ActiveControl - Quick Setup Guide

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Basis Technologies

Table of Contents

Introduction **3**
Documentation and Templates 4

1. Prepare **6**

2. Explore **8**

3. Realize **9**
Initial Installation: SAP GUI 10
Initial Installation: Web Platform 13
Mandatory Configuration: Web Platform 14
Mandatory Configuration: SAP GUI 18
Optional Configuration 20
ActiveDiscover Integration 22

4. Deploy **24**

5. Run (Ongoing Support) **28**

Introduction

Welcome to the ActiveControl 9.20 Quick Setup Guide.

The Quick Setup Guide is intended as a summarised step-by-step guide to implementing ActiveControl. It only details the main setup that most customers will perform and is not intended as an exhausted list of all configuration and feature capabilities within ActiveControl. It should be used in conjunction with the other available ActiveControl documentation and templates outlined in the Documentation and Templates section.

The Quick Setup Guide is split into five sections to reflect the key phases of an ActiveControl implementation project:

1. Prepare (Kickoff and Planning)
2. Explore (Design and Blueprint)
3. Realize (Technical Setup and Configuration, Testing, Training)
4. Deploy (Final Preparation, Data Migration, Go-Live)
5. Run (Hypercare, Support)

Most implementations of ActiveControl are typically performed with the support of a Basis Technologies' Solution Specialist to help ensure the product is deployed in a way that best meets the requirements of the customer, and also provides the most value from the product.

Documentation and Templates

Useful Documentation

The following documentation will be useful during the initial setup of ActiveControl, and also for ongoing reference during operational usage of the product.

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
ActiveControl User Guide	Detailed functional user documentation about ActiveControl
Security Roles Matrix	Details the standard out-of-the-box Single and Composite Roles that are provided with ActiveControl.
Email Notifications Matrix	Details the standard email notifications sent by ActiveControl, and their audiences.
Analyser Matrix	Summary of the 70+ automated ShiftLeft analysers available with ActiveControl.
Knowledge Articles	Online forum containing 1000+ Knowledge Articles and Changes Notes relating to ActiveControl. Available at https://basistechnologies.zendesk.com/hc/en-us
DevAnalytics – Quick Setup Guide	Step-by step instructions for the setup of DevAnalytics

Useful Templates

ActiveControl Template	Purpose
Activity Plan	Excel spreadsheet outlining the main activities required during a standard ActiveControl implementation.
Data Migration	Excel spreadsheet template used to migrate inflight tickets & transports into ActiveControl as Business Tasks and Transport Forms.

Training Slidedeck	Generic ActiveControl training slides that can be tailored to your organisations requirements.

Popular Knowledge Articles

Depending on your intended processes within ActiveControl, the following online Knowledge Articles will likely also be helpful during the implementation:

FAQ Topic	Knowledge Article link
Rules Engine – Approvals	Various – search for “Rules Engine Approval”
Rules Engine – Skipping	Various – search for “Rules Engine Skip”
Rules Engine – Testing	Various – search for “Rules Engine Test”
Merge	Link
Auto-Transport Naming Convention	Link
Backout	Link
Transport of Copies	Link
Data Migration	Link
Domain Controller Migration	Link
System Refreshes	Link

1. Prepare

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 items are discussed and progressed as part of a Project Kickoff meeting involving the key internal SAP stakeholders and decision-makers within your organisation.

Activity	Details
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 SAP Basis and/or SAP Change & Release resources within most organisations*.
Designate 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. Many customers over the years have chosen to use Solution Manager or GRC as their ActiveControl Domain Controller, however the reality is it can be any Production system with high availability. The Domain Controller system must be a Unicode system running NetWeaver 7.01 or above_.
Designate ActiveControl Web Platform docker host	The ActiveControl Web Platform front end User Interface is a docker image that needs to be hosted by the Customer. This can be deployed to either SAP BTP or a standalone Linux server.
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.
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.
Obtain Active Software & Documentation	Request the ActiveControl software and documentation from Basis Technologies.
System access	Part of the ActiveControl Implementation will require developer access in all ABAP development systems, and also the Domain Controller. Please ensure that the relevant

	resource has Developer Key access in advance of BTI coming onsite to avoid delays in the Implementation.
Setup CTS+	CTS+ is a pre-requisite for managing any inscope non-ABAP systems through ActiveControl. Most customers use their Production Solman system as CTS+ domain controller but again, it does not have to be. This external web link provides some reference info to help your Basis team set up CTS+
Setup SCOT	SCOT is a pre-requisite on your elected ActiveControl Domain Controller for the AC email notifications to work.

2. Explore

Activity	Details
Design Workshop	Depending on the nature of your ActiveControl Implementation, it is likely that a Design Workshop may be organized by Basis Technologies as part of the Explore phase of your ActiveControl implementation project, and a formal Blueprint document provided as an output from that session.
Self-Blueprint	Populate all tabs of the Self-Blueprint.
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. Decide whether you will use the out-of-the-box ActiveControl roles, or take Z copies. Decide whether you will use solely single roles, or also use composite roles.

3. Realize

This section of the Quick Setup Guide summarises the technical steps to setup ActiveControl.

Initial Installation Setup

After the Project Kickoff meeting held during the Prepare Phase, there are some initial installation activities that should be done in advance of the main technical configuration. Given these activities are pre-requisites for the main Realization phase, Basis Technologies recommend that they are initiated in parallel to the Explore Phase, since some of the activities (eg transport deployment, user creation) may have a lead-time within the Customer organisation, particularly where third-party partners are involved.

- Initial Installation – SAP GUI
- Initial Installation – Web Platform

Mandatory Configuration

After completing the initiall installation setup activities outlined above, ActiveControl can now be configured. The majority of the Configuration detailed in this section will be appropriate for most ActiveControl customers.

- Configuration in the Web Platform
- Configuration in the SAPGUI

Optional Configuration

No Basis Technologies customer uses all features and capabilities within ActiveControl. Some configuration is deemed slightly more optional, and will depend more on an individual SAP customer's required processes within ActiveControl.

- Optional Configuration

Initial Installation: SAP GUI

ActiveControl is an ABAP Add-On. Most of the data/configuration of ActiveControl resides in a Domain Controller SAP system elected by the Customer.

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 the ActiveControl implementation.

It is recommended that you perform these steps with the support of a Basis Technologies' Solution Specialist to ensure that all activities are completed and checked correctly.

Activity	Details
ActiveControl software transports (ActiveControl Domain Controller)	Please refer to this Knowledge Article for full details of the transports and sequence.
ActiveControl software transports (Development Satellite Systems)	Please refer to this Knowledge Article for full details of the transports and sequence that need to be deployed in Development satellite systems.
ActiveControl software transports (Non-Development Satellite Systems)	Please refer to this Knowledge Article for full details of the transports and sequence that need to be deployed in non-Development satellite systems.
Create RFC user (Domain Controller)	Use SU01 to create a service AC_RFC user in the ActiveControl Domain Controller. This RFC user needs the following ActiveControl role assignments: **/BTI/TE:CTS_RFC** **/BTI/TE:CTS_ADMIN_USER** **/BTI/TE:CTS_ADMIN**
Create RFC users (all remote Satellite systems, all clients)	Use SU01 to create a system AC_RFC user in **all clients** of all remote satellite SAP systems (Ie Dev, QA, Production, Training etc) to be managed by ActiveControl. This RFC user needs the following ActiveControl role assignments: **/BTI/TE:CTS_RFC**
Create RFC destinations out to all satellite	Use SM59 (>> Create Connection) to create RFC destinations in your ActiveControl Domain Controller. The following nomenclature must be used:

managed systems (Domain Controller)	**RFC Name**: TRANSPORT EXPRESS XXX (where XXX is the SID of the SAP system) **Connection Type**: 3 **Target Host**: Hostname of an application server of the SAP system. **Client**: The main client of the SAP system. **User**: AC_RFC **Password**: _____ 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.*
Create RFC destination pointing back at itself (Domain Controller)	An RFC destination should be created in the ActiveControl Domain Controller, pointing back to itself. The same nomenclature as the previous step should be used. *After set up, test the connection via Utilities -> Test -> Authorization Test.*
Create RFC Destinations (in Development Systems)	Use SM59 (> Create Connection) to create RFC destinations in all your development SAP systems to connect to the AC Domain Controller. The following nomenclature is recommended: **RFC Name**: TRANSPORT EXPRESS CONTROLLER (it does not have to be exactly this) **Connection Type**: 3 **Target Host**: Hostname of an application server of the SAP system. **Client**: The main client where users connect to ActiveControl in the Domain Controller. **User**: AC_RFC (it does not have to be exactly this) **Password**: _____ *After set up, test the connection via Utilities -> Test -> Authorization Test.*
Create ActiveControl Administrators and allocate ActiveControl roles	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): **/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.
Create ActiveControl Batch job user	Using SU01, create a Batch job user (suggested username AC_BATCH) for use in all background jobs. The First and Last names should be ‘Active’ and ‘Control’ 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**
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.
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.

Initial Installation: Web Platform

The ActiveControl Web Platform UI is a docker image that must be hosted by the customer on either SAP BTP or a standalone Linux server.

Links to Knowledge Articles detailing the deployment steps for each deployment option can be found below:

- Deploying the Web Platform on SAP BTP
- Deploying the Web Platform on standalone Linux server

It is recommended that you perform the docker deployment with the support of a Basis Technologies solution specialist.

Mandatory Configuration: Web Platform

The following configuration should be done within the ActiveControl Web Platform UI. Most of this configuration is done via the Administration tile, in configuration screens that can be maintained only by defined ActiveControl Administrators.

Note: If performing Upgrade from TE6.20 or earlier, please first run program **/BTI/TE_RFIX_NULL_FIELDS** in the SAPGUI of the ActiveControl Domain Controller to avoid issues with new NetWeaver libraries delivered since version 6.20.

Fields & Metadata

Activity	Details
Groups	Within the **Groups** app tile, add the Transport Form and Business Task groups that were defined during the Preparation Phase activities. Reminder: Transport form groups typically 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.
Types	Within the **Types** app tile, 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].
Mandatory / Optional Fields	Within the **Standard Fields** app tile, update the Mandatory fields to reflect whether you need the various standard Business Task and Transport Form fields to be mandatory or optional.
Labels	Within the **Standard Fields** app tile, define any field Labels to adjust the standard field names to your own local terminology (Eg. Business Task – Reference field may be renamed as “Jira #”.
Custom Fields	Within the **Custom Fields** app tile, add any additional Custom Fields deemed necessary for the Business Task and Transport Form screens within your organisation.
Statuses	Within the **Statuses** app tile, add the Deployment Statuses that were defined during the Preparation Phase activities.
Target Roles	Within the **Target Roles** app tile, create Target Roles for each environment in your SAP estate. Depending on your SAP landscape, typical examples 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

Users

Activity	Details
Administrators	Within the **Administrators** tile, add in the names of any other ActiveControl Administrators designated for your organisation. Please note, Administrators can either be defined here or given the ActiveControl authorisations for an Administrator. Either of these will result in the user being able to perform the configuration within ActiveControl.
Business Roles	Within the **Business Roles** tile, define the User Roles as required. It is recommended not to assign all users until closer to go-live, to avoid unwanted emails being sent during initial setup and testing.
Priority Approvers	Within the **Priority Approvers** tile, add in the names of any required Priority Approvers. It should be noted that most Basis Technologies' customers do not use this powerful approval capability.

Targets & Paths

Activity	Details
Target Systems	Within the **Targets** tile, create 'New Targets' for all system in your SAP landscape. Target systems must be created for every individual SAP systems (e.g. ECC DEV, TST, PRD plus BW DEV, TST, PRD) that ActiveControl is to manage on your SAP estate.
Transport Paths	Within the **Transport Paths** tile, create Transport Paths for each of the SAP applications in your landscape. (eg S/4HANA Production Support, S/4HANA Project Track etc.
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.)
Control	Within the **Targets and Transport Paths** tab, switch on the required Inbox, Test Queue and

Points	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.
Approvers	Since ActiveControl 8.0, most ActiveControl customers use the Rules Engine for defining Approvers, instead of the Inbox/Outbox target configuration. For customers still utilising the legacy [Transport Form]-[Group] based Approval structure, 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.
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.

Other Setup

Activity	Details
Import Schedules	Within the **Import Schedules** tile, create any required schedules for automatically importing transports on your systems. Some examples of Schedules you might set up are: Every 2 minutes – QA Thursdays @ 18:00 Production 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. It is recommended not to assign the Schedules to any of the Target Systems during the initial setup, this can be done later on during the testing cycle.
Global Options	Enable the configuration options in the **Global Options** tile as per your specific requirements.
Feature Deactivation	Disable any of the Features of ActiveControl that you do not want to use via the **Feature Deactivation** tile.
Backend Tables	Although much of the ActiveControl configuration is done within the Web Platform, around 20% is done in backend tables. This includes features such as Rules Engine, Transpot Naming Convention, Document Attachments, Transport of Copies etc. These tables can be accessed via the SPRO menu accessed via the **Backend Tables** tile.

Home Screen

Projects	Within the **Projects** app tile on the main ActiveControl screen, add the initial customer Projects and Releases as per what were defined during the Design workshop.

Mandatory Configuration: SAP GUI

The following ActiveControl configuration should be performed within SAPGUI directly.

Topic	Details
Set up Email Notifications Job & Variant	Use SA38 on program **/BTI/TE_RNOTIFICATION_ENGINE** in the ActiveControl Domain Controller to switch on/off the required email notifications for your organisation and save as a variant. Then use SM36 to schedule program /BTI/TE_RNOTIFICATION_ENGINE to run every 5-10 minutes. Use the AC_BATCH 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, as this is what will actually send the emails.
Activate SAP GUI processing	Use SE16 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. Needs to be added in each Client if creating transports in more than one client in the Dev system. *At Go-Live, entering a Blank username will switch on ActiveControl for all users.*
Activate Development System SAP GUI Functions	Use SE16 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 • Transport is first used
Activate Web Services	Use **SICF** to activate the following services in your Domain Controller: default host > BTI > te web services default host > BTI > tessocntl default host > BTI > webplatform default host > sap > public -> bsp -> sap default host -> sap -> bc -> gui -> sap -> its -> webgui
Schedule Web UI News Job	Use SE38 to create a variant for program **/BTI/TE_RUNEWS_UPDATE** (use the default settings). Then use SM36 to schedule program to run every 5 minutes, using the AC_BATCH user for the job.
Schedule Web Following Job	Use SE38 to create a variant for program **/BTI/TE_RUFOLLOWITEMS_UPDATE** (use the default settings). Then use SM36 to schedule program to run every 5 minutes, using the AC_BATCH user for the job.
Schedule RFC	Use SE38 to create a variant for program **/BTI/TE_RCHECK_RFC_CONNECTIONS*

Connections Job	Note you should exclude any Virtual Target SIDs from your Variant. Then use SM36 to schedule program to run every 10 minutes, using the AC_BATCH user for the job.
Schedule Forward Scheduling Job	Use SE38 to create a variant for program **/BTI/TE_RX002* . Then use SM36 to schedule program to run every 10 minutes, using the AC_BATCH user for the job. More information can be found in this online Knowledge Article.
Schedule ActiveControl Data Backup	Use SE38 to create a variant for program **/BTI/TE_RBACKUP_DATA_EXP_V3** to back up all your ActiveControl data and configuration tables. Run the program once to check it works. Then use SM36 to schedule program /BTI/TE_RNOTIFICATION_ENGINE to run once daily. Use the Batch user for the job steps. Basis Technologies would generally recommend that you schedule this backup on a daily basis.
Rules Engine: Skipping	Create **Skipping Rules** for the required process scenarios, via the Rules Engine. Link
Rules Engine: Approvers	Create **Approvals Rules** for the required process scenarios, via the Rules Engine Link

Optional Configuration

The following configuration and set-up is deemed optional within an overall implementation ActiveControl, and will depend more on an individual SAP customer's SAP landscape and desired processes.

General Configuration

Activity	Details	Useful Knowledge Articles
Rules Engine: Testers	Create **Tester** Rules for the required scenarios, via the Rules Engine	Link
Transport of Copies	Configure any required Transport of Copies via **/BTI/TE_TOCONFIG** and **/BTI/TE_VAUTOCON** tables.	Link
Transport auto-naming convention	SAP transport short description can be automatically generated, via /BTI/TE_TR_DESC.	Link
Create Document Categories	Create the relevant Document Categories via **/BTI/TE_ATT_CAT**.	Link
Documentation Links	Define any customer documentation to be accessible via the ActiveControl Web Platform via **/BTI/TE_HLP_LINK**.	Link
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.	Link
Switch on ActiveControl Backout	a) Within the target configuration in the Web Platform, enable the "Automatically create backup transport requests" for all required systems. NB Most organisations switch on Backout for Production systems only. b) Create a virtual system called BAK needs to be created in TMS within the transport domain of the intended systems where you will run Backout. c) set the STMS parameter tadirdeletions = "True" in each of the intended systems where you will run Backout.	Link1 Link2

Multi-Track (N+n) Configuration

ActiveControl includes Merge and other functionality to help keep multi-track SAP landscapes synchronised and consistent.

Activity	Details	Useful Knowledge Articles
Merge	Configure Merge Targets within ActiveControl as per your requirements.	Link
ShiftLeft: Conflict Analysis (0005)	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.	
In-Line Conflict Active Functions (SAP GUI)	Switch on the Inline Conflict Analysis related active functions via **/BTI/TE_ACTIVE** in the Domain Controller.	
In-Line Conflict Analysis (SAP GUI)	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.	
In-Line Conflict Analysis Systems (Web Platform)	In the Target configuration, ensure that you have entered a client number in the "Before Importing, check whether…." text box for the target. This is required so that ActiveControl knows what client to connect to for the analysis.	

System Specific Setup

Some additional configuration is required if you have specific types of SAP systems such as BW or non-ABAP systems, or if you want to manage BTP changes via ActiveControl

Please refer to the ActiveControl Administration Guide and online Knowledge Articles for full details of what is required, depending on your individual requirements.

ActiveDiscover Integration

Prerequisites

Ensure “ActiveDiscover Integration” component is included the license that is uploaded in the ActiveControl Domain Controller.

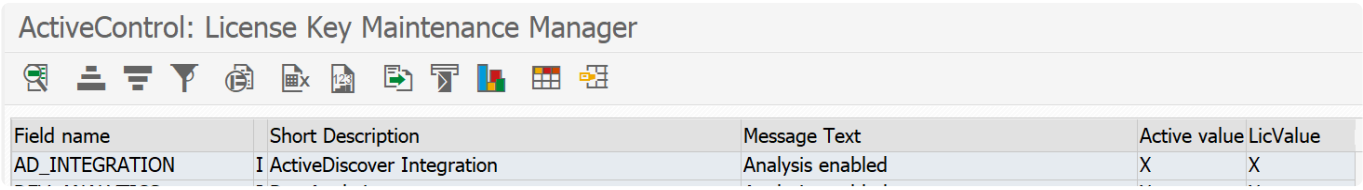
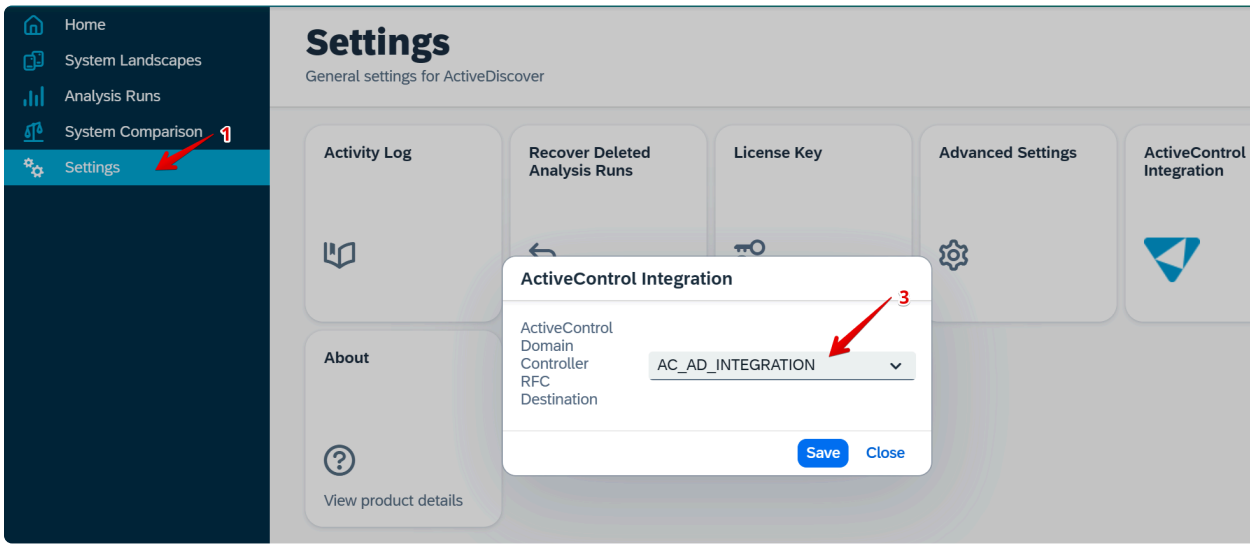


Figure AC114-2: ActiveDiscover Integration license

Configuration

The following configuration steps are required to establish a successful integration between ActiveControl and ActiveDiscover.

Activity	Details
Create RFC user (ActiveControl Domain Controller)	Use SU01 to create a Service “AD_INTEG” user (or equivalent based on customer naming conventio policy) in the ActiveControl Domain Controller. This RFC user needs the following ActiveControl role assignments: **/BTI/TE:CTS_RFC** **/BTI/TE:CTS_ADMIN_USER** **/BTI/TE:CTS_ADMIN**
Create RFC user (ActiveDiscover Central System	Use SU01 to create a System “AC_INTEG” user (or equivalent based on customer naming conventio policy) in the ActiveDiscover Central System. This RFC user needs the following ActiveDiscover role assignment: **/BTI/PX_RFC**
Create RFC Destination (ActiveDiscover Central System)	Use SM59 (> Create Connection) to create RFC destination in ActiveDiscover Central System pointir the ActiveControl Domain Controller. The following nomenclature is recommended: **RFC Name**: AC_AD_INTEGRATION (or equivalent based on customer naming convention policy) **Connection Type**: 3 **Target Host**: Hostname of the ActiveControl Domain Controller. **Client**: The main client where users connect to the ActiveControl Domain Controller. **User**: AD_INTEG (or equivalent) **Password**: _____

	After set up, test the connection via Utilities -> Test -> Authorization Test.
Assign RFC Destination (ActiveDiscover Central System)	Assign the RFC destination created in ActiveDiscover Central System in ActiveDiscover dashboard settings.  Figure AC223-3: ActiveControl settings in ActiveDiscover
Create & Assign Environment Variables (ActiveControl Web Platform Server)	Create and assign environment variables in the ActiveControl Web Platform Server as detailed in this Change Note.

4. Deploy

This section details the final preparatory activities that should be done as part of Go-Live.

Testing

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

Basis Technologies does not provide formal test scripts as part of an Implementation (or subsequent Upgrade) of ActiveControl, this is a customer responsibility. We find that our customers perform very different levels of testing, depending on the scope of the ActiveControl implementation and the extent of their existing SAP estate and Change Management processes. Wherever possible, this should involve moving SAP transports through each ActiveControl path, to test the workflow and approvals you have configured within ActiveControl.

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

Item	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 creation of Manual Steps / Manual Activities.
8	Test user access and roles / authorizations. (especially if using copied Z roles)
9	Test transport Backout process. (if relevant)
10	Test Merge process (if relevant)
11	Test In-line conflict analysis. (if relevant)
12	Test user exits / enhancements. (if relevant)
13	Test any existing Integrations – between your non-Production DC and a non-Production Integration instance.

Basis Technologies recommend involving the intended end-user community in the testing process of ActiveControl, to ensure early familiarity with the tool and buy-in to the to-be processes, prior to the Go-Live of ActiveControl.

Training

All stakeholders will need to be trained on ActiveControl prior to go-live. Basis Technologies typically deliver various training sessions to the following audiences as part of an ActiveControl Implementation:

1. Transport Owners (all developer, functiona and securities and authorisations teams that create Transports)
2. Approvers & Testers (all users that will perform an Inbox, Outbox or Test Queue approval as part of the to-be workflow within ActiveControl.
3. Basis (all Basis team-members that will need to perform additional responsibilities such as manual transport imports, adding external transports etc)

This training is generally done by a Basis Technologies solution specialist in conjunction with the customer ActiveControl Administrator and/or SAP Training team.

Data Migration

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

1. All open, inflight Tickets are uploaded as Business Tasks,
2. All open, inflight Transports are uploaded as Transport Forms against those Business Tasks.

A template spreadsheet that can be used to upload Business Tasks and Transport Forms will be provided by Basis Technologies solution specialist as part of project. That template and the following instructions should be used for uploading your existing data into ActiveControl:

Item	Activity	Details
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 ActiveControl. Note that the values for Business Task [Group], Business Task [Type] and [Project] are the long GUID numbers taken from tables /BTI/TE_GROUPS, /BTI/TE_TYPE and /BTI/TE_PROJ respectively. You can use SE16 to get this information.
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 ActiveControl. 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_GROUPS and /BTI/TE_TYPE respectively. Again, you can use SE16 to get this information. Note: Utility program /BTI/TE_TRANS_DATAMIG can be run in the Domain Controller to help identify inflight transports.

3	Upload Business Tasks	Use SE38 to execute program /BTI/TE_RTASK_UPLOAD
4	Upload Transport Forms	Use SE38 to execute program /BTI/TE_ANALYTICS. 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.
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.

Go-Live / Cutover Activities

The following activities should typically be performed at the time of your ActiveControl Go-Live:

Activity	Details
Data Migration	Perform Data migration as per steps mentioned above.
Assign Schedules	Within the **Targets** app tile, open each Target System and allocate the relevant Schedule to each of your SAP systems.
• 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. When switching on for all users using the blank entry, it is recommended to remove any legacy entries for individual users from the table
• Add Users to User Roles*	Add any approvers/testers not already assigned to the User Roles, via the User Roles tile within the Administration screen.

Ignore Flags

Within ActiveControl – there is some ongoing Housekeeping activities that need to be performed periodically by customer ActiveControl Administrators. The exact nature of these Housekeeping activities will depend on your SAP landscape, existing processes and configuration setup of ActiveControl, and should be discussed with the Basis Technologies solution specialist working with you on the implementation of ActiveControl.

Prior to ActiveControl go-live, it is recommended to set an Ignore flag on historical transports that have already been deployed through your entire SAP landscape, to avoid spurious errors in ActiveControl. This can be done by running program /BTI/TE_RU002 (via transaction SE38) in the source development

system – to set assign ActiveControl attribute YBT_TE_IGNORE to all the transports that historically went to Production.

5. Run (Ongoing Support)

Raising Support Tickets

To request support from Basis Technologies on any issue relating to our product sets (ActiveControl, Transport Expresso, DevOps, Diffuser, BDEx Utilities or Transformation), support can be requested from Basis Technologies by submitting a request via our support portal link here.

Submitting your request will automatically create a ticket in Zendesk, the ticketing tool used by Basis Technologies.

Frequently Asked Questions

Basis Technologies maintains an online Knowledgebase of FAQs and Error Messages on our Support website. We 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 become more self-sufficient in resolving common issues themselves, but accessing the forum also helps us understand the common challenges our customers are facing so we can prioritise product improvements in the future.

There is no ‘per-user charge’ for creating accounts on our Support website. Some customers choose to create a central account and have all resources use this to raise support tickets, so that any Basis Technologies ticket replies go to a central mailbox. Other customers prefer to have each user have their own individual account.

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 support portal link here, or alternatively by contacting your assigned Customer Success Manager.