile

The IC profile is now called business role and is maintained in transaction CRMC_UI_PROFILE.

Account Identification

Specify the account identification profile, submenu object components, and iBase component and select the auto search. The search approach that was previously maintained in the account identification profile, fields IB_PARTNER, is now selected here.

3.1.6 CRM Web Channel

The upgrade from SAP CRM 4.0 to SAP CRM 5.0 is described in the upgrade guide for Java components. This information is still valid for the upgrade from SAP CRM 4.0 to SAP CRM 7.0. You find this guide on SAP Service Marketplace at ▶ `http://service.sap.com/crm-inst` → *SAP CRM 2005* → *CRM Core and Standalone Components* → *Upgrade Documentation SAP CRM 5.0 Server ABAP and Java Components* ◀.

3.1.7 Partner Channel Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Enhancement in SAP CRM 7.0
Activity management	Not available	New transaction types for interaction logs
Partner management	Not available	New workflow to delete users
Partner management	Not available	New role PRCONT — *Partner Contact*
Partner management	Not available	Business partner role *Channel Partner* is automatically assigned during creation.
Account management	Not available	New partner-specific UI for the maintenance of account contacts
Further partner UIs	Not available	New UI configurations for the display of products and internal employees of partners
Partner role	Available as SAP NetWeaver Portal iView	New WebClient UI presales work center content available: flexible customization of presales activities, queries for activities, leads, and opportunities including counters.
Market development funds	Not available	The Partner Channel Management solution now supports the process of market development funds. The roles for *Channel Manager* and *Partner Manager* have been extended by several applications.
Rule-based employee assignment to channel partners	Not available	Partner management now contains a button to assign a channel manager to a channel partner based on certain rules.
User assignment to company contacts in the *Channel Partner* role	Not available	The *Company Contacts* application has been extended in such a way that information can be maintained.

New Authorization Object to Control Business Partner Roles

In SAP CRM 7.0, the authorization object CRM_BPROLE has been introduced to control the change access to business partner roles. This is useful to restrict the access of external users. The authority

check is deactivated by default. You need to activate it by using a BAdI that you can find in Customizing for *Customer Relationship Management* under ▷ *Master Data → Business Partner → Accounts and Contacts → Business Add-Ins → Implementation: Filtering of BP Roles by Authorization Check.* ◁

Rule-Based Employee Assignment

The *Assign Employee* button has been introduced in partner management. It allows the automatic assignment of channel managers to channel partners. For more information, see Customizing of *Customer Relationship Management* under ▷ *Master Data → Business Partner → Accounts and Contacts → Rule-Based Assignment of Employees.* ◁

The button is only visible when the employee assignment is switched on.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0:

Function in SAP CRM 4.0	4.0 UI	Restriction in SAP CRM 7.0
Partner Employee role	PC UI	The *Partner Employee* role is not available; the *My Profile* application is not available in the WebClient UI.

Migration Activities

Integration of Web Channel Applications into the WebClient UI

The business role for the external partner manager user includes several Web Channel applications. Due to the switch from SAP NetWeaver Portal to the WebClient UI, the settings for the integration of Web Channel applications have changed. For more information about the new settings, see Customizing for *Customer Relationship Management* under ▷ *Partner Channel Management → Basic Settings → Activate Links from CRM WebClient UI to CRM Web Channel Applications* ◁.

Change in Partner Functions for Business Activities

To harmonize the partner functions that are used for activities and tasks, one partner function has been changed in the partner determination profile 00000046 − *CHM Bus. Activities (Partner)*. Instead of partner function 00000022 *Person Responsible*, partner function 00000014 *Employee Responsible* is now used.

New Activity Transaction Types for Interaction Log

In SAP CRM 7.0, the following new activity transaction types have been introduced:

- *SCCP Partner Report*
- *SCPO Channel Report*

Request to Brand Owner

The request-to-brand owner approach has been changed slightly compared with SAP CRM 5.0. The transaction type CHM4 has been introduced to support this function.

Changed Request for Qualification

In SAP CRM 4.0, in the request for qualification, surveys were used to capture qualification-specific data. Since SAP CRM 5.1, surveys are not used anymore. Instead, the new transaction type CHM3 was introduced. Transaction type CHM2 is now obsolete.

New Partner Contact Role

In SAP CRM 5.2, the new business partner role PRCONT – *Partner Contact* was introduced. This role allows you to improve separating employees of channel partners from other contacts. The applications *Partner Contacts* (for the channel manager) and *Company Contacts* (for the partner manager) filter on this business role.

> 💡 **NOTE**
>
> If you have existing partner contact records in your system, you need to assign them to the new business partner role PRCONT.

Channel Partner Role

Since SAP CRM 5.2, channel partners are automatically assigned the business partner role *Channel Partner* when they are created in the system. This role allows you to improve separation of channel partners from other accounts.

New Workflow to Delete Users

In SAP CRM 5.2, the workflow WS53000005 CHM_DELUSER was introduced.

In the Channel Management business scenario, the brand owner, together with external companies called channel partners, uses the CRM system. To give employees of these external companies access to the brand owner system, they have users in this brand owner system.

These users are always assigned to a business partner that represents the channel partner employee in the CRM brand owner system. Every channel partner employee (his or her business partner) has a relationship *is contact of* to a channel partner company.

> 💡 **NOTE**
>
> If this relationship is deleted, you need to check whether the user related to the channel partner employee also needs to be deleted in the brand owner system. However, the user is not deleted automatically, but a decision of the brand owner employee responsible (for example, channel manager) is required. This decision process is provided via the business workflow WS53000005 CHM_DELUSER.

You need to make the following settings for this business scenario:

- Activate start event linking for WS53000005 in Customizing of CRM in transaction OOCU.
- Assign agents for the *Delete user* decision task TS53007922, for example, based on the authorization role for the *Channel Manager* role in Customizing of CRM in transaction OOCU.
- Activate the BAdI implementation CRM_CHM_BUPA_UPD of the BAdI PARTNER_UPDATE.

User Assignment in Channel Manager Role

In SAP CRM 4.0, the Web Channel user management was integrated in the *Channel Manager* role. Since SAP CRM 5.2, the channel manager can maintain the user data in the partner contacts application. Additionally, the Web Channel user management is available in the *Channel Manager* role as hidden application.

User Assignment in Partner Role

In addition to the Web Channel user management application, the *Company Contacts* application now contains an assignment block that allows you to maintain user data.

Changed User Management for External Users

Up to SAP CRM 5.0, the CRM Web Channel user management in the Enterprise Portal was used for the channel manager and the partner manager. The external partner users were created in this application. In SAP CRM 7.0, the CRM Web Channel user management is no longer displayed by default in the CRM business roles or in the *Channel Manager* and *Partner Manager* portal roles. Instead, the applications *Partner Contact* (in the *Channel Manager* role) and *Company Contact* (in the *Partner Manager* role) contain the *User* assignment block. You can now create or update user data in this assignment block. The assignment block functions are similar to the CRM Web Channel user management application. Only if you use Partner Channel Management in the Enterprise Portal, is there a gap compared to SAP CRM 5.0. The CRM Web Channel user management application offers special functions to synchronize back-end users in the CRM server with the SAP User Management Engine (UME) user in the Enterprise Portal. This synchronization is missing when you use the *User* assignment block. In this assignment block, you can only create a user in the CRM server.

If you want to user the CRM Web Channel user management for the *Channel Manager* and *Partner Manager* business roles, you need to:

1. Include the CRM Web Channel user management in the *Channel Manager* and *Partner Manager* business roles. Both business roles already contain the logical links. These links are hidden by default.

2. Change the UI configuration for the *Partner Contact* and *Company Contact* applications to exclude the assignment block *User*.

Obsolete Customizing Settings

In the Customizing activity ▶ *Customer Relationship Management* → *Partner Channel Management* → *Basic Settings* → *Define Copy Control for Order Processing* ↵ the *Application* column is obsolete. This column will be removed in a future release.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
1024211	Business partner groups in Partner Channel Management

Note Number	Short Description
1075424	Partner Channel Management upgrade from SAP CRM 4.0
1119251	Partner Channel Management Upgrade: New BP role PRCONT
1138855	Partner Channel Management Authorization Roles

3.2 Migration from SAP CRM 5.0 to SAP CRM 7.0

3.2.1 Master Data

3.2.1.1   Accounts and Contacts

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Accounts	Not available	Introduction of a life cycle stage for the account; the fields on the user interface depend on the user's selection. **EXAMPLE** If you select *Prospect*, you see different fields and assignment blocks to those you see if you select *Customer*.
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	The generation of BOL and WebClient UI requires a deep regeneration as well as the update of generated coding. This is triggered by starting the wizard for the enhancement again and running through all steps without making any changes. **NOTE** Do not click the *Generate* button instead since this will produce syntax errors in generated coding.
UI enhancements	SAP GUI, PC UI	Label positioning is possible using configuration. You can display and hide additional fields from a pool of fields of the business object.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	Business data toolset (BDT) not supported (not reusable) in SAP CRM 7.0; therefore, field and screen modification has changed.
Postal validation	SAP GUI, PC UI	If a customer uses third-party software for postal validation, the implementation of interfaces for postal validation pop-ups is necessary.

Migration Activities

Field-Like and Table-Like Enhancements

Regeneration is necessary for generation of BOL and WebClient UI.

UI Enhancements

Modification-free configuration with the UI configuration tool

New Enhancement Spots

To implement account and contact functionality in the WebClient UI, you can use the new enhancement spots CRM_UIU_BP_ENHANCEMENT and CRM_BUPA_IL_SEARCH, which include business add-ins (BAdIs) for the WebClient UI. You find these BAdIs in Customizing for *Customer Relationship Management* under ▷ *Master Data → Business Partner → Accounts and Contacts → Business Add-Ins* ◁.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
999092	Field and screen modification
1017763	Pop-ups for postal validation

3.2.1.2   Products, Product Hierarchies, Objects, Partner/ Product Ranges

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Maintenance transaction	SAP GUI	As in PC UI, maintenance is split for the different types of products: ■ Products (common search for product type material and service, but maintenance of material only) ■ Service ■ Warranty ■ Competitor products ■ Objects

Enhancing Products

■ To enhance products in the WebClient UI, you can use the following business add-ins (BAdIs) in Customizing for *Customer Relationship Management* under ▷ *Master Data → Products → Business Add-Ins* ◁:
  • BAdI: Maintenance of Additional Data in Product BOL (CRM_PRODIL_ADD_DATA)
  • BAdI: Enhancements in WebClient UI for Products (CRM_PRODIL_UIU_BADI)

■ To enhance standard searches with search parameters for fields in set types, see SAP Note 1026956.

■ To add important fields to the header area of the WebClient UI and make them visible at first glance, see SAP Note 1088910.

■ UI generation of customer-specific relationships
The appropriate BOL layer entries can be generated; the views need to be manually developed and integrated into the product application.

> **NOTE**
>
> For more information about how to add new fields and set types, see SAP Library for Customer Relationship Management at ▶ *Master Data → Products → Concepts → Set Types and Attributes → Definition of Set Types and Attributes/Creating UI Configuration for Set Types* ◀.

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Restrictions for Products

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Concept of inactive products	SAP GUI	No longer supported To block a product for business transactions, you need to set the status to *locked*; inactive products need to be set to *active* in SAP GUI, before they can be changed in the WebClient UI.
Display of related business documents (BDocs)	SAP GUI	No longer supported
Recategorization of products	SAP GUI	Only available in SAP GUI
Display data for date/time in the past (this does not refer to change documents)	SAP GUI	No longer supported The change history allows a detailed view of the changes.
UI generation of relationships between products and business partner/product	SAP GUI	BOL entries are generated for the WebClient UI; the user interface is not generated.

Restrictions for Product Hierarchies

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Definition of default values and value restrictions with regard to the maintenance of product categories	SAP GUI	The new template functionality can be used to define default values on category level; to define value restrictions, values can only be set in the attribute definition.

Restrictions for Partner/Product Ranges

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Listing functionality for partner/product ranges (PPRs): specific view on PPR reporting and maintenance adapted to the specific needs of the consumer products (CP) industry	SAP GUI	Only generic PPR maintenance can be used.

Migration Activities

Object Fact Sheet

The environment for Customizing and configuration of a fact sheet is provided in SAP CRM 7.0. The appropriate steps have to be performed for the object fact sheet. Additionally, the required fact sheet views need to be developed and assigned to this object fact sheet.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
1026475	UI layout ■ In SAP CRM 7.0, only those relationships that are explicitly assigned to the categories are visible in the UI. In SAP GUI, combined screens exist. **EXAMPLE** You access product HT-001. In the *Accessories* screen, a subscreen is included that shows the accessories of HT-001. A second subscreen is included that shows the products to which HT-001 is an accessory. In SAP CRM 7.0, such screens are displayed as two separate assignment blocks, which have to be assigned explicitly to the categories. ■ Since the WebClient UI does not support tab pages, the assignment of views and positions is no longer evaluated.

3.2.1.3 Installed Bases

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Display of detail data for the products	SAP GUI, PC UI	You can navigate via hyperlink to the complete data.
Maintenance of specific data for the (individual) object	SAP GUI, PC UI	You can navigate via hyperlink to the complete data.
No display of installed bases at a specific point in time	SAP GUI	Not available
Structure of an installed base − assigned as component − not visible in the installed base in focus	SAP GUI	You can navigate via hyperlink to the complete data.
Parallel display of two installed bases, one beside the other, and moving objects between both (transaction IB54)	SAP GUI	Not available
Fact sheet	PC UI	The reporting is performed in different assignment blocks in the application.
Attachments	SAP GUI, PC UI	The following functions are not supported: ■ Document tree structure ■ Document versioning

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
		■ Where-used list

3.2.2 Sales

3.2.2.1 Sales Order Management, CRM Billing

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Price change approval workflow	Not available	New function
Credit analyst workbench	Not available	New function
Package quotation	Not available	New function

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Inquiry processing	SAP GUI	Not available
Partial transaction processing (sales order, sales quotation, and sales contract)	SAP GUI	Not available
Combination of quotation and order items in one document	SAP GUI	Not available
Incentive and commission management	SAP GUI, PC UI	Not available
Reference objects on sales order item level	SAP GUI	Not available in WebClient UI
Partners on sales order item level	SAP GUI	Ship-to party, payer, and bill-to party are available in the business context (assignment blocks *Shipping* and *Billing*); no separate assignment block for *Parties Involved*.
Account fact sheet (AFS)	SAP GUI	Not available in WebClient UI
Commodity pricing	SAP GUI, PC UI	Not available

3.2.2.2 Opportunities, Listings, Territory Management, Organizational Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Opportunities	SAP GUI, PC UI	Graphical maintenance of buying centers: You can create, change, and delete buying centers in a graphical view. This includes maintenance of

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
		contacts, relationships, and characteristics. You can use this function to maintain buying centers for opportunities.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Opportunities	SAP GUI, PC UI	The following functions are not supported: ■ The hierarchy on item-header level; only the hierarchy on header-header level is supported, which is visualized as a simple list. ■ Competitor products ■ Document flow on item level ■ Project integration with Product Lifecycle Management (PLM) in Collaboration Projects (cProjects)
Listings	SAP GUI, PC UI	■ Listing maintenance: Personalization of dynamic fields is not supported. ■ Listing reports: The function *Save Search As* is not supported.
Territory management	SAP GUI	■ It is not possible to assign employees to a territory when you use the input help of the *Employee* field; this is now possible with the input help of the *Position* field. ■ The number of objects for a territory is not displayed.
Organizational management	SAP GUI	■ New territories cannot be assigned from the organizational model; assignment is only possible via territory management; from the organizational model you can only see the existing assignments. ■ In the assignment block, the corresponding SAP ERP sales organization is no longer displayed; this is now done in CRM Customizing. ■ While trying to download the employee data in SAP CRM, the system dumps. For more information, see SAP Note 1635858.

3.2.2.3 Account Planning

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Customizing	Not available	Action profile is assigned as default value in Customizing.
Customizing	Not available	Business Warehouse (BW) analysis can be viewed within an account plan.
Change history	Not available	Change history function is available for account plan.
Status *Rejected*	Not available	New system status *Rejected* is available; it locks the account plan and deletes the associated condition records.
Flex front end	Not available	All integrated planning applications have a flex front end in SAP CRM 7.0; this change is performed in the Planning Services infrastructure. However, the flex UI is only available with SAP NetWeaver Business Warehouse (BW) 7.0. SAP CRM 7.0 and the BI 3.5 UI are automatically switched to the current HTML control. For more information, see SAP Note 1072595.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_ACC_PL, method AUTHORITY CHECK	PC UI	The method AUTHORITY_CHECK is no longer called for the result list. There is no workaround possible at the moment; instead, use Easy Enhancement Workbench (EEW).
BAdI CRM_ACC_PL	SAP GUI, PC UI	New BAdI methods CHECK_BEFORE_SAVE and GET_DROPDOWNBOX_VALUE
Customizing	SAP GUI, PC UI	The delivery Customizing for planning profile groups has been changed: *Plan Basis* is no longer used; it has been replaced by *Product Planning Basis*.
Partner/product range (PPR) check on person responsible	SAP GUI, PC UI	The PPR check is only performed on the planning account and product/product category; it is no longer performed on the person responsible.

3.2.2.4 Mobile Sales

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Quotation and order management	Mobile client	Additional Customizing is necessary.
Quotation and order management: rough stock information	Mobile client	Additional Customizing is necessary.

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Quotation and order management: sales-area dependent transaction types	Mobile client	Additional Customizing is necessary.
Quotation and order management: cockpit	Mobile client	Additional Customizing is necessary.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Account planning	Mobile client	The account planning data persists only in SAP NetWeaver Business Warehouse (BW); there is no data present on the CRM server. There is also no automatic conversion of previous account plans created in SAP CRM 4.0; these account plans are only accessible via reporting.

3.2.3 Service

Enhancements

The following table shows functional enhancements in all service transactions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Role concept	SAP GUI, PC UI	The *Service Professional* role combines the functions of the former *Service Manager* and *Service Representative* roles.
Multilevel categorization	SAP GUI, PC UI	Used in all service transactions
Screen sequence control	SAP GUI	Screen sequence control is no longer supported; new unified way to customize the WebClient UI.

Restrictions

There are no functional restrictions in the service transactions in SAP CRM 7.0 compared with SAP CRM 5.0.

Migration Activities

Multilevel Categorization

In SAP CRM 5.0 (SAP GUI and PC UI), users could use subject codes to classify the header and items of service transactions. In SAP CRM 7.0, the use of subject codes is no longer supported. Instead, you need to create categorization schemas. A categorization schema is a hierarchical structure that can be defined flexibly within the category modeler. It can be created for the following applications:

- Cases
- Complaints
- Returns
- In-house repairs

- Service orders
- Service order quotations
- Service order templates
- Service confirmations
- Warranty claims

A subject profile is then assigned to the categorization schema. When you create the different nodes of a hierarchy structure, the subject codes that are available within the subject profile that you have assigned to the schema need to be mapped to these nodes.

> ⚠ **CAUTION**
>
> If you implement Mobile Service in SAP CRM 7.0, the categorization schemas are not supported on the client; instead, the previous use of subject codes is still supported. To avoid inconsistencies between CRM mobile and CRM online, **all** subject codes that are part of the subject profile assigned to the categorization schema of a specific application need to be mapped to a node in the schema.

3.2.3.1 Complaints and Returns, In-House Repair Orders

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Search for complaints, returns, and in-house repairs	SAP GUI, PC UI	User-defined search variants are now available.
Maintenance transaction	SAP GUI, PC UI	The three types are now divided into three applications that provide optimized UI configuration: complaints, returns, and in-house repairs.
Advanced search for reference documents	SAP GUI	The search for reference documents covers both internal and external document types.

3.2.3.2 Service Orders, Service Contracts, Warranty Claim Processing

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Restrictions for Service Orders, Service Contracts, and Warranty Claim Processing

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Item hierarchy tree	SAP GUI, PC UI	Not supported
Service monitor	SAP GUI	Only supported in SAP GUI
Action monitor	SAP GUI	Only supported in SAP GUI

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Subject codes	SAP GUI, PC UI	Not supported; subject code catalogs have been replaced by the category modeler.

Restrictions for Service Orders and Service Contracts

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Service order quotations	SAP GUI, PC UI	Converting service order quotations to service orders by using statuses is not supported; to create a service order from a service order quotation, a follow-up transaction needs to be created.

Restrictions for Service Contracts

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Service level agreement (SLA) profile administration	SAP GUI, PC UI	The administration transaction (CRMD_SERV_SLA) *Maintain Availability and Response Times* remains in SAP GUI.

3.2.3.3   Case Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Case closing	SAP GUI, PC UI	In cases, you can now close assigned business transactions; Customizing tables are available to define rules for when and how a case closing starts the closing of the dependent transactions.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Action monitor	SAP GUI	Only supported in SAP GUI

3.2.3.4   Mobile Service

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Assignments	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 online
Multilevel categorization	Mobile client	Used in all service transactions in SAP CRM 7.0 online; the former use of subject codes is still supported only on the mobile client.

Migration Activities

Product Service Letter

Remove the relevant product service letter titles and fields from the mobile client.

Usage-Based Billing

Remove the relevant usage-based billing titles and fields from the mobile client.

Object Structure

Remove the relevant object structure titles and fields from the mobile client.

Assignments

Remove the relevant assignment titles and fields from the mobile client.

Multilevel Categorization

For more information about multilevel categorization, see *Service* [].

3.2.4 Marketing

3.2.4.1 Marketing Plans and Campaigns

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Customizing	Not available	Status profile, action profile, and communication medium are assigned as default values in Customizing.
Campaign execution	Not available	All assigned segments are transferred to channel (for example, e-mail) when you click *Start*.
Enhancement spot CRM_MKTPL with several BAdIs	Not available	Based on the introduction of a new object layer architecture, new BAdIs have been introduced: ■ The BAdIs CRM_MKTPL_OL_APP and BCRM_MKTPL_OL_OBJ replace BAdI CRM_MKTPL. ■ The new BAdI CRM_MKTPL_OL_ASG allows you to build enhancements for assignments. ■ The new BAdI CRM_MKTPL_SEARCH allows you to build enhancements for the search.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP 5.0	5.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_MKTPL	SAP GUI, PC UI	Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is no longer supported. It is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ.

Function in SAP 5.0	5.0 UI	Restriction in SAP CRM 7.0
		The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.
BAdI CRM_MKTPL, method AUTHORITY CHECK	PC UI	The method AUTHORITY_CHECK is no longer used for the result list for performance reasons; you can either use the Access Control Engine (ACE) or BAdI method CHANGE_QUERY_RESULT in CRM_MKTPL_SEARCH instead.
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore; it has been replaced by BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
Business Warehouse (BW) reports	SAP GUI, PC UI	BW reports assigned to planning profile groups are not evaluated anymore for marketing plans and campaigns.
Customizing	SAP GUI	The Customizing settings for column number, column width, and text width for distributions are not evaluated anymore.
ERP integration	SAP GUI, PC UI	The ERP integration type *Online* is not available anymore. Only the ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	The standard Customizing for planning profile groups has changed: ■ Workflow profiles from 4CO1 and 4CO2 removed ■ Business partner planning profile moved from 4MKT to 4CP1 ■ Planning profile group SAP1 removed ■ New key performance indicator (KPI) removed
Key figure planning	SAP GUI, PC UI	Old style key figure planning in SAP List Viewer (ALV) is not supported anymore.
Budgeting	SAP GUI	Top-down budgeting in Microsoft Excel is not supported anymore.
Success key measure planning	SAP GUI, PC UI	Success key measure planning is not supported anymore.
Hierarchy	SAP GUI, PC UI	The creation of a campaign or campaign elements below campaign elements is no longer possible.
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available (BOL/GENIL exists, but no UI component).
Search function	SAP GUI, PC UI	Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.

3.2.4.2   Segmentation

Migration Activities

To display target group members, you need to adapt business add-in CRM_MKTTG_SEG_MEM_EX.

> **EXAMPLE**
>
> See method SELECT_TG_MEMBER_DETAILS of class
> CL_DEF_IM_CRM_MKTTG_SEG_MEM_EX for variable value FLT_VAL = '51'.

As of SAP CRM 7.0, ranges for certain number range objects must be created manually in each client that uses the segmentation application. For more information, see SAP Note 1565886.

3.2.4.3   External List Management

Migration Activities

Mapping formats created in earlier releases need to be migrated before they can be used in the current release. Transport of mapping formats is not included in the application anymore. Instead, you need to use the marketing export tools in SAP GUI.

If you want to continue to use certain functions in the current release, see SAP Note 976438.

3.2.4.4   Mail Forms

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Letter as direct channel	SAP GUI	Letter is no longer supported as a direct channel; sending letters should be performed via export channel.
PDF format	SAP GUI	PDF format is no longer supported.
Mail templates	SAP GUI	Mail templates are no longer supported.
Address administration	SAP GUI, PC UI	Automatic address administration via address node is no longer supported.

Migration Activities

Since SAP Smart Forms are not technologically supported for mail forms anymore, you can no longer use existing mail forms. Therefore, you need to create new mail forms.

3.2.4.5   Trade Promotion Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Customizing	SAP GUI	Status profile and action profile are assigned as default values in Customizing.
Customizing	SAP GUI	Customizing for *Define Parameters for BI Analysis* was adapted for the WebClient UI.
Product hierarchy promotion	Not available	Promotions can be planned for product category, product group, or product segment without the need to explode to the product level.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
BAdI CRM_MKTPL	SAP GUI, PC UI	Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is not supported any longer; it is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ. The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.
BAdI CRM_MKTPL, method AUTHORITY_CHECK	PC UI	The method AUTHORITY_CHECK is no longer called for the result list; no workaround is possible at the moment; use Easy Enhancement Workbench (EEW) instead. Trade promotion management uses Access Control Engine (ACE) to filter search results.
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore. It has been replaced by the BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
ERP integration	SAP GUI, PC UI	ERP integration type *Online* is not available anymore. Only ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	Delivery Customizing for planning profile groups has been changed; the new key performance indicator (KPI) has been removed.
Key figure planning	SAP GUI, PC UI	Old-style key figure planning in SAP List Viewer (ALV) is no longer supported.
Budgeting	SAP GUI	Top-down budgeting in Microsoft Excel is no longer supported.
Success key measure planning	SAP GUI, PC UI	Success key measure planning is no longer supported.
Hierarchy	SAP GUI, PC UI	Creation of trade promotions or trade promotion elements below trade promotion elements is no longer possible.

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
		An existing marketing project cannot be assigned to another marketing project (only to a link in the parent field, but there is no *Add* button in the hierarchy).
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available.
Search function	SAP GUI, PC UI	Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.
Copy function	SAP GUI, PC UI	The advanced copy function has been enhanced compared to SAP CRM 5.0.
Mass change	PC UI	Mass change options have been enhanced compared to SAP CRM 5.0.
Trade promotion execution	SAP GUI, PC UI	The execution function is limited to the activity.
Customer defaults	PC UI	The promotional calendar is no longer supported.

3.2.5 Interaction Center

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Standard responses	SAP GUI	■ New standard response editing page in the *IC Manager* role ■ Insert agent signatures using attributes in mail form tool
Alerts	SAP GUI	■ New alert editing tool in the *IC Manager* role (WebClient UI) instead of in the Customizing activity ■ Alerts are now part of the new intent-driven interaction guidance.
Rule modeler	PC UI	■ New application for rule modeler in WebClient UI ■ New program CRM_RULE_TRANS to transport rule policies and rules
Interactive scripting	IC WebClient UI	Navigation concept has changed
Activity clipboard	IC WebClient UI	■ Customizing has been enhanced for more flexibility ■ The clipboard now offers a customizable number of columns and supports up to five columns.
Intent-Driven Interaction (IDI)	Not available	■ Intent-driven interaction guidance ■ Interaction modeling and evaluation

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
NOTE The IDI is available as of SAP CRM 5.1.		
Account identification	IC WebClient UI	- Address validation and duplicate check *Do not contact* indicator available in *More Fields* link - Index-based search - Mixed B2B and B2C account identification - Option to search and create related business partner (BP) for identified account - iBase search is no longer the only view that can be embedded into the right-hand side of the account identification page. Customizing is now available to integrate iBase or other components.
Product	IC WebClient UI	- Product registration allows the integration of objects. - Product search and result list enhanced - Product search based on product catalog
Multichannel communication	IC WebClient UI	- Dual tone multifrequency tones (DTMF) enabled - Display and maintenance of contact-attached data - Pushing ERMS e-mails to agents enabled - Monitoring statistics from multiple telephony systems - Presence-availability of agents when transferring interactions - Simple telephony integration - IC toolbar now supports icons.
Interaction record	IC WebClient UI	Allow auto or manual dialog boxes if the interaction record has multiple organizational units and partners based on the Customizing settings
ERP sales order	IC WebClient UI	Listing is added to the product proposal BAdI for IC ERP sales order.
Service order/service ticket/lead	IC WebClient UI	- Dialog box for organizational data selection - Order can be created without first confirming an account ID
Complaint/sales order/lead	IC WebClient UI	Automatic dialog boxes can be configured for organizational unit selection and partner selection.
Complaint/Sales Order/Lead	IC WebClient	Automatic dialog boxes can be configured for organizational unit selection and partner selection

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Scratch pad	IC WebClient UI	Scratch pad needs to be closed before importing content.
Alerts	IC WebClient UI	No default alerts are provided.
Launch transaction	PC UI	PC UI-based launch transaction is no longer supported.
Service ticket	IC WebClient UI	There is a service message view that has not yet been implemented.

Migration Activities

Rule Modeler

Complex PC UI-based value help is no longer supported. This has been replaced by value help based on ABAP search help. If you have enhanced the rule repository with your own attributes or actions, you need to adjust your coding to support ABAP search help.

Simple PC UI-based value help is no longer supported. By default, this is now displayed as dropdown list boxes. If you have enhanced the rule repository with your own attributes or actions and do not want to use dropdown list boxes for specific value help, you need to adjust your coding to use ABAP search help.

Interactive Scripting

Recreate SAP CRM 5.0 scripts that used navigation in SAP CRM 7.0.

Custom Views and Controllers

Custom views and controllers from SAP CRM 5.0 do not work with the SAP CRM 7.0 framework. Recreate all custom views and their corresponding controllers in the component workbench (transaction BSP_WD_CMPWB).

Standard Responses

Recreate all standard responses with the new editor.

Alerts

Recreate alerts with the new editing tool. No standard alerts are delivered with SAP CRM 7.0.

Launch Transaction

Regenerate launch transaction in transaction CRMC_UI_ACTIONWZ.

Activity Clipboard

Make Customizing settings for the activity clipboard in the new view cluster CRMC_UI_CLIP.

Navigation Bar

Make Customizing settings for the navigation bar in transaction CRMC_UI_NBLINKS.

IC Profile

The IC profile is now called business role and is maintained in transaction CRMC_UI_PROFILE.

Account Identification

Specify the account identification profile, submenu object components, and iBase component and select the auto search. The search approach that was previously maintained in the account identification profile, fields IB_PARTNER, is now selected here.

3.2.6 CRM Web Channel

The naming of the key capability CRM E-Commerce was changed to CRM Web Channel. For more information about the new naming, see SAP Note 817119.

In CRM Web Channel, many applications are Java-based (JSP UI) with exception of the Web catalog management, which was converted to the CRM WebClient UI.

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Web catalog management	JSP UI	■ The *Web Channel Manager* role contains the work center *Catalog Management*. ■ Catalog staging via the work center *Catalog Management* in the *Web Channel Manager* role ■ Use of the SAP TREX API programming interface instead of SRET API
Roles with administrative and business functions related to CRM Web Channel	SAP GUI	*Web Channel Manager* role
Business scenario: *Contract Management*	SAP GUI	The following user status profiles for the contract negotiation process are delivered: ■ CRMECOCN: user status profile for the contract header ■ CRMECN_I: user status profile for the contract items
Business scenario: *Quotation and Order Management in CRM Web Channel*	JSP UI	New business process *Sales Order Processing B2C for Service Providers in CRM Web Channel*. This process covers: ■ Selling packages, rate plans, incentives, and enabling products ■ Collecting technical data ■ Automatic contract creation for rate plan items
Business process: *Sales Order Processing B2B in CRM Web Channel*	JSP UI	■ Dynamic field control for orders ■ Search for items in orders, quotations, and order templates
Business process: *Sales Order Processing B2C in CRM Web Channel*	JSP UI	■ Enhancements of the B2C Web shop UI: catalog navigation, Web shop header, mini shopping basket, shopping basket, scale price display ■ Verification word for integration with Interaction Center

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Business process: *Browsing for and Selecting Products in B2C CRM Web Channel*	JSP UI	■ Additional way to display products in product catalog via block view ■ Paging through list of (special and personalized) offers on Web shop home page ■ Display of number of pages in catalog area browsing
Business process: *Browsing for and Selecting Products in B2C CRM Web Channel — Configurable Material in Product Catalog*	JSP UI	Inline configuration display in block view of product display in product catalog
Business process: *Sales Order Processing B2C in CRM Web Channel*	JSP UI	■ Interaction Center mode ■ New text types *Eye-catcher text* and *Price eye-catcher text* for display in product catalog and in product details (only *Price eye-catcher text*)
Business process: *Sales Order Processing B2C in CRM Web Channel — Special Prices*	JSP UI	Strike-through prices in product catalog display (available for IPC prices and list prices)
Business scenario: *Catalog Management*	JSP UI	Usage of packages and products with dependent components in catalog management
Business scenario: *Quotation and Order Management with CRM Web Channel*	JSP UI	New business process *Sales Order Processing B2B with ERP Order in CRM Web Channel*
Business scenario: *Quotation and Order Management with CRM Web Channel*	JSP UI	New business process *Loyalty Management with CRM Web Channel*
Catalog management in CRM		■ Enterprise Service bundle *Product Catalog Processing with CRM* ■ Web services for the runtime product catalog

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Catalog management in CRM	JSP UI	■ The Web catalog management application has been replaced by the *Catalog Management* work center that is available with the *Web Channel Manager* role in SAP CRM. ■ The SAP TREX API programming interface replaces the SRET API interface that was used in SAP CRM 5.0.
Catalog XML export: download option to save to local drive	SAP GUI	The catalog XML export download option to save to local drive saves to the application server drive only.
Contract negotiation: status change for all/selected items from the contract inquiry on header level	SAP GUI	The user status change for all/selected items from *Inquiry* to *Quotation* on sales contract header level can now be performed when the sales contract is displayed in the CRM WebClient UI. User statuses can now also be set on sales contract item level in the contract negotiation process, which was not possible in SAP CRM 5.0. A user status profile for the items is delivered with SAP CRM 7.0.

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
CRM business package for SAP NetWeaver Portal	Portal	The *Change Password* iView is no longer available in the *Customer* portal role; the password can now be changed via personalization in SAP NetWeaver Portal. The iViews for Internet telephony (IT) and callback are not available in the *Customer* portal role in SAP CRM 7.0.
Business process: *Live Web Collaboration*	JSP UI	The following features are not available anymore, because the IC WinClient is no longer supported: multi chat, Internet telephony, telephone callback.

Migration Activities

Sales Order Processing B2C in CRM Web Channel: Special Prices

When you want to use existing Web shops, make sure that in the shop definition in the Web shop management, a value is entered for the *Controlling Price Determination in the Catalog* parameter. Additionally, if Internet Pricing and Configurator (IPC) prices are used, a pricing procedure similar to the standard example pricing procedure 0IST02 needs to be set up and used in the Web shop.

If list prices are used in the Web shop in the catalog variant, a condition needs to be maintained for special prices.

Catalog Management in CRM

- Replacement of the Web catalog management
    - Assign the authorization role (PFCG role) to the *Web Channel Manager* business role in transaction SU01.
    - Assign the *Web Channel Manager* business role to the business users who need access to the *Catalog Management* work center in the CRM WebClient UI.
- Replacement of the programming interface SRET API with SAP TREX API
  You need to make the necessary settings in Customizing for *Customer Relationship Management* under ▶ *Master Data → Product Catalog → Define Catalog Variant Indexing* ◀.
- Catalog indexing (formerly known as catalog replication from SAP CRM to SAP TREX)
  If you want to continue to use the catalog indexing method used in SAP CRM 5.0, choose *No Staging: Overwrite Index Immediately (SAP TREX-API)* in the Customizing activity *Define Catalog Variant Indexing* under ▶ *Customer Relationship Management → Master Data → Product Catalog* ◀. If you want to ensure that your Web shop is always available, choose *No Staging: Overwrite Index After Indexing (SAP TREX-API)*. If you want to use the catalog staging additionally, choose *Staging (SAP TREX-API)*.

Catalog XML Export: Download Option to Save to Local Drive

Existing export profiles need to be adapted to the application server files.

Contract Negotiation: Status Change for All/Selected Items

Make settings for the user status in Customizing for *Customer Relationship Management* under ▶ *Web Channel → E-Commerce → Contracts → Contract Negotiation* ◀.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
980915	XML Export
988965	Proxy Error Message

3.2.7 Partner Channel Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0
Activity management	Not available	New transaction types for interaction logs
Partner management	Not available	New workflow to delete users
Partner management	Not available	New role PRCONT – *Partner Contact*
Partner management	Not available	Business partner role *Channel Partner* is automatically assigned during creation.
Account management	Not available	New partner-specific UI for the maintenance of account contacts
Further partner UIs	Not available	New UI configurations for the display of products and internal employees of partners
Market development funds	Not available	The Partner Channel Management solution now supports the process of market development funds. The roles for *Channel Manager* and *Partner Manager* have been extended by several applications.
Rule-based employee assignment to channel partners	Not available	Partner management now contains a button to assign a channel manager to a channel partner based on certain rules.
User assignment to company contacts in the *Channel Partner* role	Not available	The *Company Contacts* application has been extended in such a way that information can be maintained.

New Authorization Object to Control Business Partner Roles

In SAP CRM 7.0, the authorization object CRM_BPROLE has been introduced to control the change access to business partner roles. This is useful to restrict the access of external users. The authority check is deactivated by default. You need to activate it by using a BAdI in Customizing for *Customer Relationship Management* under ⏵ *Master Data → Business Partner → Business Add-Ins → Implementation: Filtering of BP Roles by Authorization Check*. ⏎

Rule-Based Employee Assignment

The *Assign Employee* button has been introduced in partner management. It allows the automatic assignment of channel managers to channel partners. For more information, see Customizing for *Customer Relationship Management* under ⏵ *Master Data → Business Partner → Rule-Based Assignment of Employees*. ⏎

The button is only visible when the employee assignment is switched on.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 5.0:

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0
Partner Employee role	PC UI	The *Partner Employee* role is not available; the *My Profile* application is not available in the WebClient UI.

Migration Activities

Integration of Web Channel Applications into the WebClient UI

The business role for the external partner manager user includes several Web Channel applications. Due to the switch from SAP NetWeaver Portal to the WebClient UI, the settings for the integration of Web Channel applications have changed. For more information about the new settings, see Customizing for *Customer Relationship Management* under ▷ *Partner Channel Management → Basic Settings → Activate Links from CRM WebClient UI to CRM Web Channel Applications* ◁.

Change in Partner Functions for Business Activities

To harmonize the partner functions that are used for activities and tasks, one partner function has been changed in the partner determination profile 00000046 – *CHM Bus. Activities (Partner)*. Instead of partner function 00000022 *Person Responsible*, partner function 00000014 *Employee Responsible* is now used.

New Activity Transaction Types for Interaction Log

In SAP CRM 7.0, the following new activity transaction types have been introduced:

- *SCCP Partner Report*
- *SCPO Channel Report*

Request to Brand Owner

The request-to-brand owner approach has been changed slightly compared with SAP CRM 5.0. The transaction type CHM4 has been introduced to support this function.

Changed Request for Qualification

In SAP CRM 4.0, in the request for qualification, surveys were used to capture qualification-specific data. Since SAP CRM 5.1, surveys are not used anymore. Instead, the new transaction type CHM3 was introduced. Transaction type CHM2 is now obsolete.

New Partner Contact Role

In SAP CRM 5.2, the new business partner role PRCONT – *Partner Contact* was introduced. This role allows you to improve separating employees of channel partners from other contacts. The applications *Partner Contacts* (for the channel manager) and *Company Contacts* (for the partner manager) filter on this business role.

> **NOTE**
>
> If you have existing partner contact records in your system, you need to assign them to the new business partner role PRCONT.

Channel Partner Role

Since SAP CRM 5.2, channel partners are automatically assigned the business partner role *Channel Partner* when they are created in the system. This role allows you to improve separation of channel partners from other accounts.

New Workflow to Delete Users

In SAP CRM 5.2, the workflow WS53000005 CHM_DELUSER was introduced.

In the Channel Management business scenario, the brand owner, together with external companies called channel partners, uses the CRM system. To give employees of these external companies access to the brand owner system, they have users in this brand owner system.

These users are always assigned to a business partner that represents the channel partner employee in the CRM brand owner system. Every channel partner employee (his or her business partner) has a relationship *is contact of* to a channel partner company.

> **NOTE**
>
> If this relationship is deleted, you need to check whether the user related to the channel partner employee also needs to be deleted in the brand owner system. However, the user is not deleted automatically, but a decision of the brand owner employee responsible (for example, channel manager) is required. This decision process is provided via the business workflow WS53000005 CHM_DELUSER.

You need to make the following settings for this business scenario:

- Activate start event linking for WS53000005 in Customizing of CRM in transaction OOCU.
- Assign agents for the *Delete user* decision task TS53007922, for example, based on the authorization role for the *Channel Manager* role in Customizing of CRM in transaction OOCU.
- Activate the BAdI implementation CRM_CHM_BUPA_UPD of the BAdI PARTNER_UPDATE.

User Assignment in Channel Manager Role

In SAP CRM 4.0, the Web Channel user management was integrated in the *Channel Manager* role. Since SAP CRM 5.2, the channel manager can maintain the user data in the partner contacts application. Additionally, the Web Channel user management is available in the *Channel Manager* role as hidden application.

User Assignment in Partner Role

In addition to the Web Channel user management application, the *Company Contacts* application now contains an assignment block that allows you to maintain user data.

Changed User Management for External Users

Up to SAP CRM 5.0, the CRM Web Channel user management in the Enterprise Portal was used for the channel manager and the partner manager. The external partner users were created in this application. In SAP CRM 7.0, the CRM Web Channel user management is no longer displayed by default in the CRM business roles or in the *Channel Manager* and *Partner Manager* portal roles. Instead, the applications *Partner Contact* (in the *Channel Manager* role) and *Company Contact* (in the *Partner Manager* role) contain the *User* assignment block. You can now create or update user data in this assignment block. The assignment block functions are similar to the CRM Web Channel user management application. Only if you use Partner Channel Management in the Enterprise Portal, is there a gap compared to SAP CRM 5.0. The CRM Web Channel user management application offers special functions to synchronize back-end users in the CRM server with the SAP User Management Engine (UME) user in the Enterprise Portal. This synchronization is missing when you use the *User* assignment block. In this assignment block, you can only create a user in the CRM server.

If you want to user the CRM Web Channel user management for the *Channel Manager* and *Partner Manager* business roles, you need to:

1. Include the CRM Web Channel user management in the *Channel Manager* and *Partner Manager* business roles. Both business roles already contain the logical links. These links are hidden by default.
2. Change the UI configuration for the *Partner Contact* and *Company Contact* applications to exclude the assignment block *User*.

Obsolete Customizing Settings

In the Customizing activity ▷ *Customer Relationship Management → Partner Channel Management → Basic Settings → Define Copy Control for Order Processing* ◁ the column *Application* is obsolete. This column will be removed in a future release.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in SAP CRM 7.0:

Note Number	Short Description
1024211	Business partner groups in Partner Channel Management
1119251	Partner Channel Management Upgrade: New BP role PRCONT
1138855	Partner Channel Management Authorization Roles
1111654	Partner Channel Management Upgrade from CRM 5.0

3.3 Cross-Application Components

3.3.1 Fact Sheet

This release contains the necessary environment for customizing and configuration of fact sheets. If you have assigned your own views to the account fact sheet in SAP CRM 5.0, you need to develop these

views again in the current release of SAP CRM 7.0 and assign them to the account fact sheet in the current release of SAP CRM 7.0. If you have created your own fact sheet in SAP CRM 5.0, you need to perform the necessary customizing and configuration of this fact sheet in the current release of SAP CRM 7.0. Additionally, you need to develop the necessary fact sheet views and assign them to this fact sheet in the current release of SAP CRM 7.0.

For more information about fact sheets, see SAP Library for SAP CRM on SAP Help Portal at `http://help.sap.com/crm-core`. Choose a release and then *Application Help*. In SAP Library, choose ▷ *WebClient UI Framework → Fact Sheet* ↵.

3.3.2 Groupware Integration

You can migrate from the Java-based MapBox used in SAP CRM 5.0 to the ABAP-based MapBox used in the current release. For more information about the migration, see SAP Library for SAP CRM on SAP Help Portal at `http://help.sap.com/crm-core`. Choose a release and then *Application Help*. In SAP Library, choose ▷ *Data Exchange and Mobile Technologies → Groupware Integration → Server-Based Groupware Integration → Migration of Groupware Integration Data to the ABAP MapBox* ↵.

3.3.3 MS Office Integration

If you have created your own templates in SAP CRM 5.0, you can adapt these templates in SAP CRM 7.0 with little effort. The data for the templates is provided by a Web service that reads the data from a back-end and not from the user's screen. To use MS Office Integration in SAP CRM 7.0, you need Microsoft Office Professional 2003, Microsoft Office Professional 2003 Enterprise, or Microsoft Word 2003 core program.

For more information about the MS Office Integration, see SAP Library at ▷ *SAP Customer Relationship Management → Basic Functions → Template Designer* ↵.

3.3.4 Web Services

The existing Web services in SAP CRM 5.0 can also be used in SAP CRM 7.0. If you want to create new Web services in SAP CRM 7.0, you can access the Web services tool from the *Service Professional* (SERVICEPRO) business role in the work center *Service Operations*.

For more information about the Web services tool, see SAP Library at ▷ *SAP Customer Relationship Management → Basic Functions → Web Services* ↵.

3.3.5 Portal Integration

With SAP CRM 7.0, the WebClient UI has been integrated into SAP NetWeaver Portal. You can run SAP CRM 7.0 with all features in the portal. Every CRM application is displayed in one portal page. In comparison to prior releases, you can now easily create portal content by using the role upload tool.

> 💡 **NOTE**
>
> The portal roles *Channel Manager*, *Partner Manager*, *Customer*, *Telco Channel Manager*, and *Telco Partner Manager* are contained in the CRM Business Package. You do not have to upload them separately. The CRM Business Package has to be customized as described under *Basic Settings for SAP CRM (Business Package for SAP CRM)* in SAP Solution Manager.

If you want to use your existing CRM business roles in the portal, proceed as follows:

1. Install SAP CRM 7.0 or upgrade to this release.
2. Adapt your CRM business roles in SAP CRM 7.0 and perform the necessary customizing.
3. Check your business roles in SAP CRM 7.0 standalone.
4. Install SAP NetWeaver Portal 7.0 (2004s) or upgrade to this release, and connect SAP CRM 7.0 to the portal.
5. Export your CRM business role to an XML file and import this file to the portal.
6. Assign your generated portal role to the portal users.
   The CRM business roles that correspond to the portal roles need to be assigned to the CRM users that correspond to the portal users.
7. Check your generated portal role in the portal.

> 💡 **NOTE**
>
> If your role is not running in the portal, you need to check whether you have successfully performed step 2 and step 5. Make sure that you also assign the new portal roles to the existing users.

For more information about portal integration into SAP CRM 7.0, see the following:

- Customizing for Customer Relationship Management under ▐▶ *UI Framework → Portal Integration → Overview* ◀▌
- SAP Library for Customer Relationship Management on SAP Help Portal at http://help.sap.com/saphelp_crm700_ehp01/helpdata/en/e1/8e51341a06084de10000009b38f83b/frameset.htm under ▐▶ *Basic Settings → UI Framework and Configuration → Portal Integration* ◀▌

> ⚠️ **CAUTION**
>
> In SAP CRM 7.0, the People-Centric UI (PC UI) is no longer supported. If you want to upgrade portal roles supported in SAP CRM 5.0 to SAP CRM 7.0, follow the steps mentioned above. As a result, new portal roles are created. The previous portal roles are no longer supported.

For more information about the upgrade to SAP CRM 7.0, see the introduction to the migration.

3.3.6 Workflow Inbox

In SAP CRM 7.0, the workflow inbox of the Business Workplace (transaction SBWP in SAP GUI) is not available in the WebClient UI. Instead, you can use the workflow inbox of the SAP CRM worklist.

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 compared with SAP CRM 4.0 and 5.0:

Function in SAP CRM 4.0/5.0	4.0/5.0 UI	Enhancement in SAP CRM 7.0
Workflow inbox of Business Workplace	SAP GUI	Workflow inbox of the SAP CRM worklist: You can integrate other SAP systems with the workflow inbox of the SAP CRM worklist. This allows you to receive, display, and edit workflow tasks from other SAP systems in the workflow inbox of the SAP CRM worklist. You make the required settings in Customizing for Customer Relationship Management under ▷ *Basic Functions → Worklist → Integrate Other SAP Systems in Workflow Inbox* ◁ and *BAdI: Integrate Other SAP Systems in Workflow Inbox*.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 compared with SAP CRM 4.0 and 5.0:

Function in SAP CRM 4.0/5.0	4.0/5.0 UI	Restriction in SAP CRM 7.0
Workflow inbox of Business Workplace	SAP GUI	Workflow inbox of the SAP CRM worklist: ■ "Advance with dialog": not supported ■ Secondary methods (tab page *Methods of an Activity*): not supported ■ Methods before work item execution: not supported ■ Methods after work item execution: not supported ■ Condition "complete execution": not supported ■ Program exits: not supported ■ Display of work items: implemented differently from SAP GUI (different functions offered, functions offered differently) ■ Step type "form": not supported ■ Step type "user decision": supported using DDLB instead of buttons ■ Step type "document from template": not supported ■ Step type "ad hoc anchor": not supported ■ Reviewer workflow, graphical workflow log: not supported

Workflows for Objects

In the current enhancement package of SAP CRM 7.0, you can view the tasks of workflows that are related to a business object. You can view these workflow tasks in a CRM WebClient UI assignment block within the overview page of the business object if you have implemented an integration of the UI block into the overview page. For more information, see SAP Note 1717812.

Function in SAP CRM 5.0	5.0 UI	Enhancement Up to the Current Enhancement Package of SAP CRM 7.0
View tasks of workflows related to a business transaction object	SAP GUI	View tasks of workflows related to a business transaction object
View tasks of workflows related to types of CRM business objects other than business transactions	Not available	View tasks of workflows related to a business object

3.4 Authorizations

Business Roles

For more information about business roles, see Customizing for *Customer Relationship Management* under ⏵ *UI Framework → Business Roles → Overview* ⏎.

To define your own business roles, see Customizing for *Customer Relationship Management* under ⏵ *UI Framework → Business Roles → Define Business Role* ⏎.

Authorization Roles

If you have implemented authorization roles (PFCG roles) in SAP CRM 5.0, you can partly reuse these roles in SAP CRM 7.0.

> ⚠ **CAUTION**
>
> In SAP CRM 7.0, the authorization roles have been enhanced with framework-specific authorizations that need to be added to your existing authorization roles. Authorizations that you need to run the framework are part of the authorization role SAP_CRM_UIU_FRAMEWORK.

You can check authorizations that are used in UI navigation in the authorization object UIU_COMP. For more information, see SAP Library at ⏵ *SAP Customer Relationship Management → Basic Functions → UI Framework and Configuration → UI Configuration Tool → Authorization Object* ⏎.

To define authorization roles for business roles, see Customizing for *Customer Relationship Management* under ⏵ *UI Framework → Business Roles → Define Authorization Role.* ⏎.

Application-Specific Authorizations

For authorizations concerning business partner roles, see SAP Note 1028531.

Access Control Engine

If you want to upgrade from SAP CRM 4.0 to SAP CRM 7.0, see SAP Note 825264.

If you want to upgrade from SAP CRM 5.x to SAP CRM 7.0, the following applies:

Change of Access Control Engine (ACE) Background Processing to Calculate Authorization Data

As of SAP CRM 5.0, the following processes run in the background:

- The calculation of authorization data after the user has created and changed ACE-relevant objects
- The activation of rights and the recalculation of the object context initiated by the system administrator

The background processes are automatically triggered by a job that is created, released, and started by a program in the context of the current user. Using a destination with a system user as described in SAP Note 897126 avoids the problem that the current user has insufficient batch job authorization. As of SAP CRM 7.0, the job is started by an event that is automatically raised by the current user or the system administrator with the above-mentioned activities.

> ⚠ **CAUTION**
>
> This periodic job needs to be created in every client in which ACE is relevant. Otherwise, the authorization data cannot be created or recalculated.

You need to perform the necessary Customizing for *Customer Relationship Management* under ▷ *Basic Functions* → *Access Control Engine* → *Prerequisites* ↵. For more information, see section *Job Processing*.
The destination recommended in SAP Note 897126 and the corresponding parameter DISPATCHER_DESTINATION maintained in Customizing for *Customer Relationship Management* under ▷ *Basic Functions* → *Access Control Engine* → *Maintain General Parameters* ↵ is no longer needed.

3.5 UI Configuration

To adapt the user interface of SAP CRM 7.0 to your business needs and to your corporate identity, a bundle of tools is available. For more information, see SAP Library at ▷ `help.sap.com` → *SAP Business Suite* → *SAP Customer Relationship Management* → *Basic Functions* → *UI Framework and Configuration* ↵.
The following table contains an overview of what you can do with which tool and where you find the necessary information about how to use a particular tool.

Task	Tool	More Information
Configure views: ■ Position fields and columns ■ Add fields and columns from the field set ■ Remove fields and columns ■ Rename field labels ■ Set fields to mandatory or display-only ■ Define load options for assignment blocks	UI configuration tool	

Task	Tool	More Information
Use parameters to save your configuration		
Use customer-specific fields (created with Easy Enhancement Workbench) within view configuration		
Configure fact sheet	UI configuration tool	See Customizing for *Customer Relationship Management* under ▮▷ *UI Framework → UI Framework Definition → Fact Sheet → Maintain Fact Sheet* ◀
Implement the same configuration content for several views	Design layer	See Customizing for *Customer Relationship Management* under ▮▷ *UI Framework → UI Framework Definition → Design Layer* ◀
Define input helps and dropdown boxes		
Configure buttons	■ BSP component workbench ■ Framework enhancement concept	See Customizing for *Customer Relationship Management* under ▮▷ *UI Framework → UI Framework Definition → Access BSP Component Workbench* ◀
Enhance components, create own views, context nodes, and so on		
Define input helps and dropdown boxes		
Create your own skins	CSS customizing	
■ Change navigation bar entries on first and second level ■ Define logical links ■ Define business roles	■ Navigation bar customizing ■ Business role customizing	■ See Customizing for *Customer Relationship Management* under ▮▷ *UI Framework → Technical Role Definition → Define Navigation Bar Profile* ◀ ■ See Customizing for *Customer Relationship Management* under ▮▷ *UI Framework → Business Roles → Define Business Role* ◀
Create customer-specific fields	Easy Enhancement Workbench	See Customizing for *Customer Relationship Management* under ▮▷ *CRM Cross-Application Components → Easy Enhancement Workbench* ◀

4 Solution-Wide Topics

4.1 Importing Modifications and Extensions From Previous Releases

This section describes how to import modifications and extensions from previous releases (SAP CRM 4.0, 5.0, 5.2, or 2007) into SAP NetWeaver Development Infrastructure (NWDI).

For more information about NWDI, see the following documentation:

- *Master Guide − SAP NetWeaver 7.0* for information about NWDI installation
- SAP NetWeaver Library at ▷ *Administrator's Guide → Technical Operations Manual for SAP NetWeaver → Administration of SAP NetWeaver Systems → Development Infrastructure (DI)* ◁ for information about NWDI administration
- The online help of SAP NetWeaver Developer Studio for information about using DTR and development configurations
- SAP Note 594370 for specific information about the upgrade from CRM 4.0 to CRM 5.0

4.2 Monitoring the System Landscape

To monitor your system landscape, use the SAP NetWeaver monitoring infrastructure. After you have installed all required components, configure the monitoring. For more information, see the guides required for operating your SAP NetWeaver system on SAP Service Marketplace at ▷ `http://service.sap.com/instguides` → *SAP NetWeaver → SAP NetWeaver <release> → Operations* ◁.

The setup of monitoring features is a prerequisite for performing the monitoring activities for your SAP CRM landscape. For more information about analysis tools for different systems, components, and scenarios, see the application operations guide on SAP Service Marketplace at ▷ `http://service.sap.com/crm-inst` → *<choose release> → Operate* ◁.

4.3 Shared Services

You normally run shared services on central systems in your system landscape. For SAP NetWeaver, there are the following features that could be used to implement shared services:

- SAP Solution Manager
  Used to implement, train, test, maintain, monitor, administer, control change, and manage incidents in your SAP solution system landscape (open end-to- end application management). As of SAP Solution Manager 7.0 (4.0) Support Package 15, SAP Solution Manager has become the platform for SAP's end-to-end solution operations strategy: Functions for complete application

management have been combined with administrative tools, and have been merged in newly created, role based work centers.

> 💡 **NOTE**
>
> Note that you require an SAP Solution Manager system (minimum release 3.2 SP8) to install or upgrade to SAP NetWeaver 7.0. An SAP Solution Manager system is required to generate the SAP Solution Manager key needed during the installation or upgrade process. Without this key, the installation or upgrade process cannot continue. For more information, see SAP Note 805390.
>
> To simplify the software maintenance procedure for your support staff and thus reduce your cost of operations, all corrective software packages, including Support Packages (Stacks) for SAP NetWeaver 7.0 and subsequent versions (as well as all applications that are based on this software) are available exclusively through the Maintenance Optimizer in SAP Solution Manager as of April 2, 2007. For more information, see ▶ `http://service.sap.com/` `solutionmanager` → *Functions in Detail* → *Support Area* → *Maintenance Optimizer* ◀.

- Solution Manager Diagnostics

  An integral part of SAP Solution Manager that runs as a Java application on the Java stack of SAP Solution Manager 7.0. It is used to analyze the root cause of incidents in your landscape in an efficient and safe way. Before Go-Live, Solution Manager Diagnostics has to be set up and made accessible remotely.

- SAP NetWeaver Administrator

  SAP NetWeaver Administrator is the central administration component, which is used for monitoring and administering Java applications. It is included in SAP NetWeaver systems with AS Java. For SAP NetWeaver 7.0, SAP NetWeaver Administrator is focused on Java and is used in combination with SAP Visual Administrator.

  SAP NetWeaver Administrator exists in the following flavors:

  - A local mode, which runs out of the box and which focuses on administering the underlying SAP NetWeaver AS Java
  - A central mode, which has to be configured before use, and which deals with the system landscape management

  SAP has decided to merge the central mode of SAP NetWeaver Administrator into the new work centers available as of SAP Solution Manager 7.0 SP 15. Thus, it can be used in an administrative context together with non-Java— based administration tools. Although the central mode of SAP NetWeaver Administrator is still available for some time, SAP does not develop this tool any further. SAP focuses on optimizing the administrative work centers of SAP Solution Manager instead.

  The local mode of SAP NetWeaver Administrator stays untouched: It is available for current and future releases of SAP NetWeaver. As of SAP NetWeaver 7.1, it fully replaces SAP Visual Administrator as the common tool for day-to-day administration. Moreover, depending on the usage type, it will be enhanced by additional functions.

- Alert Monitor

  If your system landscape only consists of ABAP components, use the alert monitor included in AS ABAP (transaction RZ20) as the central tool for monitoring your entire system landscape. If malfunctions or problems occur, alerts are generated. These alerts are displayed in various monitors in a tree structure, and you can assign auto-reactions to them. In this way, you are informed quickly and reliably about an alert − even if you are not working in the alert monitor at that time.

- SAP Central Process Scheduling by Redwood

  SAP Central Process Scheduling application by Redwood enables central job scheduling and job monitoring of current and old releases of AS ABAP systems (as of Basis Release 3.1). This application is fully integrated in SAP NetWeaver. Depending on the business needs, SAP business applications are the initial trigger for scheduled activities. You can now manage jobs and job chains conveniently using a graphical user interface.

- System Landscape Directory

  The System Landscape Directory is the central directory of system landscape information relevant for the management of your software life-cycle. It contains a description of your system landscape (that is, software components that are currently installed) and a repository of software components that can theoretically be installed in your landscape (such as the software components available from SAP).

- Software Lifecycle Manager

  The Software Lifecycle Manager simplifies software logistics tasks (such as the installation of Support Packages) in your system landscape. It does this by providing services to SAP Solution Manager and as a result helps in managing the life cycle of your SAP solutions and products. The Software Lifecycle Manager provides the most important services out of the box. In other words, no configuration or operation effort from your side is required to profit from these services in your landscape.

  For information about further services provided by the Software Lifecycle Manager, see the
  ▶ http://help.sap.com/nw70 → *SAP NetWeaver 7.0 Library <Language> → SAP NetWeaver by Key Capability → Solution Life Cycle Management by Key Capability → Software Life Cycle Management → Software Lifecycle Manager* ↵.

- Adaptive Computing Controller

  The Adaptive Computing Controller enables users to control an adaptive computing landscape from a single point through observation, operation, and dynamic resource distribution. With adaptive computing, hardware, software, and system services are able to adapt to changing business needs. In the Adaptive Computing Controller, the runtime data of logical and physical landscapes can be monitored, application services can be started/stopped/relocated, and hardware resources can be assigned to application services. The operation can also be mass executed and be planned as tasks to be executed.

4.3.1 Use Cases

You can use the aforementioned features for use cases that are normally performed centrally. This section describes these use cases.

4.3.1.1 End-to-End Solution Operations

Running business applications through their complete life cycle is a challenge. Therefore, SAP provides the Run SAP methodology for implementing End-to-End Solution Operations. Based on a set of SAP standards, a roadmap, and a package for training and certification, Run SAP helps customers to facilitate End-to-End Solution Operations.

You can download the SAP standards for Solution Operations from SAP Service Marketplace at `http://service.sap.com/supportstandards`. They describe roles customers typically have in their IT environment. For optimal role support, SAP has grouped existing and new functions in SAP Solution Manager work centers as of SAP Solution Manager 7.0 Support Package 15. Operations aspects are fully covered by adding administrative functions for SAP NetWeaver as well. Work centers are ABAP Web Dynpro-based applications. They offer the following advantages:

- Easy to use, similar look and feel
- Context transfer while jumping from one work center into another
- Logical grouping of tools for a certain area
- Simple authorization concept
- Easy to expand

Each IT role belongs to one or more work centers. For instance, the *Technical Administrator* IT role is covered by the work centers for *System Monitoring*, *System Administration*, and *Landscape Management*.

The following work centers are available as of SAP Solution Manager 7.0 Support Package 15:

- Solution Landscape/Operation Setup
- Change Management
- Incident Management
- Service Delivery
- Business Process and Interface Monitoring
- Job Schedule Management
- System Monitoring
- System Administration
- Diagnostics: Root Cause Analysis
- Implementation & Upgrade
- System Landscape Management

Further work centers are planned for the future.

4.3.1.2 Support Infrastructure

A key requirement for effective support of IT solutions is the ability to perform root cause analysis with speed and efficiency.

SAP Solution Manager is a well-established infrastructure for SAP ABAP applications that efficiently supports SAP solutions. This helps ensure the high availability and smooth running of business processes. For more information, see the *SAP Solution Manager* section.

With Solution Manager Diagnostics, this knowledge has been extended to Java applications. If there are problems with the performance of iViews in SAP NetWeaver Portal, or if homegrown Java applications cause instability, Solution Manager Diagnostics helps trace the cause to eradicate the problem rapidly. Solution Manager Diagnostics is fully integrated into SAP Solution Manager 7.0. Solution Manager Diagnostics also contains the following third-party tools:

- WilyTech Introscope for measuring performance, as well as troubleshooting problems of AS Java and applications running on it
- Mercury Loadrunner, which enables SAP Support to produce a defined load in the SAP solution landscape remotely.

For more information, see the *Solution Manager Diagnostics* section.

The support infrastructure provides SAP Support with safe access to your productive landscape for safe root cause analysis, so ensuring that SAP Support does not change your landscape inadvertently. You require a support infrastructure to run SAP NetWeaver.

Landscape Aspects

- If you run pure ABAP system landscapes, you have to use SAP Solution Manager as a central support platform.
- If you use Java productively (for example, if you are using EP, PI, Web Dynpro,or SAP ESS/MSS as part of the SAP ERP 2005 application), besides SAP Solution Manager, you have to set up Solution Manager Diagnostics for supportability reasons.

Only valid for: Installation |

Implementation Sequence

The following table shows an overview of the required implementation steps:

No.	Action [Corresponding Documentation]	Remarks and Subsequent Steps
1	Install SAP Solution Manager 7.0 (includes Solution Manager Diagnostics) [*Master Guide — SAP Solution Manager* available on SAP Service Marketplace at ▶ http://service.sap.com/instguides → *SAP Components* → *SAP Solution Manager* → *Release 7.0* ⏎]	
2	Install the Diagnostic Agent where required: ■ SAP NetWeaver 7.0 installations before SAP NetWeaver 7.0 SR3: install the Diagnostic	The Diagnostics Agent delivers data to the central monitoring system.

No.	Action [Corresponding Documentation]	Remarks and Subsequent Steps
	Agent on each host that you want to monitor. ■ SAP NetWeaver 7.0 SR3 and higher: install the Diagnostic Agent in systems based on AS ABAP only inthird-party-software systems. SAP NetWeaver systems that include AS Java automatically include the Diagnostics Agent. [*Diagnostics Agent Setup Guide* available on SAP Service Marketplace at ▷ http://service.sap.com/diagnostics ◁]	
3	If required, make sure that you have a *System Landscape Directory* [page 86] running in your system landscape.	
4	If required, install Wily Introscope. [*Root Cause Analysis Installation and Upgrade Guide* available on SAP Service Marketplace at ▷ http://service.sap.com/diagnostics ◁]	
5	If you have installed Wily Introscope, install Wily Agent on each SAP NetWeaver component host that runs AS Java.	
7	Configure SAP Solution Manager and Solution Manager Diagnostics.	Solution definitions in SAP Solution Manager are a prerequisite for the configuration of Solution Manager Diagnostics.
8	Perform the supportability setup. [*Root Cause Analysis Installation and Upgrade Guide* available on SAP Service Marketplace at ▷ http://service.sap.com/diagnostics ◁]	

End of: Installation |

Only valid for: Upgrade |

Upgrade Sequence

Since Solution Manager Diagnostics and SAP NetWeaver Administrator are fully integrated into the SAP Solution Manager work centers as of SAP Solution Manager 7.0 Support Package 15, proceed as follows:

No.	Action [Corresponding Documentation]	Remarks and Subsequent Steps
1	Upgrade SAP Solution Manager 4.0 (includes Solution Manager Diagnostics) [*Master Guide — SAP Solution Manager* available on SAP Service Marketplace at ▷ http://service.sap.com/instguides → *SAP Components* → *SAP Solution Manager* → *Release 4.0* ◁]	

No.	Action [Corresponding Documentation]	Remarks and Subsequent Steps
2	Install the Diagnostic Agent on each SAP NetWeaver component host that you want to monitor: [*Diagnostics Agent Setup Guide* available on SAP Service Marketplace at ▌ http://service.sap.com/diagnostics ◂]	The Diagnostics Agent delivers data to the central monitoring system.
3	If required, make sure that you have a *System Landscape Directory* [page 86] running in your system landscape.	
4	If required, install Wily Introscope. [*Root Cause Analysis Installation and Upgrade Guide* available on SAP Service Marketplace at ▌ http://service.sap.com/diagnostics ◂]	
5	If you have installed Wily Introscope, install Wily Agent on each SAP NetWeaver component host that runs AS Java.	
6	Configure SAP Solution Manager and Solution Manager Diagnostics.	Solution definitions in SAP Solution Manager are a prerequisite for the configuration of Solution Manager Diagnostics.
7	Perform the supportability setup. [*Root Cause Analysis Installation and Upgrade Guide* available on SAP Service Marketplace at ▌ http://service.sap.com/diagnostics ◂]	

End of: Upgrade |

4.3.1.3 Central Administration and Monitoring of SAP NetWeaver

Whereas the support infrastructure is focused on the support role, which guarantees remote accessibility and safe root cause analysis without making any changes, the focus of the central administration and monitoring infrastructure is to efficiently support the daily tasks of customer administrators (for example, monitoring, starting and stopping applications or instances, automation, and configuration).

💡 **NOTE**

As of SAP Solution Manager 7.0 Support Package 15, almost all functions described below can be performed centrally from a single SAP Solution Manager system. They are included in the new *work centers* [page 76].

The newest versions of SAP Adaptive Computing Controller, which runs on SAP NetWeaver 7.1, and the newest versions of SAP Central Process Scheduling are not accessible from the work centers for high availability reasons.

The daily administration tasks are currently safeguarded by the following features and services:

- SAP NetWeaver Administrator for central administration and monitoring
- SAP Central Process Scheduling, which enables central job scheduling and job monitoring for current and old releases of AS ABAP systems (as of Basis Release 3.1). The newest version of the scheduler runs as a fully integrated part of SAP NetWeaver. In this version, depending on business needs, SAP business applications can act as the initial triggers for scheduled activities. Jobs and job chains can now be handled conveniently in a graphical UI. For more information about job scheduling, see SAP Developers Network at `http://sdn.sap.com/irj/nw-scheduling`.
- IT Reporting

  It is essential for most customers to be able to analyze SAP NetWeaver with respect to service level agreements. In the past, this was done using expensive, third-party tools. Now customers can collect landscape-wide monitoring information centrally and forward this information to SAP Business Intelligence for powerful history or forecast analysis. Results can be presented in a convenient Web-based format.

  Moreover, highly detailed statistics information from all parts of the landscape (ABAP and Non-ABAP components) is forwarded to SAP Business Intelligence. This offers detailed drill-down opportunities in case of low system performance. For more information, see SAP Developers Network at `http://sdn.sap.com/irj/sdn/operations`.
- History and forecast analysis using CCMS, together with the powerful reporting engine of SAP Business Intelligence

  CCMS is included in SAP NetWeaver systems with usage type AS ABAP. CCMS provides alert monitoring of both Java and ABAP parts, performance history, and performance statistics.
- In the back end, the familiar CCMS agents are used for data provisioning. There is no need to handle the productive components directly. For more information about the CCMS agents, see SAP Developers Network at `http://sdn.sap.com/irj/sdn/operations`.
- SAP NetWeaver enables adaptive computing, where hardware, software, and system services are able to adapt to changing business needs. SAP NetWeaver provides the platform for users to run any service, anytime, on any server. It also provides a central point of control for flexible computing-resource assignment, the Adaptive Computing Controller, which is a shared service.

  The Adaptive Computing Controller enables users to control the whole landscape from a single point through observation, operation, and dynamic resource distribution. The runtime data of logical and physical landscapes can be monitored, application services can be started, stopped, and relocated, and hardware resources can be assigned to application services. The operation can also be executed on a mass scale and be planned as tasks to be executed.

  For more information about Adaptive Computing, see SAP Service Marketplace at `http://sdn.sap.com/irj/sdn/adaptive`.
- System Landscape Directory as a complete landscape directory

Landscape Aspects

- We recommend that you use the new work centers, which are part of SAP Solution Manager 7.0 SP15.

  However, you can also access all functions described here individually.

- If you run pure ABAP system landscapes, use SAP Solution Manager for central monitoring. There is no need to implement System Landscape Directory for administration and monitoring purposes in this case.

- If you use Java productively (for example, if you are using EP, PI, Web Dynpro, or SAP ESS/MSS as part of the SAP ERP 2005 application), we recommend that you also set up a non-productive version of the SAP System Landscape Directory in SAP Solution Manager. This non productive version is then continuously updated with data from the productive SLDs using bridge forwarding. The new work centers offer many functions for monitoring and administering Java.

- Install the newest versions of SAP Central Process Scheduling and SAP Adaptive Computing Controller on separate systems.

- The more functions you use in SAP Solution Manager, the more you need to rank it as mission critical. Depending on your business needs, you should set up SAP Solution Manager itself as a high availability system.

Implementation Sequence

SAP NetWeaver administration tools and their implementation are covered by the *SAP NetWeaver Operations* IT scenario.

4.3.1.4   Collection of Landscape Data

The support infrastructure and the SAP NetWeaver administration tools rely on system landscape data. With regard to the management of this landscape data, we need to distinguish between two cases:

1. If the landscape consists of ABAP components only, SAP Solution Manager can collect all required landscape data. You do not need to implement the System Landscape Directory for the collection of landscape data in this case, but we highly recommend it.

2. If there are non-ABAP components in the solution landscape, the System Landscape Directory is mandatory. The landscape data that is automatically gathered by the System Landscape Directory is replicated to SAP Solution Manager.

   The System Landscape Directory has several topology options. They offer different levels of availability at the expense of low administration and operation effort. As a result, there is no generic rule on how to set up the SLD in your system landscape.

   For more information, see the *System Landscape Directory* section.

4.3.1.5 Authentication and Single Sign-On

Before implementing your system landscape, plan how to implement authentication and how to integrate different systems into a Single Sign-On landscape. Single Sign-On reduces complexity for end users, saving them valuable time, while also reducing administration effort for resetting passwords, which helps reduce TCO.

Once you have logged on to the portal where authentication takes place, all systems in the landscape – no matter whether they are based on AS ABAP, AS Java, or both – can be accessed.

For more information, see the *Authentication and Single Sign-On* IT scenario.

4.3.1.6 Integrated User and Access Management

In a system landscape containing a combination of ABAP and Java components, we recommend that you integrate your user and access management. This enables you to use the same user data across different systems, administer this data centrally, and control access to data. SAP's mature, fine-grained authorization concept allows detailed control of access rights. SAP NetWeaver provides both ABAP and Java-based user management solutions. The user management solution, which you use to administer your user data, depends on factors such as the type of systems that are running in your landscape.

If you want to use central user administration, we recommend that you run it in a non production system. If you have not already set up central user administration in a dedicated system, then implement it in the SAP Solution Manager system.

For more information, see the *Integrated User and Access Management* IT scenario.

4.3.1.7 Creating Interactive Forms and Print Forms

You can use SAP Interactive Forms by Adobe to create interactive forms and print forms for optimizing your form-based business processes. This solution uses the Portable Document Format (PDF) and software from Adobe Systems Inc. (Adobe document services and Adobe LiveCycle Designer) that has been integrated into the SAP environment.

You can create interactive forms in PDF format that allow users to fill out the form on the screen and save their entries in XML format in the form. When the SAP system receives the PDF form, it extracts the data saved in the form and can process it further. You can also merge a form template with current system data to generate a PDF document that you can print out or send by e-mail.

> **NOTE**
>
> In certain circumstances, you require a license for interactive forms. For more detailed information, read SAP Note 750784.

For more information, see the *Adobe Document Services* section.

4.3.2 Examples of the Overall System Landscape of Shared Services

This section provides examples of how you can set up shared services depending on the system landscape for which they are intended. The following examples aggregate the landscape aspects given in the *Use Cases* section.

> **NOTE**
>
> The following sections and the illustration do not show information about the life cycle of shared services. For example, you may also need a development and test/quality assurance system for SAP Solution Manager. You should consider this aspect, in addition to the information provided in this section based on your requirements.

Pure ABAP Landscape

If you run a pure ABAP system landscape, you have to use SAP Solution Manager as the central monitoring and support platform. Monitoring can be performed using the Alert Monitor (transaction RZ20). However, we recommend that you use the SAP Solution Manager work centers. You do not need to use the System Landscape Directory.

Small and Medium-Sized Customer Landscapes with Java

If you use Java productively (for example, if you are using EP, PI, Web Dynpro, or SAP ESS/MSS as part of the SAP ERP 2005 application), you have to set up additional components (besides SAP Solution Manager) for optimal monitoring, administration, and support. Solution Manager Diagnostics and the central mode of SAP NetWeaver Administrator are already fully integrated into SAP Solution Manager 7.0 as the central operations hub.

We recommend that you set up and operate the system that hosts your productive SAP Central Process Scheduling application as a mission critical system. Do not install SAP Central Process Scheduling in the SAP Solution Manager system.

In the SAP Solution Manager system, you should set up a local System Landscape Directory in addition to a central runtime System Landscape Directory. This creates a clear separation between your management system (SAP Solution Manager) and managed systems in your landscape. For more information about this setup, see the *Planning Guide – System Landscape Directory*.

If you want to use a central system for Adobe document services, we recommend that you install a dedicated system for this purpose in your production environment. For more information about the sizing of the system for the different use cases, see the *Sizing Guide* for Adobe document services at SAP Service Marketplace at ▶ http://service.sap.com/sizing → *Sizing Guidelines* → *Solutions & Platform* ◀.

We recommend that you start with this centralized SAP Solution Manager approach as depicted in the following figure:
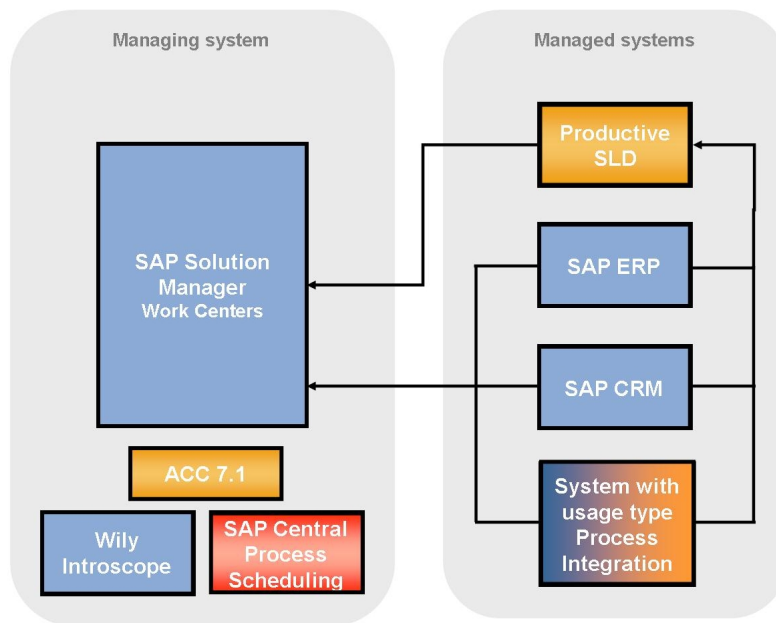
Figure 3: Single SAP Solution Manager Landscape

Large Customer Landscapes with Java

Large customers who have environments in their landscape that are large and distributed, administered by different groups, or separated for security reasons, can consider a distributed operations setup. In addition to the centralized setup described for small and medium-sized customers above, large customers can put parts of the central management functions on extra hosts or systems for performance or policy reasons.

- You can set up an extra system or client for central user administration (CUA).
- The Change and Transport System (CTS) can be run on an extra system. However, it is not performance-intensive or data-intensive.
- You can set up an extra system for central CCMS monitoring. Depending on the Customizing and the landscape size, central CCMS might generate a high system load. You can connect a separate central CCMS to SAP Solution Manager for displaying alerts in the alert inbox of the *System Monitoring* work center.
- You can use a separate SAP NetWeaver system with usage type BI together with SAP Solution Manager. This might be worthwhile with respect to the amount of landscape management data that is stored for reporting purposes. The amount of data strongly depends on the data granularity, storage time frame, and landscape size.
- You can easily put Wily Introscope Enterprise Manager on a separate host.

Other aspects described above for small and medium-sized customers (such as the setup of the System Landscape Directory) are also valid for large customers.

4.3.3 Feature Details

This section provides further information about the features described above.

4.3.3.1   SAP Solution Manager

SAP provides you with SAP Solution Manager as the strategic application management and operations solution and to enable the collaboration between you and SAP. You need to install at least one SAP Solution Manager in your system landscape. To ensure the availability of this application management solution, an SAP Solution Manager system (minimum release 3.2 SP8) is required to install or upgrade to SAP NetWeaver 7.0. If you are already using an SAP Solution Manager, you can also use it to manage the solution that you build with SAP NetWeaver. In this case, we highly recommend that you update SAP Solution Manager to the latest version.

As of SAP Solution Manager 7.0 SP15, you can use the new work centers.

> **NOTE**
>
> During the SAP NetWeaver 7.0 installation or upgrade process, you are prompted to enter the SAP Solution Manager key. An SAP Solution Manager system is required to generate this key. Without this key, the installation or upgrade process cannot continue.
>
> You can generate all required keys for your entire system landscape (development, quality assurance, and production system) in one SAP Solution Manager system. If you plan to install several solution landscapes (for example, in different countries), one SAP Solution Manager system is still sufficient.
>
> For more information, see SAP Note 805390.

It is possible to install multiple SAP Solution Managers. If you do so, each SAP Solution Manager should host a separate business solution.

If you want to reduce the risk of unavailability, you should not install SAP Solution Manager as a central component. Instead, you can operate a 2-system landscape with a test environment and production environment of SAP Solution Manager (especially if you are using time-critical functions like Support Desk). If you also develop your own content, a 3-system landscape with a development, test, and production environment is recommended.

For more information about SAP Solution Manager, see the following table:

Topic	Where to Find More Information
System infrastructure, scenarios, installation, and configuration of SAP Solution Manager	*Master Guide – SAP Solution Manager* available on SAP Service Marketplace at ▌ `http://service.sap.com/` `instguides` → *SAP Components* → *SAP Solution Manager* → *<Release>* ↵
Benefits and usage scenarios	SAP Solution Manager – Learning Maps available on SAP Service Marketplace at ▌ `http://`

Topic	Where to Find More Information
	`service.sap.com/rkt-solman` ↵ or ▷ `https://` `service.sap.com/solutionmanager` ↵
Additional information	See SAP Service Marketplace at ▷ `http://` `service.sap.com/solutionmanager` ↵

4.3.3.2   Solution Manager Diagnostics

Solution Manager Diagnostics provides efficient and safe root-cause analysis of incidents in customer solutions powered by SAP NetWeaver. It can help monitor operating systems, databases, Java application activities, performance, and logs. It also supports the reporting of software and configuration changes that can lead to malfunctions and errors.

You must run Solution Manager Diagnostics within your SAP solution landscape, if you are running applications based on SAP NetWeaver systems with usage type AS Java. Agents are responsible for delivering the data from all productive hosts within your system landscape to the Solution Manager Diagnostics system.

⚠ **CAUTION**

SAP Support performs root-cause analysis on incoming incidents with Solution Manager Diagnostics. Not installing and configuring this support infrastructure results in a dramatically reduced service level.

Solution Manager Diagnostics is fully integrated into SAP Solution Manager 7.0.

Solution Manager Diagnostics also contains Wily Introscope (Display, Server, and Agent part) for measuring performance and for troubleshooting problems of Non-ABAP applications. Wily Introscope is frequently used for troubleshooting applications running on AS Java.

SAP has signed a distribution agreement for Wily Introscope. SAP customers are allowed to use this tool in a preconfigured way.

For more information about Solution Manager Diagnostics and an FAQ list, see SAP Service Marketplace at `http://service.sap.com/diagnostics`.

4.3.3.3   System Landscape Directory

Today's system landscapes consist of several distributed software components with different platform dependencies, different interfaces, and different requirements for installation and change management. An overall concept is required that facilitates the implementation, upgrade, and maintenance of your system landscapes — including the SAP NetWeaver system landscape you are installing. This is where the System Landscape Directory (from now on abbreviated as SLD) comes into play.

> **NOTE**
>
> Note that the abbreviation SLD is not intended to define a product, since the System Landscape Directory is part of SAP NetWeaver. This abbreviation is solely intended to improve readability.

The System Landscape Directory of SAP NetWeaver (SLD) serves as a central information repository for your system landscape. A system landscape consists of hardware and software components that depend on each other with regard to installation, software updates, and demands on interfaces. Information in the SLD is used by various SAP tools, for example, for planning and performing upgrades to the system landscape, finding destination information for ABAP systems and Web services (Web Dynpro Java), and for maintaining information used by the SAP NetWeaver Development Infrastructure (NWDI) and Process Integration (PI).

The SLD gathers information from the landscape: Technical systems use SLD's self-registration, SAP Component Repository content is imported; based on this information manual content (mainly business systems for PI and landscapes) is created. The SLD provides the following features:

- The SLD stores information about all installable and installed components of a system landscape and their host systems based on the standard Common Information Model (CIM).
- SAP provides both a Web-based UI for interactive access and client APIs for programmatic access in ABAP and Java.
- SAP provides up-to-date information about installable SAP software and their dependencies on SAP Service Marketplace to be imported into the SLD.
- The SLD allows name reservation in the NWDI such as development component or Java package names
- The SAP NetWeaver Process Integration uses the SLD to store information about business systems, which are logically connected to technical systems.

If there are non-ABAP components in the solution landscape, the System Landscape Directory is mandatory. If your system landscape consists of ABAP components only, there is no need to implement the System Landscape Directory since SAP Solution Manager can collect all required landscape information. However, we highly recommend to use the System Landscape Directory.

The System Landscape Directory is part of SAP NetWeaver 7.0. It is automatically included in every SAP NetWeaver 7.0 system with usage type AS Java. During the installation of a system with usage type Java you decide whether you want to use this local SLD or whether you want to register the system to an existing central SLD. To start operating the System Landscape Directory in one of your systems, you simply have to perform some quick and easy configuration steps in the relevant system.

We recommend that you use a DNS alias so that you are able to switch to another System Landscape Directory easily.

> **EXAMPLE**
>
> If customers build a new landscape, they normally start with a sandbox environment. Over time, more and more environments are set up. Once the production environment is in place, move

the System Landscape Directory there. To do this, you can configure a new System Landscape Directory in the production environment, synchronize it manually with the old System Landscape Directory (export/import), and switch to the new one.

> **NOTE**
>
> The System Landscape directory of SAP NetWeaver 7.0 is compatible with old System Landscape Directory versions. After the installation, you can migrate the System Landscape Directory data to an SAP NetWeaver 7.0 System Landscape Directory.

Topology

The System Landscape Directory offers several topology options with different grades of availability at the expense of low administration and operation effort. Therefore, there is no generic rule for setting up a System Landscape Directory in your system landscape. To find the topology and synchronization strategy for the System Landscape Directory that fits your requirements concerning the System Landscape Directory availability (and hence, the availability of the applications that rely on it), see the documentation *Planning Guide — System Landscape Directory* available in SAP Developers Network at `http://sdn.sap.com/irj/sdn/nw-sld`.

Implementation Sequence

Perform the following steps:

No.	Action [Corresponding Documentation]	Remarks and Subsequent Steps
1	If required, install the standalone engine gateway on the System Landscape Directory host.	For the data exchange between the data suppliers of ABAP-based systems and the System Landscape Directory, a gateway is required since the data is exchanged using RFC.
2	Configure the System Landscape Directory in the system where you want to run System Landscape Directory. [*Post-Installation Guide — System Landscape Directory*]	■ For SAP NetWeaver 7.0, the installation procedure offers an option to configure the System Landscape Directory automatically during the installation. ■ If you want to run the System Landscape Directory in a separate system, install an SAP NetWeaver 7.0 system with usage type AS Java according to the *Installation Guide — SAP NetWeaver 7.0 <Technology> on <Operating System>: <Database>* and perform the automatic configuration of the system landscape directory as part of the standard installation procedure.
3	Download and install the most current SLD content - updated monthly - available on SAP Service Marketplace. [SAP Note 669669]	

4.3.3.4   Adobe Document Services

Adobe document services are included in AS Java. This means that you have to install an SAP NetWeaver system with usage type AS Java regardless of the development language of your application (ABAP or Java).

The following Adobe software is included SAP Interactive Forms by Adobe:

- Adobe LiveCycle Designer

  A graphical tool for designing form layouts; it is integrated into SAP NetWeaver Developer Studio and ABAP Workbench.

- Adobe Document Services

  Web services used to generate the PDF forms at runtime; in interactive scenarios, they extract the XML data from the form and send it to the system.

On the front end, you require Adobe Acrobat or Adobe Reader. For information about the required version, see SAP Note 834573.

You can use ADS as a local installation (option A in the following figures) or as a shared service on a central SAP NetWeaver AS Java (option B in the following figures).
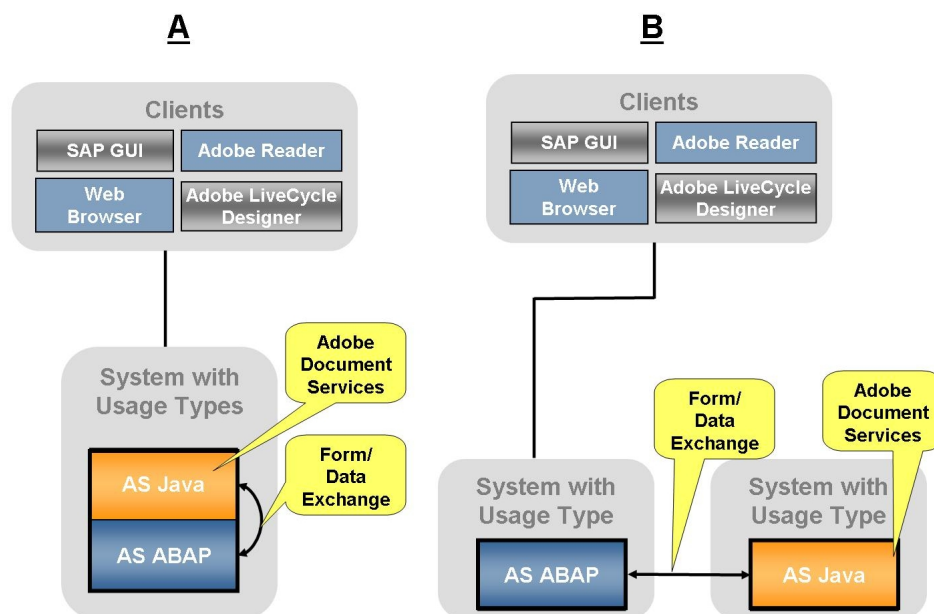

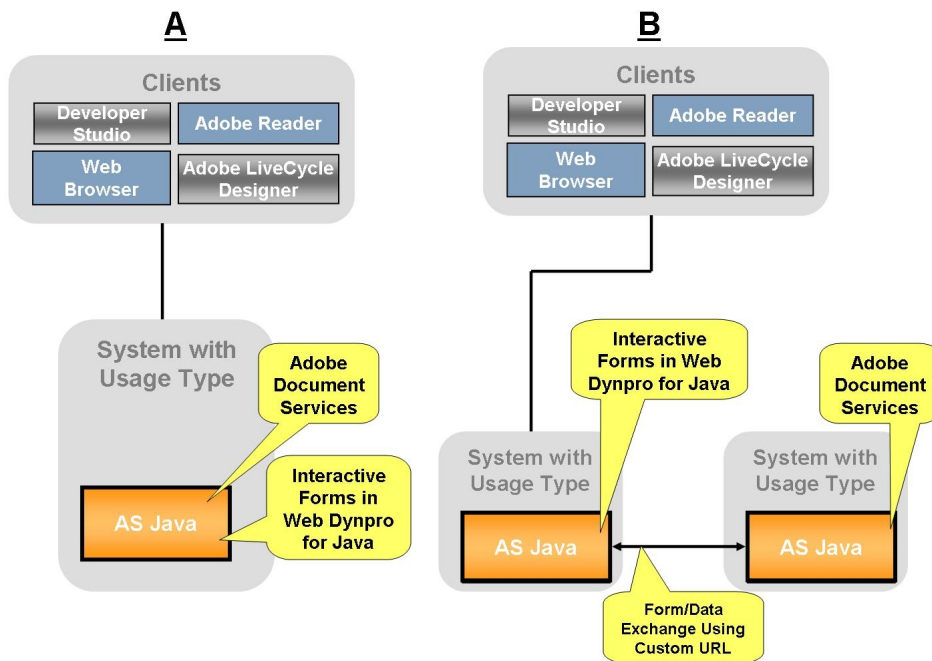**Figure 4:** System Landscapes for SAP Interactive Forms in AS ABAP

Figure 5: System Landscapes for SAP Interactive Forms in AS Java

When you want to implement Adobe Document Services, consider the following system landscape aspects:

- Using One ADS Installation from Several Systems

    To optimize the use of your system landscape, you can connect several ABAP-based SAP systems to one SAP NetWeaver AS Java that is running the ADS that generates SAP Interactive Forms output formats. This setup is suitable for the use of SAP Interactive Forms in interactive scenarios.

    > 💡 NOTE
    >
    > For SAP NetWeaver 7.0 SP Stack 06 and higher, run both usage types AS ABAP and AS Java in one system to improve performance for printing scenarios in this system. This precludes the possibility of using one central ADS for several systems.
    >
    > As of SAP NetWeaver 7.0 SP Stack 12, this restriction no longer applies. Therefore you can also improve performance by using one central ADS for several systems.

    Ensure that the system running ADS has at least the Support Package level of the systems connected to it.

- Using Several ADS Installations from One System

    In an ABAP system, it is possible to create connections to several ADS installations through corresponding RFC destinations.

    The ABAP system uses the default ADS destination shipped with SAP NetWeaver. Note that this configuration is only created by the installer when you install an ABAP+Java dual stack system. If you install a Java standalone system, this destination is not created automatically. Therefore, if you choose a setup with several destinations, this needs to be coordinated with the business application

using a specific ADS installation. This is because the destination needs to be specified explicitly in the application.

In Java development (Web Dynpro), you can only connect to one ADS installation at a time.

- Adobe document services currently do not run on all platforms supported by SAP NetWeaver. For more information, see SAP Note 925741.

- For more information about the prerequisites for the development of SAP Interactive Forms by Adobe, see the information on SAP Developer Network at ▶ `http://sdn.sap.com/irj/sdn/adobe` → *Installation and Configuration* ◀.

A   Appendix

A.1 List of Documentation

Title	Location on SAP Service Marketplace
Cross-Component	
Master Guide — SAP NetWeaver 7.0	`http://service.sap.com/installNW70`
Upgrade Master Guide — SAP NetWeaver 7.0	▌▶ `http://service.sap.com/upgradeNW70` ◀┙
CRM Core	
Master Guide — SAP CRM 7.0	▌▶ `http://service.sap.com/instguides` ◀┙
Installation Guide — SAP CRM 7.0 <Java> on <Operating System>: <Database>	▌▶ `http://service.sap.com/instguides` ◀┙
Standalone Components	
Upgrade - TREX 6.1 to TREX 7.0 *Upgrade - TREX 7.0 to TREX 7.1*	`http://service.sap.com/trex`
Installation Guide — SAP Content Server	`http://service.sap.com/installNW70`
Installation Guide - Groupware Connector	`http://service.sap.com/instguides`
Application Components	
Upgrade Guide — SAP NetWeaver 7.0 Business Intelligence ABAP	`http://service.sap.com/upgradeNW70`
Upgrade Guide — SAP SCM Server	▌▶ `http://service.sap.com/instguides` → *SAP Business Suite Applications* → *SAP SCM* ◀┙
Solution Manager	
Master Guide — SAP Solution Manager	▌▶ `http://service.sap.com/instguides` → *SAP Components* → *SAP Solution Manager* ◀┙
Upgrade Guide — SAP Solution Manager	▌▶ `http://service.sap.com/instguides` → *SAP Components* → *SAP Solution Manager* ◀┙

A.2 SAP Notes for the Upgrade

Area	SAP Note Number	Title
Core	1118231	Supported user interfaces for SAP CRM
CRM Web Channel application	594370	Build tool for adjusting CRM Web Channel applications
CRM Mobile	1080862	Upgrade information about CRM Mobile Client Solution — CMW_LOB_MIGRATION and CRM new installation
Segmentation	1565886	Missing Number Ranges in Segmentation After Upgrade

Area	SAP Note Number	Title
SAP NetWeaver	1468349	This note describes which applications can run on a hub system with SAP NetWeaver 7.3 and as of which start release or SAP Enhancement Package this is possible.
SAP Organizational Management CRM	1635858	Multiple implementations under BADI `HRALE00INBOUND_IDOC` in CRM system - `"SINGLE_EXIT_MULTIPLY_ACTIVE"`

A.3 Links to Related Information

Content	Location in SAP Service Marketplace
The latest versions of installation and upgrade guides for SAP CRM	`http://service.sap.com/instguides`
Sizing of SAP CRM	`http://service.sap.com/quicksizer`
Information about released platforms	▶ `http://service.sap.com/platforms` → *Product Availability Matrix* ◀
Information about network security	`http://service.sap.com/securityguide`

B   Reference

B.1 The Main SAP Documentation Types

The following is an overview of the **most important** documentation types that you need in the various phases in the life cycle of SAP software.

Cross-Phase Documentation

SAPterm is SAP's terminology database. It contains SAP-specific vocabulary in over 30 languages, as well as many glossary entries in English and German.

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

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

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

The **security guide** describes the settings for a medium security level and offers suggestions for raising security levels. A collective security guide is available for SAP NetWeaver. This document contains general guidelines and suggestions. SAP applications have a security guide of their own.

- Target group:
  - System administrators
  - Technology consultants
  - Solution consultants
- Current version:
  - On SAP Service Marketplace at http://service.sap.com/securityguide

Implementation

The **master guide** is the starting point for implementing an SAP solution. It lists the required installable units for each business or IT scenario. It provides scenario-specific descriptions of preparation,

execution, and follow-up of an implementation. It also provides references to other documents, such as installation guides, the technical infrastructure guide and SAP Notes.

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

The **installation guide** describes the technical implementation of an installable unit, taking into account the combinations of operating systems and databases. It does not describe any business-related configuration.

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

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

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

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

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

Production Operation

The **technical operations manual** is the starting point for operating a system that runs on SAP NetWeaver, and precedes the application operations guides of SAP Business Suite. The manual refers

users to the tools and documentation that are needed to carry out various tasks, such as monitoring, backup/restore, master data maintenance, transports, and tests.

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

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

- Target group:
  - System administrators
  - Technology consultants
  - Solution consultants
- Current version:
  - On SAP Service Marketplace at `http://service.sap.com/instguides`

Upgrade

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

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

The **upgrade guide** describes the technical upgrade of an installable unit, taking into account the combinations of operating systems and databases. It does not describe any business-related configuration.

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

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

- Target group:

- Consultants
- Project teams for upgrades
■ Current version:
  - On SAP Service Marketplace at `http://service.sap.com/releasenotes`
  - In the SAP menu of the SAP system under ▷ *Help* → *Release Notes* ◁ (only ABAP developments)