ActiveControl - Quick Setup Guide

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Basis Technologies

Table of Contents

1. Introduction

Welcome to the ActiveControl 7.1 Quick Setup Guide.

ActiveControl is comprised of the following four modules:

- **Transport Expresso** – Core transport and change management module where transports, tasks, workflows, approvals, testing, imports and notifications occur
- **ShiftLeft** – Automated analysis checks that look at sequencing, completeness, risks, issues, dependencies, impacts and quality
- **DevAnalytics** – A set of KPIs and metrics to delivers deep insight into the performance of the SAP development and change process. Key metrics report on Velocity, Cycle Times, Rework & Waste, Work in progress and Approval times
- **DevMax** – Management of multi-track development processes enabling dynamic conflict detection and automated merge & retrotfit (included with ActiveControl Plus only)

These four modules will be referred to throughout the documentation as the relevant product features can be associated to one or more of these modules.

The Quick Setup Guide is intended as a simple step-by-step guide to setting up ActiveControl. This Guide is split into five sections to reflect the key phases of a ActiveControl implementation:

1. Preparation
2. Installation
3. Configuration
4. Final Preparation
5. Go Live & Support

Whilst setting up ActiveControl on your SAP estate, this Quick Setup Guide should be used in conjunction with the other available ActiveControl documentation and templates outlined in this section.

Typically, most implementations of ActiveControl are done with the support of an onsite Basis Technologies Solution Specialist. Remote support is also available from Basis Technologies if required via the contact details outlined at the back of this Quick Setup Guide.

1.1. Useful ActiveControl Documentation

The following documentation will all be useful during the initial setup of ActiveControl.

ActiveControl Document	Purpose
Self Blueprint	Used to help define the key characteristics of your organisation's required setup.
ActiveControl – Quick Setup Guide	Step-by step instructions for the main setup of ActiveControl
ActiveControl Administration Guide	Detailed technical documentation about ActiveControl
Security Roles Matrix	Details the standard roles that are provided with ActiveControl.
Technical FAQs	Online forum detailing many key functionalities available in ActiveControl. Available at http://support.basistechnologies.com/forums
DevAnalytics – Quick Setup Guide	Step-by step instructions for the setup of DevAnalytics

Depending on your intended processes within ActiveControl, the following online Technical FAQs may also be helpful during the implementation:

FAQ Topic	Location
Skipping	https://basistechnologies.zendesk.com/hc/en-us/articles/211710003
Merge	https://basistechnologies.zendesk.com/hc/en-us/articles/211706603
Auto-Transport Naming Convention	https://basistechnologies.zendesk.com/hc/en-us/articles/211711583
Backout	https://basistechnologies.zendesk.com/hc/en-us/articles/360000529123
Transport of Copies	https://basistechnologies.zendesk.com/hc/en-us/articles/211709163
Data Migration	https://basistechnologies.zendesk.com/hc/en-us/articles/211707003
Domain Controller Migration	https://basistechnologies.zendesk.com/hc/en-us/articles/211706863
System Refreshes	https://basistechnologies.zendesk.com/hc/en-us/articles/211707403

1.2. Useful ActiveControl Templates

ActiveControl Document	Purpose
Implementation Plan	Outlines the main activities required during a standard ActiveControl implementation.
Data Migration	Template used to migrate inflight ticket & transport into ActiveControl.
Training Slidedeck	Generic ActiveControl training slides that can be tailored to your organisations requirements.

2. 1. Preparation

Some preparatory activities need to be undertaken within your organisation before ActiveControl can be installed and configured, to define the scope of your ActiveControl rollout and map out the required processes and approvals workflow to be used.

Basis Technologies generally recommends that these preparation steps, and in particular the completion of the Self-Blueprint template are undertaken via a workshop involving the key internal SAP stakeholders and decision-makers within your organisation.

#	Activity	Details
1.1	Designate ActiveControl Administrators	Installing and maintaining ActiveControl requires a basic working knowledge of SAP and an understanding of your organisation's Change & Release processes. *Basis Technologies recommend 2-3 resources be assigned as ActiveControl Administrators, these will typically be Basis / Change & Release resources within most organisations*.
1.2	Designate a ActiveControl Domain Controller	The Domain Controller is a SAP system that hosts the ActiveControl application, is where ActiveControl configuration and application data is stored and is where users connect to access the tool. *Basis Technologies generally recommends to use a Solution Manager production system as the ActiveControl Domain Controller where possible. The Domain Controller system must be a Unicode system running NetWeaver 7.01 or above*.
1.3	Setup CTS+	CTS+ is a pre-requisite for managing non-ABAP systems through ActiveControl. This webpage provides some reference info to help your Basis team set up CTS+ http://wiki.scn.sap.com/wiki/pages/viewpage.action?pageId=343933137 Most customers use their Production Solman system as CTS+ domain controller but it does not have to be.
1.4	Setup SCOT	SCOT is a pre-requisite on your elected ActiveControl Domain Controller for TE notifications to work
1.5	Confirm all SAP systems	Every system that is to be managed by ActiveControl needs to be listed and documented along with details of their versions. Within the System tab of the Self-Blueprint, document all the SAP systems on which ActiveControl needs to be installed, including your elected Domain Controller.
1.6	Confirm if existing MDR /	Verify if customer is on an earlier release of MDR or Diffuser that might be overwritten and cause issues by ActiveControl installation.

	Diffuser customer	
1.7	Obtain ActiveControl License Key	Request a ActiveControl license key from Basis Technologies. You will need to provide your ActiveControl Domain Controller SID and installation number.
1.8	Obtain TE Software & Documentation	Request the ActiveControl server and client software from Basis Technologies along with the ActiveControl documentation.
1.9	Availability of Development system access	Part of the ActiveControl Implementation will require developer access in all ABAP development systems. Please ensure that the relevant resource has Developer Key access in advance of BTI coming onsite to avoid delays in the Implementation.

3. 2. Blueprint / Design

#	Activity	Details
2.1	Populate the Self-Blueprint	Populate all tabs of the Self-Blueprint.
2.2	Agree ActiveControl user roles	Review the Security Roles Matrix spreadsheet, and identify which roles will be needed within your organisation based on existing roles/responsibilities and processes and the decisions made on required Control Points and Approvers.

Depending on the nature of your ActiveControl Implementation, a formal Blueprint document may be provided by Basis Technologies as part of the Design phase of your ActiveControl implementation project.

4. 3. Realization

4.1. Installation

Regardless of your SAP system scope and architecture, some general installation steps will need to be performed on your SAP systems to prepare them for ActiveControl.

#	Activity	Details
3.1.1	Import ActiveControl Server and Web UI transports into Domain Controller	Import the transports provided by Basis Technologies into your designated ActiveControl Domain Controller. They must be imported in the order specified.
3.1.2	Import ActiveControl server transport into all other systems	Import the transport provided by Basis Technologies into all ABAP SAP systems that are running NW 7.01 or later. Important Note: A different transport is required if the remote systems are running an earlier version than NW 7.01 or are non-Unicode. If the system has multiple clients the ActiveControl roles transport needs to be imported into each client.
3.1.3	Create RFC users	Use SU01 to create a TE_RFC user in all clients of all SAP systems, including the ActiveControl Domain Controller. This RFC user needs the following ActiveControl role assignments: **SAP_BC_TRANSPORT_ADMINISTRATOR** **/BTI/TE:CTS_RFC** For all remote systems the TE_RFC user needs to be of type **System User** For the Domain Controller systems the TE_RFC user needs to be of type **Service User** Important: In the Domain Controller, TE_RFC user also needs **/BTI/TE:CTS_ADMIN_USER** and **/BTI/TE:CTS_ADMIN**
3.1.4	Create RFC destinations (in Domain Controller)	Use SM59 (>> Create Connection) to create RFC destinations in your ActiveControl Domain Controller: 1. To connect to All participating SAP systems (development, test, production, etc.) that will be managed by ActiveControl. 2. To connect back to the ActiveControl Domain Controller system itself The following nomenclature must be used:

<table>
<tr><td></td><td></td><td>
<table>
<tr><td>RFC Name</td><td>TRANSPORT EXPRESS XXX
Where XXX is the SID of the SAP system.</td></tr>
<tr><td>Connection Type</td><td>3 (ABAP Connection)</td></tr>
<tr><td>Target Host</td><td>Hostname of an application server of the SAP system
For CTS+ systems the RFC destination needs to connect to the CTS+ controller system</td></tr>
<tr><td>Client</td><td>The main client of the SAP system</td></tr>
<tr><td>User</td><td>TE_RFC</td></tr>
<tr><td>Password</td><td>_____</td></tr>
</table>
Note that RFC Destinations must be in ALL CAPITALS in the exact naming convention detailed above. (ie do not add client numbers)
After set up, test the connection via Utilities -> Test -> Authorization Test.

In addition, an RFC destination should be created on the ActiveControl Domain Controller, pointing back to itself.
</td></tr>
<tr><td>3.1.5</td><td>Create RFC Destinations (in Development Systems)</td><td>Use SM59 (> Create Connection) to create RFC destinations in all your development SAP systems to connect to the Domain Controller.

The following nomenclature must be used:
<table>
<tr><td>RFC Name</td><td>TRANSPORT EXPRESS CONTROLLER</td></tr>
<tr><td>Connection Type</td><td>3 (ABAP Connection)</td></tr>
<tr><td>Target Host</td><td>Hostname of an application server of the SAP system</td></tr>
<tr><td>Client</td><td>The main client where users connect to TE in the Domain Controller</td></tr>
<tr><td>User</td><td>TE_RFC</td></tr>
<tr><td>Password</td><td>_____</td></tr>
</table>
After set up, test the connection via Utilities -> Test -> Authorization Test.
</td></tr>
<tr><td>3.1.6</td><td>Install ActiveControl Windows GUI</td><td>Install the ActiveControl Windows GUI on your ActiveControl Administrator’s PC.

Note: ActiveControl can alternatively be installed/run from a central fileshare or Citrix server.</td></tr>
<tr><td>3.1.7</td><td>Create ActiveControl Administrators and allocate ActiveControl roles to</td><td>Using SU01, create the ActiveControl Administrator users and assign a valid email address for email notifications.

Add the following ActiveControl roles (within the ActiveControl Domain Controller):</td></tr>
</table>

		/BTI/TE:CTS_ADMIN_USER **/BTI/TE:STD_ADMIN_ROLE** Although most other user assignments can be done closer to ActiveControl go-live, the above roles are needed for the ActiveControl Administrators to install and configure ActiveControl.
3.1.8	Create ActiveControl users and assign ActiveControl roles to ActiveControl users	Using SU01, create the ActiveControl users and assign a valid email address for email notifications. Add the appropriate ActiveControl roles identified earlier (within the ActiveControl Domain Controller). Some organisations choose to do this activity nearer to go-live but it is good practice to get a full user list as soon as possible.
3.1.9	Create ActiveControl Batch job user	Using SU01, create a Batch job user (suggested username TE_BATCH) for use in all background jobs. The First and Last names should be ‘Transport’ and ‘Express’ so it’s easy for users to see where notification emails have come from. Add the following ActiveControl roles (within the ActiveControl Domain Controller): **/BTI/TE:CTS_ADMIN_USER** **/BTI/TE:CTS_RFC** **/BTI/TE:COMP_ADMIN_ROLE**
3.1.10	Update rdisp/ max_hold_time system parameter (Domain Controller + Development System)	To stop the SAP GUI screens from timing out when entering a transport form or task whilst using the field exit functionality it is recommended to increase the **rdisp/max_hold_time** parameter on all application servers of the ActiveControl domain controller AND all ABAP Development Systems. The recommended value for this is 360. This will require a system restart.

4.2. Configuration

After completing the preparation and installation activities outlined in the previous sections, ActiveControl can then be configured.

This section has been split into two main sub-sections to reflect the configuration that needs to be done within the ActiveControl Windows GUI and the configuration that needs to be done within SAP.

Depending on your existing SAP infrastructure and the scope and requirements of your ActiveControl setup, you may also need to perform some additional ActiveControl configuration. This optional configuration is detailed at the very end of this section.

4.2.1. Mandatory Configuration (Windows GUI)

The following configuration should be done within the ActiveControl Windows GUI main Configuration screen (accessible via Tools >> Configuration…).

#	Activity	Details
3.2.1	Upgrades Only	If performing Upgrade from previous version of ActiveControl, run program **/BTI/TE_RFIX_NULL_FIELDS** in the ActiveControl Domain Controller to avoid issues with new NetWeaver libraries delivered since version 6.20.
3.2.2	Create ActiveControl Administrators	Within the **Administrators and Priority Approvers** tab, add in the names of any ActiveControl Administrators designated for your organisation. The first user to login to ActiveControl via the Windows GUI will automatically be created as a ActiveControl Administrator.
3.2.3	Configure Projects	Within the **Classification** tab, add the Projects that were defined during the Preparation Phase activities.
3.2.4	Configure Groups	Within the **Classification** tab, add the Transport Form and Task groups that were defined during the Preparation Phase activities. Reminder: Transport form groups drive the approval process so this should map appropriately to the project/team structure. Task groups are used for grouping and reporting purposes and can be different to the Transport Form group.
3.2.5	Configure Types	Within the **Classification** tab, add the Transport Form and Business Task [Types] that were defined during the Preparation Phase activities. Reminder: the Type field is used for grouping and reporting purposes only. Again Business Task [Types] can be different to Transport Form [Types].
3.2.6	Configure Custom Fields	Within the **Fields** tab, add any additional Custom Fields deemed necessary for the Business Task and Transport Form screens within your organisation.
3.2.7	Confirm Mandatory / Optional Fields	Within the **Fields** tab, update the Mandatory pane to reflect whether you need the various standard Business Task and Transport Form fields to be mandatory or optional.
3.2.8	Configure Deployment Statuses	Within the **Task Statuses** tab, add the Deployment Statuses that were defined during the Preparation Phase activities.
3.2.9	Create Target Roles	Within the **Target Roles and Transport Schedules** tab, create Target Roles for each environment in your SAP estate. Depending on your SAP landscape, typical examples

<table>
<tr><td></td><td></td><td>of Targets you may want to create include:

1. Development
2. QA
3. Pre-Production
4. Production
5. Training
6. Sandbox
7. Project QA
8. Project Integration Testing
9. Project Regression
10. Merge</td></tr>
<tr><td>3.2.10</td><td>Create Import Schedules</td><td>Within the Target Roles and Transport Schedules tab, create any required schedules for automatically importing transports on your systems.

Some examples of Schedules you might set up are:

<table><tr><td>QA Import</td><td>Daily, every 15 minutes</td></tr><tr><td>Production Import</td><td>Thursdays @ 18:00</td></tr></table>
Please refer to Admin Guide for further information on schedules as required. You must allocate the batch user to each schedule and add them as an ActiveControl administrator so they have the correct roles to allow them to perform the imports.

Note: Do not assign the Schedules to any of the Target Systems at this time, this should be done just prior to go-live.</td></tr>
<tr><td>3.2.11</td><td>Configure Target Systems</td><td>Within the Targets and Transport Paths tab, create ‘New Targets’ for all system in your SAP landscape. Target systems must be created for every SAP systems (e.g. ECC DEV, TST, PRD plus BW DEV, TST, PRD) that ActiveControl is to manage on your SAP estate.

Please refer to the Administration Guide for more details of the settings, however the following is a general example of what you might want to setup at this point.

<table><tr><td>SAP System ID</td><td>ECD</td></tr><tr><td>Description</td><td>ECC Development System (BAU)</td></tr><tr><td>Group Label</td><td>ECC</td></tr><tr><td>Role</td><td>Development</td></tr><tr><td>Clients</td><td>100,200, 300</td></tr></table>
The rest of the Target configuration will be done later in this section.</td></tr>
</table>

3.2.12	Configure Transport Paths	Within the **Targets and Transport Paths** tab, create 'New Transport Path…' for all system in your SAP landscape. Separate transport paths should be created for each SAP module (e.g. ECC, BI, CRM, XI, Portal etc.) and for each landscape tier in your overall SAP estate (e.g. BAU, N+1 etc.) Please refer to the Administration Guide for more details of the Transport Path settings.
3.2.13	Add Targets to Transport Paths	Within the **Targets and Transport Paths** tab, add Target Systems to each Transport Path (by highlighting the required path and dragging and dropping into the window). If a target is dragged on top of another target it will follow that target in the transport system sequence. (E.g. QA could be dragged onto top of Development; Production could be dropped on top of QA etc.)
3.2.14	Switch on Approval Control Points	Within the **Targets and Transport Paths** tab, switch on the required Inbox, Test Queue and Outbox control points for each target system in the Transport Path. These should be switched on wherever there is a requirement to enforce an approval or test result entry step. Allocate the required deployment statuses to each target system and control point.
3.2.15	Configure Approvers	Within the **Targets and Transport Paths** tab, open each Target System and add the required Approvers to each of the **Inbox (Pending) Approvers** and **Outbox Approvers** tabs.
3.2.16	Add Analysis Type Checks	Within the **Targets and Transport Paths** tab, open each Target System and add the Analysis Checks required for that system in the **Analysis Types** tab.
3.2.17	Switch on Caching and other configuration	Within the **Other** tab: 1. Switch on **Caching remote transport data** to improve performance. 2. Switch on **Require transport forms to be assigned to related tasks** to enforce that every transport form must be allocated to the relevant change/ticket. 3. Switch on **Configured testers only to complete testing** to enforce that only the designated testers are allowed to enter test results. 4. Switch on **Enable "Add to Control Point" function** to activate this function. The other configuration settings on this tab are entirely dependent on your organisations individual requirements. Refer to the Administration Guide to help you decide whether any of the 'Other' configuration options should be enabled.

4.2.2. Mandatory Configuration (SAPGUI)

The following ActiveControl configuration should be done within SAP GUI directly.

<table>
<tr><th>#</th><th>Activity</th><th>Details</th></tr>
<tr><td>3.3.1</td><td>Enable Email Notifications in Domain Controller</td><td>Use SCOT to enable the sending of SMTP emails in your ActiveControl Domain Controller SAP system.

Depending on your existing SAP setup and chosen Domain Controller, this activity may already have been done by your Basis team.</td></tr>
<tr><td>3.3.2</td><td>Set up Email Notifications Job & Variant</td><td>Use SA38 on program /BTI/TE_RNOTIFICATION_ENGINE to switch on/off the required email notifications for your organisation in your Domain Controller.

The following settings must also be configured:
<table><tr><td>Connection string</td><td>This is to allow the transport logs to be accessible via an email attachment for import emails. E.g. /H/bt35.basistechnologies.net/S/3220

Note: the final 20 (in 3220) is the system number</td></tr><tr><td>BSP Server address</td><td>This is to allow direct access to the TE web interface from the emails E.g. http://office.basistechnologies.net:8020/

Note: the final 20 (in 8020) is the system number again</td></tr></table></td></tr>
<tr><td>3.3.3</td><td>Schedule Email notification job</td><td>Use SM36 to schedule program /BTI/TE_RNOTIFICATION_ENGINE to run every 2-5 minutes in the ActiveControl Domain Controller.

Use the Batch user for the job steps.

You may also need to schedule program RSCONN01 to run as a second step in this job if it is not already set up by your Basis team. This will actually send the emails.</td></tr>
<tr><td>3.3.4</td><td>Activate SAP GUI processing</td><td>Use SM31 to update table /BTI/TE_CONTROL in each of your development systems with an “Active” entry for the users that will be involved in testing.

Use a Blank username to switch on for all users.</td></tr>
<tr><td>3.3.5</td><td>Activate Development System SAP GUI Functions</td><td>Use SM31 to maintain table /BTI/TE_ACTIVE in your ActiveControl Domain Controller and switch on the relevant active functions required for your desired process:

• Transport is released</td></tr>
</table>

		• Transport is first used • In-Line Conflict Analysis (needed for multi-track landscapes only) • Show object key conflicts in In-Line Conflict Analysis (needed for multi-track landscapes only) etc…
3.3.6	Web UI Activate web interface	Use SICF to activate the following services in your Domain Controller: default host > BTI > te web services default host > sap > public -> bsp -> sap (to enable web interface to work, all sub nodes must be activated) default host -> sap -> bc -> gui -> sap -> its -> webgui (to enable the Reports to work in Web UI) default host > sap > bc -> bsp -> bti -> te_bsp_new When completed, establish the Web UI URL by testing the te bsp new service.
3.3.7	Schedule Web UI News Job	Use SM36 to schedule program /BTI/TE_RUNEWS_UPDATE to run every 5 minutes in the ActiveControl Domain Controller. (after first creating a variant in SE38) Use the Batch user for the job steps.
3.3.8	Schedule Web Following Job	Use SM36 to schedule program /BTI/TE_RUFOLLOWITEMS_UPDATE to run every 5 minutes in the ActiveControl Domain Controller. (after first creating a variant in SE38) Use the Batch user for the job steps. This can be run against the same job as the previous step.
3.3.9	Schedule TE Data Backup	Use SM36 to schedule a job to run program /BTI/TE_RBACKUP_DATA_EXP_NEW to back up all your ActiveControl data and configuration tables. (after first creating a variant in SE38. Make sure that the path for saving the files is valid. Run the program once to check it works.) Use the Batch user for the job steps. Basis Technologies would generally recommend that you schedule this backup on a daily basis. 1. Consider your backup frequency, 2. Consider your Domain Controller capacity consumption.
3.3.10	Document Categories	Use SE16 to populate /BTI/TE_ATT_CAT with the required document categories. (See FAQ for some suggestions)
3.3.11	Archive Preparation	(Upgrades only) Use SE38 to run /BTI/TE_RUUPDATE_TASK_CRT_DATE to populate new Task Creation Date field on historically created Tasks.

4.2.3. Optional Configuration

The following configuration and set-up is deemed optional and is not mandatory for running ActiveControl. Many organisations choose not to setup some or all of these steps due to their own internal and external requirements and obligations.

#	Activity	Details
3.4.1	Switch on Transport Backout	Within the **Import Options** tab of each Target System, enable the "Automatically create backup transport requests" for all required systems Most organisations switch on Backout for Production systems only.
3.4.2	Create BAK virtual target	If using Transport Backout, a virtual system called BAK needs to be created in TMS within the transport domain of the intended systems where you will run Backout.
3.4.3	Tadirdeletions parameter	If using Transport Backout, you also need to set the STMS parameter tadirdeletions = "True" in each of the intended systems where you will run Backout.
3.4.4	Add Priority Approvers	Within the **Administrators and Priority Approvers** tab, add in the names of any Priority Approvers deemed necessary within your organisation. This activity is deemed as optional. For most organisations, Priority Approvers will not be set-up for audit/compliance reasons.
3.4.5	Add Labels	Labels can be used to customise the text names of fields presented within ActiveControl Windows GUI. For example, you might want to create a label to rename the default **Reference** field on a Business Task to be **ServiceNow #**. Labels can be created within the **Classifications** tab as required.
3.4.6	Configure User Roles	Within the **User Roles** tab, create any required user roles and then allocated the required users to each one.
3.4.7	Configure Planning Statuses	Within the **Task Statuses** tab, add any Planning Statuses that were defined during the Preparation Phase activities. This activity is deemed as optional. For most organisations, the Planning functionality will not be used within ActiveControl as any pre-transport deployment will be handled outside of ActiveControl.
3.4.8	Configure Planning	Within the **Planning** tab, create any required planning configuration. This is used for pre-deployment approval steps (e.g. CAB approval). • Configure the Change Step Templates. • Create the required Change Paths.

		• Drag the change step templates into the change paths to create the required change process.
3.4.9	Setup Configurable Analysis	Within the **Targets and Transport Paths** tab, open the required target systems and in the **Analysis Types** tab, switch on the required analysis types. This can be used to setup checks like Risk Assessment, Security, Performance, Development Standards, etc.
3.4.10	Web UI: Maintain preferences	Use SM31 to update table /BTI/TE_WEBUICFG in the Domain Controller to set any general parameters and preferences for the Web UI.
3.4.11	Web UI: Maintain user pictures	Use SMW0 to upload any user pictures in the Domain Controller. Refer to the Admin Guide for further instructions on how to do this optional configuration.
3.4.12	Web UI: Maintain Project Phases	Use SM31 to update table /BTI/TE_PHASE in the Domain Controller to reflect the project phases that your organisation may want to reflect within the ActiveControl Web UI.
3.4.13	Web UI: Map Statuses to Phases	Use SM31 to update table /BTI/TE_PHASSTAT in the Domain Controller to allocate Deployment Statuses to Project Phases.
3.4.14	Web UI: Allocate Project Start/End Dates	Use SM31 to update table /BTI/TE_PRJPHASE in the Domain Controller to allocate start/end dates to the phases of each Project.
3.4.15	Documentation Links	It is possible to add URL documentation links via the web UI and Windows GUI help menus to point at standard BTI or customer specific documentation. These document links will then be visible via the Help menu in both the ActiveControl Windows GUI and the ActiveControl Web UI. Document links can be maintained in the ActiveControl Domain Controller via table /BTI/TE_HLP_LINK.
3.4.16	Lock transport naming convention	SAP transport short description sequence can be locked to force developer naming consistencies.
3.4.17	Automate transport Release after defined Control Point sign-off	After approval of items at the Test Queue or Dev Outbox, Transport Expresso could automatically release transports.

4.2.4. DevMax: Multi-track Specific Configuration

DevMax functionality is relevant only for customers with dual/multi-track SAP. The configuration detailed in this section can be ignored if you are operating a single-track SAP landscape.

#	Activity	Details
3.5.1	Setup Merge	Please refer to the ActiveControl Administration Guide and/or online FAQ Forum for detailed instructions on setting up Merge Process.
3.5.2	Switch on Merge Conflict Analysis	Within the **Targets and Transport Paths** tab, open all Merge Target Systems and in the **Analysis Types** tab, switch on 'Conflict Analysis' and make it mandatory.
3.5.3	Configure In-Line Conflict Analysis Systems	Use SM31 to update table /BTI/TE_INLINE in the Domain Controller to configure which systems should be checked for parallel development activity. For example, if systems ECD and EPD are parallel development systems, "Active" entries should be created here for ECD -> EPD and EPD -> ECD.
3.5.4	Configure In-Line Conflict Analysis Systems	In the Windows GUI, ensure that you have entered a client number in the "Before Importing, check whether…." text box for the target. This is required so that Transport Expresso what client to connect to for the analysis.

4.2.5. System Specific Configuration

Some additional configuration is required if you have specific types of SAP systems such as BW or Java systems or if you want to use specific functionality such as ShiftLeft: Deep Impact Analysis

Please refer to the ActiveControl Administration Guide and online support forum for full details of what is required for anything not covered already as part of this Quick Setup Guide.

5. 4. Final Preparation

This section details the final preparatory activities that should be done prior to Go-Live.

5.1. Testing

Basis Technologies strongly recommend that our customers thoroughly test their ActiveControl setup fully before go-live.

Wherever possible, this should involve moving SAP transports through the entire SAP landscape using the workflow and approval control points you have configured within ActiveControl

At an absolute minimum, Basis Technologies would recommend that the following scenarios are tested:

#	Suggested Test
1	Run test transports through all systems to ensure that all is working correctly and as expected. Check Imports, Skipping Rules etc
2	Test Workbench and Customizing transports end to end.
3	Test Approval process.
4	Test all key Analysers Including Overtake / Conflict Analysis etc
5	Test Email notifications (including link from Web interface).
6	Test Web interface (operation, approvals, analysis, etc.).
7	Test user access and roles / authorizations. (especially if using copied Z roles)
8	Test transport Backout process. (if relevant)
9	Test Merge process (if relevant)
10	Test In-line conflict analysis. (if relevant)
11	Test user exits / enhancements. (if relevant)

Basis Technologies recommend involving the intended end-user community in the testing process, as it is a good way of building familiarity and buy-in to the ActiveControl product in advance of go-live.

5.2. Training

Developers/Functional Teams, Testers and approvers and Basis will all need to be trained on ActiveControl prior to go-live.

Please refer to the provided training slide-decks template for the generic Basis Technologies training slides.

Basis Technologies recommend that these template slides are tailored to a customer’s own organisation and intended ActiveControl setup.

This is typically done by a Basis Technologies consultant in conjunction with the customer, during an implementation project.

5.3. Data Migration

The upload of inflight transports into ActiveControl is a 2-step process.

First your existing Tickets are uploaded as Business Tasks, and secondly then your in-flight Transports are uploaded as Transport Forms.

The Data Migration template (please request from Basis Technologies consultant working with you) and the following instructions should be used for uploading your existing data into ActiveControl.

It is strongly recommended that you switch off any automated Schedules before performing a Data Migration, to avoid any risk of transports being incorrectly imported / re-imported to a SAP system.

#	Activity	Details
4.1	Populate Business Task Template	Populate the **Task** tab of the Data Migration template with the details of all current open 'tickets' you want to upload into Transport Expresso. Note that the values for Business Task [Group], Business Task [Type] and [Project] are the long GUID numbers taken from tables /BTI/TE_GROUP, /BTI/TE_TYPE and /BTI/TE_PROJ respectively. You can use SE16 to get this information.
4.2	Populate Transport Form Template	Populate the **Transport Form** tab of the Data Migration template with the details of all current open 'tickets' you want to upload into Transport Expresso. The Business Task [Reference] , [Project], [Group] and [Type] are again the long GUID numbers taken from tables /BTI/TE_TASK, /BTI/TE_PROJ, /BTI/TE_GROUP and /BTI/TE_TYPE respectively. Again, you can use SE16 to get this information.
4.3	Upload Business Tasks	Use SE38 to execute program /BTI/TE_RTASK_UPLOAD
4.4	Upload Transport Forms	Use SE38 to execute program /BTI/TE_ANALYTICS
4.5	Perform any manual movements	Depending on your intended ActiveControl workflow, it is likely that you will need to manually move some of the uploaded Transport Forms into the correct location. This should be done using the standard ActiveControl Approval and 'Mark as Imported' functionality.

6. 5. Go-Live & Support

6.1. Cutover activities

The following activities should be performed just prior to your ActiveControl Go-Live:

#	Activity	Details
5.1	Assign Schedules	Within the **Targets and Transport Paths** tab, open each Target System and allocate the relevant Schedule to each of your SAP systems.
5.2	Activate SAP GUI processing	Use SM31 to update table /BTI/TE_CONTROL to switch on the SAP GUI processing for all users in each of your development systems, but using a blank username.

6.2. Frequently Asked Questions

Basis Technologies actively maintain an online database of FAQs and Error Messages on our website.

http://support.basistechnologies.com/forums

Basis Technologies strongly encourage our customers (in particular ActiveControl Administrators and Basis team) to register for accounts on our website, and actively make sure of this forum. It not only helps our customers be more self-sufficient in resolving common issues more quickly, but also helps us understand the common challenges our customers are facing so we can add product improvements in the future where appropriate.

6.3. Support from Basis Technologies

Raising Support Tickets

To request support from Basis Technologies on any issue relating to our product sets (ActiveControl, Transport Expresso, DevOps, Testimony, Diffuser, Utilities or Transformation), a ticket should be raised via the following email address:

support@basistechnologies.com

Sending an email to this address will automatically create a ticket in Zendesk, the ticketing tool used by Basis Technologies.

To help us offer you the best service with your issue, please include as much information as possible about the issue, with particular attention to the following:

- **Customer:** Include the name of the customer you are representing, it may not always be obvious from your email address
- **Product and Version:** Include the Basis Technologies product and version that you are operating that has the issue
- **System & Client:** The system and client where the issue/fault occurred and if it's a license key issue provide the SAP system installation number (it is always ten digits long)
- **Description:** A clear description of the problem and the steps to replicate the issue, with screen shots
- **Data:** Any master or transactional data objects associated with the issue. E.g. Business Partner, BPEM Case ID, Plant
- **Error Messages:** Details of any error or warning messages given including where applicable run time errors, short dumps and error logs
- **User ID:** The User ID being used when the issue occurred
- **Authorisations:** Ensure transaction SU53 is run and results shared to help with authorisation issues
- **Contact Details:** Please include your own contact details in your email
- **Priority:** Reflect any high priority issues by including URGENT or HIGH PRIORITY at the start of the email subject

Support Escalation

If you have any concerns with the service you are getting from Basis Technologies support, or wish to escalate any high priority issues please email **supportescalation@basistechnologies.com**

Require additional Information or Services?

If additional information or services relating to any of Basis Technologies product sets is required, you can contact us via the above support@basistechnologies.com address, or alternatively by contacting your assigned Basis Technologies Account Director.

7. Cutover activities

The following activities should be performed just prior to your ActiveControl Go-Live:

#	Activity	Details
5.1	Assign Schedules	Within the **Targets and Transport Paths** tab, open each Target System and allocate the relevant TE schedule to each of your SAP systems.
5.2	Activate SAP GUI processing	Use SM31 to update table /BTI/TE_CONTROL to switch on the SAP GUI processing for all users in each of your development systems, but using a blank username.

8. Frequently Asked Questions

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9. Support from Basis Technologies

Raising Support Tickets

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