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SAP Analysis for Microsoft Office
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SAP Business Planning and Consolidation Plug-in

THE BEST RUN

Content

1 What's New

1.1 What's New in version 2.5 Support Package 1

Access to connections and activities has been modified

The group *Connection* that had been introduced in version 2.5 has been removed in this support package. Just like before version 2.5, you connect and open the *My Activities* view.

See Accessing Activities [page 7].

1.2 What's New in version 2.5

Access to connections and activities has been modified

- The new group *Connection* now enables to connect or create connections without opening the *My Activities* view. It contains all the commands that were previously included in the group *Open My Activities*.
- When clicking *Open My Activities*, the *My Activities* view opens, based on the already selected connection.

Also, the command *Open Activity using EPM Connection* has been renamed into *Connect Using EPM Connection...* and the command *Open Activity using NetWeaver Connection* has been renamed into *Connect...*.

See Accessing Activities [page 7].

Changing the context of the activity

You can now change the members for the activity context, provided that the authorizations have been set on the web client of SAP BusinessObjects Planning and Consolidation. See Working with a Specific Activity [page 9].

Changing the work status

When using a standard Planning and Consolidation model, you can now change the work status directly, without using the web client of SAP BusinessObjects Planning and Consolidation.

Customizing the user interface

You can customize certain user interface areas for the BPC plug-in. See Introduction to Customizing the User Interface [page 14].

1.3 What's New in version 2.4

Using SAP NetWeaver connections

You can now access from the plug-in an activity using an SAP NetWeaver connection. See Accessing Activities [page 7] and the *SAP BusinessObjects Analysis for Microsoft Office Administrator Guide*.

Embedded Models - Mandatory installation of two SAP notes to be able to use the activities

When using embedded models, to be able to work with your activities as of version 2.4, you need to install the two following SAP notes on the BW server: 2363387 and 2308662. See *SAP BusinessObjects Analysis for Microsoft Office Administrator Guide*.

1.4 What's New in version 2.3 Support Package 2

Selecting an environment without changing the connection

You can now select another environment directly from the view *My Activities* without having to change the connection. See Managing your Activities [page 12].

Deadline for completing or reviewing an activity

When a deadline for completing or reviewing an activity has been set on the web client of SAP BusinessObjects Planning and Consolidation, the date along with an icon is displayed in the view *My Activities* and in the *Activity* pane. See Working with a Specific Activity [page 9] and Managing your Activities [page 12].

1.5 What's New in version 2.3 Support Package 1

Accessing an activity directly from the plug-in

To access an EPM-related activity, you can now either open it from the Planning and Consolidation web client or directly open it from the plug-in. See Working with a Specific Activity [page 9].

Accessing more web client views

From the *Activity* pane of the plug-in, you can now access the two following views of the Planning and Consolidation web client: My activities and Process Monitor. See Working with a Specific Activity [page 9].

2 Introduction to the Business Planning and Consolidation Plug-in (BPC plug-in)

The BPC plug-in is a component to SAP Analysis for Microsoft Office, as of version 2.3.

The plug-in allows to execute the Microsoft Excel or PowerPoint-related tasks for the activities defined on the web client of SAP Business Planning and Consolidation, as part of the Business Process Flows feature.

> ⓘ Note
>
> The plug-in supports only SAP Business Planning and Consolidation 10.1 Support Package 10, version for SAP NetWeaver or higher.

BPC Plug-in Interface Areas

The plug-in is available in the interface as a pane named *Activity*. This pane can be displayed in the Ribbon tab *Analysis*.

3 Accessing Activities

You can access an activity from the BPC plug-in or from the Planning and Consolidation web client.

Accessing an activity from the BPC plug-in

You can access an activity from the Microsoft Office (Excel or Powerpoint) Backstage view by selecting *File* > *BPC* > *Open My Activities*.

- To use an EPM connection, select *Connect Using EPM Connection...* then create an EPM connection or select a connection and enter the connection information in the dialog box that appears. The view *My Activities* opens and you can choose the activity you want to work with.
- To use other connections, select *Connect...*, then select a Planning and Consolidation system and environment or create a connection. The *Log On* dialog opens and you can choose the activity you want to work with.

> Note
>
> To create connections, see the *SAP Analysis for Microsoft Office Administrator Guide*.

Back to the Backstage view, a button with the selected environment is displayed next to *Open My Activities*. You can click it and select another environment.

> → Tip
>
> - The last ten connections you have used are listed when clicking *Open My Activities*. You can simply select a connection from the list.
> - If you are already using a specific connection, you can simply select *Open my Activities* > *Open my Activities for Current Connection*.

Accessing an activity from the Planning and Consolidation web client

From the Planning and Consolidation web client: when you click a task that is to be executed using SAP BusinessObjects Analysis for Microsoft Office (in Excel or Powerpoint), the application opens, and the dedicated *Activity* pane is displayed.

> Note
>
> If Microsoft Excel, PowerPoint is already opened, a new instance of the application opens.

The content of the activity workspace area in the pane depends on the status of the activity and whether you are a performer or a reviewer for the activity.

4 Working with a Specific Activity

Once you have accessed an activity, you can do the following using the *Activity* pane.

The content of the activity workspace area in the pane depends on the status of the activity and whether you are a performer or a reviewer for the activity.

1. Execute tasks for a specific activity

In the pane, you can see the following for the current activity:

- If comments have been entered for the activity, the *Comments* button under the *Status* area enables you to view the comments, their authors and their creation dates.
- In the *Activity Workspace* area, a list of actions and sub-actions is available for the current activity.

> ⓘ Note
>
> The action that you have clicked on in the web client is highlighted in the pane.

When you click an action, the sub-actions that are related to the action are displayed below the list of actions. When you click a sub-action link, it takes you to the place where you can perform the action.

Here are the available types of actions:

Icon	Action to be executed in...
	the EPM tab, using the EPM plug-in
	Data Manager, using the EPM plug-in
	an Analysis report, using the Analysis plug-in
	the Planning and Consolidation web client
	an EPM presentation, using the EPM plug-in

> ⓘ Note
>
> In the *CONTEXT* area is displayed the context of the activity. If no locked icon is placed before a member, it means that you can modify this member. The authorizations have been set on the web client of SAP

BusinessObjects Planning and Consolidation. Once you have changed the member, you still have the possibility to reset to the default member by clicking the icon that appears on the right side of the member. Note that this is the context of the activity.

2. Change the status of an activity

When you are finished working with an activity, click the button under *Status* in the *Activity* pane to:

- Change the status of the activity. Depending on the current status of the activity, you can perform the following actions: submit, reopen, approve, reject and complete.
- Enter a comment, if needed. Entering a comment is mandatory when you reject an activity.

> ⓘ Note
>
> Alternatively, you can change the status of an activity in the *My Activities* view.

If you are the responsible reviewer for an activity, you can choose to approve or reject an activity that is ready for review.

Approve sets the activity to the status Completed. Reject sets the activity to Rejected status until the responsible user resubmits it for approval. You can also reopen activities provided that the criteria for reopening are fulfilled. However, only the previous completed activity, or a specific activity if the process uses matched opening criteria, can be reopened.

> ⓘ Note
>
> When a deadline for completing or reviewing an activity has been set, an icon is displayed with the status, indicating if the activity is due in more or less than one week or if the activity is overdue. Alternatively, you can view the deadline in the *My Activities* pane.

3. Access further information in other areas

From the *Activity* pane, you can access the following other user interface areas:

Icon	Takes you to...
	the *My Activities* view, where you can manage all your activities. See Managing your Activities [page 12].

<table>
<tr><th>Icon</th><th>Takes you to...</th></tr>
<tr><td></td><td>the following views in the Planning and Consolidation web client:
Activity Workspace
My Activities
Process Monitor
Note
the Process Monitor view is accessible as of Support Package 11 of SAP BusinessObjects Planning and Consolidation 10.1, version for SAP NetWeaver.</td></tr>
<tr><td></td><td>the notification center, where you can view all technical errors, warnings and other information. You can then copy the detailed technical messages and report them to your administrator.
Note
When there are no notifications, the icon is greyed out.
When there is at least one notification that you have not viewed yet, the icon showing the highest severity (warning, then error, then information) is displayed.
When there is at least one notification, which you have already viewed, the icon is displayed.</td></tr>
<tr><td></td><td>the help you are currently looking at!</td></tr>
</table>

5 Managing your Activities

You can manage your activities in the *My Activities* view.

The view opens when clicking the icon from the *Activity* pane.

Using the *My Activities* view, you can do the following:

1. Select an activity

The processes that have activities requiring action by you as a performer or a reviewer are displayed in the left part of the view

> ⓘ Note
>
> Using the *Processes* dropdown list, you can see all the processes, only the finalized processes or only the active processes (that is the processes that have the "Waiting Finalization" and "Running statuses").

When you select a process, all the activities for that process that require action by you are displayed in the right part of the window.The activities that requires action by you appear in bold. To process with the next activity that requires action by you, select it: the *My Activities* view closes and the activity is displayed in the *Activity* pane, where you perform the required tasks.

> ⓘ Note
>
> - You can display the ID, description or both, of the process or activity names, using the *Display* dropdown list.
> - If comments have been entered for the activity, the *Comments* button in the *Comments* column enables you to view the comments, their authors and their creation dates.
> - When a deadline for completing or reviewing an activity has been set on the web client of SAP BusinessObjects Planning and Consolidation, the date is displayed in the *Deadline* column, along with an icon indicating if the activity is due in more or less than one week or if the activity is overdue.

2. Change the status of an activity

When you are finished working with an activity, select the activity and click the button located in the upper part of the view to:

- Change the status of the activity. Depending on the current status of the activity, you can perform the following actions: submit, reopen, approve, reject and complete.
- Enter a comment, if needed. Entering a comment is mandatory when you reject an activity.

> ⓘ Note
>
> Alternatively, you can change the status of an activity from the *Activity* pane.

Select another environment at any time

You can select another environment directly from the view *My Activities* without having to change the connection. To do so, select the environment using the link in the upper right corner of the window.

6 Customizing the User Interface

6.1 Introduction to Customizing the User Interface

Why customize the user interface?

To meet your business profile needs, you want to display only the commands that you use the most, and hide those commands you use less often.

For example, you can customize the *Analysis* tab of the Ribbon by hiding the commands you do not need. You can add the groups and commands you use the most.

You customize the user interface by using profiles.

Which areas of the user interface can you customize?

- In the Microsoft Excel version of Analysis, you can customize:
  - The tabs of the Ribbon for the plug-ins installed (such as Analysis and BPC),
  - The context menu for the plug-ins.
  - The entries to the installed plug-ins in the File Menu.
  - The tabs of the design panel for the Analysis plug-in.
- In the Microsoft PowerPoint version of Analysis, you can customize:
  - The tabs of the Ribbon for the plug-ins installed (such as Analysis and BPC),
  - The context menu (called from tables) for the plug-ins.
  - The entries to the installed plug-ins in the File Menu.

  Please note that Analysis, edition for SAP Analytics Cloud, does not include a PowerPoint version. Therefore, you don't have this option when using the SAP Analytics Cloud edition.

6.2 Profiles

What's a profile?

A profile is a set of user interface customizations.

Here are the several types of profiles that exist.

Profile (or user profile)

When you create a profile using the dedicated dialog box, it is a user profile.

The profile is stored in your user information on your computer at the following location: C:\Users\[user]\AppData\Roaming\SAP\Cof\User Interface

- *Standard Profile (read-only)*. If you haven't made any customizations yet, the standard profile is applied by default. It is tagged with (read-only) and you cannot modify or delete it.
- Default profile. This is the profile you set as the profile to be applied the next time you open Analysis. As said above, as long as you haven't made any customizations, the standard profile is applied by default. See Setting a profile as a default profile [page 23].
- User profile tagged with *(read-only)*. So that users can share user profiles without having to make a copy of them, you can store user profiles in a specific dedicated folder: all the profiles are read-only. Using user profiles as read-only profiles [page 26].

Company Profile

If you are an administrator, you can define a specific profile for your company and provide it to your end-users. This profile is tagged with "Company" and cannot be deleted or modified by end-users.

Company default profile: you can set a default company profile to make sure that the end-users have at least one company profile applied.

Besides, you can impose the default company profile and not allow the end-users to create their own profiles. Therefore, they cannot access the User Interface Customization feature.

For further details, see Creating a Company Profile [page 25].

Embedded Profile

An embedded profile is a user profile that is embedded in a workbook. When you provide the workbook to other users, the embedded profile applies by default. See Embedding a profile in a workbook [page 24].

6.3 Creating a profile

If you haven't made any customizations yet, the standard profile is applied by default. You can't modify or delete it. The standard profile is named Standard Profile (read-only).

But you can create other profiles, using the dedicated dialog box *Customize User Interface*.

Where do you access the Customize User Interface dialog box?

Select *File* > *Analysis* > *Customize Analysis* > *Customize User Interface*.

How do you create a profile?

Using the dialog box *Customize User Interface*, you can create a profile by clicking *Save As* and then entering a name for your profile in the dialog box that appears.

> ⓘ Note
>
> if you want this profile to be applied the next time you open Analysis, select the option *Set as Default Profile*. But you can always set later a profile as the default profile.

The name of profile you have just created is selected in the *Profile* dropdown list. You can now start to define the customizations you want: in the tabs of the Ribbon, in the context menus or in the Backstage view.

> ⓘ Note
>
> the profile that is currently applied is displayed in the bottom-left part of the *Customize User Interface* dialog box.

6.3.1 How do you customize a tab in the Ribbon?

You can arrange, add or hide groups or commands as needed in the tabs of the Ribbon.

> ⓘ Note
>
> To see how you can customize the Ribbon, check out this how-to video (produced for version 2.4): https://youtu.be/X1jXGF8NiFs

> → Tip
>
> You can quickly search for every occurrence of a specific word or phrase, by entering the text that you want to find in the upper-right part of the window. Any instances of the found text are highlighted in yellow.

Arrange

To arrange the groups or commands of a tab, you can do the following:

- Use the buttons *Move Up*, *Move Down* and *Move to Group*.

> ⓘ Note
>
> Using the *Move Up* and *Move Down* buttons, you can move the elements only inside a node element. Using the *Move to Group* button, you can move an element only into a first-level element.

- Use the drag-and-drop to move an element inside or outside a node element, and into any level.

Show or hide

- To hide or display all the groups and elements of a tab, use the *Show / Hide all Elements*.
- To hide or display all the sub-elements of a group or an element, select the group or element, then right click and use the commands *Show all Elements of* and *Hide all Elements of*.
- Select or deselect the checkboxes in the tree view.

Add

You can create new tabs.

You can create the following in a tab:

- new groups
- inside a group you have created, you can create the following types of elements: menu, separator, button, split button, or toggle button.

How do you do it?

To create or delete new tabs, use the *New Tab* button (or the tab with the + icon) and the *Delete Tab* button. You can enter a name for a new tab and specify where to position it, before or after an existing tab (amongst the tabs that are natively delivered with Microsoft Excel).

To create or delete the groups or elements, use the *New Group*, *New Sub-Element*, *Delete* buttons or the same commands that you access from the context menu in the tree view of the tab.

What elements can you create?

Here is the list of elements you can create, with their properties (that are explained below).

- Menu: label, size of the icon, icon.
- Separator: no properties.
- Button: identifier, label, macro, image size, image.
- Split button: identifier, label, macro, image size, image.
- Toggle button: identifier, label, macro (for the action), macro for the state of the button (pressed or not), image size, image.

What are the possible properties of the elements you create?

- Label: enter the name of the element as it will appear on the interface.
- Image: choose the image that you want to be displayed next to the label.
  The images are stored within the profile xml.
- Image size: choose the size *Normal* or *Large*, depending on the type of element and available user interface space. If you are creating a group, choose *Large*. If you are creating another element, choose *Normal*.
- Get Button State: macro that sets the state of the toggle button, pressed or not.
- Macro: see below the Macro section.
- Display ID: see below the ID section.

IDs

For buttons, split buttons, and toggle buttons, you can display and modify the automatically generated ID.

> ⚠ Caution
>
> Once you have changed an ID, the original ID is overwritten, which means that you cannot reset it to the automatically generated ID.

To display an ID, select the option *Display ID*.

To modify an ID, select the option, then modify it in the row *ID*.

Here are the syntax rules for an ID : must be unique, must not contain colons, must start with either a letter or underscore (_) and may contain only letters, digits, underscores (_), hyphens (-), and periods (.).

> ⓘ Note
>
> You can use the IDs to create VBA root macros.

> ⚠ Caution
>
> As of version 2.5, macros with IRibbonControl are available. If you have defined macros in an earlier version of Analysis, you need to add the control of type IRibbonControl as the first parameter in each macro so that the macros function in version 2.5.

Macros

For buttons, split buttons, and toggle buttons, you call VBA macros to perform the actions.

A macro can be defined in either one of the following:

- In an .xlam file that you need to enable as an add-in to Microsoft Excel. In this case, in the *Macro* area, enter the name of the file, followed by ! and then by the name of the macro that you want to call. For example: functions.xlam!opendocument
- Directly in the current workbook. In this case, you simply enter the name of the macro in the *Macro* area. For example: opendocument

Even if you do not use it, the first parameter must be the control of type IRibbonControl.

Example of macro for a button action:

Sample Code

```
Sub MacroName(control As IRibbonControl)
'You can check control.ID
'Do whatever you need depending on the control Identifier
End Sub
```

Example of macro for a toggle button action:

Note

A macro for a toggle button action has a boolean parameter as the second parameter (the first parameter being IRibbonControl), which corresponds to the state of the button (pressed or not pressed).

Sample Code

```
Sub MacroName(control As IRibbonControl, pressed As Boolean)
'You can check control.ID
'Do whatever you need depending on the control Identifier
End Sub
```

Example of macro for the state of a toggle button:

Sample Code

```
Function MacroName(control As IRibbonControl) As Boolean
'You can check control.ID
'Evaluate pressed state as boolean
MacroName = <pressed state as boolean>
End Function
```

6.3.2 How do you customize context menus?

You can arrange, add or hide the elements of the context menu for a plug-in.

Arrange

To arrange the elements of the context menu for a plug-in, you can do the following:

- Use the buttons *Move Up* and *Move Down*.

  Note

  Using the *Move Up* and *Move Down* buttons, you can move the elements only inside a node element.

- Use the drag-and-drop to move an element inside or outside a node element.

Show or hide

To hide or display all the elements of a the context menu for a plug-in, use the *Show / Hide all Elements*.

To hide or display all the elements of a the context menu or a specific element, select the context menu or element, then right click and use the commands *Show all Elements of* and *Hide all Elements of*.

Add

You can create the following:

- new first-level elements in a context menu,
- inside a first-level element you have created, you can create the following types of sub-elements: menu, menu separator, button, split button, or toggle button.

How do you do it?

To create or delete elements, use the *New Element*, *New Sub-Element* and *Delete* buttons or the same commands that you access from the context menu in the tree view of the tab.

What elements can you create?

Here is the list of elements you can create, with their properties (that are explained below).

- Menu: label, image, *Activate only on*, *Hide if not active*.
- Menu separator: no properties.
- Button: identifier, label, macro, image, *Activate only on*, *Hide if not active*.
- Split button: identifier, label, macro, image, *Activate only on*, *Hide if not active*.
- Toggle button: identifier, label, macro (for the action), macro for the state of the button (pressed or not), image, *Activate only on*, *Hide if not active*.

What are the possible properties of the elements you create?

- Label: enter the name of the element as it will appear on the interface.
- Image: choose the image that you want to be displayed next to the label.
  The images are stored within the profile xml.
- Get Button State: macro that sets the state of the toggle button, pressed or not.
- Macro: see the Macro section here: How do you customize a tab in the Ribbon? [page 16].
- Display ID: see the ID section here: How do you customize a tab in the Ribbon? [page 16].
- *Activate only on*: see the *Activate only on* section below.
- *Hide if not active*: see the *Hide if not active* section below.

Activate only on

By default, the element you are creating is active and visible in the context menu where and whenever, meaning in all the situations listed below. You can restrict this. So that the element be active only in some of situations, you need to select the corresponding options, depending on the plug-in you are using:

- When using the Analysis plug-in, you can activate an element only:
  - on an Analysis worksheet
  - on a data source (whether it is active or not)
  - on an active data source
  - on an inactive data source

> ⓘ Note
>
> When selecting several options, all the criteria need to be met so that the element be activated in the context menu.

> ⓘ Note
>
> Using the Microsoft PowerPoint version of Analysis, when you create an element in a context menu, the following options are available in the Activate only on area:
>
> - When in the Analysis context menu: *Active Data Source*.

Hide if not active

By default, this option is selected. This means that when an element is not active, it is hidden by default.

However, you may want to always show an element, whether it is active or not. In such a case, you can deselect the option *Hide if not active*.

6.3.3 How do you customize the File menu?

You can arrange, add or hide menu groups or commands as needed for the plug-ins in the File menu.

Arrange

To arrange the columns, the groups or commands of a tab, you can do the following:

- Use the buttons *Move Up* and *Move Down*.

  > ⓘ Note
  >
  > Using the *Move Up* and *Move Down* buttons, you can move the elements only inside a node element.

- Use the drag-and-drop to move an element inside or outside a node element.

Renaming columns

To rename the columns, the groups or commands of a tab, click the column and enter a text in the *Label* area.

Show or hide

- To hide or display all the groups and commands of a tab, use the *Show / Hide all Elements*.
- To hide or display all the elements of a group or an element, select the group or element, then right click and use the commands *Show all Elements of* and *Hide all Elements of*.
- Select or deselect the checkboxes in the tree view.

Add

You can create new tabs.

You can create the following in a tab: new sub-elements.

You can create the following types of sub-elements: menus under one of the columns, menu groups under menus, then buttons or toggle buttons under menu groups.

How do you do it?

To create or delete new tabs, use the *New Tab* button (or the tab with the + icon) and the *Delete Tab* button. You can enter a name for a new tab and specify where to position it, before or after an existing tab (amongst the tabs that are natively delivered with Microsoft Excel).

To create or delete the groups or elements, use the *New Sub-Element* and *Delete* buttons or the same commands that you access from the context menu in the tree view of the tab.

What elements can you create?

Here is the list of elements you can create, with their properties (that are explained below).

- Menu: label, description, image.
- Menu group: size.
- Button: identifier, label, description, macro, image, *Leave Backstage View*.
- Toggle button: identifier, label, description, macro (for the action), macro for the state of the button (pressed or not), image.

What are the possible properties of the elements you create?

- Label: enter the name of the element as it will appear on the interface.
- Description: enter a text describing what is the aim of the element.
- Image: choose the image that you want to be displayed next to the label.

The images are stored within the profile xml.

- Get Button State: macro that sets the state of the toggle button, pressed or not.
- Macro: see the Macro section here: How do you customize a tab in the Ribbon? [page 16].
- Display ID: see the ID section here: How do you customize a tab in the Ribbon? [page 16].
- *Leave Backstage View*: see the *Leave Backstage View* section below.

Leave Backstage View

When you select this option, once you click the button you are currently creating, you leave the Backstage view.

6.3.4 How do you customize the Design Panel

You can show and hide tabs of the design panel as needed for the Analysis plug-in. By default, all tabs are shown in Analysis.

To show or hide a tab in the design panel, select or deselect the corresponding checkbox.

The following tabs are available for the design panel in the Analysis plug-in:

- Analysis
- Information
- Components
- Design Rules
- SAC Versions
  This tab is only displayed if a SAC data source is used.
- Comments

6.4 Renaming a profile

Select the profile you want to rename, then enter the new name and click *Save*.

6.5 Setting a profile as a default profile

To set a profile as the default profile:

- When creating a new profile, select the option *Set as Default Profile*. See Creating a profile [page 16].

- At any time, you can set a default profile by selecting the profile and clicking the appropriate icon (next to cross icon) in the upper part of the *Customize User Interface* dialog box.

The profile is applied the next time you open Analysis.

> ⓘ Note
>
> As long as you haven't made any customizations, the standard profile is applied by default.

6.6 Embedding a profile in a workbook

You can embed a user profile in one or more workbooks. When you provide the workbook to other users, the embedded profile applies by default. You can also modify embedded profiles.

Note that you can only apply an embedded profile to workbooks that are saved locally.

When you open a workbook that has an embedded profile, a message appears in the *Customize User Interface* dialog.

> ⓘ Note
>
> You can embed a profile only in workbooks with an Open XML format: xlsx and xlsm. This concerns all workbooks saved with Excel versions before version 97-2003.

Why would you embed a profile in a workbook?

For example, for a viewer type of profile, you want all the greyed out buttons to be hidden.

When using a workbook in which a profile is embedded:

- The profile is applied and overrides all the other profiles that you can see in the profile dropdown list of the *Customize User Interface* dialog.
- You can still modify and create other user profiles, but you cannot apply them to this workbook.

How do you embed a profile in one or more workbooks?

1. Make sure that the workbook(s) that is to get an embedded profile is saved locally.
2. Open an empty workbook and open *Customize User Interface* dialog.
3. Select the profile in the dedicated dropdown list, then do one of the following:
    - To embed the profile in the current workbook, save the current workbook if not already, then select the icon *Embed Profile*, then *Embed [profile name] in the Current Workbook [workbook name]*.
    - To embed the profile in one or more workbooks, then select the icon *Embed Profile*, then *Embed [profile name] in one or more Workbooks*. Select the workbooks, then click *Embed Profile*.

4. You can cancel the process by clicking the *Cancel* button that appears instead of the *Close* button during the embedding process.
5. You can upload the workbook(s) with the embedded profile to the server.

The embedded profile is applied to the selected workbook(s).

How do you modify an embedded profile?

1. Make sure that the workbook(s) that contains the embedded profile is saved locally.
2. Open an empty workbook and open the *Customize User Interface* dialog.
3. Select the embedded profile in the dedicated dropdown list and change the user interface according to your needs.
4. Select *Save* to save your changes.
5. Select *Embed Profile* and apply the changed profile as embedded profile to the local workbook(s).
6. You can upload the workbook(s) to the server and overwrite the existing version with the changed embedded profile.

6.7 Creating a Company Profile

If you are an administrator, you can define a specific profile for your company and provide it to your end-users.

When you create a profile, it is a user profile that is stored locally at the following location: C:\Users\[user]\AppData\Roaming\SAP\Cof\User Interface.

Making a profile a company profile

As an administrator, to make your profile a company profile, you take your profile from the above location and move it to the location for company profiles: C:\ProgramData\SAP\COF\User Interface. This is the default location.

When you open your application, the profile is tagged with “Company” and cannot be deleted or modified by end-users.

Setting a company profile as the default company profile

You can set a default company profile to make sure that the end-users have at least one company profile applied.

If there is a default company profile, the following rules apply:

- If you have set a user profile as the default profile, this user profile is applied,
- If not, the default company profile is applied,
- If there is no default company profile, the standard profile is applied.

To set a company profile as the default company profile, enter the path to the default company profile in the file Cof_app.config located in C:\ProgramData\SAP\COF, using the following parameters:

- <section name="AppBuilderExcelDefaultCompanyProfilePath" type="String" configurationLevel="PerMachine" />
- <section name="AppBuilderPptDefaultCompanyProfilePath" type="String" configurationLevel="PerMachine" />
- <section name="AppBuilderWrdDefaultCompanyProfilePath" type="String" configurationLevel="PerMachine" />

If needed, you can impose the default company profile and not allow the end-users to create their own profiles, so they cannot access the User Interface Customization feature.

To impose the default company profile and not give access to the User Interface Customization feature, set this parameter to False:

<section name="CanCustomizeUserInterface" type="Boolean" configurationLevel="PerMachine" />

6.8 Using user profiles as read-only profiles

Read-only profiles behave just like user profiles, except that they cannot be modified.

Typically, you store read-only profiles in a shared folder so that other users can use the profiles.

To create a read-only profile, go to this configuration file: "C:\Users\[User1]\AppData\Roaming\SAP\Cof\Cof_user_roaming.config"

- You enter the path to the folders that contain the user profiles you want to use as read-only profiles.
- If you enter several paths, enter ; between each path.
- Here is an example where I is a shared folder:

  ```
  <AppBuilderReadOnlyProfileDirectories
  value="I:\...\ReadonlyProfilesDirectory1;I:\...\ReadonlyProfilesDirectory2 "/>
  ```

- If you use images in the read-only profiles, the images are stored within the profile xml.

You do not need to have administrator rights to manage read-only profiles.

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