Documentation Addendum
SAP BusinessObjects Strategy Management 7.5

Target Audience

- Technical Consultants
- System Administrators

PUBLIC

Document version: 2.0 – 9/15/2010

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You can find this documentation at the following Internet address:
service.sap.com/instguidescpm-stm

Typographic Conventions

Type Style	Represents
Example Text	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options.
	Cross-references to other documentation
Example text	Emphasized words or phrases in body text, titles of graphics and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, source code as well as names of installation, upgrade and database tools.
`Example text`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example text>`	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.
`EXAMPLE TEXT`	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.

Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Contents

1 Overview

This documentation addendum contains information about new features and functionality available in SAP BusinessObjects Strategy Management 7.5. The information provided in this Addendum is not included in the SAP BusinessObjects Strategy Management 7.5 Application Help or Release Notes for version 7.5.

The topics include:

- New information about client configuration
- New features and functionality in the strategy management application
- New features in the Administrator, including Entry and Approval
- Creating Initiatives and KPIs using Planning and Consolidation Data
- New features in Interactive Publisher
- Documentation issues

1.1 History of Changes

The current version of the Documentation Addendum for SAP BusinessObjects Strategy Management 7.5 is at **`service.sap.com/instguidescpm-stm`** on *SAP Service Marketplace*.

The following table provides an overview of the most important changes in prior versions.

Version	Important Changes
1.0	First version
1.1	The topic about refreshing the scorecard status is more accurately worded.
1.2	The description of Interactive Publisher features is updated with new information about the Java (JPIP) version.
1.3	Added a documentation issue. Documented a new feature in 7.5 SP2 about collecting traces in the Administrator
1.4	Added documentation issues. Documented a new feature in 7.5 SP3 about a new Scheduler task.
1.5	Added description of bookmarking a view to a URL.
1.6	Added new 7.5 SP3 features to section 8. Removed a feature about copying operational reviews, which does not exist.
1.7	Added 7.5 SP4 features in section 8.7 and 8.8
1.8	Corrected the name of EAValueAuditFlag Java System Property
1.9	Added *Delete Obsolete Items* to list of administrator functions that can be logged.
1.10	Added 7.5 SP6 feature in section 8.9. Excel Add-In now supports Microsoft Excel 2007.
2.0	Added 7.5 SP7 feature in section 8.10. There is a new Java System Property called *MaxUsersLimit*.

2 New Information about Client Configuration

2.1 Security Setting Related to SWF Files

If you have the following scenario, you must change a security setting for your browser.

- You are using Internet Explorer version 7.x.
- You are a strategy management administrator loading a SWF file in the *Configure Home Page* section of the Administrator and it fails to display.
- You are a strategy management user trying to display a SWF file in the Home component of the strategy management application and it fails to display.

Procedure

1. In the Internet Explorer 7 browser window, go to *Tools -> Internet Options*.
2. Do one of the following:
   - Select the *Security* tab, then click *Trusted Sites*, and then click the *Sites* button. Add this URL to your trusted zones:

     `<nwce_server>:<port>/strategy/filemanager.pw?path=/strategy/home/`
   - Select the *Advanced* tab and make sure the *Allow active content to run in files on My Computer* setting is deselected.

2.2 Client Access on Microsoft Windows Vista

Client access to the strategy management application using Internet Explorer 7, the Diagram Manager, and Excel Add-In are now supported on the Microsoft Windows Vista platform.

2.3 Desktop Settings

Screens are optimized to run in 4:3 resolutions, for example 1024 x 768 or 1280 x 1024 to deliver the best visual results. Resolutions with other ratios may provide varying results. Large fonts are supported only with resolutions higher than 1280 x 1024.

3 New Features and Functionality in the Strategy Management Application

This section describes new features and functionality that are available in the strategy management application in 7.5 SP01.

3.1 Identifying Temporary Owners

Users who have been assigned as temporary owners of certain objects now have an asterisk (*) next to their name. The asterisk identifies that this owner is temporarily assigned.

For information about setting a temporary ownership, see the SAP Library at http://help.sap.com -> *SAP BusinessObjects -> EPM Solutions -> Strategy Management -> SAP BusinessObjects Strategy Management 7.5 -> Application Help -> Administration -> Administration -> User Responsibility Updates*.

3.2 Context Maps

You display the context map in any component of the strategy management application by clicking the *Context Map* link.

For information about context maps, see the SAP Library at http://help.sap.com -> *SAP BusinessObjects -> EPM Solutions -> Strategy Management -> SAP BusinessObjects Strategy Management 7.5 -> Application Help -> Home (or any component) -> Standard Features of Most Components -> Context Map*.

3.2.1 Searching in the Context Map

You can now search for a context in the *Context Map* using the new *Search* text box. In the *Context Map* box, enter a portion of a context name or all of the name and click *Go.* Any context that contains that combination of letters will be highlighted in bold. For example, if you enter “east”, contexts such as “Northeast”, “Southeast” and “East” are highlighted.

3.2.2 Context Map Views

Depending on how your administrator has set up the context map view, your context map may appear as a standard tree view, or an organization chart view. You might also have the ability to toggle between each view.

3.3 Notifications for Object Reassignment

If you subscribe to alerts, you are now notified when an object has been reassigned.

3.4 External Links in Home Component

In addition to accessing external content in the Home component, you can now access external links if the strategy management administrator has set them up.

3.5 Bookmarking a View as a URL

You can now bookmark a strategy management view as a URL. You can then share the view with other strategy management users by distributing the URL. For example, if you email the external URL to another strategy management user, that user can click the link and display the view within the strategy management application.

To generate a URL of a strategy management view, first display the view, then click *Mark this page* and then choose *External*.

Previously, you could bookmark any view by clicking *Mark this page* and the view would appear as a link in the *My Bookmarks* section of your Home component. This type of link to the view is available only when you run the Home component and cannot be viewed by anyone else.

4 New Features in the Administrator and Entry & Approval

4.1 Context Map Views

Every component in the strategy management application now has a link to a *Context Map*, which displays all the contexts and the tabs available to you in those contexts. This allows you to easily jump between contexts and tabs.

You can now control whether the *Context Map* appears in the tree view or the organizational chart view. You can provide access to one or the other view, or you can provide access to both views and allow the user to toggle between the views. If you allow access to both views, you must set one of the views as the default view.

Previously, the *Context Map* was available in tree view only.

Prerequisites

You are the strategy management administrator.

Procedure

1. Click *Set Application Defaults* in the *Administration* section.
2. In the *Context Map* section, choose the option for how you want to display the *Context Map* in the strategy management application.
3. Specify whether you want to always display the full context hierarchy.

4.2 Goal Diagrams Copied during a Context Copy

When the strategy management administrator copies a context based on another context using the *Create/Copy* link in the *Manage Contexts* section, the goal diagram is now copied as well as all other aspects of the context.

4.3 Searching for Users for Application Group Assignments

When adding users to application groups in the *Manage Application Groups* section of the Administrator, the strategy management administrator can now search for users. When you click Users in the Groups and users section, a new Search box appears. If you enter a letter or series of letters, the search shows the last names that begin with those letters. For example, if you enter ***d***, all the last names starting with ***D*** appear.

When many names are loaded into strategy management, this feature helps you to find names easily so you can add them to an application group.

4.4 External Links in the Home Page

Previously, you could create default Home page layouts and include panels containing the contents of a .SWF, PNG, PDF, JPG, and GIF file for different application groups. Now, you can include a panel that contains links to files.

By adding links to files, you can provide access to certain content that is not available through the external content feature. For example, you can add links to .DOC files and .XLS files, but you cannot display them as external content.

Procedure

1. Click the *Configure Home Page* link in the *Administration* section.
2. In the *External Content* section, click *Upload*, and browse for a file.
3. Click *Add* to add the file to the *Selected External Content Links* area.
4. Select the application group who can see this link.
5. Click *Customize* and add the *External Content Links* panel to the view.

For information about external panels, see the SAP Library at http://help.sap.com -> *SAP BusinessObjects -> EPM Solutions -> Strategy Management -> SAP BusinessObjects Strategy Management 7.5 -> Application Help -> Administration -> Administration -> Home Page Configuration*.

4.5 Detailed Approval Log in Entry and Approval

You can now display a detailed log about data entered in the Entry and Approval Data Entry screen or Excel spreadsheet for the current time period.

To enable the detailed logging, you must change the *EAValueAuditFlag* Java System Property for the strategy management application in SAP NetWeaver so that it has a value of *YES*. By changing this value to *YES*, it causes a *Details* button to appear in the *Approval Log*.

When users display the *Approval Log*, they see the full audit trail of the selected metric set. The Approval Log captures detailed user interactions, including time stamps for approval, rejection and uploading of metrics.

When users click the *Details* button, they see records for every data value written from Entry and Approval Data Entry screen. If an entered value is changed (for example, when rejected by the approver) the previous value is also captured. Viewing a detailed log for historical data or target data is not possible unless that data is part of the current period.

The Approval Log lets you choose other periods from the *Period* drop-down menu. The default is always the current period. The data for quarterly or yearly metrics is listed in the first month of the quarter or year.

4.6 Setting the Thousand and Decimal Separator for the Application

You now change the thousands separator and the decimal separator by accessing the *Preferences* dialog box in the Administrator, Entry and Approval, and strategy management application.

This is the only way to set numeric separators. Previously, separators were based on Regional Settings, Language, and Application Server settings.

The default separators are in the US format.

4.7 Refreshing the Scorecard Status

The following enhancements describe the times that scorecard statuses are now recalculated

- The strategy management application has a new Scheduler task called *Calculate All Scorecard Objects* that recalculates the scorecard status according to a specified schedule. Any objects that have been add or removed or modified since the last session or since the last scheduled activity are refreshed at the scheduled date and time.
- Previously, the scorecard status was updated whenever a user started a new session or reloaded their session. Records were deleted and recalculated for all contexts available to the user. Now when a user starts a new session, the scorecard status is evaluated but not updated automatically. If an item was deleted that affects the status, the user receives a message stating that they need to contact the system administrator. At this time, the administrator should run the schedule to update all items in the scorecard.

5 Creating Initiatives and KPIs using Planning and Consolidation Data

You can add Planning and Consolidation data to the strategy management application, allowing an integrated, consolidated, and comprehensive view of planning and consolidation data in the context of performance-related initiatives and KPIs.

Prerequisites

The system administrator has configured the strategy management application to work with Planning and Consolidation data.

For information, see the *Server Configuration Guide for SAP BusinessObjects Strategy Management* located on SAP Service Marketplace at http://service.sap.com/instguidescpm-stm -> *SAP BusinessObjects Strategy Management*. See the topic *Integration with Other Systems -> Configuring the Application to Access BPC Data*.

You are the strategy management administrator.

You have created an Application Server model and associated it with a model connection.

You have created the Planning and Consolidation model and application.

5.1 Implementing Initiatives Based on Planning and Consolidation Data

You can set up connections to use SAP Business Planning and Consolidation data as the source of initiative actual and budget values in the application. This creates a closed loop process for developing and executing strategy since organizations typically create budgets for ongoing operations and strategic initiatives using a financial planning application.

Prerequisites

You are the strategy management administrator.

Process

1. The strategy management administrator specifies the Planning and Consolidation model, application, and dimensions to make available to Initiatives authors.
2. The strategy management administrator sets a reporting permission that allows certain users to create initiatives using Planning and Consolidation data.
3. The strategy management administrator sets up a schedule to periodically load Planning and Consolidation data using the *Refresh PC Initiative Data* activity in the *Configure Scheduler* link in the *Scheduler* section.

   For information, see *Scheduling a Refresh of Planning and Consolidation Initiative Data*.
4. The Initiatives user creates initiatives using the Planning and Consolidation data as the actual and target values.

5.1.1 Creating a Connection and Making Dimensions Available

Prerequisites

You are the strategy management administrator.

Planning and Consolidation is installed at your site and the system administrator has configured the strategy management application to work with Planning and Consolidation.

For information, see the *Server Configuration Guide for SAP BusinessObjects Strategy Management* located on SAP Service Marketplace.

Procedure

1. Start the Administrator by issuing this URL in a browser window:

   `http://<nwce_server>:<port>/strategy/administration`

2. Click *PC — Initiatives* in the *Connectors* section.
3. From the list of PC models, select the Planning and Consolidation model to use for the source of initiative and actual or budget data and click *Add*.
4. From the *Select a PC application* drop-down list, select the Planning and Consolidation application to use for the source.
5. In the dimension drop-down lists, select up to five dimensions to use for the actual and budget values.

   Note: When the Initiatives user creates an initiative and chooses the dimensions to apply from this list of dimensions, the Account, Category, and Time are also available to users.

5.1.2 Setting Permissions for Users Creating Planning and Consolidation Initiatives

The new *Create Initiative Source from PC* reporting permission in the *Manage Application Groups* screen allows application groups to see the *Enter from PC* link in the *Edit Initiatives* dialog box. The link enables users to create indicatives using PC data for the actual and budget values.

Prerequisites

You are the strategy management administrator.

Procedure

1. Start the Administrator by issuing this URL in a browser window:

   `http://<nwce_server>:<port>/strategy/administration`

2. Click *Manage Application Groups* in the *Administration* section.
3. Select the application group containing the users who will be creating PC-based initiatives. If necessary, create a new group and add users.
4. Select *Create Initiative Source from PC* and click *Save.*

5.1.3 Scheduling a Refresh of Planning and Consolidation Initiative Data

You must schedule the loading of Planning and Consolidation data for the initial implementation as well as for ongoing data updates. The *Refresh PC Initiative Data* schedule loads the PC data into the application and updates the actual and budget values of PC-based initiatives.

Prerequisites

You are the strategy management administrator.

You have specified the Planning and Consolidation model, application, and dimensions to use for initiative data.

You have added the *Create Initiative Source from PC* reporting permission to appropriate application groups.

Procedure

1. Start the Administrator by issuing this URL in a browser window:

   `http://<nwce_server>:<port>/strategy/administration`

2. Click *Configure Scheduler* in the Scheduler section.
3. Click *Add Task* next to the *Refresh PC Initiative Data* activity.
4. Specify the frequency and time at which to run the task. If you are not ready to set up a schedule and you want to load data once, you can choose *Run Once.*
5. Click *Save.*

5.1.4 Creating Initiatives Using Planning and Consolidation Data

Use

You can create initiatives whose actual and budget values are based on BPC data.

Prerequisites

The strategy management administrator has set up your application group with *Create Initiatives* permission and *Create Initiative Source from PC* permission, and has allowed the application group to access the *Initiatives* tab.

The strategy management administrator has configured the strategy management application for a Planning and Consolidation implementation, has set up a connection and made dimensions available, and has scheduled and loaded PC data.

Procedure

1. Start the strategy management application using this URL:

   `http://<nwce_server>:<port>/strategy/strategymanagement`

2. Click the *Initiatives* tab.
3. In the Initiatives component, click *Add Initiative* to display the *Initiatives* dialog box.
4. Enter a name and a description for this initiative.
5. Next to the *Actual* box, click *Enter from PC*.

6. From the *PC Model* drop-down list, select the model containing the BPC data to use for the initiative.
7. For each dimension, including *Account, Category*, and *Entity*, click *Select member*, and then select a dimension member to use for the actual number for this initiative.
8. In the *Time* section, click the period for the data.
9. Click inside the *Enter start date* box to display a list box where you can select the start date for the data you want to use.
10. Click inside the *Enter end date* box to display a list box where you can select the end date for the data you want to use.
11. Click *Get Data*.
12. Click *Save*.

    When you return to the *Initiatives* dialog box, the *Actual* box contains a value based on the selections.
13. Next to the *Budget* box, click *Enter from PC*. Select values for the Planning and Consolidation model, dimensions, and time frames that you want to use for the initiative's *Budget* value using the same steps used to specify the *Actual* value.
14. Add all the appropriate information for this initiative as follows:

Field	Description
Start	Click the *Calendar* icon to display a calendar where you specify the month, day, and year for the day on which to start this initiative. If no previous date has been set, by default, today's date is selected. Click on the date, and then click the X button in the top right corner of the calendar. In the calendar section, if you see *Set Date*, it means that you have not yet set a date. If you see a date, it means that this date is currently set.
Target End	Click the *Calendar* icon and specify the target end date for this initiative. There is no limit on the time frame to specify for the length of an initiative.
Actual End	Click the *Calendar* icon and specify the actual end date. If the initiative is not complete, leave this information blank. You can edit the initiative at a later time and update this information.
Expiration	(Optional) Click the *Calendar* icon and specify the expiration date for this initiative. Or, click *This initiative doesn't expire* if you do not want to set an expiration date.
Owner	Select the owner of this initiative. If there are more than 500 names, then a *Get full user list* link appears so you can display the full list of users. The *Author* box is read-only. It shows your username as you are the user creating the initiative.
Progress	(Optional) Specify the progress of this initiative. If you mark this initiative as not started or started, you'll need to edit the initiative at a later time to update its progress.
Actual	Type an actual value for this initiative. If there is no cost associated with this initiative, leave this box empty.
Budget	Type a budgeted value for this initiative. If there is no cost associated with

Field	Description
	this initiative, leave this box empty.
Publish this initiative	If you are ready to publish the initiative, select this option. If you are not ready, deselect this option. The initiative will not appear in the Initiatives component until you publish it or you choose the Include Unpublished filter. You might want to keep an initiative from being published if it is still under review or unapproved. When you create an initiative, you decide whether to publish it or not. You change an initiative's status between published and unpublished by editing the initiative.
URL	Type the URL that you want to associate with this initiative. Then, in the *Title* box, type the text for this URL The URL represents a Web location that supports the initiative.
Associated Dashboards	Select a dashboard you want to associate with this initiative.
Perspectives/Objectives	Select the perspectives and objectives to associate with this initiative.
Groups	Select the application groups who will be able to view this initiative. You can see a list of all the members in a group by clicking *Display group members*.
Options: *Omit Initiative Status* *Set Initiative Status* *Measure initiative on a KPI*	Specify whether this initiative will have a status indicator and how the initiative's indicator will be determined. The initiative status is a subjective value that is entered by you to communicate how well the initiative is progressing. The status indicator appears in the *Status* column as follows: To show an empty space in the *Status* column instead of a status indicator, choose *Omit Initiative Status*. To show a status indicator of your choice, choose *Set Initiative Status*. Then from the drop-down list, select the performance for the status indicator. *Very Good* shows a dark green status indicator. *Good* shows a green status indicator. *Average* shows a yellow status indicator. *Poor* shows a red status indicator. *Very Poor* shows a dark red status indicator. To show a status indicator that is based on the status of a selected KPI, choose *Measure initiative on a KPI*. Then from the drop-down list, select the KPI whose status indicator will be used for this initiative.
Importance	Select the level of importance to give to this initiative.

5.1.5 Viewing Details about the Planning and Consolidation Data

In the Initiatives component, you can select the Planning and Consolidation-based initiative and click *Details*. Then click *Show PC Info* to get details about the initiative's data.

5.1.6 Launching Planning and Consolidation from the Initiatives Component

In the Initiatives component, click *Launch PC* to launch the Planning and Consolidation application. Even if your system is set up with single sign on, you must still log into the system.

5.2 Implementing KPIs Based on Planning and Consolidation Data

You can set up strategy management to use SAP Business Planning and Consolidation data as the source of KPIs in the application.

Prerequisites

You are the strategy management administrator.

Planning and Consolidation is installed at your site and the system administrator has configured the strategy management application to work with Planning and Consolidation.

For information, see the *Server Configuration Guide for SAP BusinessObjects Strategy Management* located on SAP Service Marketplace.

The Application Server model and Planning and Consolidation model and Application exist and contain data.

A model connection is created for the Application Server model.

A context is associated with the model connection.

Process

1. Create a connection between strategy management and Planning and Consolidation by mapping the strategy management model to the Planning and Consolidation model and application.
2. Map the Application Server dimensions and members to the Planning and Consolidation dimensions and members.
3. Specify the periodicities and start and end dates of the measures in both models.
4. Create the measures in the Application Server model based on the mapped information.
5. Load the Planning and Consolidation data into Application Server measures based on the mapped information.
6. Create KPIs using the Planning and Consolidation sourced measures in the Application Server model.
7. Scorecard users can now access the KPIs in the Scorecard component of the strategy management application.

5.2.1 Mapping Models

Prerequisites

You are the strategy management administrator.

Procedure

1. Start the Administrator by issuing this URL in a browser window:

   `http://<nwce_server>:<port>/strategy/administration`

2. Click *PC — Scorecard KPIs* in the *Connectors* section.
3. From the *SM Model* drop-down list, select the Application Server model to work with. This model will eventually contain the Planning and Consolidation data that is used to create scorecard KPIs.
4. From the *PC Model* drop-down list, select the Planning and Consolidation model to work with.

5. From the *Applications* drop-down list, select the Planning and Consolidation application from the model that contains the data for the KPIs.
6. Click *Save*.

5.2.2 Mapping Dimensions and Dimension Members

Prerequisites

You are the strategy management administrator.

You have mapped the strategy management model to the Planning and Consolidation model.

You are running the *PC – Scorecard KPIs* screen and the strategy management model/ Planning and Consolidation model combination are selected.

Procedure

1. In the *SM dimensions* section, select the strategy management dimensions you want to map to Planning and Consolidation dimensions.
2. From each *PC dimensions* drop-down list, select a Planning and Consolidation dimension to map to the strategy management dimension.

   Note

   Application Server has embedded time intelligence rather than a Time dimension. There is no need to map a Planning and Consolidation's Time dimension into Application Server.
3. Click *Map Members* next to each SM Dimension and PC Dimension combination and map dimension members. In turn, select one strategy management dimension member and one Planning and Consolidation dimension member and click *Add Selection*.
4. When you are finished mapping members for this combination of dimensions, click *Apply*.
5. In turn, map the dimension members for the rest of the dimensions.
6. Click Save.

5.2.3 Specifying the Periodicities and Time Frames

Prerequisites

You are the strategy management administrator.

You have mapped the dimensions and members.

The measures to be mapped must be available in Planning and Consolidation in the base periodicity of the metric in Application Server. For example, if the Application Server measure is defined as monthly, the Planning and Consolidation measure must be monthly.

You are running the *PC – Scorecard KPIs* screen and the strategy management model/Planning and Consolidation model combination is selected.

Procedure

1. From the *Periodicity* drop-down list in the *Strategy Management* section, select the periodicity for the measures in the Application Server model.
2. Click inside the Strategy Management *Start Date* box and specify a start date for data in the Application Server model.

3. Click inside the Strategy Management *End Date* box and specify an end date for data in the Application Server model.
4. From the Periodicity drop-down list in the *Planning & Consolidation* section, select the periodicity for the measures in the Planning and Consolidation model.
5. Click inside the Planning and Consolidation *Start Date* box and specify a start date for data in the Planning and Consolidation model.
6. Click inside the Planning and Consolidation *End Date* box and specify an end date for data in the Planning and Consolidation model.
7. Click *Save*.

5.2.4 Creating the Measures

You can create measures that are the basis for KPIs, or you can create standard measures.

You can only create new Application Server measures for the Planning and Consolidation data. You cannot add Planning and Consolidation data to existing Application Server measures.

Prerequisites

You are the strategy management administrator.

You have specified the time frames and start and end dates for the measures in both models.

You are running the *PC – Scorecard KPIs* screen and the strategy management model/Planning and Consolidation model combination is selected.

Procedure

1. Click *Create*.
2. In the *Add Measure* dialog box, type a measure name for the KPI.
3. Enter the following values as required:

Field	Description
Time Series Consolidation	Specify the consolidation method for the time series
Dimension consolidation	Specify the consolidation method for the dimension.
Decimal places	Specify the number of decimal places to use.
KPI	Specify YES to create the measures as KPI measures. Specify No to create the measures as standard (non-scorecard) measures.
Score Calculation	Specify the calculation to use for this metric. Use *Achievement %* to calculate measures such as Revenue if the ideal score is when actual exceeds the target. Use *Reduction %* to calculate measures such as Cost or Expense if the ideal score is when actual is less than target. Use *Absolute %* to calculate measures such as Inventory if the ideal score is when actual is equal to target. Use *Zero Target* to calculate measures such as product defects or employee sick days if the ideal score is when actual and target are both 0.

Field	Description
	Use *Deviation %* to calculate measures when you want to express the score as the percentage above or below the desired target.
PC Account	Click *Select Member* in the *Actual* column and select a member that represents the Actual Account value. Click *Select Member* in the *Target* column and select a member that represents the Target Account value.
PC Category	Click *Select Member* in the *Actual* column and select a member that represents the Actual Category value. Click *Select Member* in the *Target* column and select a member that represents the Target Category value.
PC Entity	Click *Select Member* in the *Actual* column and select a member that represents the Actual Entity value. Click *Select Member* in the *Target* column and select a member that represents the Target Entity value.

4. Click *Save*.

5.2.5 Loading the Planning and Consolidation Data into Application Server Measures and Creating a Schedule

You can load the data now, or load it on a schedule.

If you need to modify the schedule, use the *Configure Scheduler* link.

Prerequisites

You are the strategy management administrator.

You have created the measures in Application Server.

You are running the *PC – Scorecard KPIs* screen and the strategy management model/Planning and Consolidation model combination is selected.

Procedure

1. Click *Load PC Data* to specify when to load Planning and Consolidation data into the Application Server model.
2. Select one of these values:
   - *Load PC Data Now* to load the data now.
   - *Schedule PC Data Load*, which display fields for scheduling the data.

   You can run it on a schedule or run the task once. When you name the task, it appears in the scheduler task list in the *Configure Scheduler* section of the Administrator. You will be alerted by email when the task runs.

5.2.6 Creating KPIs using Planning and Consolidation Data

Prerequisites

You are the strategy management administrator.

You have loaded data into the Application Server measures.

You are running the Administrator.

A model connection is created for the Application Server model.

A context is associated with the model connection.

Procedure

1. In the Administrator, click *Set KPIs* in the *Scorecard* section.
2. From the *Context* drop-down list, specify the context that references the model connection that is associated with the Application Server model.
3. Click *New* to create a new KPI.
4. Specify a name for the KPI and create a standard KPI using default values.
5. From the *Actual* drop-down list, select the application server measure created from Planning and Consolidation data that represents actual data.

   The remaining *Model & Metrics* fields become populated.
6. Enter all appropriate values to complete this KPI and click *Save*.
7. Repeat this process to create additional KPIs for the Planning and Consolidation-based measures in the Application Server model.

6 New Features in Interactive Publisher

6.1 Java (JPIP) Version of Interactive Publisher

The strategy management application now uses a new Java interface to Analysis Services. This is called JPIP for the Java version of Interactive Publisher.

When you install the new version of strategy management, your system is set up to run with the Java version of Interactive Publisher. If you want to use the previous format written in C++, you can change the value of the *pip.type* parameter in the strategy management Java System Properties in SAP NetWeaver Administrator.

To use the C++ (CPIP) version of Interactive Publisher, change the value of the *pip.type* Java System Property in SAP NetWeaver to *CPIP* for the strategy management application.

To use the Java (JPIP) version of Interactive Publisher, keep the value of the *pip.type* Java System Property set to *JPIP* for the strategy management application.

When using the JPIP version, Interactive Publisher does not use the PipAdmin Web Service and does not support caching. As a result, the following aspects of the *Set System Defaults* screen in the Administrator are unavailable when JPIP is in use:

- Cache
- Global Cache Setting
- Web Service

7 Documentation Issues

The strategy management Application Help has the following documentation issues:

- The topic *Creating a Model Connection for an Entry and Approval Model* in the Administrator Help should note that the measures in the model must have either monthly, quarterly, or yearly data. Entry and Approval does not support measures with any other periodicities.
- The following note about updating user responsibilities for Entry and Approval is incorrect:

  Entry and Approval workflow steps are defined for an Application Server model rather than the context. If you filter on *Entry and Approval Workflow Steps* for a particular owner, you see all the workflow steps from the model on which the selected context is based. The *Context* drop-down list is not relevant in this case. You may see workflow steps from multiple contexts if those contexts are all based on the same model.

  In the Application Help, the note should be written as follows:

  Entry and Approval workflow steps are defined for an Application Server model rather than the context. If you filter on *Entry and Approval Workflow Steps* for a particular owner, you see all the workflow steps from the model no matter which context is selected. The *Context* drop-down list is not relevant when viewing workflow steps of a particular owner.

  The topic is located on the SAP Library at http://help.sap.com -> *SAP BusinessObjects -> EPM Solutions -> Strategy Management -> SAP BusinessObjects Strategy Management 7.5 -> Application Help -> Administration -> Administration -> User Responsibility Updates.*
- The following feature in the topic about setting system defaults is incorrect:

  Enable or disable the cache by selecting *Enable* or *Disable*. You should enable caching when users typically repeat the same queries, such as in the Reports component. For the Navigator template in the Reports component, users enter ad hoc queries and may not repeat the same queries, so you might want to disable caching for that template only.

  The feature should be written in Application Help as follows:

  Enable or disable the cache by selecting *Enable* or *Disable*. You should enable caching when users typically repeat the same queries, such as in the Reports component.

  The topic is located on the SAP Library at http://help.sap.com -> *SAP BusinessObjects -> EPM Solutions -> Strategy Management -> SAP BusinessObjects Strategy Management 7.5 -> Application Help -> Administration -> Administration -> System Defaults Selection.*
- All topics in the Administrator Help that describe how to set up a model connection should state that you cannot use a model in the strategy management application that contains text variables.
- All topics in the Administrator Help that describe how to set up a model connection should state that if you are running Application Server on a Linux/UNIX server, the UNIX or Linux user specified when creating a model connection must have appropriate access to the $ORACLE_HOME directories, particularly $ORACLE_HOME/lib32. It is highly recommended to grant read and execute access to the directory structure under `$ORACLE_HOME` to ensure that there are no problems with Application Server connections to Oracle. You can run the `$ORACLE_HOME/install/changePerm.sh` script to ensure that the account used for client/server connections has the appropriate access privileges to the Oracle client software. This script establishes Read access to most of the directories in `$ORACLE_HOME`.
- The IGS charting system interprets missing or null values from Application Server as 0 and displays 0's in line charts. The alternate CVOM charting component recognizes that there is a missing value in the series and displays a break in the line for these data points.
- The topic *Adding, Editing, and Removing Comments and Replies* in the application Help should have the following information in the discussion about deleting comments:

The strategy management administrator can delete any comments or replies. This special privilege is unrelated to the Create Comments setting in the Reporting Permissions section of the Manage Application Groups link, where the administrator and users in the application group may or may not be able to create comments depending on the Create Comments setting.

- When setting a filter for the time period in the Scorecard component, the documentation does not sufficiently describe the To-Date periods. It should mention that if you choose *Latest <period>TD*, the scorecard view shows you information for the latest period to date, with a weighted average by days.

8 New Features in Support Packages

8.1 Controlling Traces in the Administrator

The *Set System Defaults* screen in the *Administration* section of the Administrator has these new settings which is not documented in the Application Help:

Pip Trace Enables or disables the PipTrace.

PasTrace Enables or disables the PasTrace, which traces all commands and the response times to process the commands in the same session, and can also trace the result/ouptut from the commands.

This feature is available in version 7.5 SP02.

8.2 Scheduling a Task to Restart PIP Sessions

The Scheduler in the Administrator has a new task called *Restart PIP Sessions*. This task closes all connections that are open between Interactive Publisher and Application Server. It is the equivalent of restarting the SAP SM Extended Listener.

This feature is available in version 7.5 SP03.

8.3 Deleting of Obsolete Items

The *Administration* section in the Administrator has a new feature called *Delete Obsolete Items*. Strategy management administrators can delete outdated or unused operational reviews. In addition, the strategy management administrator can delete alerts for a particular user or all users. The administrator can delete all alerts, or alerts that have a particular age, such as 30+ days old or 20+ days old.

This feature is available in version 7.5 SP03.

8.4 Logging Administrator Comments

When the strategy management administrator adds, modifies, or renames an entry in certain screens, they may now be prompted to enter a comment about the activity. Any comments get logged in the *Auditor* along with the log activity.

A strategy management administrator may be prompted for a comment in these sections of the Administrator:

- *Manage Application Groups*
- *Manage Models*
- *Set System Defaults*
- *Set Application Defaults*
- *Update User Responsibilities*
- *Delete Obsolete Items*

Prerequisites

The SAP NetWeaver Administrator has set the *AuditLogComments* Java System Property in the strategy management application in SAP NetWeaver CE to a value of *Yes*. The default value is *Yes*. For information about doing this, see *Strategy Management Properties Configuration* in the *Server Configuration Guide for SAP BusinessObjects Strategy Management* on SAP Service

Marketplace at http://service.sap.com/instguidescpm-stm -> *SAP BusinessObjects Strategy Management*.

Note:

The Auditor tool, available at `http://<nwce_server>:<port>/strategy/tools` logs all activity in *Management Application Groups, Manage Models, Set System Defaults, Set Application Defaults*, and *Update User Responsibilities* screens in the Administrator.

This feature is available in version 7.5 SP03.

8.5 Controlling the Display of the Export Link

The *Manage Application Groups* screen in the Administrator has an *Allow Export* reporting permission. This permission controls the display of the *Export* link in the Initiatives, Scorecard, and Reports component.

If you select this option, the selected application group will see the *Export* link in the components and will be able to export their views to Excel or Word. If you deselect this option, the selected application group will not see the *Export* link and will not be able to export views to Excel or Word.

This feature is available in version 7.5 SP03.

8.6 New Schedule to Calculate Initiative Status

The new *Calculate Initiative Status* activity in the *Configure Scheduler* section of the Administrator allows you to recalculate the initiative statuses in the Home component.

This feature is available in version 7.5 SP03.

8.7 IBM DB2 Support for SAP NetWeaver CE System Database

You can now use IBM DB2 as your SAP NetWeaver CE system database. For information, see *Setting Up Client Access to the SAP NetWeaver System Database* in the *Server Configuration Help for SAP BusinessObjects Strategy Management* located on SAP Service Marketplace at http://service.sap.com/instguidescpm-stm -> SAP BusinessObjects Strategy Management.

This feature is available in version 7.5 SP04.

8.8 Restricting Access within the (Administration) Set System Defaults Screen

By default, strategy management administrators have access to all administrative tasks including the ability to add other users as strategy management administrators.

The strategy management application has a new *SetSMAdminsGroup* Java System Property in SAP NetWeaver that allows you to restrict access to the *SM Administrator(s)* field on the *Set System Defaults* screen of the Administrator application.

If you want the function of assigning strategy management administrators to be restricted, you must create a system group (either SAP NetWeaver UME or SAP BusinessObjects Enterprise) with the list of users who can perform this task. Then in SAP NetWeaver Administrator, modify the value for *SetSMAdminsGroup* for the strategy management application and specify the name of the system group.

A user who is a member of this special group can be strategy management administrator also. However, they cannot add themselves to the list; their name would have to be added to the *SM Administrator(s)* field by another member of the group defined in the *SetSMAdminsGroup* property.

The default value of *SetSMAdminsGroup* is (null), and users who are defined as strategy management administrators have access to all administrative tasks including the ability to add other users as strategy management administrators.

This feature is available in version 7.5 SP04.

8.9 Support for Microsoft Excel 2007 for Excel Add-In

The *Required Software and Settings* topic in the *Startup Requirements* section of Application Help should say that it is possible to use Microsoft Excel 2007 with Excel Add-In.

This feature is available in version 7.5 SP06.

8.10 MaxUsersLimit Java System Property

The new Java System Propertym *MaxUsersLimit* controls the number of users to add to an application group. The default value is 1,000. To add more than 1,000 users to an application group, modify the value of *MaxUsersLimit* in SAP NetWeaver Administrator for the strategy management application.

This feature is available in version 7.5 SP07.