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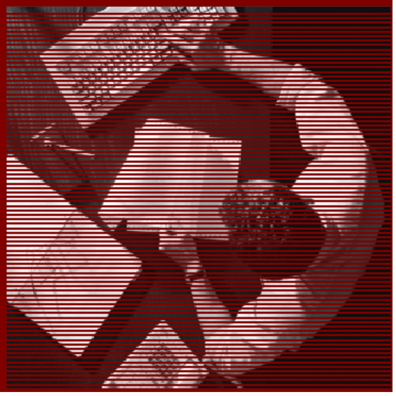

SAP Library

BPC Web Guide

SAP Business Planning and Consolidation 7.0 SP03

version for the Microsoft platform

Target Audience

- System Administrators
- Technology Consultants

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Welcome to Business Planning and Consolidation Web Guide

Business Planning and Consolidation (BPC) Web is a zero footprint client that allows you to publish reports and other documents and other unstructured documents, create and analyze live reports, view KPIs on a dashboard, and perform predictive analysis.

Starting BPC Web

You can start BPC Web from a browser, or from the BPC Launch page.

To start BPC Web

1. Do any of the following:
   - Open a browser and type **http://<***server name***>/osoft**, where *server name* is the name of your BPC server.
   - From the Windows Start menu, select **SAP > BPC**.
   - From your Windows Desktop, click the **BPC** icon.
2. From the Launch page, select **BPC Web**.
3. From the **Getting Started** action pane, select the desired task.

Getting started in BPC Web

To get started using BPC Web, select one of the following tasks in the Getting Started action pane:

Task	Description
Open a business process flow	Allows you to open a business process flow that has been defined and saved by an administrator. **See Using business process flows**
Launch BPC reporting menu	Allows you to view reports on auditing, comments, and business process flows. **See BPC reporting**
Content Library	Launches the Content Library. **See About the Content Library**
Live Reporting	Launches Live Reporting. **See About Live Reporting**
Insight	Launches Insight. **See About Insight**

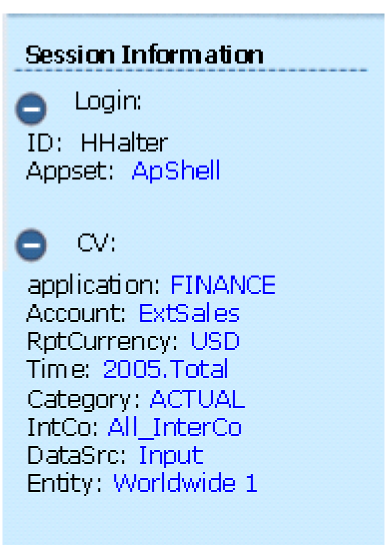
Understanding Action Panes

A BPC action pane consists of the following sections: **Navigation**, **Session Information**, **Task Selection or Input Fields**, **Available Interfaces**, and **See Also**. These sections are described below.

Navigation

The Navigation section provides a Back, Forward, and Home button. The Back button brings you to the previous action pane; The Forward button brings you to the next action pane (only if you previously pressed Back); and the Home button brings you to the first action pane for the current process.

Session Information



The **Session Information** section contains login and current view information.

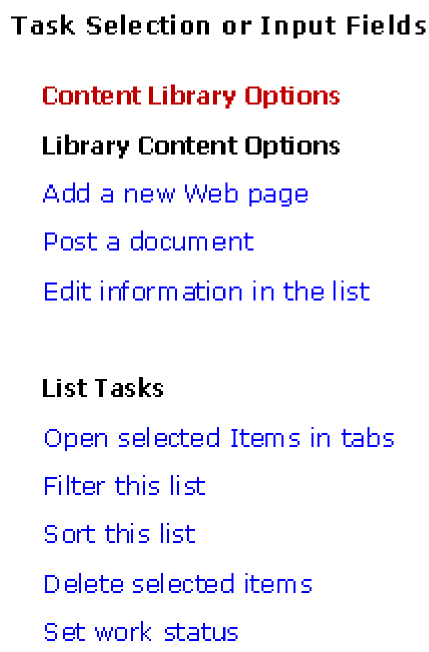
Login

This area shows the active user ID and application set. To change the application set, select the link, make your selection, then click **OK**.

Current View

This area controls which members, parent members, or top-level members are represented in the active report or input schedule. It allows you to dynamically change the current view by entering various members, or selecting them from the Member Lookup. You can expand the section to view all available dimensions and members to which you have access.

Task Selection or Input Fields

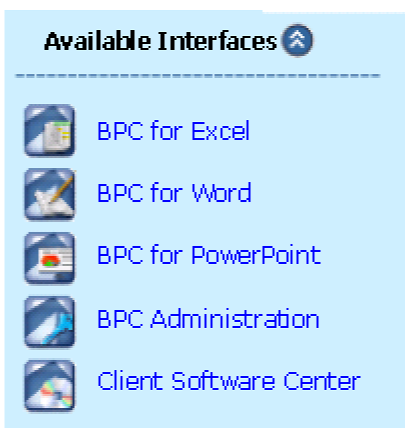


The **Task Selection** or **Input Fields** section displays either a list of tasks, or input fields that require action. If a task list displays, clicking a link will perform a task, open a dialog box, or open another action pane.

If input fields display, you must take action by completing the required fields. If you make a mistake, you can always click the Back button at the top of the action pane.

This example is a sample Task Selection section.

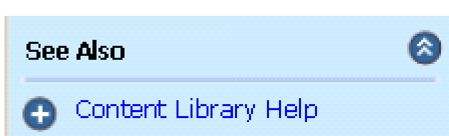
Available Interfaces



The **Available Interfaces** section contains links to other components: BPC Web, BPC for Excel, BPC for Word, and BPC for PowerPoint. You can expand or collapse this section to see more or less, respectively, of the Task Selection/Input Field section.

Click a link to start the desired program.

See Also



The **See Also** section contains a link to the context help topic associated with items in the Selection or Input area in the action pane. Click the link to view field-level help, an overview, and a how-to.

You can expand and collapse this section to see more of the Task Selection/Input Field section.

Minimizing/Maximizing action panes

You can minimize the action pane to display more of the BPC Web interface, and then maximize it when you need to navigate or perform a task.

To minimize an action pane

- From a displayed action pane, click the minimize button in the upper right corner.

To maximize the action pane

- Click **View action pane** from the BPC Web header bar.

Changing the current view

The content of many BPC Web pages, such as a live report, changes based on the members chosen in the current view. You can change the current view on a page to display a different set of information. (Note that current view members may be fixed on certain reports and input schedules.) When you change the member of a dimension on the current view, it is changed across the entire active desktop, not only the current page.

To change the current view

1. From a current view-driven page in BPC Web, click one of the dimensions in the Session Information area. (You might have to click the application name to set the application first.)
2. Select the desired member from the Member Lookup dialog box, then click OK. To search for a member, you can filter the list by selecting Show Filter and specifying the desired filter.

Using the Content Library

About the Content Library

The Content Library is a repository for storing files that you want to share. Valid file types include Word, HTML, Excel, PowerPoint, text (such as an email), and images.

When you open the Content Library, you are presented with Content Library List page. This page contains all the files that have been added by BPC users. To open a file, click on the Title.

The following table describes the Content Library List categories. You can click a category to sort the items alphabetically, or if sorting by Date, most recent.

Field	**Description**
☐	Allows you to select one or more items to display on tabs or delete. **See Opening items in tabs** and **Deleting items**
Title	The name of the web page or file. You can click the title to open the file.
Document Type	The document type associated with the posted file. By default, the Content Library provides four document types in which to categorize the posted documents. The default document types are: Application, Guidelines, Schedule, and Scorecard. In addition, there is an extra layer of categorization, called a Subtype (see below). A document type and subtype must be supplied when posting a document to the Content Library for sorting and filtering purposes. Document types and subtypes are defined by administrators.
SubType	The document subtype associated with the posted document. While document types are defined by administrators, subtypes can be defined on the fly.
Application context	You can post files that are application-specific or not. If a file is application-specific, that means that it is associated with a current view. For example, a Word document might be associated with a particular report. If you want to view a report and anything that is associated with that report, you could view a particular current view. Relevant reports and documents would be displayed.
Team Access	Each file that is posted is assigned user or team access. Access rights are listed in this column.
Date	The date the file was posted, or the web page was added.

Opening the Content Library

This topic describes how you can open the Content Library from BPC Web.

To open the Content Library, do one of the following

- From any page in BPC Web, click the **Content Library** button in the header pane.
- From the **Getting Started** action pane in BPC Web, select **Content Library**.

Posting documents

You can post documents to the Content Library. These can exist on your hard drive or network folder, and can be any type supported by your browser such as Word, PowerPoint, Excel, GIF, JPG, HTML, or PDF.

After posting documents using this procedure, they appear in the Content Library List. The files displayed in the list are filtered by the current view (for those that have been assigned application context), the user's view rights to information, and any manual filters set.

To post a document

1. From the Content Library, select Post a document from the **Content Library Options** action pane.
2. In the **Post a Document Options: Step 1 of 5** action pane, click the Browse button to choose a file. Browse for the file, select it, and click **Open**.
3. Enter a description for the file, then click the button.
4. In the **Post a Document Options: Step 2 of 5** action pane, click the **Select users/teams** link. In the **Access** dialog box, select the teams and/or users to which to grant access, then click **OK**. Click the button.
5. In the **Post a Document Options: Step 3 of 5** action pane, select a document type and subtype, then click the button.
6. In the **Post a Document Options: Step 4 of 5** action pane, click **Yes**, send an email to send an email to the users and teams to which you granted access to the document. Enter an appropriate email message, or click Default message to use the default system message. Click the button.
7. In the **Post a Document Options: Step 5 of 5** action pane, select application context, if desired, then click the button.
8. The **Content Library List page** is displayed, and the document you just added now appears in the list.

Adding new pages

You can add a new Web page to the content library to display information you want to share with other BPC users. There are several types of objects (documents, web pages, lists of reports, etc.) you can add to the pages. **See Types of objects**.

Once an object is added to the page, any subsequent updates to the object can be immediately seen in the containing page after the object is republished. That is, you do not have to make any changes to the containing page once an object is posted there. **See Posting documents**.

You can make any page from the Content Library your BPC Web home page. To do this, hover over the item you want to add. The number is displayed in the status field. Enter the number in the BPC Administration application set parameter page in the LANDINGPAGEITEM field. See your administrator for more information. Any item in the Content Library can be used as the starting page. You can even designate a two-column page as the item to display.

To add a new page

1. Open the Content Library. **See Opening the Content Library**

2. From the **Content Library Options** action pane, select **Add a new web page**.
3. Type a name for the page in the **What is the new page name** field. This name will be displayed in the Title column of the Content Library list, and is displayed at the top of the web page, when opened.
4. Select an orientation for the new page:
   - **No columns** - Content will be left justified and span across the page.
   - **Side by side** - Content will be contained in a two column layout. The columns will be of equal width.
   - **Small left side** - The page will have two columns, with the left side being smaller than the right.
   - **Small right side** - The page will have two columns, with the right side being smaller than the left.
5. Click OK to continue with the process of creating a new Web page.
6. Select an object from the Available Objects list, and drop it in one of the columns on the page. If there are multiple items in a column, you can use the arrow keys to move items up and down.
   More info

   Up arrow button: Moves the selected object, in the associated list, up one line. This button is ghosted until 2 or more objects appear in the associated list.

   Down arrow button: Moves the selected object, in the associated list, down one line. This button is ghosted until 2 or more objects appear in the associated list.

   X button: Deletes the selected item in the associated list. This is a destructive action that cannot be un-done, there is a confirmation prompt.
7. To manipulate the object, see the associated topic for that object:
   - **Adding web-ready files**
   - **Adding web-ready books**
   - **Adding live report - files**
   - **Adding documents**
   - **Adding websites**

Setting access to pages

You can set access rights for other BPC users to web pages that you add to the Content Library.

To set access to a page

1. From the Content Library List, select the web page for which you want to set access rights.
2. Select **Modify this page**.
3. Select **Set access to this web page**.
4. In the **Access** dialog box, select the teams and/or users to which to grant access, then click **OK**.
5. Click **Save and show me the finished web page**.

Setting the work status

You can set the work status for data in a live report. You must have the correct task and member access authority in order to change the work status on a particular set of data.

To set the work status

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Set work status** from the Live Reporting Options action pane.
3. In the Work Status Options - Step 1 of 2 action pane, select **The active CV** or **Another CV**.

4. If you selected **Another CV**, click the dimension links to open the Member Lookup and select the desired current view members.
5. When members for all dimensions have been selected, click the button.
6. In the **Should children of this data region be included?** field, select **Include children in the data region** if you want the work status change to apply to the members you previously selected and their children. Otherwise, leave blank.
7. In the **What would you like to set as the work status?** field, select the desired setting from the drop-down list.
8. Click the button.

Adding objects

You can add objects to Content Library pages.

Adding objects to pages

After you add a page, you can add objects to it. The table below describes the types of objects you can add.

After you add objects to it, you can preview it. Previewing allows you to see the way the page will look, so you can make revisions to it without posting it.

Feature	**Description**
Web Ready - File	An Excel spreadsheet, published report, Word document, PowerPoint slide, web page, etc. You specify a title for the file, and then select the file from an AppSet or Application Publications folder. **See Adding web-ready files**
Web Ready - Book	A book of reports. You specify a title for the book, then select the book from the list of books that have been published using the Book Publication Wizard in BPC for Excel. **See Adding books of reports**
Live Reports - File	A live report created from Live Reporting. **See About live reporting**
Document - File	A document saved to the Content Library. **See About the Content Library**
Documents - List	A list of documents saved to the Content Library. **See Adding documents lists**
Website	Any website. You specify the URL. **See Adding websites**
BPF	A business process flow 'to do' list. **See Adding BPF To Do Lists**

To add an object to a page

1. From the Content Library, add a new page, or open an existing page. (You open an existing page by selecting it from the Content Library List. It has a Type of Web Page.)

2. If modifying an existing page, select **Modify this page** from the action pane. If adding a new page, drop the desired object to the appropriate column from Page 2 of the Content Library.

Adding Web-Ready files

In order to add a file to a page, it must have been published as a web-ready file or book using WebExcel. The following table describes the folders to which web-ready files are saved.

Folder	Description
AppSet	This folder contains files with the highest level of visibility. Files stored here are available to all valid users of the application set.
Application	Files stored here are available to all valid users of the application.
Team	Files stored here are available to a particular team.

The file can be any type that your web server supports, including Excel, Word, PowerPoint, HTML, and image files.

To add a Web-Ready file

1. Add or modify a web page and add the **Web-Ready file** object to the page by dragging it to the desired location. **See Adding new pages** or **Adding objects to pages**.
2. From the **Web Ready - File: Step 1 of 2** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.
4. From the **Web Ready - File: Step 2 of 2** action pane, select the folder from which to retrieve the file.
5. Select the name of the file (browse folders, if necessary), then click the button.
6. Continue adding objects to the page, or select an item from the action pane:
   - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
   - **Set access to this web page**. **See Setting access to pages**.
   - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
   - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding Web-Ready books

You can add a book of reports to a page. The book of reports must have been published using BPC Excel's Book Publication Wizard.

To add a Web-Ready book

1. Add or modify a web page and add the **Web-Ready - book** object to the page by dragging it to the desired location. **See Adding new pages** or **Adding objects to pages**.
2. From the **Web Ready - Book: Step 1 of 3** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.
4. From the **Web Ready - Book: Step 2 of 3** action pane, select the book from the list of books available to you, select the book section you want to add, then click the button**.**
5. From the **Web Ready - Book: Step 3 of 3** action pane, select **Show as list of reports** if you want to display the list of reports contained in the book, or select **Show as a specific report** to select one or more specific reports from the book.

6. If you selected to **Show as a specific report**, select a report from the **Selected Report** drop-down list. If the report has VaryKeys defined for any dimensions, select the desired member(s) or select **CurrentView** to have the system take the members from the user's current view.

   Note that when you set the report to vary by the current view setting, there may not be reports for every current view combination. In this case, BPC Web displays a message which says there is no report available.

7. Click the button.
8. Continue adding objects to the page, or select an item from the action pane:
   - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
   - **Set access to this web page**. **See Setting access to pages**.
   - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
   - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding Live Report - Files

You can add live reports that were created in BPC Web's Live Reporting to pages.

To add a Live Report - File

1. Add or modify a web page and add the **Live Report - File** object to the page by dragging it to the desired location. **See Adding new pages** and **Adding objects to pages**.
2. From the **Live Report - File: Step 1 of 2** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.
4. From the **Live Report - File Step: 2 of 2** action pane, select the desired folder and file, then click the button.
5. Continue adding objects to the page, or select an item from the action pane:
   - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
   - **Set access to this web page**. **See Setting access to pages**.
   - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
   - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding Documents

You can add documents that have been posted to the Content Library to a web page.

1. Add or modify a web page, and add the **Document - File** object to the page by dragging it to the desired location. **See Adding new pages** and **Adding objects to pages**.
2. From the **Document - File Step 1 of 2** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.
4. From the **Live Report - File Step 2 of 2** action pane, select **My files** to select a file from your local folder or select **Team files** to select a file from the Team folder.
5. If you selected **Team files**, select the team folder in which the file exists.

6. Select the radio button next to the file you want to add to the page. If you do not see the file, click **Next** to see the next set of available documents. Click **Open list in full page** to see the entire list of available documents. When you have found and selected the file you want to add to the page, click the button.
7. Continue adding objects to the page, or select an item from the action pane:
   - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
   - **Set access to this web page**. **See Setting access to pages**.
   - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
   - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding document lists

You can add a list of documents to a page.

To add a Document - List

1. Add or modify a web page, and add the **Document - List** object to the page by dragging it to the desired location. **See Adding new pages** and **Adding objects to pages**.
2. In the **Document - List : Step 1 of 2** action pane, enter a title for the page item.
3. Select the desired pixel height of the item, then click the button.
4. In the **Document - List : Step 2 of 2** action pane, select **All documents** or **Filtered documents**. If you selected Filtered documents, click **Filter this list**. **See Filtering and sorting content lists**.
5. Click the button.
6. Continue adding objects to the page, or select an item from the action pane:
   - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
   - **Set access to this web page**. **See Setting access to pages**.
   - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
   - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding websites

You can add any website to a page.

If the website you add to a page contains code that blocks it from displaying in a framed page, the website opens in a new window when a user opens the containing page. This is because the BPC Web website uses frames, and some commercial websites detect that their pages are contained in frames, and redirect their output to a whole page.

To add a website

1. Add or modify a web page, and add the **Web Site** object to the page by dragging it to the desired location. **See Adding new pages** and **Adding objects to pages**.
2. From the **Web Site - File Step 1 of 2** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.

4. From the **Web Site - File Step 2 of 2** action pane, enter the URL for the website, then click the button.
5. Continue adding objects to the page, or select an item from the action pane:
    - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
    - **Set access to this web page**. **See Setting access to pages**.
    - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
    - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Adding BPF To Do Lists

You can add a BPF 'To Do List' to a page.

To add a BPF To Do List

1. Add or modify a web page, and add the **BPF** object to the page by dragging it to the desired location. **See Adding new pages** and **Adding objects to pages**.
2. From the **Business Process: Step 1 of 3** action pane, enter the name you would like to appear as the title of the item.
3. Select the desired pixel height of the item, then click the button.
4. From the **Business Process: Step 2 of 3** action pane, select the BPF you want to add, then click the button.
5. From the **Business Process: Step 3 of 3** action pane, enter the name of a background image to display behind the list. The image must be saved to the **/webfolders/<***appset***>AppSetPublications\BPFBackground** folder on the server.
6. Click the button.
7. Continue adding objects to the page, or select an item from the action pane:
    - **Modify the selected page object**. This option allows you to reenter the action pane flow to modify the selected object.
    - **Set access to this web page**. **See Setting access to pages**.
    - **Preview this web page**. This option opens a window where you can view your changes, without saving them.
    - **Save and show me the finished web page**. This selection saves the displayed page, and opens a window where you can view your changes.

Modifying pages

You can modify web pages after they have been added to the Content Library.

To modify a web page

1. From the Content Library List, select the name of the web page (in the Title column) you want to modify.
2. Select **Modify this page** to add, remove, or change order of objects on the page, or select **Delete this page** to delete it from the Content Library List.

Opening items in tabs

If you want to view multiple items from the Content Library List, you can display them in tabs, and then flip through the tabs to view each file.

To open items in tabs

1. From the Content Library List, select the check box in front of one or more items that you want to display in tabs.
2. From the **Content Library Options** action pane, select **Open selected items in tabs**.
3. If prompted to open the file, click **Open**.
4. Click the file name on the tab to view a particular file.

Filtering and sorting content lists

You can filter the items in the Content Library List to see a subset of the files, or sort the list to change the order of the column values. You can use the procedure in this topic to sort a column, or click a column heading to sort a column.

To apply a filter

1. From the Content Library List, select **Filter this list** from the **Content Library Options** action pane.
2. For the option **What items do you want to view**, select one of the following:
   - **All** - Shows all files you have access to, including items you posted. This is the default option.
   - **From me** - Shows only the files you posted.
   - **To me** - Shows all the files that you have access to (not the files you posted).
3. Select one or more of the following items, and then specify additional information about that item.
   - **Title** - Filters on the title of the item, based on the text entered in the **Description contains what text** field.
   - **Type** - Filters on the file's document type, based on the text entered in the **Description contains what text** field.
   - **Subtype** - Filters on the file's document subtype, based on the text entered in the **Description contains what text** field.
   - **Application context** - Filters on the specified application and dimensions listed in the **Context contains what values** field.
   - **Date** - Filters on the date range specified in the **From** and **To** fields.
4. Click **OK**.

To sort the list

1. From the Content Library List, select **Sort this list** from the **Content Library Options** action pane.
2. From the Sort This List Options action pane, select **Title**, **Type**, **Subtype**, **Application Context**, or **Date**.

Deleting items

You can delete items from the Content Library.

To delete an item

1. From the Content Library List, select the check box next to one or more items that you want to delete.
2. From the **Content Library Options** action pane, select **Delete Selected Items**.
3. Select **OK** to confirm the deletion.

Using Live Reporting

Live Reporting lets you create and analyze drag & drop reports with ease.

About Live Reporting

With live reporting, you have the ability to create a report using drag & drop. You can start from a blank page, or edit an existing report or input schedule. You can switch the row/column dimensions easily, and add nested dimensions.

In addition to creating a report, you can add an interactive chart to it that gets updated as you update or drill down on the report.

Building reports using Drag & Drop

You build reports in Live Reporting using a drag & drop interface.

To build a drag & drop report

1. Open Live Reporting, and click **Build a report using drag & drop** from the action pane.

   If no dimensions appear, click the application name in the action pane to log on to an application.

2. From the dimension list, select the dimension you want to add to the columns, and drag it to the column area.
3. From the action pane, select the individual members that you want to use on the columns. Alternatively, type the member names directly in the **Selected Members** edit box. Values must be separated by commas with no trailing or leading spaces. You can also delete selected members by highlighting a value in the **Selected Members** edit box and selecting the **Delete** key on your keyboard.
4. If you want the report to always use the current view to determine the column member, click the **Inherit member value from CV** check box.
5. If you want to select member selection rules and expansion behaviors, select the **Specify Member Selection rules** check box, then click the button. **See Specifying member selection rules**, below.
6. Select **Set parent after** if you want the parent to display after the expansion, then click the button.
7. Repeat steps 2 - 6 for the row dimension.
8. Add a header or footer by typing text or a function in the **Page Header** or **Page Footer** fields.
9. If you did not select to specify member selection rules, select the desired option from the **Drag & Drop Options** action pane.
   - **Report Data Preview** - gets the data from database and displays it on the page.
   - **Save Report** - to save the report. Enter the name and description for the report, then click the green check.
   - **Format Report** - to set scaling options. From the **Data Scaling Option** action pane, select one of the options, then click the green check.
   - **Charting options** - to add a chart to the report, **see Adding charts to live reports**.

Specifying member selection rules

If you selected to specify member selection rules, do the following.

To specify member selection rules

1. From the **Member selection rule - Step 1** action pane, select one of the selection options.

2. If you selected one of the 'Dependents' options, select the expansion level, **1**, **2**, or **3**, to specify how many dependent levels to display.
3. Select **Set parent after** to display the parent last when expanding rows. When this check box is not checked, the system displays the parent before the expansion of the members.
4. Select **Suppress if zero** to suppress data when expanding rows and values are zero.
5. Click the button.
6. From the **Member selection rule - Step 2** action pane, select whether to display the member ID, description, or both in the report, then click the green check.
7. If both the row and column dimensions are displayed, see step 7 in the "To build a drag & drop report" procedure, otherwise start with step 6.

Viewing and using live reports

There are several things you can do with live reports when viewing them in BPC Web.

Task	Description
Send data values	Sends updated values to the database.
Add a new comment	**See Adding comments**
View comments	**See Viewing comments**
Set work status	Allows you to set the work status for the report. **See Setting the work status**
Edit the report using drag & drop	Edit the report using drag & drop. **See Building reports using drag & drop**
Refresh report	Refreshes the data from the database.

To view a live report

1. Select the **Live Reporting** button in the BPC Web header or from the Available Interfaces section of the action pane.
2. Click on a report name in the list.
3. Select one of the options (as described in the table above) from the **Live Report Options** action pane.

Setting the work status

You can set the work status for data in a live report. You must have the correct task and member access authority in order to change the work status on a particular set of data.

To set the work status

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Set work status** from the Live Reporting Options action pane.
3. In the Work Status Options - Step 1 of 2 action pane, select **The active CV** or **Another CV**.
4. If you selected **Another CV**, click the dimension links to open the Member Lookup and select the desired current view members.
5. When members for all dimensions have been selected, click the button.

6. In the **Should children of this data region be included?** field, select **Include children in the data region** if you want the work status change to apply to the members you previously selected and their children. Otherwise, leave blank.
7. In the **What would you like to set as the work status?** field, select the desired setting from the drop-down list.
8. Click the button.

Adding charts to live reports

You can create a chart from a live report, or add a chart to a live report so it displays on the same page. When you change the report in any way, the associated chart is also updated.

To add a chart

1. Open an existing report, or create a new report.
2. From the **Drag & Drop Options** action pane, select **Chart options**. (You can open this action pane by selecting **Edit report using drag & drop** from the **View Report Options** action pane.)
3. From the **Chart Options - Step 1 of 4** action pane, do the following:
   a. Select **Report & Chart** to display the live report and chart side by side, or **Chart Only** to display only the chart.
   b. Select the width and height of the chart, the type of chart (bar, column, line, point, pie, area), and whether it's 2D or 3D.
   c. Click the button.
4. From the **Chart Options - Step 2 of 4** action pane, do the following:
   a. Select the data range from the report grid to specify the chart source data. The source data must contain data values only (not column or row headings). You can select one or more rows and columns. (To select the cells, click and hold the mouse button.)
   b. Select **Rows** to place the items from the selected rows on the Y axis, or **Columns** to place the items from the selected columns on the Y axis.
   c. Click **Preview chart** to display the chart.
   d. Click the button.
5. In the **Chart Options - Step 3 of 4** action pane, do the following:
   a. Select **Visible** to display the chart's legend.
   b. Select **Docked in chart** to display the legend within the chart.
   c. If you did not select **Visible**, click the green arrow button. Otherwise, continue with step 5d.
   d. If you selected **Visible**, select where to place the legend in relation to the chart, the alignment, font type, font size, and font color.
   e. Click the button.
6. In the **Chart Options - Step 4 of 4** action pane, do the following:
   a. Select **Visible** to display data values in the chart.
   b. If you selected **Visible**, select the font type for the values, and the font size and color, and whether the value marker is displayed.
   c. Select **Display X grid lines** to display grid lines across the horizontal axes, and **Display Y grid lines** to display grid lines across the vertical axes.
   d. Click the button.
7. To learn more about the options on the **Drag & Drop options** action pane, **see Building reports using drag & drop**.

To remove a chart from a report

1. Open an existing report, or create a new report.
2. From the **Drag & Drop Options** action pane, select **Chart options**. (You can open this action pane by selecting **Edit report using drag & drop** from the **View Report Options** action pane.)

3. From the **Display Chart - Step 1 of 4** action pane, select **Report Only** from the **Display Options** field, then click the the button.

Formatting reports

There are several ways you can format live reports.

Setting the data scale

You can scale your numbers in a live report.

To set the data scale

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Edit report using drag & drop**, then select **Format report**.
3. From the **Format Report Options** action pane, select **Set data scaling**.
4. From the Data Scaling Options action pane, select the scale value, number of digits to display to the right of the decimal point, the number format, and whether you want to highlight calculated cells.
5. Click the button.

Setting suppression options

You can suppress the rows and/or columns with null values in a live report.

To set suppression options

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Edit report using drag & drop**, then select **Format report**.
3. From the **Format Report Options** action pane, select **Set suppression options**.
4. To suppress rows, select **Suppress rows**, and to select columns, select **Suppress columns**.
5. Click the button.

Setting the header visibility

You can choose to display or hide column and/or row headings in your live report.

To set header visibility

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Edit live report using drag & drop**.
3. From the **Drag & Drop options** action pane, select **Format report**.
4. Select **Header Visibility** from the **Format Report Options** action pane.
5. To display the row header, select the **Row header visible** check box. To display the column header, select the **Column header visible** check box. (To hide the row or column header, deselect the appropriate check box.)
6. Click the button.

Setting column width

You can set the column width for the row and column headers and the data in your live report. The row header value sets the width for the first column, that is, the column that contains the row headers. The column header value sets the width for the column headers in the subsequent columns, that is, the columns that contain data.

To set column width

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Edit live report using drag & drop**.
3. From the **Drag & Drop options** action pane, select **Format report**.
4. Select **Column width** from the **Format Report Options** action pane.
5. In the **Width of row header** field, enter the desired width, in pixels. (140 is the default.)
6. In the **Width of column header** field, enter the desired width, in pixels. (140 is the default.)
7. Click the button.

Setting the data format

You can define the font type, size, and color of the data in a live report.

To set the data format

1. Open Live Reporting, and open a live report. **See Viewing and using live reports**.
2. Select **Edit live report using drag & drop**.
3. From the **Drag & Drop options** action pane, select **Format report**.
4. Select **Data Formatting**.
5. Select the font type, size, and color, then click the button.

Using Insight

You use BPC Web's Insight to monitor KPIs and predict future performance.

About Insight

Insight is a powerful BPC feature that gives you a business process monitor that tracks real-time events and predicts future performance. It allows you to define key performance indicators (KPIs) corresponding to accounts that individual users wish to monitor. It also displays trends in KPI values.

Insight features include:

- **Dashboard** - The dashboard displays user-specific key performance indicators (KPIs) and other information. **See Understanding the dashboard**.
- **Variance Analysis window** - The Variance Analysis window shows detailed variance information for the selected value. **See Analyzing variances**
- **Predictor window** - Shows predicted actual values for future time periods based on historical data. **See About the Predictor window**.

Create Content Tasks

The following table describes the tasks available under the Create Content category.

Task	Description
Maintain KPIs	Select this task to add or delete KPIs. **See Adding KPIs** and **Deleting KPIs**
Maintain Alerts	Select this task to add, delete, or update an alert. **See Defining KPI alerts**

Starting Insight

You start Insight from BPC Web.

To open Insight, do one of the following

- From any page in BPC Web, click the **Insight** button in the header pane.
- From the Getting Started action pane in BPC Web, select **Insight**.

Understanding the dashboard

The Insight dashboard shows your user-defined KPIs and the following items:

- Budget and actual values for the current time period
- Actual values for the last two time periods
- Budget values for the next two time periods
- Year-to-date values for Actual and Budget
- Positive and negative trends between periods
- Where Actual vs. Budget variances in KPI values occur
- Which variances are predicted to be unfavorable in future time periods
- Which KPIs have custom alerts set for them, or associated actions

Sample dashboard

By default, the dashboard page shows KPI data for all applications in the active application set. You can customize the display to see KPI data for only the applications you specify. The following figure shows a sample dashboard for a single application, Finance. In the example, the current time period represented is September 2006, so the Actual and Budget data for the September 2006 time period is highlighted in yellow.

Insight - FINANCE

Data last synchronized at: 8/3/2006 12:42:43 PM

Key Performance Indicator	Trend	July 2006 ACTUAL	August 2006	September 2006				September 2006	October 2006	November 2006	YTD	YTD
Customer Satisfaction Index		95.02	93.98	93.62				93.46	96.07	95.37	93.62	93.46
Direct Profit		31,342	33,267	28,189				30,211	31,830	32,119	228,611	226,927
DSO		38.36	38.11	38.53				37.84	37.28	36.73	38.53	37.84
Headcount		1,293	1,296	1,296				1,284	1,286	1,287	1,296	1,284
Inventory Turns		4.28	4.31	4.17				4.30		4.41	4.17	4.30
Net Revenue		45, 806	48,569	42,487				44,504	4.36	47,119	335,584	333,066
Operating Expenses		17,923	17,989	18,042				18,087		18,223	161,873	160,885
Units Sold		1,693	1,790	1,587				1,647	46,686	1,723	12,382	12,390

Last updated at: 8/4/2006 1:07:07 PM Refresh Scale: KPI Alert Predictor Action Variance

Dashboard features

The following table describes the features of the Dashboard.

Column	Description
Key Performance Indicator	The **Key Performance Indicator** column shows the description or ID of the KPI. Select the Plus sign (+) icon next to the KPI to expand the hierarchy. KPIs expand to show the accounts beneath the account of the defined KPI. Select the Minus sign (−) icon next to the ID or description of the KPI to collapse the KPI hierarchy. Select a KPI ID or description to view a chart of the account data.
Trend	The **Trend** column shows positive or negative trends between time periods. The blue arrow facing up indicates that the KPI account type is INC or AST, and the current value has increased since the last time period. The blue arrow facing down indicates that the KPI account type is EXP or LEQ, and the current value has decreased since the last time period. The red arrow facing up indicates that the KPI account type is EXP or LEQ, and the current value has increased since the last time period. The red arrow facing down indicates that the KPI account type is INC or AST, and the current value has decreased since the last time period.
July 2006 Actual	The first data column shows the actual values for the time period that is two periods before the current time period. (The current time period is shown on the action pane in the Session Information section.)
August 2006 Actual	The second data column shows the actual values for the time period before the current time period.

Column	Description
September 2006 Actual	The third data column shows the actual values for the current time period. This column is highlighted in yellow.
September 2006 Budget	The fourth data column shows the budget numbers for the current time period. This column is highlighted in yellow.
October 2006 Budget	The fifth data column shows the budget numbers for the time period that is one period after the current time period.
November 2006 Budget	The sixth data column shows the budget numbers for the time period that is two periods after the current time period.
YTD Actual	The seventh data column shows the year-to-date actual values.
YTD Budget	The eighth data column shows the year-to-date budget values.

The following table describes additional items on this page.

Item	Description
	If there is a user-defined alert set on the KPI, and the alert criteria has been met, the Alert icon is displayed. You can click on the icon to display the alert information. **See Defining KPI alerts**
	If a KPI has been predicted by Insight to have a significant unfavorable variance, the Prediction icon is displayed. **See About the Predictor window**
	If an action is associated with this KPI, this icon is displayed in the KPI row. **See Using actions**
Refresh button	The Refresh button refreshes the page.

Analyzing variances

A variance represents the difference between two data values for predefined categories, such as actual vs. budget, for a given period and based on a predefined percentage.

If there is a variance (either favorable or unfavorable) in the current time period for a KPI, the cell displays a special variance formatting. You can click on the formatted cell to see the **Variance Analysis** window. The window shows a summary, the reasons, root causes, variance context, and actions.

The following table describes the variance detail.

Item	Description
Summary	Shows the data values for the variance categories, and the variance amount.
Reasons	Shows the reasons, or the dimension members from the account that contributed to the variance. For each member, the actual and budget values, the amount of the

Item	Description
	variance, and the impact is displayed. You can display up to six (6) members, and show members by ID or description.
Root Cause	For each KPI, Insight attempts to find events occurring outside of the database that contribute to a variance. When it finds the such events, it displays the top three in the Variance Analysis window as root causes of the KPI variance. Event name — The name of the transaction that contributed to the variance. Time — The date of the transaction. Source — The Entity member that contributed to the variance. Value — The value of the member.
Variance Context	In order to be considered for inclusion in a Variance Analysis, documents must first be posted to the Content Library in BPC Web. After synchronization, Insight compresses the documents into an unformatted string of words which is analyzed for frequency of terms. If a match is found to the account description of a KPI (or the account descriptions of any relevant accounts), there will be a link to that doc in the Variance Context pane of the KPI's Variance View.
Actions	Shows actions for this KPI.

To analyze a variance

1. From BPC Web, start Insight.
2. From the dashboard, select a cell that shows a variance.
3. From the Reasons & Causes tab, review the **Reasons** section, and do any of the following:
   - Select **1 - 6** to show the top one through six members for the selected dimension that contributed to the unfavorable variance.
   - Select **Description** or **ID** to show the selected dimension's description or ID, respectively.
4. Review the **Root Causes** section.
5. Select the **Contexts & Actions** tab, and review the **Variance Context** section. Do one or more of the following:
   - Click on any document to open it.
   - Click the **Set Threshold Date** link to change the number of time periods for which to get relevant documents. Enter the number of time periods, then click the green check.
   - Click **Change View Options** to select the variance context sources you want to display with this variance analysis. Select an option from the **Source Relevancy**, **Type**, and **Originator** columns, then click the green check.
6. Review the actions in the **Action** section. To add a new action, select **Add a New Action**, enter the desired text, then click the green check.
7. Click the Close button (**x**) to close the Variance Context window and return to the dashboard.

Editing Insight properties

The following table describes the Insight system properties you can edit for each application set. The Keys are divided into the following categories:

- **System** tasks are those that define general system settings.

- **Offline** tasks are Insight calculation tasks invoked during the Offline Scheduler synchronization process. You can specify the interval (in seconds) each task is invoked.
- **Content service** tasks are those that determine how frequently the system updates the content relevancy map.
- **Synchronize** tasks represent tasks that will be included during the synchronization process.

Tasks	Key ID	Description	Default value
System	Correlation Threshold	(Optional) The minimum correlation factor between KPIs or KPI and event data, calculated by the specified regression, used in the KPI predictor and root cause.	.45
	Minimum Sample Size	(Optional) The minimum number of periods to use to calculate the specified regression used in the KPI predictor and root cause. If there are less than 6 periods of data, there are no predictions or root cause.	6
	Sample Size	(Optional) The number of months to use to calculate the regression used in the KPI predictor and root cause. If there are more than 12 periods of data available, only use the 12 periods prior to the current reporting period.	12
	MaxRelevantKPINum	The limit of correlated KPIs that are used to calculate the prediction of a KPI.	6
	TableSpan	The number of previous time period actuals and post time period budgets data for querying KPI data. It is used in the scheduled task of KPI Row Performance.	2
	Maximum Document Number	The maximum number of content library documents to display in the Variance Analysis window.	15
	Maximum Variance Reason Number	The number of reasons to display in the Variance Analysis window.	6
	Prediction Time Lag	The time period on which to base the variance. 0 = current period; 1 = last period; 2 = two periods ago, etc.	0
Content Service	Index Time	The interval (in seconds) to re-index the documents in the Content Library that have been changed since last time it was indexed. For example, once document A is indexed, the system knows that	7200

Tasks	Key ID	Description	Default value
		document A is made up of key words like finance, P_L, 2005. The system can search for other documents that are relevant to document A. But Document A will not show up if the system searches for keyword Finance if it is not committed yet. See Commit Time below.	
	Commit Time	Amount of time (in seconds) that the system finds relevant documents in the Content Library and stores them for use in the Variance Context. Continuing with the previous example, once document A is "committed," then the system stores document A. As a result, the system's key word weighting system might change. After the system commits the document, it will display if the system searches for keyword Finance.	7200
	Removal Time	The interval (in seconds) for the Removal background task to remove the documents that are no longer posted to the Content Library.	432000
Offline Task	KPI Prediction	The frequency (in seconds) at which the system pre-generates the predicted KPI value for next time period.	-1
	KPI Association	The frequency (in seconds) at which the system calculates association (based on the specified regression algorithm) among KPIs. KPI association is used to predicate KPI at risk	292000
	Query KPI Alert	The frequency (in seconds) at which the system pre-generates KPI alert data	-1
	KPI Row Performance	The frequency (in seconds) at which the system pre- generates KPI Performance data, including actual values for the current time period and previous time period, budget values for the current time period and next time period, performance band, etc.	-1
	KPI Analysis	The frequency (in seconds) at which the system pre-generates the top three reasons for each KPI variance, and saves in the cache.	-1

Tasks	Key ID	Description	Default value
	KPI Root Cause	The frequency (in seconds) at which the system pre- generates the root causes of variances.	-1
Synchronize Task	KPI Prediction	Controls whether to include the KPI prediction values in the synchronization.	True
	KPI Association	Controls whether to include the KPI association values in the synchronization.	False
	Query KPI Alert	Controls whether to include the KPI alert values in the synchronization.	True
	KPI Row Performance	Controls whether to include the KPI row performance values in the synchronization.	True
	KPI Analysis	Controls whether to include the KPI analysis values in the synchronization.	True
	KPI Root Cause	Controls whether to include the root cause values in the synchronization.	True

Analysis tasks

There are several task available from the **Insight Options** action pane. The following table describes the tasks available under the **Analysis Tasks** category.

Task	Description
Change this view	Select this task to open the **Change View Options** action pane, where you can specify the applications to display in the dashboard, and define other formatting options. **See Changing view options**
Change number formatting	Select this task to open the **Number Formatting Options** action pane. **See Changing number formatting**
Graph account data	Select this task to open the **View Chart Options** action pane. **See Graphing account data**
View Radar/View Dashboard	Select this task to toggle between displaying the **Radar** window and the dashboard. **See Understanding the Radar view** and **Understanding the dashboard**
View alerts	Select this task to open the **View Alert Options** action pane where you can change dashboard alert options. **See Defining KPI alerts**
View predictions	Select this task to view predictions.

Task	Description
	See About the Predictor window
View actions	Select this task to view actions. **See Viewing actions**
Enter a new action	Select this task to add a new action. **See Adding actions**
Build report	Select this task to build an Insight Flash report. See **Building Insight reports**

Changing view options

You can change some of the formatting options on the Insight dashboard. You can select which applications you want to appear on the dashboard, how you want to view variances, and if you want to view KPIs by their ID or description.

The following table describes the formatting options for variances.

Solid	The cells with unfavorable variances are highlighted in red; the cells with favorable variances are highlighted in blue.
Flash	The cells with unfavorable variances flash red; the cells with favorable variances flash blue.
Outline	The cells with unfavorable variances are outlined in red; the cells with favorable variances are outlined in blue.

To change view options

1. From the Insight dashboard, select **Change this view** from the **Insight Options** action pane.
2. Select the applications and KPIs you want to view in the dashboard. You can expand the list of KPIs under an application by selecting the '+' button to the right of the application name, or you can collapse the list by selecting the '-' button.
3. Select the way that variances are presented to you: **Solid**, **Flash**, **Outline**.
4. Select to view the KPI by ID or Description.
5. Click the green check mark to save your changes and return to the Insight Options action pane, or click the red **X** to cancel your changes and return to the Insight Options action pane.

Changing number formatting

You can change the way that number values are displayed in the dashboard.

To change view options

1. From the Insight dashboard, select **Change number formatting** from the **Insight Options** action pane.
2. Select the scale value:
   - **KPI** – Displays the scale chosen when the KPI was created. This allows values for different KPIs to be displayed with different scales on the same dashboard. **See Adding KPIs**.
   - **No Scale** – Do not scale the numbers (scale = 1)
   - **10's**, **100's**, etc. – Scale according to the selection.

3. Select the number of digits to display to the right of the decimal point for numbers on the dashboard. This overrides any KPI-specific decimal places chosen when the KPI was created.
4. Click the green check mark to save your changes and return to the **Insight Options** action pane, or click the red **X** to cancel your changes and return to the **Insight Options** action pane.

Graphing account data

You can display a graph for KPI.

To graph account data

1. From the Insight dashboard, select **Graph account data** from the **Insight Options** action pane.
2. Select the KPI's application. A list of KPIs in the application is displayed.
3. From the list, select the member you want to graph by highlighting it, then clicking the green check mark. (To cancel, click the red **X**.) You can expand the hierarchy by clicking the '+' button, or collapse the hierarchy by clicking the '-' button. A popup window with the graph of the data is displayed.
4. Change the graph type by selecting another graph type in the **Select Chart Type** list.
5. When you are finished viewing the graph, click the Close (**x**) button from the title bar.

Understanding the Radar view

The radar screen shows a graphical overview of all KPIs in the application set for the current time period. If a KPI value is at the blue line, the KPI is within the normal range. If the KPI is in the red range, the KPI is an underperformer.

To view the Radar page

1. From BPC Web, start Insight, then select **View Radar** from the action pane.
2. Optionally, do one or more of the following:
   - Click on a KPI name to see its Variance view. **See Analyzing variances**.
   - Select **Play** to show monthly KPI values within a 12-period loop.
   - Select **Next** to show KPI values for the next time period.
   - Select **Prev** to show KPI values for the previous time period.
3. Click **View dashboard** from the action pane to return to the Insight dashboard view.

Defining KPI alerts

You can define KPI alert messages that automatically send an email triggered by a defined event. For example, an alert can be defined called **SalesOrderProcessingTimeTooLong,** that is triggered when the average sales order processing time for the period exceeds ten days.

You have up to separate three criteria for the alert. You must set up at least one criteria, and you may append up to two more with Boolean operations to create a combined alert.

You can choose to have all alerts both emailed and sent to you through Instant Messenger, or one or the other.

To define a KPI alert

1. In BPC Web, start Insight, then select **Maintain Alerts** from the **Maintain Alert Options** action pane.
2. Select the **Email Alert notifications** check box if you want to be notified through email when each one of your alert definitions occurs.
3. Select the **IM notifications** check box if you want to be notified through instant messaging when each of your alert definitions occurs.

   The email and IM addresses are determined from the user's profile and are display only.

4. Select **Add Alert** from the action pane.
5. in the **Alert Name** field, enter a name for this alert.
6. For each criteria:
   a. Select the KPI to start with.
   b. Select the operator.
   c. Select the comparison type and value.
7. Optionally, select another KPI to combine or compare the first against, its operator, comparison type, and value. And again, select a third KPI, if desired.
8. When finished, click the green check mark from the action pane.

About the Predictor window

BPC uses statistical analysis to determine the relationship between a KPI and the other accounts. This is not a time trend of the KPI, but a mathematical analysis of the data to determine what relationships “drive” the KPI. In this way, for example, 'product quality' might contribute to the analysis of the 'customer satisfaction' KPI. BPC uses this model when making predictions.

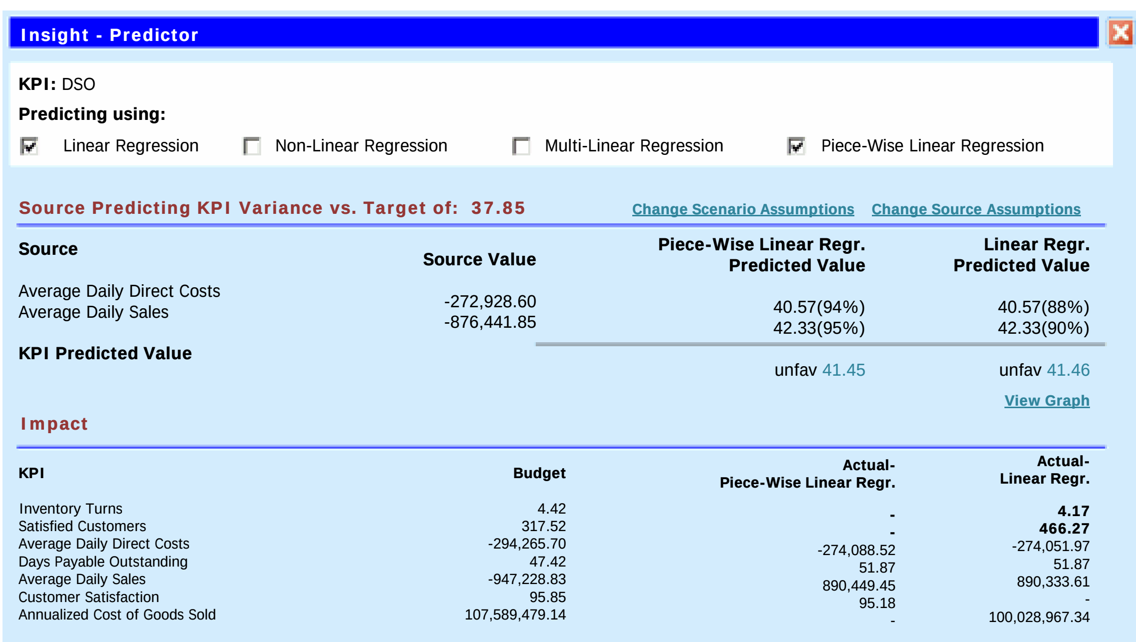
Insight calculates predictions based on account correlations derived by one or more specified algorithms. Prediction cannot be calculated from only one account. Insight processes every KPI, identifying relevant accounts and filtering out irrelevant ones based on a specified threshold.

When the predicted values are unfavorable compared to the budgeted values, the Predictor icon is displayed next to the corresponding KPI. When you click the icon, the Predictor window is displayed. The Predictor icon only displays when all of the following conditions are met:

- There is sufficient historical data for the KPI (by default, six periods of data)
- There is sufficient historical data for the correlated accounts (by default, six periods of data)
- The predicted value for the next time period is unfavorable
- The unfavorable predicted value is beyond the threshold for the KPI, as determined by the specified performance band

You can select up to four algorithms to use to calculate the predicted values.

See the *BPC Admin Guide* for information about setting parameters for each of these algorithms.



To display the Predictor window

1. From BPC Web, start Insight.
2. Do one of the following:
   - Select the **Predictor** icon next to the KPI.
   - From the **Insight Actions** action pane, select **View Predictions**, then from the action pane, select the application and the KPI from the list, then click the KPI for which you want to see the Predictor window.
3. When finished viewing the prediction, click the Close button in the upper right corner.

Changing scenario assumptions

You can change the minimum scenario assumption value, or the 'level of confidence' used to make the current period's prediction. The default value for determining if there is a correlation between accounts is 45%. This means that if the correlation is found to be under 45%, the KPI is not deemed to be relevant. If the correlation is greater than 45%, the system acknowledges a relevant correlation between those accounts. You can change the minimum value if you want to raise or lower the correlation threshold. The KPIs deemed to be relevant are displayed in the 'Source' column.

To change scenario assumptions

1. From the Predictor window, select **Change Scenario Assumptions**. The **Change Scenario Assumptions** popup is displayed.
2. Use the **< >** arrows to decrease or increase the percentage, as desired, then click the check button. The 'Source' values change based on your selection.

Changing source assumptions

The KPIs from the previous period that have an impact on the active KPI appear in the Source column. You can remove certain accounts and recalculate the prediction value. For example, if you know that a particular account has little impact on the active KPI, you can remove that KPI from consideration.

To change source assumptions

1. From the Predictor window, select **Change Source Assumptions**. The **Change Source Assumptions** popup is displayed.
2. Deselect the accounts that you want to remove from the predicted value. The predicted values of the KPI changes based on your selection.

Using on-demand forecasting

You can use on-demand forecasting to see how the 'impacted' KPI values will change given a different predicted value.

In the Insight Predictor window screen shot above, the predicted value for the piece-wise linear regression is 41.45 days. If you change the on-demand value to 20 (days), the values of the impacted KPIs are adjusted to accommodate for the updated number of days.

To use on-demand forecasting

1. From the Predictor window, select the predicted value.
2. Enter the desired value, then click the check mark. The predicted values of the impacted KPIs change based on your selection.

Using actions

Actions allow you to annotate ‘check list’ items you want to associate with a KPI. These action items can be used to address concerns with thresholds reported by Insight. Actions entered appear in the dashboard and are denoted by the action icon. Actions entered for a KPI also appear in the Variance Analysis window.

Adding actions

In BPC Web, you can add actions when Insight is selected in the Web tray at the top of the page.

To add an action

1. From the Insight dashboard, select **Enter a new action** from the action pane.
2. Select the desired KPI from the drop-down list box in the popup window.
3. Type the desired text in the **Action** edit box.
4. Click the **green check mark** to save the new action.

Viewing actions

In BPC Web, you can view actions when Insight is selected in the Web tray at the top of the page.

To view any KPI action

1. From the Insight dashboard, select **View actions** from the action pane.
2. Select the desired KPI from the drop-down list box in the popup window.
3. When you are finished, click the **green check mark** to close the popup window.

To view a specific KPI action

1. From the Insight dashboard, click the desired KPI action icon that appears in the KPI table in the center of the page.
2. When you are finished, click the **green check mark** to close the popup window.

Editing actions

In BPC Web, you can edit actions when Insight is selected in the Web tray at the top of the page.

To edit any existing KPI action

1. From the Insight dashboard, select View actions from the action pane.
2. Select the desired KPI from the dropdown list box in the popup window.
3. Modify the desired text in the Action edit box.
4. Click the green check mark to save your changes.

To edit a specific KPI action

1. From the Insight dashboard, click the desired KPI action icon that appears in the KPI table in the center of the page.
2. Modify the desired text in the Action edit box.
3. Click the green check mark to save your changes.

Building Insight reports

You can build Insight reports based on the application, KPI category, and type of variances (favorable or unfavorable).

To build an Insight report

1. From the **Insight Options** action pane, select **Build Report**. The **Insight - Flash Report Builder** window is displayed.
2. From the **Application** field, select the application from which you want to report.
3. From the **KPI Category** field, select the KPI category on which you want to report, or select **ALL KPIs**.
4. From the **Variances On** field, select **Favorable KPIs** or **Unfavorable KPIs**, or leave All KPIs to view a report on all KPIs.
5. From the **Insight Report Options** action pane, do one or more of the following:

- Export the file by selecting the file format and selecting **Export** in the **Select file format to export** field. You can import the export the file to Microsoft Excel, PDF, CSV, or mhtml.
- From the **KPI Category** field, filter the report by selecting to display **Favorable** or **Unfavorable KPIs** from the drop-down list.
- If you selected to view variances, from the **Variance On** field, select **Above** or **Below**, and then the variance percentage.

Using KPIs

You use Key Performance Indicators (KPIs) to measure accounts against which performance goals have set for an organization.

About KPIs

KPIs are Key Performance Indicators. They are specific and measurable accounts against which performance goals have set for an organization.

Typically, there are a small number of KPIs selected for their importance to an organization's overall strategy. Examples of KPIs include customer retention rate, operating margin, and system uptime.

In BPC, KPIs are the accounts analyzed by the predictive analytic engine to determine the reasons, root causes, and context of performance variances. KPIs are also the accounts for which future performance predictions are made.

KPIs are typically the accounts which are highlighted on dashboards, scorecards and other performance reporting interfaces.

Adding KPIs

Each BPC user has their own custom view of Insight, so each user must have their own set of KPIs. This means that each user can only see the KPIs that have been specifically defined for (or by) them.

When you define a KPI, you define performance bands to represent different variances, and dimensional constraints. The following table describes the performance bands. Dimensional constraints are the dimension members (in addition to the account) to which the KPI applies.

The following performance band specifications are for income accounts. To create a similar performance band for expense accounts, simply reverse the signs (+ -).

Performance bands	Default value	Description
Weak	<-20%	The current value is greater than 20% below the value for the previous time period.
Under	<-5% to -20%	The current value is between 20% and 5% below the value for the previous time period.
Normal	<-5% to 5%>	The current value is between 5% below and 5% above the value for the previous time period. Values that are in the normal band do not have any formatting in the Dashboard and Radar views.
Over	>5% to 20%	The current value is between 5% and 20% above the value for the previous time period.
Strong	>20%	The current value is greater than 20% above the value for the previous time period.

To add a KPI

1. From BPC Web, start Insight, then select **Maintain KPIs** from the action pane.
2. Select **Add new KPI** from the action pane.

3. In the **Step 1 – Define KPI** tab, do the following:
   a. From the **Application** field, select an application. The subsequent field choices reflect the specified application.
   b. In the **Account** field, enter the account for which you want to define the KPI. Click the '**...**' link to select an account from a list of accounts in the application.
   c. In the **KPI Name** field, accept the default value (the selected account) or enter a meaningful name for the KPI.
   d. In the **Dimensional Constraints** fields, accept the default members (which are the top-most members in the hierarchy to which you have access), or enter new ones. To select new members, select a member from the drop-down list, or click **Browse** to select one from a window that displays the hierarchy. You must specify a constraint on each dimension in the application. (Time and Account are not included because Time is controlled by the reporting period and Account is defined by the KPI definition.)
   e. In the **Correlation Context** field, specify how you want to calculate root cause and prediction values for this KPI: **Base values** or **Variance**.
4. Select the **Step 2 – Define Basis** tab, and do the following:
   a. In the **Performance Band** fields, accept the default performance bands, or adjust them. See the table above for the default values. Notice that you only need to modify one end of a band. The adjacent band's range limit that touches the current one is adjusted accordingly. Also notice that it is not necessary to modify the range of the 'Normal' band directly as both ranges are determined by modifying the adjacent bands.
   b. In the **Algorithms** fields, choose the default algorithm from the list, and select the other algorithms you would like to use to calculate the prediction. Available algorithms are:
      - Linearregression (default)
      - Nonlinearregression
      - Multiline regression
      - Piecewiseline regression

      See About algorithms
5. Select the **Step 3 – Select Options** tab and do the following:
   a. Under **KPI Management Options**, select to get notified of a favorable or unfavorable variance, and ability to modify or delete the KPI definitions.
   b. Under **Default Chart Options**, select how you want to view KPI values in the dashboard. From the **Chart Type** field: **Columns** (default), **Line Chart** or **Pie Chart**.
   c. Select the **Include YTD data** check box if the dashboard should display year-to-date values.
   d. In the Scales field, select how you want to scale your dashboard data: **1** - **100,000**.
   e. In the Decimal field, select how many values you want to appear to the right of the decimal point desired when viewing values in the Dashboard.
6. Select the green OK button, when you have completed all modifications.

Editing KPIs

After you add KPIs by either adding them individually or importing them, you can edit them.

To edit a KPI

1. From BPC Web, start Insight, then select **Maintain KPIs** from the **Insight Options** action pane.
2. Select the **View** link next to the KPI you want to edit.
3. Edit the fields, as desired. For descriptions of each field, **see Adding KPIs.**

   If you edit the KPI band, the dashboard will be updated the next time the KPI is recalculated, which may be overnight or the next time the Insight data is synchronized.

About algorithms

BPC uses statistical analysis to determine the relationship between a KPI and the other accounts. This is not a time trend of the KPI, but a mathematical analysis of the data to determine what relationships “drive” the KPI. In this way, for example, product quality might contribute to the analysis of the customer satisfaction KPI.

BPC uses these models in two different analyses: when making predictions, and when analyzing root causes.

The data relationships are calculated by mathematical algorithms. There are four different algorithms employed by BPC to uncover these relationships:

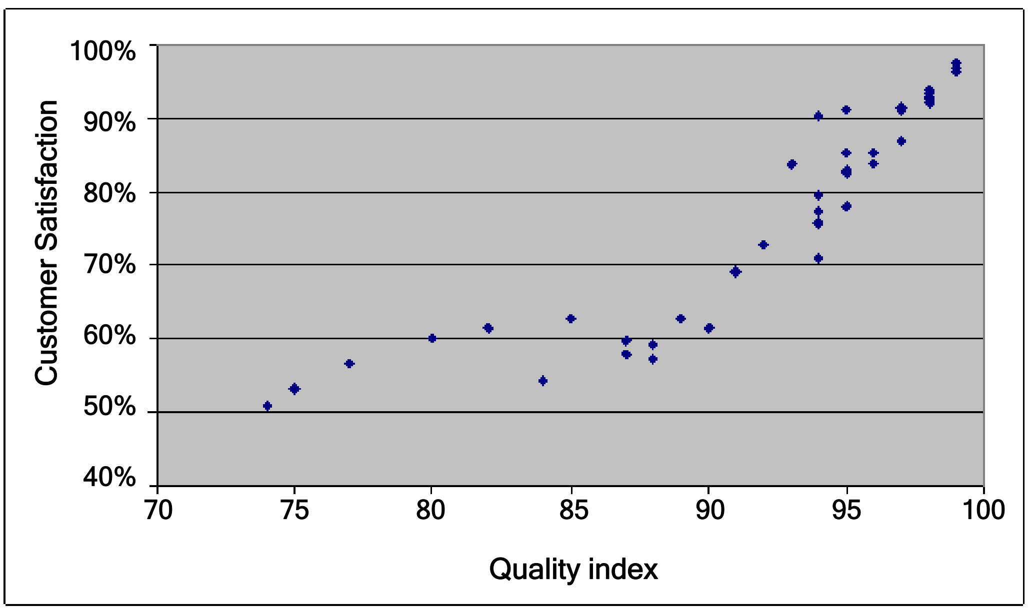
- Linear Regression
- Piecewise Linear Regression
- Non-Linear (3rd-order polynomial) Regression
- Multiple Linear Regression (not used for root causes)

You can easily find detailed discussions of these algorithms on the web. Our discussion here will provide a high-level overview, along with examples that describe how these algorithms might work in a business context.

Example

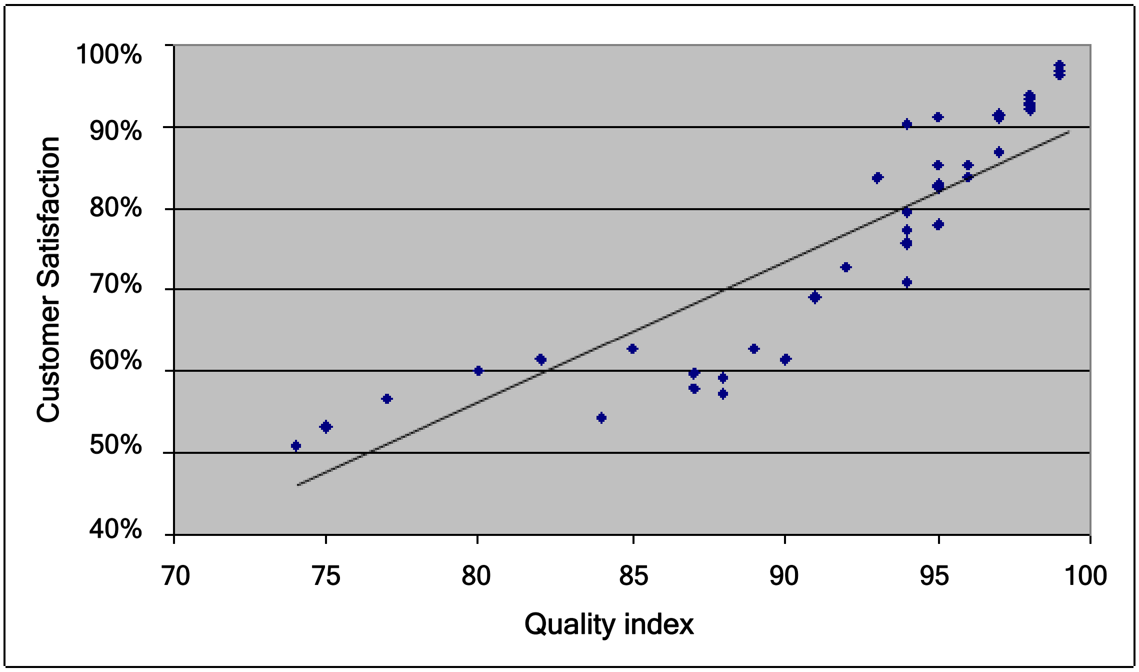
Imagine a set of data points representing the relationship between last month’s product quality and the current month’s customer satisfaction. If you plotted all the points on a graph, it might look like the following figure, where each point represents a different month’s data, representing the customer satisfaction (Y axis) as a function of the previous month’s quality index (X axis).

Notice that satisfaction declines when quality falls below 80, remains steady while quality is in the 80’s, and then climbs toward 100% as quality moves from 90 to 100.



Linear Regression

The simplest relationship between two variables is the linear one. Linear regression analyzes that relationship by finding the best straight line through the data, something like the following. While this line generally captures the trend, it will overestimate customer satisfaction if quality is in the high 80’s and will understate it if the quality is in the high 90’s. It will do a pretty good job overall, however. Linear regression is good for many conventional relationships and is the most efficient and fastest algorithm.

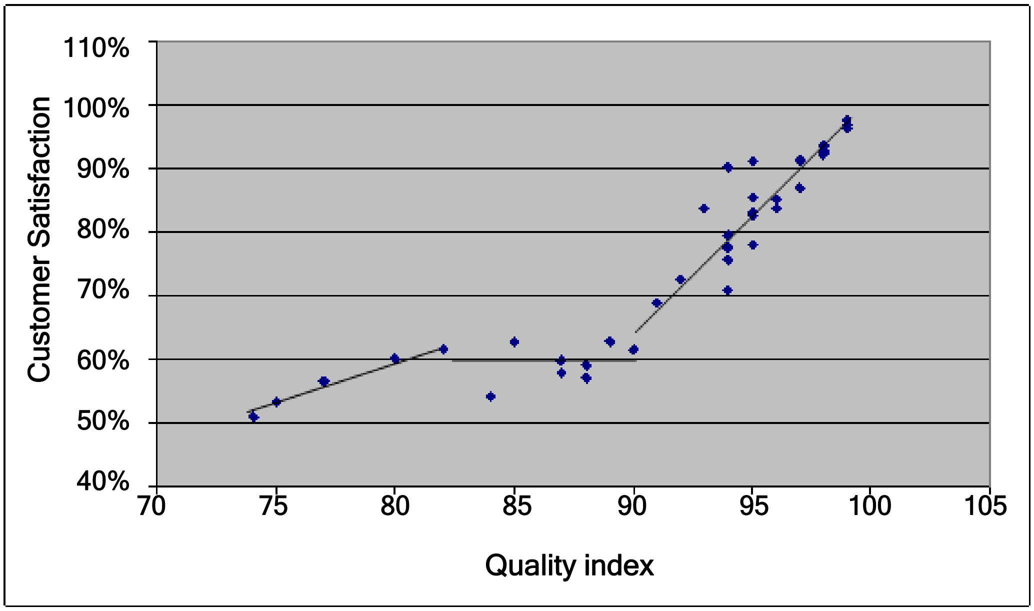


Piecewise Linear Regression

Piecewise Linear Regression is an extension to the simple linear regression. Unlike the linear regression, which seeks to draw a straight line through all available data points, Piecewise Linear Regression seeks to draw segments of straight lines in different regions of the data set.

In BPC, each KPI measurement data set can be seen as a data series along the x axis (the independent variable). The segmentation is performed starting on the whole dataset, recursively partitioning the series until a good fit is achieved.

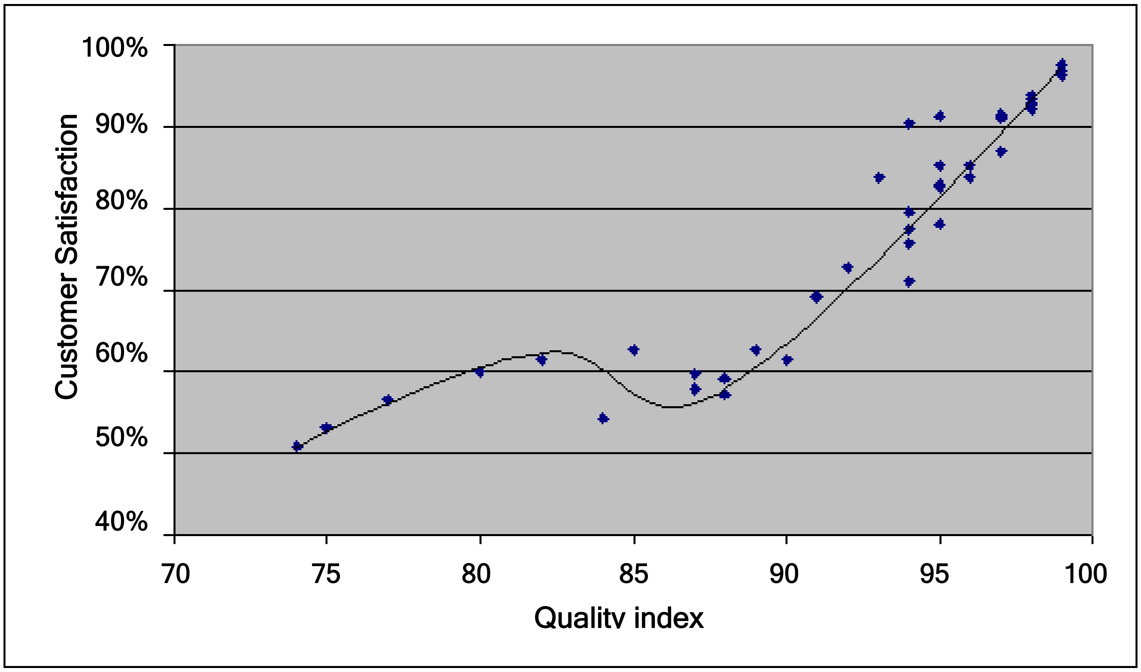
In our example, the result might look something like this, with three separate segments identified. This model is useful for relationships which might be discontinuous: once product quality falls below a certain point, for example, customer satisfaction falls more quickly.



Non-linear (3rd order polynomial) regression

However, not all relationships can be described as linear. Sometimes we need to fit data points along a curve, which is accomplished by a non-linear regression. BPC uses the 3rd-order polynomial as our pre-set fitting model.

This model smoothes out the line into a curve, as below. This model is good for relationships that change continuously and even change direction: more rain is good for growing crops, but as you go past a certain point, the crops start to drown and the yield decreases.



Multiple Linear Regression

Multiple regression is not easily conveyed in a graph. Multiple Linear Regression is based on the assumption that more than one variable drives the KPI. In our example, it could be that customer satisfaction is driven by quality and price. The analysis would also include (for example) headcount, legal fees, and shares outstanding. This would result in a 5 dimensional graph.

The analysis, though, might reveal that customer satisfaction will rise when quality improves but drop as price increases, so the prediction made for customer satisfaction will be based on both the quality and the price.

This model is limited by assuming all relationships are linear, but is better for KPIs which are likely to be driven by a set of unrelated variables.

Deleting KPIs

You can delete KPIs that you created, or other user's KPIs, depending on your security privileges.

To delete a KPI

1. Start Insight, and select **Maintain KPIs** from the **Insight Options** action pane.
2. Select one or more check boxes next to the KPIs you want to delete.
3. Select **Delete selected KPIs** from the action pane.
4. Select Yes in the confirmation message box.

Using comments

You can use comments to submit and retrieve text commentary associated with BPC data cells or other BPC unstructured data elements.

About using comments

Comments allow you to annotate BPC data so that other users can view supporting information associated with a particular data point. Previously offered as an add-on to BPC, the Comments feature is fully integrated in BPC for Excel, BPC for Word, BPC for PowerPoint, and BPC Web. This means that comments can be entered and viewed from within any interface that manages data.

Comments functions include:

- Using the Comment Manager interface makes it easy to search and report on comments.
- Create ad-hoc reports and extract to Excel through Reporting Services
- Comments can be assigned priority and keywords for setting search criteria
- Comments are flexible for either partial or fully-qualified metadata
- Comment reports contain the full history of the comment
- Comments are secured by member access
- Also define cell-based formulas in Excel to retrieve and send (EvCOM)

Adding comments

In BPC Web, you can add comments to reports displayed in the Content Library or Live Reporting.

To add a comment

1. Open the page or report in the Content Library or Live Reporting to which you want to add a comment.
2. From the action pane, select the **Add new comment** link.
3. Select a context for the comment:
    - **The published page**. This option is available when a published report or schedule is active. The comment becomes associated with the active report or input schedule.
    - **The active report or schedule cell**. This option is available when a report or schedule a cell is selected. The comment becomes associated with the cell's current view.
    - **The active current view**. This option applies the comment to the active current view.
    - **Custom current view**. This option allows you to associate the comment with a different current view from the active setting. From the **Comment for these CV Values** table, select the desired application, then the check box next to the dimension members that you want to use. If you want to remove a dimension value from consideration, de-select the check box. To open the Member Lookup, click a *dimension* link. To select a member, select it from the drop-down, or select [ALL] to apply the comment to all members of a dimension.
4. Click the button.
5. In the **What is the priority of the comment?** field, select **Critical**, **High**, **Medium**, or **Low**. When users report on comments, they are shown by in order of their priority level.
6. In the **What keyword do you want to associate with this comment?** field, enter a meaningful keyword. Keywords are used to help users organize and search for comments in the database.
7. In the **What is the comment?** field, type the desired content (up to 256 characters).
8. Click the button. The summary page is displayed, showing a summary of what is sent to the database. **See Viewing comments**.

Viewing comments

If you have a Content Library page or live report open, you can view any comments that are associated with it. You can also view comments associated with the active current view, or any other specific current view.

To view a comment

1. From a live report or input schedule or a selected cell in a report or input schedule, select **View comments** from the action pane.
2. In the **What is the context of your comments search?** field, select one of the following:
    - **The published page**. Available when a published report or input schedule is active. This option returns comments associated with the entire report or input schedule, not a specific current view.
    - **The active report or schedule cell**. Available when a data cell is selected in an active live report or input schedule. This option returns comments associated with the cell's active current view.
    - **The active current view**. Returns comments associated with the active current view. The active current view is the combination of members displayed in *Session Information: Current View* and any locked members.
    - **Custom current view**. Returns comments associated with a different current view than the active one. From the **Search on these CV values** table, select the check box next to the desired application and dimension members. To open the Member Lookup, click a *dimension* link.
3. Click the button.
4. In the **Do you want to include comment history?** field, select the check box to show multiple comments for the specified search criteria. Leave unselected to return only the most recent comment that meets the criteria.
5. In the **Comments with what priority?** field, select one or more priority options. When a priority is selected, comments associated with the selected priorities will be returned.
6. In the **Do you want to search on a comment keyword?** field, enter a keyword or leave blank. Only comments with a matching keyword will be returned in the search.
7. Click the button.
8. In the **Comments from what origin?** field, select one of the following:
    - **Comments from anyone**. This option returns comments that were entered by any user.
    - **Comments from myself**. This option returns comments that were entered by you.
    - **Comments from another**. This option returns comments that were entered by a specific user. Enter a valid user in the **BPC user** edit box.
9. In the **Do you want to search comments by a date range?** field, select the **Search by date range** check box to specify a date range for which to return comments, or leave blank. Use the **From** and **To** drop-down lists to specify the desired date range.
10. Click the button. The Comments Summary page is displayed. **See About the Comments Summary page**.

About the Comment Summary page

After adding a comment or choosing your view options, you can display them in the comments summary page. If you just added a new comment, the summary page contains the newly added comment data region and the comment entry that was made to the database. If other comments exist for the same data region, those also appear in the summary page. If you defined view options, all associated comments are displayed.

The Data Region with Comments table

In addition to comments just added, if associated data regions contain comments, those data regions also appear in the Data Region with Comments table.

To change what displays in the **Data Region with Comments** table, click the **Display Criteria** hyperlink. This opens the **Display Criteria - Step 1 of 3** action pane, which is the equivalent of the **View Comments** action pane. **See Viewing comments**.

The Comment Entries table

The following table describes the columns in the **Comment Entries** table:

Option	Description
Comment	This cell displays the entire comment. If you are the originator of the comment or if you have admin rights, you can modify the value directly in the cell.
Priority	This cell displays the priority for the comment. If you are the originator of the comment or if you have admin rights, you can modify the value directly in the cell by selecting another option from the drop-down list.
Keyword	This cell displays the keyword associated with the comment. If you are the originator of the comment or if you have admin rights, you can modify the value directly in the cell by selecting another option from the drop-down list.
Originator	This cell displays the comment originator's name. The value in this cell is display only.
Data	This cell displays the date that the comment was saved to the database. If the comment is updated by the originator or an admin, the updated date appears in this cell. The value in this cell is display only.
Show (drop-down list)	Allows you to specify how many comments to display in the table.

Deleting a comment

- To delete a comment, select the check box next to the comment in the **Comment Entries** table, then select **Delete selected comments**. Only the owner of the comment or a user with administrative rights can delete a comment.

BPC Reporting

You can generate reports on business process flows, audit data, and comments.

Reporting on comments

The BPC Reporting Console allows you to report on and track comments associated with data by application.

To report on comments

1. From the Getting Started Options action pane in BPC Web, select **Launch BPC System Reports**.
2. Select **Comments Report** from the **Application Reports** section of the action pane.
3. Use the following table to specify the report parameters:

Option	Description
Start Date	The start date for the query
Start time	The start time for the query
End date	The end date for the query
End time	The end time for the query
BPC user	An optional user name to report on. Leave this value blank to report on comments from all users.
Priority	**All** - Report on comments with all priority levels
	Critical - Only report on comments assigned Critical
	High - Only report on comments assigned High
	Medium - Only report on comments assigned Medium
	Low - Only report on comments assigned Low
	No priority - Only report on comments assigned No priority
Dimension n1 to n*x*	Optional member values for specific data regions. Leave member edit boxes blank to report on all possible values.
Set Orientation	**Portrait** - Generate the report in portrait layout
	Landscape - Generate the report in landscape layout

Reporting on Business Process Flows

Using BPC System Reports, you can generate reports on business process flows. When generating a report, you choose the name of the business process flow and some criteria for the report. Criteria includes the start and end date and time frame for the BPF, the associated data region, and the orientation for the report.

There are two types of reports you can create:

- The standard BPF reports give you information based on the data region, grouped by step:

Step 1	Data Region X
	Data Region Y
	Data Region Z

- The step BPF reports give you information about steps, grouped by data region.

Data Region X	Step 1
	Step 2
	Step 3

To generate a report on a business process flow

1. From the Getting Started Options action pane in BPC Web, select **Launch BPC System Reports**.
2. Select **BPF Report** from the action pane, then select one of the standard report or step reports.
3. Specify the start date, end date, orientation, and data region to report on.
4. Click the Check Mark to generate the report for the selected business process flow. The report appears in a new browser window.

Reporting on audit

You can generate a report that contains audit information based on specified criteria.

To report on comments

1. From the Getting Started Options action pane in BPC Web, select **Launch BPC System Reports**.
2. Select **Audit Report**.
3. From the **Task** list, select the task whose data you want to see. You can alternatively leave **All tasks** selected.
4. From the **Category** list, select the Category whose data you want to view.
5. From the **End Date/Time** field, select the date and time up to which you want to view audit data.

   The default is the current day. If the same day, the start date starts at 12:00 a.m., and the end date ends at 11:59 p.m.

6. In the **Rows** field, select the dimension you want to group the other columns by, then select **ID** or **Description** to show the member ID or member description, respectively.
7. In the **Column** fields, select the dimensions you want to see on the columns.
8. In the **Level 1 and Level 2** fields, select dimensions and members on which to base the report. For example, if you want to view audit data for a particular entity, enter **Entity** in the **Filter name** field, then enter the desired member in the **Filter value** field. Click the **Browse** button to browse for a member associated with the selected dimension.
9. Select **Portrait** to view the report in portrait orientation, or **Landscape** to view it in landscape orientation.
10. Click **View Report**.

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