



## User's Guide

# SAP Strategy Management 10.1 External Data Loader

### Target Audience

- Technology Consultants
- System Administrators

PUBLIC

Document version: 1.0 – 2013-10-01

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# Document History



## CAUTION

Before you start the implementation, make sure you have the latest version of this document that is available on the SAP Help Portal at <http://help.sap.com/bosm101>.

The following table provides an overview on the most important document changes:

Version	Date	Description
1.0	2013-10-01	Initial version

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# 1 Introduction

You can import performance management data into the SAP NetWeaver System Database and use it in the strategy management application using a data loading function in the *Transporter* tool.

You can import some aspects of a context, perspectives, objectives, and KPIs into the application. You enter data in a pre-defined spreadsheet, save the information to a TXT file, and use the External Data Loader function in the Transporter tool to load the data into strategy management.

Use the External Data Loader function to do the following:

- Migrate SAP Performance Manager data into the strategy management application.
- If you are a consultant in the early stages of a strategy management implementation and you are interviewing users at different levels of the organization to find out their perspective, objective, and KPI requirements, use the spreadsheet to save time during data entry. Rather than record the information during the interview process and then enter the information into the administration application, you can record this information once in the spreadsheet during the interview process and then import the information into strategy management. This also avoids unnecessary mistakes that may occur when entering the same data twice.
- If you need to support pre-configured KPIs, you can set up one spreadsheet for one KPI set, and then use the spreadsheet to customize the information for other aspects of the organization that need similar KPI sets.

The import includes the associations between perspectives, objectives, and KPIs. The KPIs are not fully defined until after you load the data, specify the model, and specify the actual measure for the KPI.



## NOTE

To use External Data Loader, you must be using the default scorecard hierarchy of ► *perspectives* → *objectives* → *KPIs* ◀. The scorecard hierarchy is set in the administration application during the initial implementation in ► *Administration* → *Set Defaults* ◀.

## 1.1 External Data Loader Process

1. Configure the application to use the External Data Loader by setting certain Java System Properties. The Java System Properties identify which type of data to import (either *PM* or *Consulting*), and define a role for the data load user and defines the tabs and permissions available to this user in the application.
2. Use the spreadsheet to enter data about the context, perspectives, objectives, and KPIs. Save the spreadsheet and generate a TXT file. Optionally, you can develop a program to get exported

Performance Manager data into the appropriate format. The Performance Manager data is stored in the PM repository. This information can be queried and output in flat file format using any suitable RDBMS query tool. The output is then ready to copy and paste into the spreadsheet.

3. Use the External Data Loader function in the *Transporter* to load and import the comma-delimited, fixed-format data file into the SAP NetWeaver System Database.

The import process creates the role, and the tab assignments and the permissions for the data load user. This allows the user to access and update imported data through the administration application and the strategy management application.

4. The user who performs the data load uses the administration application to add definitions and settings that are required by the strategy management application that are not included in the import.

You use the External Data Loader to load content into a context just once. If you need to modify any information that is loaded, use the administration application. Optionally, you can use the *Transporter* to delete the data and then use the External Data Loader to reload the data.

## 2 Configuring the Application to Use the External Data Loader

### Prerequisites

You are the administrator of SAP NetWeaver.

### Procedure

1. Start the SAP NetWeaver Administrator.
2. Log on as administrator with the global password you provided when you installed SAP NetWeaver.
3. Select *Configuration*.
4. Click the *Infrastructure* tab.
5. Select *Java System Properties*.
6. In the *Templates* section, select the template that corresponds to your strategy management installation.
7. Click the *Applications* tab in the *Details* section.
8. In the *Name* column, type **strategy** and press *Enter* to list the strategy applications.
9. Select the name `xapps ~ cpm ~ sm ~ strategymanagement`.
10. In the *Extended Details* section, click inside the *Name* text box and type the property you want to modify. Then specify the value. The table below shows the properties, description, and values.

Java System Property	Description
<code>external.csv.flag</code>	Set this value to <b>YES</b> to make the External Data Loader feature available in the Transporter tool. The default setting is <b>NO</b> .
<code>dataload.group.defaultPermissions</code>	<p>Enter a <b>1</b> to enable a permission and enter a <b>0</b> to disable a permission.</p> <p>Default values are:</p> <p>CreateInitiative=1,            CreatePCInitiative=0,            CreateComment=0,            CreateContext=0,            CreateStrategy=0,            CreateScorecard=0,</p> <p>To perform post-import configuration steps in the administration application, the user performing the import must be the strategy management administrator. For information about these strategy management permissions, see the <i>Installation Guide</i> on the SAP Help Portal at <a href="http://help.sap.com/bosm101">http://help.sap.com/bosm101</a>. Review the topic <i>Creating a Role</i>.</p>

Java System Property	Description
<code>external.pm.appgroup.name</code> (For sites importing SAP Performance Manager data)	Specify the value <b>PM</b> . This creates a role in the administration application named <i>PM</i> with the name of the user loading the TXT file using the <i>Transporter</i> . This role is created in the administration application automatically with the name of the user who initiates the transport in the <i>Tools</i> page.
<code>external.pm.appgroup.tabs</code> (For sites importing SAP Performance Manager data)	Specifies the application tabs available to the <i>PM</i> role. Enter a <b>1</b> to enable a tab and enter a <b>0</b> to disable a permission. Default values are: <code>ViewHome=1,</code> <code>ViewStrategy=1,</code> <code>ViewInitiatives=1,</code> <code>ViewScorecard=1</code>
<code>external.consulting.appgroup.name</code> (For sites importing consulting data)	Specify the value <b>Consulting</b> . This creates a role in the administration application named <i>Consulting</i> . The <i>Consulting</i> role contains the name of the user who initiates the transport in the <i>Tools</i> page.
<code>external.consulting.appgroup.tabs</code> (For sites importing consulting data)	Specifies the application tabs available to the <i>Consulting</i> role. Enter a <b>1</b> to enable a tab and enter a <b>0</b> to disable a permission. Default values are: <code>ViewHome=1,</code> <code>ViewStrategy=1,</code> <code>ViewInitiatives=1,</code> <code>ViewScorecard=1</code>

11. When you return to the *Extended Details* section, save your changes.

## 3 Entering Data in the Spreadsheet

You can collect performance management data and enter it into the spreadsheet. Later, you can import this data into the strategy management application and use it in the *Scorecard* and *Strategy* tabs.

### Prerequisites

You have Microsoft Excel 2003 or higher installed.

### Process


1. Obtain the Spreadsheet and set preferences.
2. Enter global properties.
3. Enter perspective data.
4. Enter objective data.
5. Enter KPI data.
6. Validate the data.
7. Save the data and generate the TXT file.

### 3.1 Obtaining the Spreadsheet and Setting Preferences

#### Prerequisites

You are running SAP Strategy Management 10.0 or higher.

#### Procedure

1. Open a browser window and type the following:  
`http://<nw_server>:<port>/strategy/template/SMDataLoader.xls`
2. From the browser menu bar, choose **File** → **Save As** , and save the spreadsheet to a local directory.
3. Open the spreadsheet in Microsoft Excel.
4. (Optional) Click *Check this box to wrap cell contents* to wrap text in the cells.

### 3.2 Entering Global Properties

You enter the global properties for each context that is being loaded with performance management data.

#### Prerequisites

The External Data Loader XLS file is displayed in Microsoft Excel.

### Procedure

1. Click the *Perspectives* tab.
2. Enter information in the fields as follows:

Field	Description
<i>Sheet Type</i>	Required. Specify <b>PM</b> if adding data from SAP Performance Manager. Specify <b>Consulting</b> if adding data as a consulting effort. This setting determines which Java System Properties are used, either <code>external.consulting.&lt;prop&gt;</code> or the <code>external.pm.&lt;prop&gt;</code> .
<i>DB Name</i>	Required. This value is the database namespace to store in the SAP NetWeaver System Database to associate with current data record.
<i>Context Name</i>	Required. Enter the name of the strategy management context that will be associated with the imported information.
<i>Context Description</i>	Enter a context description. This field is optional. If you do not enter a value in the spreadsheet, you can add it later in the <i>Manage Contexts</i> section of the administration application.
<i>Template Context</i>	Specify <b>Y</b> if you want to use these values as a context template. Specify <b>N</b> if you want to specify different values.

## 3.3 Entering Perspective Data

### Prerequisites

The .XLS file is displayed in Microsoft Excel.

### Procedure

1. Click the *Perspectives* tab.
2. Enter information in the fields as follows:

Field	Description
<i>Perspective Name</i>	Required. Enter the names of the perspectives to import
<i>Perspective Description</i>	Enter descriptions for the perspectives. This field is optional. If you do not enter a value in the spreadsheet, you can add it later to the perspectives and objectives in the administration application.
<i>Responsible</i>	This field is ignored. After the import, you will need to update the perspectives and objectives in the administration application. For information, see <i>Post-Import Configuration</i> [page 17].
<i>Associated Links</i>	Specify the link associated with this perspective, if any, and then optionally specify the title, separated by a colon. Separate one link:title combination from another using a pipe (   ). For example: <code>http://service.sap.com:SMP http://www.sap.com:SAP</code>

## 3.4 Entering Objective Data

### Prerequisites

The .XLS file is displayed in Microsoft Excel.

### Procedure

1. Click the *Objectives* tab.
2. Enter information in the fields as follows:

Field	Description
<i>Objective Name</i>	Required. Enter the names of the objectives to import
<i>Perspective Name</i>	Required. Enter the name of the perspective associated with each objective.
<i>Objective Description</i>	Enter descriptions for the objectives. This field is optional. If you do not enter a value in the spreadsheet, you can add it to the perspectives and objectives in the administration application
<i>Responsible</i>	This field is ignored. After the import, you need to update the perspectives and objectives in the administration application. For information, see <i>Post-Import Configuration</i> [page 17]*
<i>Associated Links</i>	Specify the link associated with this objective, if any, and then optionally specify the title, separated by a colon. Separate one link:title combination from another using a pipe (   ). For example: http://service.sap.com:SMP http://www.sap.com:SAP

## 3.5 Entering KPI Data

### Prerequisites

The .XLS file is displayed in Microsoft Excel.

### Procedure

1. Click the *KPIs* tab.
2. Enter information in the fields as follows:

Field	Description
<i>KPI Library</i>	Required. Enter <b>N</b> if this KPI is defined for the context only. Enter <b>Y</b> if this KPI is defined in the library of KPIs and also assigned to the context.
<i>KPI Name</i>	Required. Enter the names of the KPIs to import.
<i>Objective Name</i>	Required. Enter the names of the objectives associated with each KPI.
<i>KPI Description</i>	Enter descriptions for the KPIs. This field is optional. If you do not enter a value in the spreadsheet, you can add it to the KPI in the administration application.
<i>Responsible</i>	This field is ignored. After the import, you need to update the KPI in the administration application. For information, see <i>Post-Import Configuration</i> [page 17]*
<i>Associated Links</i>	Specify the link associated with this KPI, if any, and then optionally specify the title, separated by a colon. Separate one link:title combination from another using a pipe (   ).

## 3.6 Validating the Data

Field	Description
	For example: http://service.sap.com:SMP http://www.sap.com:SAP
<i>Index Values</i>	Enter the index values from small to large or large to small, depending on the context of your data. Separate each value with a pipe (   ) and include the low and high trend values at the end. If implementing five status indicators, you must enter four breakpoint values and two trend values as shown in the example below. In this example, 0 and 10 are the low and high trend values: <b>60 70 80 90 0 10</b> If implementing three status indicators, you must enter two breakpoint values and two trend values as shown in this example. <b>65 85 0 10</b>
<i>Leading/Lagging</i>	Specify a <b>1</b> for a lagging KPI. Specify a <b>2</b> for a leading KPI.
<i>Quantitative/ Qualitative</i>	Specify a <b>1</b> if the KPI is quantitative. Specify a <b>2</b> if the KPI is qualitative.

### 3.6 Validating the Data

You can validate the perspective, objective, and KPI data before you save it to a TXT file.

You can perform the following types of validation checks:

- Review a hierarchy of the context, its perspectives, objectives, and KPIs to make sure it is set up as intended. If the hierarchy does not look correct, you can revisit the *Perspectives*, *Objectives*, and *KPIs* tabs to make corrections.
- View any validation errors that identify any of the following:
  - Perspectives that have no objectives
  - Objectives that have no KPIs
  - Objectives not associated with a perspective
  - KPIs not associated with an objective

If you receive a validation error, you can revisit the *Perspectives*, *Objectives*, and *KPIs* tabs to make corrections.

#### Prerequisites

- The .XLS file is displayed in Microsoft Excel.
- All required data is entered in the spreadsheet.
- The current changes are saved.

#### Procedure

1. Click the *Validation* tab.
2. Click the *Validate Perspectives, Objectives, and KPIs and Generate Save Sheet* button.

**NOTE**

The validation saves the sheet changes to the XLS file, even if the validation fails. The validation does not generate a TXT file. For information about the next step of generating the TXT file, see *Saving the Data and Generating the TXT File* [[page 13](#)].

## 3.7 Saving the Data and Generating the TXT File

Now you can save the sheet in TXT format, and also in XLS format.

### Prerequisites

You entered all required data into the spreadsheet.

### Procedure

1. In the Excel spreadsheet, click the *Save Sheet* tab.
2. Click the *Save Spreadsheet and TXT File* button.

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that are printed on both sides.**

## 4 Importing the Data into Strategy Management

### Prerequisites

You have generated a TXT data file.

The context mentioned in the XLS and TXT file is already defined in the administration application.

### Procedure

1. Start the *Transporter* tool by issuing this URL:  
`http://<nw_server>:<port>/strategy/tools/transporter.jsp`
2. In the section *Choose a transport file in .txt format*, click the *Browse* button to browse for the TXT file.
3. Click *Import into Database*. You receive a message state that the external data is loaded successfully.
4. Click *Back To Transporter* to return to the Transporter, or click *Close* to close the Transporter.

### Result

The data is added to the strategy management application. Your user name is now added to the role. Your role has the tabs and permissions assigned by the Java System Properties.

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## 5 Post-Import Configuration

### Prerequisites

You are a strategy management administrator.

You have administrative permission to create and edit objectives, contexts, and scorecards in the strategy management application.

### Procedure

1. Start the administration application and log on if prompted using this URL in a browser:  
`http://<nw_server>:<port>/strategy`
2. In the *Launch* page, you see the links to applications that your role can access. Click the appropriate link to run the administration application.
3. Choose ► *Context Management* → *Manage Contexts* ◀ and specify the user responsible for this context, if it is not already specified.
4. Choose ► *Manage Scorecards* → *Scorecard Defaults* ◀ and select a model connection for each imported context.
5. Choose *Define Scorecards* to review the imported perspectives, objectives, and KPIs for this context.
6. For each KPI, do the following:
  1. From the *Actual* drop-down list, select the Application Server measure from the dimensional model that contains actual values for the KPI. The remaining drop-down list boxes will be automatically populated with the correct measures.
  2. Add trend values if appropriate.
  3. From the *Responsible* drop-down list, select the responsible users for each KPI.

In role lists in the administration application, you see a default role of either *PM* or *Consulting* depending on your data. The user who initialized the import process is assigned to the role as the default user.

You can now use the KPIs, objectives, and perspectives in the strategy management application.

# Typographic Conventions

Example	Description
< >	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, “Enter your <User Name>”.
▶ → ◀	Arrows separating the parts of a navigation path, for example, menu options
<b>Example</b>	Emphasized words or expressions
<b>Example</b>	Words or characters that you enter in the system exactly as they appear in the documentation
<u>Example</u>	Textual cross-references to an internet address, for example, <a href="http://www.sap.com">http://www.sap.com</a>
/example	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
<a href="#">123456</a>	Hyperlink to an SAP Note, for example, SAP Note <a href="#">123456</a>
<i>Example</i>	<ul style="list-style-type: none"> <li>Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options.</li> <li>Cross-references to other documentation or published works</li> </ul>
<b>Example</b>	<ul style="list-style-type: none"> <li>Output on the screen following a user action, for example, messages</li> <li>Source code or syntax quoted directly from a program</li> <li>File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools</li> </ul>
<b>EXAMPLE</b>	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, <b>SELECT</b> and <b>INCLUDE</b>
<b>EXAMPLE</b>	Keys on the keyboard



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