

Kofax Process Director

Import and Upgrade Guide

Version: 7.8

Date: 2019-12-05

The logo for Kofax, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

Legal Notice

© 2019 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

Table of Contents

Legal Notice.....	2
Overview.....	5
About Process Director transports.....	5
Transports for different SAP versions.....	5
Contents.....	5
Location.....	6
Licensing.....	6
Web Application.....	7
Upgrading.....	7
Upgrading Process Director Accounts Payable.....	7
Upgrading Process Director.....	7
Upgrading SAP.....	9
Import procedure.....	10
Implementing prerequisite SAP Notes.....	10
Required SAP notes.....	10
Recommended SAP notes.....	16
Importing the transports.....	19
Service Packs.....	20
Process Director.....	21
Languages.....	22
Reading the import log.....	22
Checking the namespaces.....	22
After importing the transports.....	22
Executing the load generator.....	22
Installing licenses.....	23
Importing and activating indexes for PD AP performance optimization.....	24
Index types.....	24
Type 1.....	24
Type 2.....	25
Type 3.....	25
Prerequisite.....	26
Importing indexes into the development system.....	26
Activating indexes.....	26
Space calculation.....	30

Troubleshooting.....	32
Process Director Accounts Payable.....	32
Import errors.....	32
Other problems.....	32
Process Director.....	32
Import errors.....	32
Short dumps.....	32
Other problems.....	33
Setting the buffer size.....	34

Overview

This document explains how to import the Kofax Process Director™ transports into your SAP system.

- [Process Director transports](#). Which ones to use and the download location.
- [Tasks to perform when before upgrading from a previous version of Process Director](#).
- [Tasks to perform before and after upgrading your SAP system](#).
- [Implementing prerequisite SAP Notes](#).
- [Importing the transport\(s\)](#).
- [Checking the necessary namespace\(s\)](#).
- [Required tasks after importing](#).
- [Troubleshooting information](#).

About Process Director transports

There are two Process Director transports:

Product	Transport	Description
Process Director Accounts Payable™	PD AP Transport	Contains the /COCKPIT/ namespace objects Required for Accounts Payable
Process Director	PD Transport	Contains the /EBY/ namespace objects Required for all the process types For Accounts Payable, this transport is required <i>in addition</i> to the Process Director Accounts Payable transport.

Transports for different SAP versions

Kofax delivers SAP release version-independent transports.

Note From Process Director 7.4, only versions from SAP ECC6 and higher are supported, including SAP S/4HANA on-premise releases.

Contents

This table lists the processes and supplementary products that the transports contain.

Transport	Contents
PD AP Transport	Kofax Process Director Accounts Payable Kofax Process Director Work Cycle (SAP parts) Kofax EDI Cockpit™ Kofax Kofax Email-based Approval™ (formerly MOBILE APPROVAL) (SAP parts) Kofax Info Mail™ (SAP parts) Kofax Reporter™ Extractor
PD Transport	Requisitions Order Confirmations Goods Receipts Payment Approvals Accounts Receivable (formerly Payment Advices) <ul style="list-style-type: none"> • Includes Electronic Bank Statements Customer Orders Financial Postings Master Data: <ul style="list-style-type: none"> • Customer • Vendor • Cost Center • Profit Center • GL Account • Asset Asset Management: <ul style="list-style-type: none"> • Acquisition • Transfer • Retirement Generic Archiving

Location

Process Director transports are available for partners and customers on the [Kofax E-Delivery](#) web service.

Licensing

You must order a license from Kofax to activate Process Director. Each process type and supplementary product can only be used if a valid license is activated. For details on installing licenses, see the following guides in the Product Documentation website at:

https://docshield.kofax.com/Portal/Products/en_US/RSPD/RS_Process_Director.htm

- *Process Director License Installation Guide*
- *Process Director Configuration Guide*

https://docshield.kofax.com/Portal/Products/en_US/RSPDAP/RS_Process_Director_AP.htm

- *Process Director Accounts Payable Configuration Guide*

Web Application

When installing a new version of Process Director or a service pack, we strongly recommend that you also deploy the latest version of the Kofax Process Director Web Application with the latest patch.

In general, since Process Director 7.4, the Web Application is independent of the SAP version.

Upgrading

This section lists the tasks that you need to perform when upgrading to Process Director from previous versions.

Note Process Director and Process Director Accounts Payable can be upgraded independently of one another, for only all the currently supported versions. Thus, it is possible, for example, to remain with Process Director Accounts Payable 7.6, but upgrade other processes to 7.8, and vice versa.

Upgrading Process Director Accounts Payable

This section lists required tasks when upgrading from old versions. For information on prerequisite tasks for upgrading from unsupported versions, contact [Tech Support](#).

Note If you are using the EOL solution, Kofax Analyzer, do not upgrade to the 7.6 version as this will remove the existing Analyzer package. Upgrading to 7.7 or 7.8 will not remove the component.

Perform this task immediately after importing the transports:

- If you upgrade from Process Director 7.5 to a higher version, check the new tax code determination configuration.

Upgrading Process Director

This section lists the required tasks when upgrading from a previous version of Kofax Process Director.

Perform these tasks **immediately after** importing the transports:

- The `/EBY/PDBO_CHECK_CUST_PROCESS` program lists all the obsolete customizing entries. To identify the changes required to be made to the configuration, you should always run this custom check for all the active process types. For example:
 - The customization of processes changed slightly in Process Director 7.2, with the result that some customizations are obsolete and must be removed. If you use a version of Process Director prior to 7.2 and have customized processes, checks, or determinations, you should run the `/EBY/`

PDBO_CHECK_CUST_PROCESS consistency check program. This program lists all the obsolete customizing entries that must be removed.

PROCESS DIRECTOR - Check Customer Process Configuration

Parameters Forwards

Customer processes

Excepti...	Object	Env.	Action	Event	Event type	Suborder	Event class	Deact.	Developer's or Consultant's comment
	SO		CHECKM	CHK_8SET_STATE	8	1	ZEBY_CL_DEMO_EVT_SUBSTATE_SET		
	SO		CHECKM	DET	5	1000	/EBY/CL_PDSO_DET_SORG_INIT		*** GENERATED by determination configuration ***
	SO		CHECKM	DET	5	1001	/EBY/CL_PDSO_DET_SORG_SP		*** GENERATED by determination configuration ***
	SO		CHECKM	DET	5	2000	/EBY/CL_PDSO_DET_PLANT_INIT		*** GENERATED by determination configuration ***
	SO		CHECKM	DET	5	2001	/EBY/CL_PDSO_DET_PLANT_MAT		*** GENERATED by determination configuration ***
	SO		CHECKM	CHK	5	1	/EBY/CL_PDSO_EVT_CHK_CREATE		*** GENERATED by check configuration ***
	SO		CHECKM	CHK	5	2	/EBY/CL_PDSO_EVT_CHK_TEXTS		*** GENERATED by check configuration ***
	SO		CHECKM	CHK	5	3	/EBY/CL_PDSO_EVT_CHK_ITEMS		*** GENERATED by check configuration ***
	SO		CHECKM	CHK	5	4	/EBY/CL_PDSO_EVT_CHK_HDRNETVAL		*** GENERATED by check configuration ***

Remove the entries in the appropriate IMG configuration activity. For example, to remove obsolete determination entries, go to **Initial settings > Rules > Determinations** and delete the entries for the corresponding **Actions**. Similarly, do it for **Initial settings > Rules > Checks**.

Determination selection

Inte...	Envi...	Determination ID	Action	Action	Sub...	Determination description
		/EBY/CL_PDSO_DET_SORG_INIT	CHECK	Check document	1	Sales Order sales organization determination
		/EBY/CL_PDSO_DET_PLANT_INIT	CHECK		2	Sales Order Plant determination
		/EBY/CL_PDSO_DET_SORG_INIT	CHECKM	Check document(s)	1	Sales Order sales organization determination
		/EBY/CL_PDSO_DET_PLANT_INIT	CHECKM		2	Sales Order Plant determination
		/EBY/CL_PDSO_DET_CONTACT_INIT	RECEP	Initial processing	1	Sales Order Contact determination

- The workflow start action was modified to allow bulk workflow start with manual assignment. If custom checks or actions have been configured for workflow start, these must be redefined after upgrading. In most cases, this involves replacing the WCSTRT10CHECK_DOC action with WCSTART10CHECK_DOC_, and the WCSTART0CHECK_OWNER action with WCSTART0CHECK_OWNER_. You can run the /EBY/PDBO_CHECK_CUST_PROCESS consistency check program to list the customizing entries that must be changed. Refer to RSPDN3026 for more information and detailed instructions.
- From Process Director 7.7, the /EBY/PDVI_TRANSLATE_OLD_MENU program is available to transition the existing custom menu and toolbar function code settings to the current design tables. The /EBY/PDVI_TRANSLATE_OLD_XY_MEN program is also available to transition the standard configuration containing the customer document types that are based on the XY template. This report transfers the menu configuration from the old to the new format, which makes it visible in the new configuration transaction available in the IMG tree.

Note After the transition, the report asks for the transport number a couple of times. Workbench transports handle the standard settings, like the menu configuration; whereas the customizing one transfers the information that the menu has been modified. The destination system needs this information to decide about menu regeneration.

If you are upgrading from a lower version, refer to the corresponding *Import Guide* and perform the upgrade in two steps; first from the lower version to the supported one, and then to the latest version.

Upgrading SAP

Before upgrading SAP

For Process Director 7.8 and Process Director Accounts Payable 7.8, there are no prerequisite tasks that need to be performed in relation to an SAP system upgrade or Enhancement Pack (EhP) installation.

If you upgrade an SAP S/4HANA version, it is recommended to upgrade to the latest Process Director Service Pack.

After upgrading SAP

After upgrading an SAP installation, perform these tasks in order to ensure the continued smooth running of Process Director .

- Upgrade Process Director.

Kofax strongly recommends upgrading to the latest version of Process Director before upgrading an SAP installation. Upgrading Process Director will ensure that all the functionality works properly in the new SAP environment. In particular, when you upgrade from a non-Unicode to a Unicode system, you must upgrade Process Director; otherwise, the customizing views will not be displayed.

- Check the license validity.

If the SAP installation number and system ID remain the same after the upgrade, the Process Director licenses will work as before and no further action is required.

You need new licenses if:

- The SAP installation number and/or system ID changes.

- Review customer-specific customizations.

All User Exits and BADIs must be reviewed and tested to confirm that they work correctly with the new version of SAP. Their compatibility with Unicode and (potentially) SAP S/4HANA must also be checked. If you are also upgrading to a new version of Process Director (recommended), this review should form a part of the migration plan.

- For information on implementing the relevant SAP notes and hotfixes, see the following links.

- [Implementing prerequisite SAP Notes](#) contains details of the relevant SAP notes.
- [Troubleshooting](#) contains fixes for various issues that may arise when installing Process Director.

Import procedure

Important Before importing the Process Director transport requests, ensure that the prerequisite SAP notes are implemented in your system. Also, check the [Upgrading](#) chapter for tasks that you may need to perform before importing.

Note Most of the referenced SAP Notes are for very old SAP releases and not applicable.

Implementing prerequisite SAP Notes

- [Required notes](#) must be applied if the corresponding process type is used; otherwise, the system may not run.
- [Recommended notes](#) are not necessary for the system to run, but fix certain minor bugs or enable feature enhancements.

Required SAP notes

[Required notes for all process types](#)

[Required notes for Accounts Payable](#)

[Required notes for Customer Orders](#)

[Required notes for Financial Postings](#)

[Required notes for Master Data Maintenance](#)

[Required notes for Requisitions](#)

All processes: Required notes

This list contains the SAP required notes that can be found at <https://support.sap.com/home.html>.

SAP Note #	Issue addressed	Comments	Affected SAP releases
930742	The Process Director Worklist configuration transaction uses the new ABAP editor control element (AB4 control).	ECC 6, no EhP	SAP_BASIS 620-640 Fixed with SAPKB62060 SAPKB64018
1078450	When using the HTML viewer, any CR/LF characters coming from a <textarea> are converted to simple hash signs.	ECC 6, no EhP	Only SAP_BASIS 620 Fixed with SAPKB62063

SAP Note #	Issue addressed	Comments	Affected SAP releases
1243840	In the dynamic selection screen of the Process Director Worklist, selection screen fields with conversion exit (for example, /EBY/PDBO_THDR-NUMBR with NUMC1) result in an error message regarding lower value greater if single value is used.	Only required if the selection screen is configured.	SAP_BASIS 620-640 700-702 and 710-711 Fixed with SAPKB62066 SAPKB64023 SAPKB70018 SAPKB70103 SAPKB70204 SAPKB71007 SAPKB71101
1539662	The FM ARCHIV_CONNECTION_INSERT terminates with a program error. Without this note, the RFC transfer function module is likely to terminate during execution.		Required in ECC 6.0 Systems Fixed with SAPKB70026 SAPKB70110 SAPKB70209 SAPKB71013 SAPKB71108 SAPKB72006 SAPKB73004 SAPKB73102
869218	Import error " Program /EBY/ CL_ICIV_DAO=====CP, Include /EBY/ CL_USER_MANAGER=====CU: Syntax error in line 000150 The type 'XUPWDSTATE' is unknown."	Required for customers with a low BASIS SP level.	SAP_BASIS 610 SAPKB61046 620 SAPKB62058 640 SAPKB64016 700 SAPKB70006

Accounts Payable: Required notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1647756	FB60 - Tax on "Basic data" tab page without specifying tax code. In transaction FB60, if the manual tax amount is specified on the "Basic data" tab page without a tax code being entered, the system does not display the amount when you branch to the tax tab page. This causes balance problems (balance is not equal to zero) and the document cannot be posted.	Obsolete since EhP 7	SAP_APPL 600-606 Fixed with SAPKH60021 SAPKH60211 SAPKH60310 SAPKH60411 SAPKH60507 SAPKH60602

SAP Note #	Issue addressed	Comments	Affected SAP releases
1666591	<p>FB60/MIRO – Setting tax on the “Basic data” tab page to not 0.</p> <p>If you do not specify a posting amount for the vendor on the "Basic data" tab page, a tax amount that was entered (or, for example, the tax from the entry from the "Tax" tab page) is set to zero if there is only one tax code.</p> <p>However, the balance is not adjusted. The error does not occur for several tax codes in the expense items because the tax amount is hidden on the "Basic data" tab page.</p>	Obsolete since EhP 7	<p>SAP_APPL 600-606</p> <p>Fixed with</p> <p>SAPKH60022</p> <p>SAPKH60211</p> <p>SAPKH60310</p> <p>SAPKH60411</p> <p>SAPKH60508</p> <p>SAPKH60602</p>
1881279	<p>MM item proposal returns the wrong quantity if the purchase order numbers are not sorted in ascending order.</p>	<p>Only required if SAP Note 1821383 “MIRO/ MIGO: wrong values proposed for amount and quantity” has been implemented.</p>	<p>SAP_APPL 600-616</p> <p>600 SAPKH60024</p> <p>602 SAPKH60214</p> <p>603 SAPKH60313</p> <p>604 SAPKH60414</p> <p>605 SAPKH60511</p> <p>617 SAPKH61702</p> <p>606 SAPKH60609</p> <p>616 SAPKH61604</p>
1605537	<p>No BI data for SAPLKACB 0002</p> <p>You have activated General Ledger Accounting (new) and, in the current company code, document splitting. In this case, Note 1137272 provides a coding block on the tax screen SAPMF05A 0312 to enable you to enter split-relevant fields. A batch input session for transaction FB01, in which these fields are not filled, hangs with message 00 344 "No batch input data for screen SAPLKACB 0002".</p>	<p>Only required if SAP Note 1137272 has been implemented.</p> <p>Obsolete since EhP 7</p>	<p>SAP_APPL 600-606</p> <p>600 SAPKH60020</p> <p>602 SAPKH60210</p> <p>603 SAPKH60309</p> <p>604 SAPKH60410</p> <p>605 SAPKH60506</p> <p>606 SAPKH60601</p>
1327973	<p>FB01/Argentina: BSEG-BUPLA not ready for input.</p>	<p>For Argentina only.</p> <p>Required for the Business Place field.</p> <p>Obsolete since EhP 5</p>	<p>SAP_APPL 600-604</p> <p>600 SAPKH60016</p> <p>602 SAPKH 60206</p> <p>603 SAPKH 60305</p> <p>604 SAPKH 60404</p>

SAP Note #	Issue addressed	Comments	Affected SAP releases
591415 605780 1148218	Error messages when processing invoices for purchase orders with freight conditions.	Obsolete since EhP 5	SAP_APPL 600-604 600 SAPKH60017 602 SAPKH60207 603 SAPKH60306 604 SAPKH60406

Customer Orders: Required notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1761277	<p>Missing profitability segments since EPH5 or SAP Note 12877794.</p> <p>During sales order creation check several short dumps are generated at the same time:</p> <p>CALL_FUNCTION_NOT_REMOTE SAPLKED1_WRITE_CE4_IDEA MESSAGE_TYPE_X SAPMSSY0 MESSAGE_TYPE_X RK2AIDEA_POST</p> <p>Caution: You have to perform this post-implementation step manually and separately in each system after you have imported the Note to implement.</p> <p>Immediately after you implement the source code corrections, execute the function module RKE_GENERATE_UPD for the operating concern that you use.</p>	Only required if these short dumps are generated.	<p>SAP_APPL 605-616</p> <p>Fixed with</p> <p>SAPKH60510 SAPKH60512 SAPKH60607 SAPKH60611 SAPKH61602 SAPKH61606</p> <p>SAP_FIN 617-700</p> <p>Fixed with</p> <p>SAPK-61704INSAPFIN SAPK-70001INSAPFIN</p>

Financial Postings: Required notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1605537	<p>No BI data for SAPLKACB 0002</p> <p>You have activated General Ledger Accounting (new) and, in the current company code, document splitting. In this case, Note 1137272 provides a coding block on the tax screen SAPMF05A 0312 to enable you to enter split-relevant fields. A batch input session for transaction FB01, in which these fields are not filled, hangs with message 00 344 "No batch input data for screen SAPLKACB 0002".</p>	<p>Only required if SAP Note 1137272 has been implemented.</p> <p>Obsolete since EhP 7</p>	<p>SAP_APPL 600-606</p> <p>600 SAPKH60020 602 SAPKH60210 603 SAPKH60309 604 SAPKH60410 605 SAPKH60506 606 SAPKH60601</p>

Master data maintenance: Required notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1537561	When asset master data is deleted in Process Director, the asset is not deleted, but no error message is displayed.	Obsolete since EhP 6	SAP_APPL 604-605 And Note 1455659 Fixed with SAPKH60409 SAPKH60504
1706458	Error message AA592 "Depreciation key has fewer depreciation types than previously valid key" during post/check.		SAP_APPL 600-616 And Note 1491266 Fixed with SAPKH60024 SAPKH60214 SAPKH60312 SAPKH60413 SAPKH60510 SAPKH60607 SAPKH61602
1578624 1574641	In ECC 6.00, during profit center deletion there is an error message "Profit centers are used in new General Ledger Accounting" (FAGL_LEDGER_CUST155).	Obsolete since EhP 6	SAP_APPL 600-605 Fixed with SAPKH60020 SAPKH60210 SAPKH60309 SAPKH60410 SAPKH60505
1770717	After implementing OSS note 1754448 (Incorrect bank data can be copied), bank data with partner type (BVTYP) is not correctly updated and there is no error message.	Only required if SAP Note 1754448 has been implemented.	SAP_APPL 600-616 Fixed with SAPKH60023 SAPKH60213 SAPKH60312 SAPKH60413 SAPKH60510 SAPKH60606 SAPKH61601

SAP Note #	Issue addressed	Comments	Affected SAP releases
2706149	When you create a customer or vendor using <code>CMD_EI_API</code> or <code>VMD_EI_API</code> , the corresponding business partner is not created.	Required for API posting with activated business partner	SAP_APPL 600-618 S4CORE 100-103 Fixed with SAPK-10008INS4CORE SAPK-10106INS4CORE SAPK-10204INS4CORE SAPK-10301INS4CORE SAPKH60031 SAPKH60221 SAPKH60320 SAPKH60421 SAPKH60518 SAPKH60623 SAPKH61613 SAPKH61718 SAPK-61812INSAPAPPL
2742999	Maintain method of Class <code>VMD_EI_API/CMD_EI_API</code> does not create the Business Partner Address data	Required for API posting with activated business partner	SAP_ABA 701-75E
2849782	In T-code BP, role FLCU00, when switching from Company Code data to General Data, a dump occurs.	Required for API posting with activated business partner	All versions

Requisitions: Required notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1160754	Update termination with <code>K_OPEN_ITEM_POST</code> when BAPI is called in simulation mode several times. Short dump <code>K_OPEN_ITEM_POST</code> .	Obsolete since EhP 5	SAP_APPL 600-604 Fixed with SAPKH60016 SAPKH60206 SAPKH60305 SAPKH60404
305785	Recheck an already checked 'OK' document in display mode. Error: Update termination module <code>K_OPEN_ITEM_POST</code> . Short dump <code>RAISE_EXCEPTION</code> --> Exception condition "TEMP_REFBN_COOI" raised.	Only required if SAP Note 100409 has been implemented.	All versions

SAP Note #	Issue addressed	Comments	Affected SAP releases
891356	Change mode: A change to an already checked OK document (for example, remove doc type) leads to a short dump RAISE_EXCEPTION -> Exception condition "FAILURE" raised in CL_HANDLE_MANAGER_MM METHOD get.	Only required for unpatched ECC6 systems (without EhP).	SAP_APPL 600 Fixed with SAPKH60003
394058	BAPI_REQUISITION and Commit Work. According to the general design guidelines, a Commit Work must not be triggered in the BAPI itself. However, this is not the case for BAPI_REQUISITION_DELETE, BAPI_REQUISITION_CREATE, BAPI_REQUISITION_CHANGE and other purchase requisition BAPIs. For upward compatibility reasons, this design error cannot be corrected. Therefore, we provide a consulting note containing a correction that you can use in specific cases.	Only required if requisitions will be created in SAP. Not required if only purchase orders will be created in SAP.	All versions
856741	OCI catalog popup support in SAP GUI. Link in HTML Viewer displays 'HTTP 500 Internal Server Error'.	Only required if using OCI catalogs.	SAP_BASIS 620-700 Fixed with SAPKB62055 SAPKB64014 SAPKB70004

Recommended SAP notes

[Recommended notes for all process types](#)

[Recommended notes for Delivery Notes](#)

[Recommended notes for Accounts Payable](#)

[Recommended notes for Asset Management](#)

[Recommended notes for Customer Orders](#)

[Recommended notes for Financial Postings](#)

[Recommended notes for Requisitions](#)

[Recommended notes for Master Data Maintenance](#)

All processes: Recommended notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1451769 1560955	Required to enable file descriptions for attachments (only available from ECC600).	Both notes must be implemented and in transaction <code>OAG1</code> the Save File Attribute flag must be set.	SAP_BASIS 700-731 Fixed with SAPKB70028 SAPKB70113 SAPKB70213 SAPKB73009 SAPKB73106 SAP_BASIS 700-702 Fixed with SAPKB70024 SAPKB70109 SAPKB70208
2596759	When there is foreign currency with anything other than two decimal points in the purchase order, using <code>BAPI_PO_GETDETAIL1</code> to get the PO data leads to incorrect POHISTORY data.		All versions

Delivery Notes: Recommended notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1050944	Goods Receipt for inbound delivery using inventory management, as of ECC 6.00.	Obsolete since EhP 7	SAP_APPL 600-606 Fixed with SAPKH60015 SAPKH60205 SAPKH60304 SAPKH60402
1974552	Canceling a Goods Receipt in the feeder system by using the VL09 transaction leads to the runtime error, <code>GETWA_NOT_ASSIGNED</code> .	Required only if SAP Note 1928615 has been implemented.	Fixed with SAPK-90720INSLLP1 SAPK-90820INSLLP1 SAPK-90920INSLLP1 SAPK-90A20INSLLP1

Accounts Payable: Recommended note

SAP Note #	Issue addressed	Comments	Affected SAP releases
1650443	Use of Perform or Post function creates short dump with error <code>CALL_TRANSACTION_USING_NESTED</code>		Check Kernel version according to the list in SAP note

Asset Management: Recommended note

SAP Note #	Issue addressed	Comments	Affected SAP releases
1569937	Error message no. B1537 during posting/checking: BAPIACAM1X_MAX_DE-WAERS initial v., currency amount & in & was transferred without a currency.	Obsolete since EhP 6	SAP_APPL 600-605 Fixed with SAPKGPFD20 SAPK-60309INEAFINSRV SAPK-60410INEAFINSRV SAPK-60505INEAFINSRV

Customer Orders: Recommended note

SAP Note #	Issue addressed	Comments	Affected SAP releases
699533	No message from BAPI SALESDOCUMENT_CREATE if the credit limit is exhausted	Only required if EA-RETAIL is used	EA-RETAIL 110 and 200 Fixed with SAPKGPRA17 SAPKGPRB06

Financial Postings: Recommended note

SAP Note #	Issue addressed	Comments	Affected SAP releases
1486149	Short dump during FI/FIC reversal due to missing function module "GM_DOCUMENT_REVERSE".	Prerequisite is Note 1608790 Obsolete since EhP 7	SAP_APPL 500-606 600 SAPKH60019 602 SAPKH60208 603 SAPKH60307 604 SAPKH60408 605 SAPKH60502

Requisitions: Recommended notes

SAP Note #	Issue addressed	Comments	Affected SAP releases
1008717	OCI catalog: Checkout in SAPGUI Only partial data is transferred back to Process Director from the OCI catalog.	Only required if using an OCI catalog.	SAP_BASIS 620-700 Fixed with SAPKB62062 SAPKB64020 SAPKB70011
1355577	BAPI_PO_CREATE1: Runtime problems when calling RTTS Performance problems occur when you call BAPI_PO_CREATE1 and/or BAPI_PO_CHANGE. ECC 600 EhP4	Valid only for EhP 4	SAP_APPL 604 Fixed with SAPKH60404

SAP Note #	Issue addressed	Comments	Affected SAP releases
1108045	Performance improvement for archiving object MM_EBAN	Obsolete since EhP 4	SAP_APPL 600-603 Fixed with SAPKH60012 SAPKH60202 SAPKH60301

Master Data Maintenance: Recommended note

SAP Note #	Issue addressed	Comments	Affected SAP releases
639754	For vendor or customer master, this note enables the use of the API posting process, instead of the IDOC posting process. You can simulate the posting process only with API, but if the number buffering for internal number ranges has been deactivated, the system uses at least one customer number. If the number buffering has been activated, the system uses all the buffered numbers.		Release independent

Importing the transports

Note Before importing, make sure you have checked the [prerequisite SAP Notes](#) and the [Upgrading](#) chapter for tasks that you may need to perform before importing.

Warning: Import the transports one at a time for the main version transports. If a return code greater than 4 is returned after importing a transport, do not import any further transport requests! Contact [Tech Support](#) for assistance and provide details of the return code.

For importing service packages, the SP transports can be imported in one queue.

The import can be done into any client.

Note In systems with Enhancement Pack 5 and later, you may get the error message “*n of n requests do not match the component version of the target system*” when trying to import the Process Director transports, and the import cannot be carried out. It is recommended to activate the **Ignore Invalid Component Version** import option in the **Import Transport Request** dialog box. See SAP Note 1742547 for more information.

Import Transport Request

Transport Request: D74K900690 DTZRS_BASIS_CHECK_BEFORE_RELEA

Target System: Q74 QA PD(AP) 7.4 - ERP 6.0 EhP5

Target Client: Targ.Client=Source Client

Options

Import Options

- Leave Transport Request in Queue for Later Import
- Import Transport Request Again
- Overwrite Originals
- Overwrite Objects in Unconfirmed Repairs
- Ignore Non-Permitted Transport Type
- Ignore Non-Permitted Table Class
- Ignore Predecessor Relations
- Ignore Invalid Component Version

To import the transports, complete the following steps.

1. Extract the ZIP file in the SAP transport folder (...\\TRANS\\).
2. The transport files are already in the correct *COFILES* and *DATA* subfolders.
If it is not possible to extract the transport files directly into the SAP transport folders (for example, because there is no direct access to the file system on the SAP application server), you have to use a binary method to transfer the files (for example, FTP). See OSS note 2050.
3. Start SAP transaction *STMS* (or use the command line using the TP program).
4. Open the import queue of the SAP system.
5. Go to Extras > Other requests > **Add**.
6. Add the required transport requests one by one to the import queue in the order listed below.
Warning: Import the transports one at a time. If a return code greater than 4 is returned after importing a transport, do not import any further transport requests! Contact [Tech Support](#) for assistance and provide details of the return code.
If you get other import errors, see the [Reading the import log](#) and [Troubleshooting](#) sections.

Service Packs

When importing service packs, you need to import only the most recent service pack. Later service packs always include previous service packs. Therefore, for example, if you want to upgrade to Service Pack 3, you do not need to import Service Packs 1 and 2 first, as these are included in Service Pack 3.

Service packs do not, however, include the main transport. You must always import the main transport before importing a service pack.

Process Director

New installation

Warning: Import the transports one at a time. If a return code greater than 4 is returned after importing a transport, do not import any further transport requests. Contact [Tech Support](#) for assistance and provide details of the return code.

Import order	Transport
1	Kofax_Process_Director_AP_7_8*.zip This is the main transport for Accounts Payable.
2	READSOFT_INVOICE_COCKPIT_Create_Indexes_*.zip This transport creates the indexes required for Process Director Accounts Payable. Indexes must be activated after import. See Importing and activating indexes for instructions. This transport is not required when a HANA database is in use.
3	Kofax_Namespaces_FQAK902104.zip This transport creates the /EBY/, /COCKPIT/, and /RSE/ namespaces. Make sure that the namespaces are activated after importing.
4	Kofax_Process_Director_7_8*.zip This transport provides components for the integration of Accounts Payable in Process Director and use of the Process Director Web Application , as well as other process types.
Optional	READSOFT_WEB_CYCLE_PDF_Form_*.zip This transport is required only if you use the old style SAPSCRIPT form to archive notes in the HTML format in the /COCKPIT/WI8 transaction. You have to import the transport into client 000. This is not required for new installations.

Note If additional components are used (for example, Business Solution Package, Data Import), these should be imported after all the other transports.

Upgrade

See [Upgrading](#) first for tasks that you may need to perform before or after importing.

Warning: Import the transports one at a time. If a return code greater than 4 is returned after importing a transport, do not import any further transport requests. Contact [Tech Support](#) for assistance and provide details of the return code.

Import order	Transport
1	Kofax_Process_Director_AP_7_8*.zip This is the main transport for Accounts Payable.

Import order	Transport
2	Kofax_Process_Director_7_8*.zip This transport provides components for the integration of Accounts Payable in Process Director and use of the Process Director Web Application, as well as other process types.

Languages

The languages listed in the *Process Director Product availability and GUI Languages* document are delivered with Process Director 7.8.

If a required language is not available in the standard delivery, contact your Kofax representative or [Tech Support](#) for assistance.

Reading the import log

Any warnings issued (return code 4) during the import can be ignored.

Important: If you get a return code greater than 4, do not import any further transport requests! Contact [Tech Support](#) for assistance and provide details of the first log with return code > 4.

Note Even if errors or aborts occur during the import, this has no adverse effect on your SAP system!

See the [Troubleshooting](#) section for other information on other import errors.

Checking the namespaces

The namespaces should have already been created and activated, but we recommend that you check these settings.

To check the namespace settings, complete the following steps.

1. Start the SE03 SAP transaction.
2. In the **Administration** folder, double-click **Display/Change Namespaces** and then the **Execute** button.


After importing the transports

After importing the transports, execute the SAP load generator (transaction SGEN).

Executing the load generator

To execute the load generator, complete the following steps.

1. Go to SGEN.

2. Select **Generate the objects of a transport request** and click **Continue**.
3. Select the Process Director transport request.
4. Click the **Execute**  button.

Installing licenses

To install the licenses you have been provided, which are text files, execute one of the following transactions.

- For Accounts Payable and its supplementary products in transaction `/COCKPIT/C46`.
- For other Process Director processes in transaction `/EBY/PD_LICENSES`.

See the *Process Director License Installation Guide* for detailed information.

Importing and activating indexes for PD AP performance optimization

This section describes how to import and activate indexes to optimize the performance of new Process Director Accounts Payable. **It is not required if a HANA database is in use.**

Process Director Accounts Payable contains indexes to support the current selection screen, scheduled reports and other developments. Activation of indexes is project specific. This saves database space because indexes are activated only when they will be used in a Process Director Accounts Payable installation.

Installation and activation of indexes requires the following steps. Make sure that the [prerequisites](#) are fulfilled, and then complete the following steps.

1. [Import the new indexes into the development system.](#)
2. [Activate the indexes that should be used in the development system.](#) The indexes must be explicitly activated so that they take effect.

Note Importing and activating indexes has to be done only once. There is no need to perform this task again after an upgrade.

Index types

There are three types of indexes available for performance optimization.

Type 1

Indexes for optimizing performance with the `/COCKPIT/1`, `/COCKPIT/2`, `/COCKPIT/WL1`, `/COCKPIT/WL2`, and `/COCKPIT/WL3` transactions.

Name	Short description	Status	Mandatory/optional
S01	Company code (COMP_CODE)	Inactive	Optional. Can be activated if the project uses more than one company code in Process Director Accounts Payable.
S02	Currency (CURRENCY)	Inactive	Optional. Can be activated if the project uses more than one currency code in Process Director Accounts Payable.
S03	Vendor (VENDOR_NO)	Inactive	Mandatory. Must be activated.
S04	Document date (DOC_DATE)	Inactive	Mandatory. Must be activated.

Name	Short description	Status	Mandatory/optional
S05	Purchasing Document Number (PO_NUMBER)	Inactive	Mandatory. Must be activated.
S06	Document number of an invoice document (SAP_DOC_NO)	Inactive	Mandatory. Must be activated.
S07	Reference document number (REF_DOC_NO)	Inactive	Mandatory. Must be activated.
S08	Agent (CR_USER)	Inactive	Optional/mandatory. Optional: Can be activated if the project uses Agent to assign Process Director Accounts Payable documents to special uses. Mandatory: If a project uses the COCKPIT/WL1, /COCKPIT/WL2, and /COCKPIT/WL3 transactions, this index must be activated.
S09	Transfer date (CR_TIMESTAMP)	Inactive	Mandatory. Must be activated.
S10	Cockpit document number (DOCNO)	Inactive	Mandatory. Must be activated.
S11	Cockpit document type (CP_DOC_TYPE)	Inactive	Optional. Can be activated if the project uses more than one Process Director Accounts Payable document type.

Type 2

Indexes for optimizing performance with the /COCKPIT/PAYMENT_CONTROL report.

Name	Short description	Status	Mandatory/optional
P01	Only PAYMENT_CONTROL (AUGBL)	Inactive	Mandatory for payment control report. Must be activated if the project uses the COCKPIT/PAYMENT_CONTROL scheduled report to update the payment information in Process Director Accounts Payable.

Type 3

Indexes for optimizing performance with project-specific requirements. These indexes will be locally created as a part of the normal project activity.

Name	Short description	Status
Z**	Xxx	Inactive
Y**	Xxx	Inactive

Prerequisite

- The namespaces must be modifiable as described in [Checking the namespaces](#).
This step must be performed by the responsible database administrator. When migrating to new indexes, some steps can create a huge amount of database load, which can slow down the system. Those steps should be done during a period that does not have a normal production load.

Importing indexes into the development system

The transport requests in the table below contain a set of necessary indexes for the `/COCKPIT/THDR` table. Import the appropriate transport request for your SAP version into the development system.


Request	User	Short description
DR6K901390	READSOFT	INVOICE COCKPIT Create Indexes ERP 6.0

Activating indexes

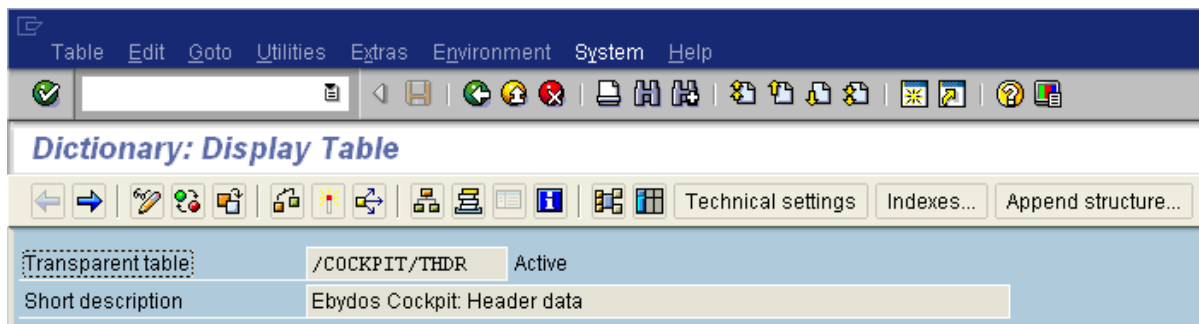
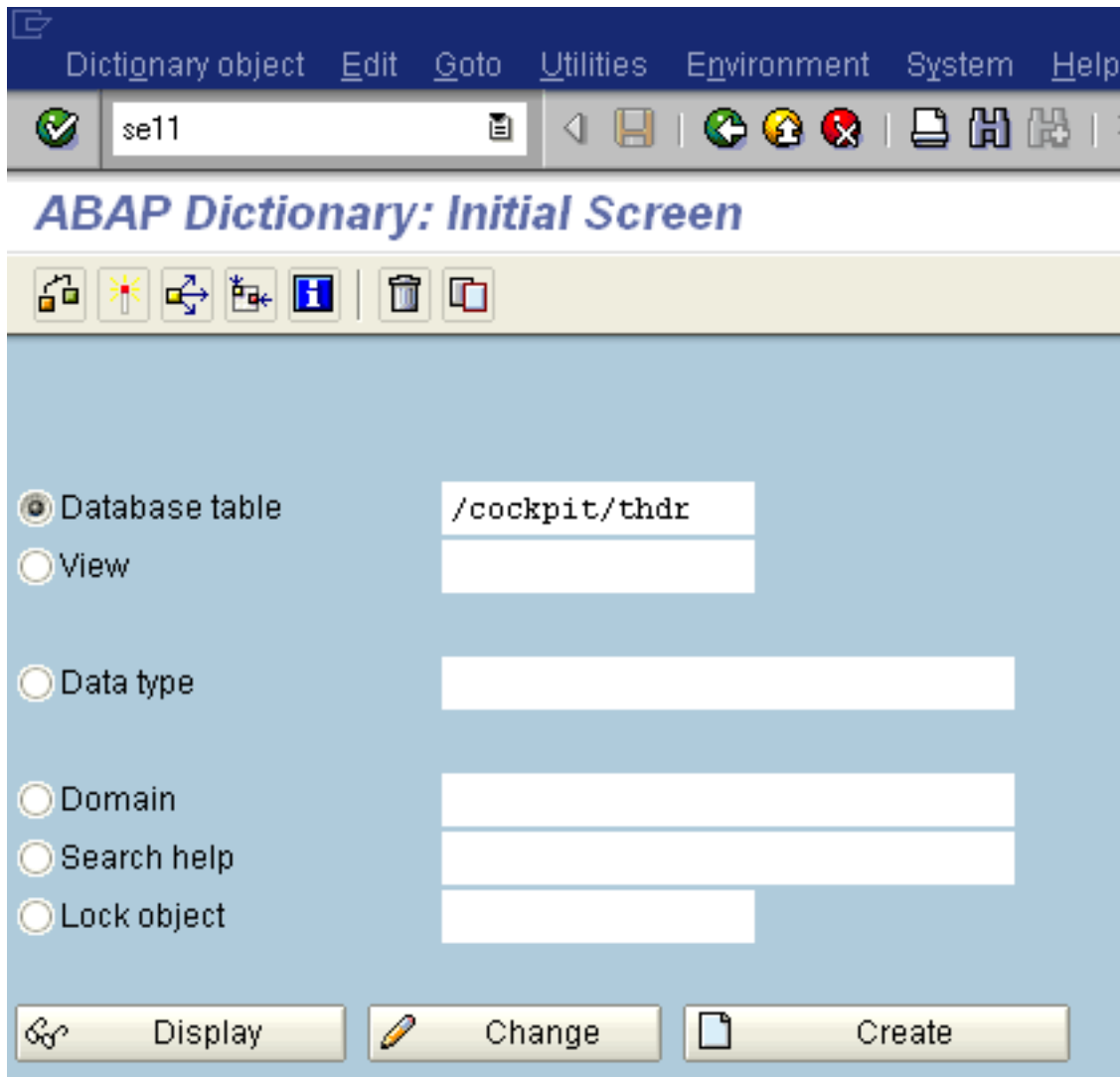
Index activation must be done in the development system, imported into a test/QA system, and then into a production system. The activation of indexes is a repair, so this will create a local transport request. Local transport requests need to be released after all the indexes have been activated. You need to create a Transport of Copies and include the local transport requests to import the indexes into successor systems.

If you migrate from old indexes to new indexes, this step can create a huge amount of database load. The installed Process Director Accounts Payable already contains data, so the database not only has to create the new indexes, but also calculate the index entries for the existing entries in the `COCKPIT/THDR` table. All the steps in this chapter need to be performed by the responsible Database Administrator.

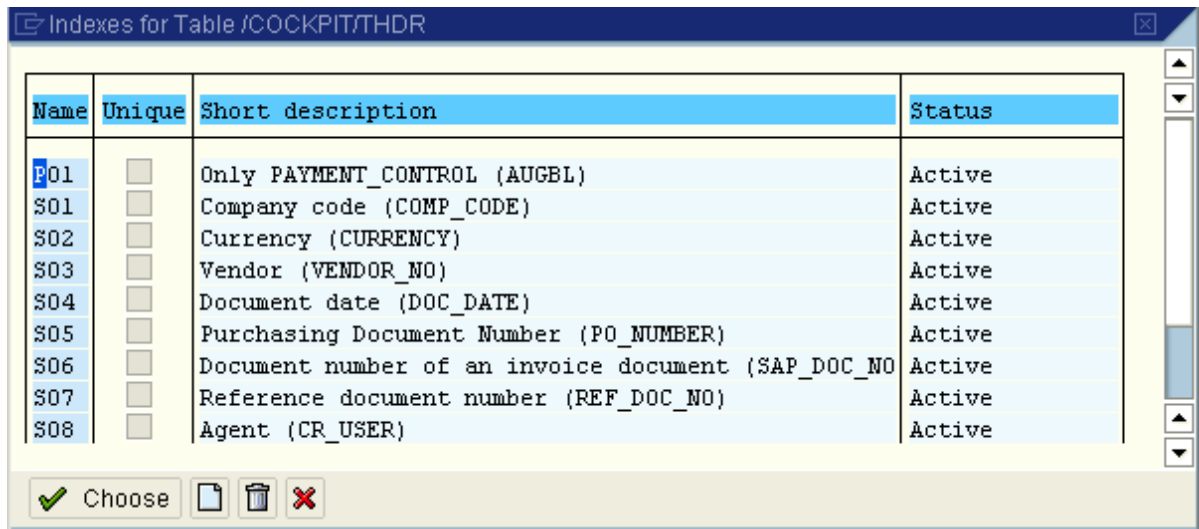
To activate an index in the `/COCKPIT/THDR` table, complete the following steps.

1. Open the `SE11` transaction.
2. Set the **Database table** to `/COCKPIT/THDR`.
3. Click **Display**  .




4. Click **Indexes** Indexes....





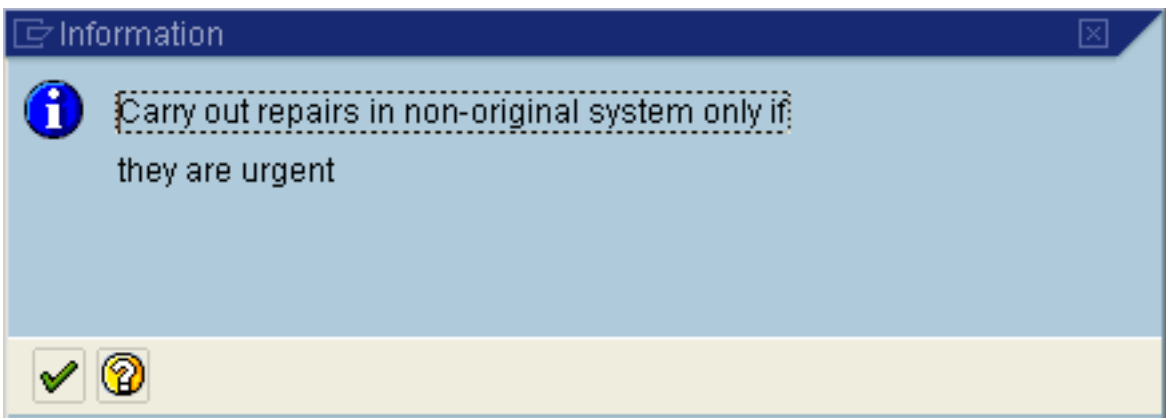
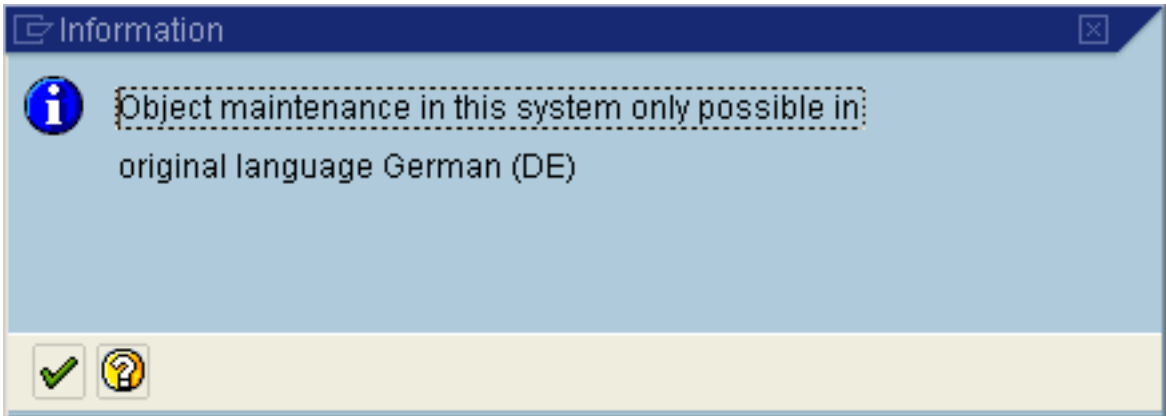
5. Double-click an index to activate it.



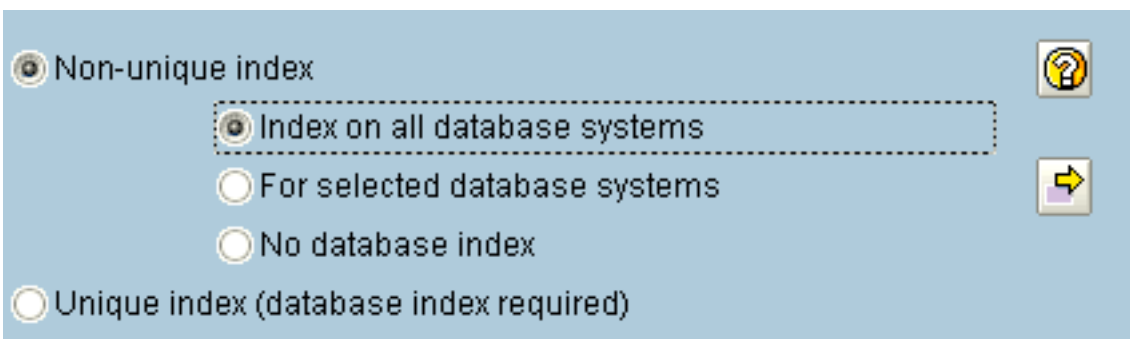
Name	Unique	Short description	Status
S01	<input checked="" type="checkbox"/>	Only PAYMENT_CONTROL (AUGBL)	Active
S02	<input type="checkbox"/>	Company code (COMP_CODE)	Active
S03	<input type="checkbox"/>	Currency (CURRENCY)	Active
S04	<input type="checkbox"/>	Vendor (VENDOR_NO)	Active
S05	<input type="checkbox"/>	Document date (DOC_DATE)	Active
S06	<input type="checkbox"/>	Purchasing Document Number (PO_NUMBER)	Active
S07	<input type="checkbox"/>	Document number of an invoice document (SAP_DOC_NO)	Active
S08	<input type="checkbox"/>	Reference document number (REF_DOC_NO)	Active

Choose   

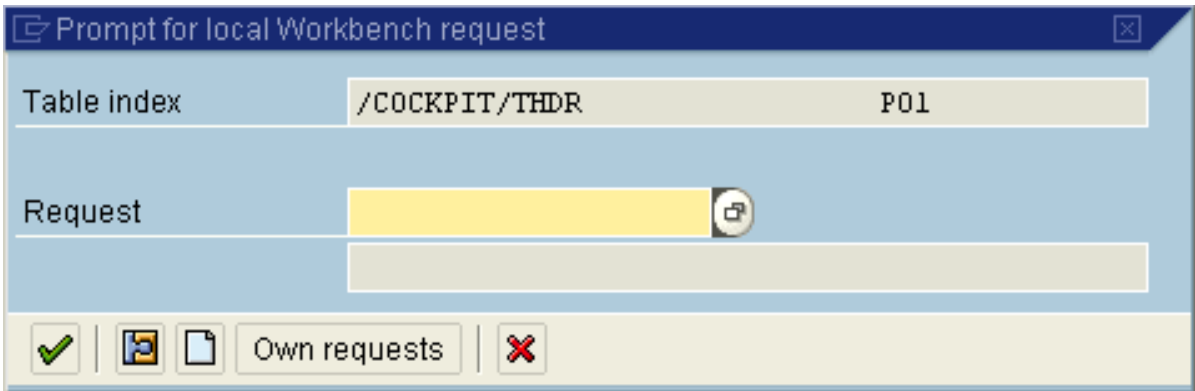
6. Click the **Display/Change**  button, and then click the **Continue (Enter)**  button for each of the **Information** pop-up messages.



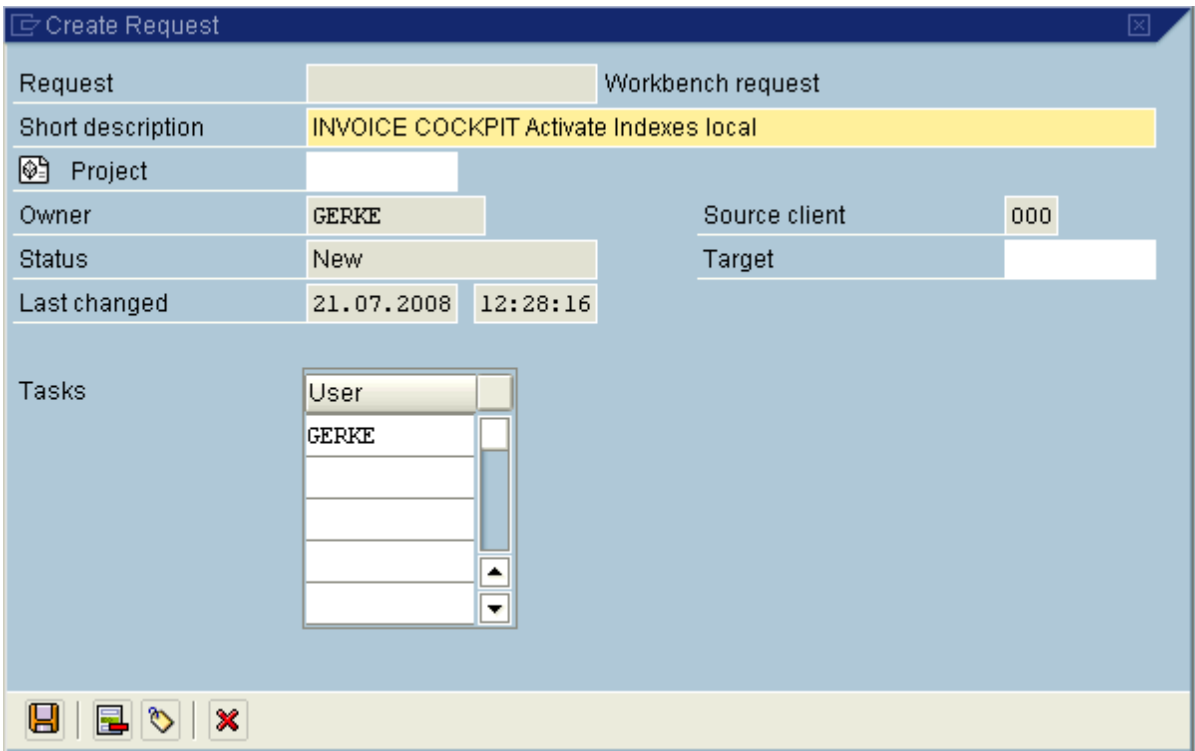
7. Under **Non-unique index**, select **Index on all database systems**.



- Save the changes and create/choose a Workbench request.



- The Workbench request cannot have an entry set in the **Target** field.



- Save the changes. If there are already a lot of documents in Process Director Accounts Payable, this step can take several minutes or even hours.
The index will be active after Step 10 has been completed and changes have been saved.

Space calculation

The table below contains the length of each delivered index.

Name	Short description	Length
P01	Only PAYMENT_CONTROL (AUGBL)	53
S01	Company code (COMP_CODE)	68
S02	Currency (CURRENCY)	69
S03	Vendor (VENDOR_NO)	53
S04	Document date (DOC_DATE)	51
S05	Purchasing Document Number (PO_NUMBER)	53
S06	Document number of an invoice document (SAP_DOC_NO)	53
S07	Reference document number (REF_DOC_NO)	59
S08	Agent (CR_USER)	80
S09	Transfer date (CR_TIMESTAMP)	64
S10	Cockpit document number (DOCNO)	57
S11	Cockpit document type (CP_DOC_TYPE)	66

$(i1 + i2 + \dots + in) * (\text{row count of table, /COCKPIT/THDR}) = \text{required space to store indexes}$

The DDIC size of the /COCKPIT/THDR table is less than 1K. Most fields are from type, VARCHAR2, and some fields are normally empty. The real size of a /COCKPIT/THDR entry on the database is ~527. Mandatory indexes total to 390.

These figures are only a clue to calculate the required space of indexes. The calculation must be balanced with the transaction, DB02 > Detailed analysis and real measurement of the used space on the database.

Example: Table /COCKPIT/THDR has 10,000 entries.

Table size on database: $\sim 10000 * 527 = 5270000$

Index size on database: $\sim 10000 * 390 = 3900000$

Total size on database: $\sim 5270000 + 3900000 = 9170000$

Troubleshooting

Process Director Accounts Payable

Import errors

During the import you may get an import error. Use the following instructions to assist in solving import errors you may encounter. For additional assistance, content [Tech Support](#).

If a specific structure cannot be activated during the import, please check the structure in the SE11 transaction. It could be that a field from a Customer Include is now a part of the standard structure. In such a case, remove that field from the Customer Include and test if you can activate the structure.

Other problems

- If you encounter the following problems:
 - Images cannot be opened in docking mode in the SAP GUI
 - Images cannot be opened in the Web Application
 - Change the settings in the /COCKPIT/C21 transaction to Y- first archive (image data), then Web server (URL).
 - These problems may arise because this configuration table is now different from the version of PD AP you are upgrading from.
- If you get a license error (license not valid) after upgrading to Process Director Accounts Payable, delete the entries in /COCKPIT/C46 and re-enter them.

Process Director

Import errors

If the log display shows errors about objects that cannot be activated, the PD AP transport was not imported.

Solution: [Import the PD AP transport](#).

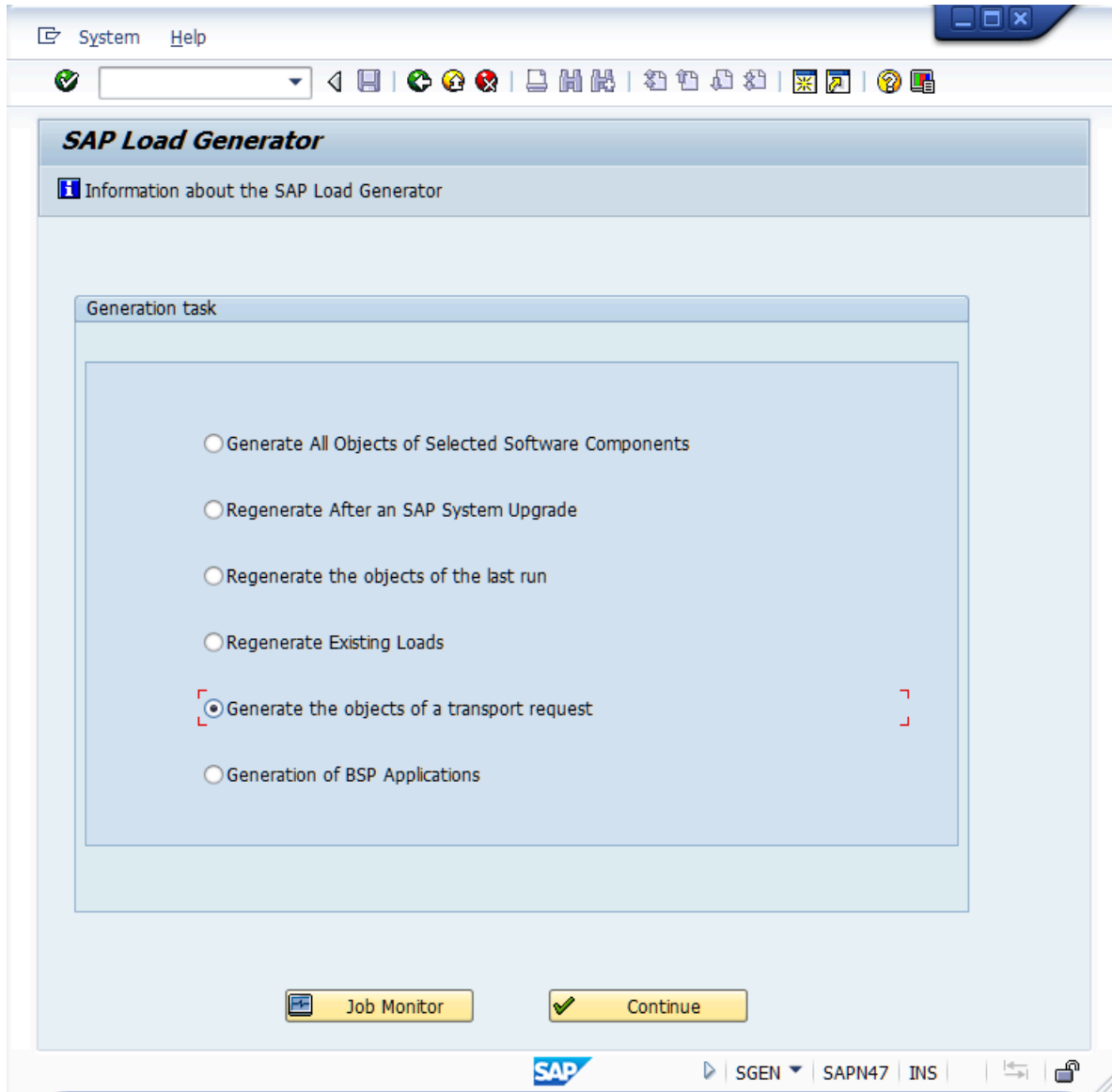
Short dumps

`LOAD_PROGRAM_LOSS` short dump occurs during document transfer, check, post, or other action.

Solution: Increase the *abap/buffersize* parameter in transaction `RZ11`, Recommended value: 400000 or higher.

Short dump object modified during runtime.

Call the `SGEN` transaction and generate all objects of the PD main transport.



`DYNPRO_READ_FAILED` short dump (terminations) occurs when you load or generate certain screens.

Solution: Adjust the `ztta/dynpro_area` profile parameter.

Other problems






Poor performance in Process Director.

Solution: Check the Tune Summary in transaction `ST02` with the SAP System Administrator.

Setting the buffer size

To set the buffer size, complete the following steps.

1. Go to RZ11.
2. Enter the parameter abap/buffersize and click **Display**.
3. We recommend a value of 400000 or higher. Ask the SAP system administrator to increase the value, if necessary. This requires a restart of the SAP system.

Display Profile Parameter Attributes	
 Documentation	
Param. Name	
abap/buffersize	
Short description(Engl)	Program Buffer Size
Appl. area	ABAP 
ParameterTyp	Integer value 
Changes allowed	Change permitted 
Valid for oper. system	All operating systems 
Minimum	0
Maximum	0
DynamicallySwitchable	<input type="checkbox"/>
Same on all servers	<input type="checkbox"/>
Dfit value	300000
ProfileVal	400000
Current value	400000