PUBLIC
2018-10-25

Application Help for SAP Strategy Management

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THE BEST RUN SAP

Content

1 SAP Strategy Management

Use

Product Information

Product	SAP Strategy Management
Release	10.1 SP20
Documentation Updates	October 30, 2018 • Updated topics in the Goal Diagram Implementation [page 106] section to reflect current functionality when working with strategies. • Updated the topics Creating a dashboard [page 248] and Modifying a dashboard [page 249] with current functionality. October 30, 2017, 10.1 SP17 • Added the Administration topic Initiative Configuration [page 33] to explain the defaults an administrator can set for initiatives, including how to force new and modified initiatives through an approval process. • Added the Administration topic Requiring Approval of New and Modified Initiatives [page 34] that explains how administrators can enable the initiatives workflow so all new and modified initiatives in selected contexts go through an approval process before they become available to end users. • Modified the End User topic Initiatives [page 218] to mention that new and modified initiatives may be required to go through an approval process if an administrator has configured this. • Added the End User topics Initiative Approval Workflow [page 245], Submitting an Initiative for Approval [page 246], and Reviewing New and Modified Initiatives [page 247] to explain how authors, owners, and approvers of initiatives perform their tasks.
Based On	SAP NetWeaver AS Java 7.3 Support Package Stack 02
SAP NetWeaver Documentation Published	February, 2011

The SAP Strategy Management application integrates the following pillars of strategy management: goals, initiatives, and key performance indicators. It can link these to accountable individuals, enabling organizations to hone their decision making and achieve their objectives.

The SAP Library documentation for SAP Strategy Management includes the following content:

- Startup Requirements [page 5] provides steps for strategy management users to set up their environment.
- Administration [page 17] enables strategy management administrators to define strategy objects and specify settings for the application using the administration application. The administration application allows companies to distribute administrative tasks to multiple people throughout the organization, promoting self-service.
- Entry and Approval [page 136] enables users of the Entry and Approval application to streamline the process of populating measures in a performance management system. A workflow system provides structure around the process, reducing the amount of time spent on measure collection and approval.
- Home [page 170] enables users of the *Home* tab to set up their own personalized view of the strategy management application. Through system messages and a condensed personalized performance summary, the *Home* tab monitors both individual and organizational performance.
- Strategy [page 184] enables users of the *Strategy* tab to visualize and update goals, cause and effect diagrams, and pathways or themes. Goal diagrams and pathways help motivate employees and foster a sense of ownership by communicating the organization's vision and mission, as well as the underlying steps to achieve them.
- Scorecard [page 193] enables users of the *Scorecard* tab to monitor performance toward goals.
- Initiatives [page 218] enables users of the *Initiatives* tab to prioritize and focus resources appropriately even in the face of conflicting tasks so that resources support the milestones most critical to organizational goals. The *Initiatives* tab provides summary views of initiatives supporting overall objectives, as well as the milestones supporting each initiative, interdependencies between them, and schedule and budget status.
- Briefing Books [page 250] enables users to formalize the review process of capturing, consolidating, and presenting certified information on goals, initiatives, and measures. Users can consolidate information captured from anywhere within the strategy management application into a unified story of performance and publish it externally, distributing performance insights to constituents who do not have direct access to the system.
- Dashboards [page 248] provides users a quick overview of key organizational measures to evaluate how they are performing at various levels within the organization.
- Reports [page 253] enables users to measure and uncover the root of performance issues.

1.1 Startup Requirements

Use

Users of SAP Strategy Management must configure their client machines to successfully run the applications. This is the first step toward working with the application.

Follow all the topics in the *Startup Requirements* after the strategy management administrator has fully installed and configured the strategy management components on the appropriate servers.

This guide contains steps to configure your client machine and browser so you can run any of the following:

- Strategy management application
- Administration application
- Entry and Approval application, accessible from the Administrator application

- Application Server Administrator application in a client/server configuration

For information about configuring your machine to run Excel Add-In, see the *Installation Guide for Excel Client Add-In* on the SAP Help Portal.

1.1.1 Required Software and Settings

Use

Application users have the following requirements to run the applications:

- Software requirements. For more information, see Software Requirements [page 6].
- Special browser settings. For more information, see Browser Settings [page 7]
- Application permissions. For more information, see Application Permissions and Settings [page 9].
- Desktop settings. For more information, see Desktop Settings [page 10].

1.1.2 Installation and Configuration

Use

This section covers the installation and configuration requirements necessary to run applications.

For installation steps and requirements to run the Excel Add-In application, see the *Installation Guide for Excel Client Add-In* on the SAP Help Portal.

1.1.2.1 Software Requirements

Use

Software requirements are as follows:

- Microsoft Windows using the Internet Explorer version 9 series. For supported versions of Windows, see the *Product Availability Matrix* at http://support.sap.com/pam. Then search on *strategy management*.
- Adobe Flash Player 10.1

The following installations may be required depending on the functions you perform:

- A PDF reader. Users who print views, review printed views, or export briefing books to PDF format must have a PDF reader installed on their client machines.
- Sun JRE 1.6 or higher if you are a scorecard administrator. For more information, see Verifying Whether You Need to Have Sun JRE Installed [page 7].
- To export data into the Entry and Approval application, you have Microsoft Excel 2000, XP, 2003, or 2007 installed.

- To export strategy management views to `CSV` files using the *Export* link, you must have a program that can open `CSV` files such as *Notepad* or a spreadsheet system installed.

1.1.2.1.1 Verifying Whether you Need to Have Sun JRE Installed

Context

If you are a scorecard administrator and you use ▸ *Context Management* ▸ *Manage Scorecards* ▸ *Scorecard Defaults* ◂ in the administration application, you need to have Sun JRE installed. This allows you to access the *Member Selector* dialog box.

If you are not a user assigned to a role with scorecard administrator permissions, you can skip these steps.

For information about roles and permissions, see Roles in the Applications [page 18].

Procedure

1. In the browser, choose ▸ *Tools* ▸ *Sun Java Console* ◂. The Java Console appears.
2. Check your version of Sun Java JRE.

   If you do not have Sun Java JRE or if you have a version lower than 1.6, download the latest version from `http://java.com`.

1.1.2.2 Browser Settings

Use

You must have the following browser settings:

- Internet options set up to disable pop-up blockers. If you have used an external tool to block pop-ups from appearing in your Web browser, you must disable the block for the application to work correctly. In Internet Explorer, choose ▸ *Tools* ▸ *Pop-up blocker* ▸ *Turn off Pop-up Blocker* ◂.
- Browser window set at maximized size
- Internet options set up to specify how to check for newer versions of stored pages. For more information, see Specifying How to Check for Newer Versions of Stored Pages [page 9].

The following setting may or may not be required depend on the functions you are performing:

- Advanced Browser Internet options set up to enable or prompt for the acceptance of ActiveX controls and scripts
  This applies to users who enter data in the Entry and Approval application via Excel.
  For more information, see Enabling ActiveX Controls [page 8].

1.1.2.2.1 Enabling ActiveX Controls to Use the Excel Interface

Context

If you want to enter data into the Entry and Approval application using an Excel spreadsheet, you must allow ActiveX scripting in your browser.

Procedure

1. In Internet Explorer browser, choose *Tools* > *Internet Options*.
2. In the *Internet Properties* dialog box, click the *Security* tab.
3. Select the correct Web content zone icon, depending on the network used for the strategy management application at your site.
4. Click the *Custom Level* button.
5. In the *Security Settings* dialog box under *ActiveX Controls* set the *Download ActiveX controls* options to either *Enable* or *Prompt*.
6. Set *Initialize and script ActiveX controls not marked as safe* to *Enable* rather than *Prompt*.
7. Close the browser and then reopen it.

Results

When the options are set to *Enable*, the following occurs:

- When you click *Download to Excel* on the Entry and Approval Data Entry screen, or when Entry and Approval administrators enter target and historical data, an ActiveX script runs from the Windows server. If your browser settings require you to be logged on at all times, you are prompted for connection information in order to download the Excel data entry template.

When the options are set to *Prompt*, the following occurs:

- When you click *Download to Excel* on the Entry and Approval Data Entry screen, or when Entry and Approval administrators enter target and historical data, an ActiveX script runs from the Windows server. You are prompted once at every session. If your browser settings require you to be logged on at all times, you are prompted for connection information so that you can download the Excel data entry template. If the ActiveX prompt pushes the connection dialog behind the Entry and Approval application, you should press `Alt` + `TAB` to go to the Excel icon so that you can continue.

1.1.2.2.2 Specifying How to Check for Newer Versions of Stored Pages

Context

You must set your temporary Internet files preference in your browser to refresh on every visit to a page.

With this setting, Internet Explorer looks for a new version of the `HTM`, `.JS`, `.GIF`, and other Internet files on the Windows server every time you access a page. You do not have to delete your browser cache when newer versions of the application are installed on the Windows server.

Procedure

1. In Internet Explorer, choose *Tools* > *Internet Options* .
2. On the *General* tab, within the *Browsing history* section, click *Settings*.
3. In the *Temporary Internet Files* section of the dialog box, choose *Every time I visit the webpage*, then click *OK*.

1.1.2.3 Application Permissions and Settings

Use

The system administrator sets most of the permissions that control the functions and accessibility in the application for your role.

The system administrator sets your user profile in the following ways:

- Adds strategy management users to SAP NetWeaver UME
- Adds users to strategy management roles, and sets permissions and accessibility for the roles

- Provides access to the Application Server server if you are a user accessing an Application Server model
- Provides access to the server where SAP NetWeaver is installed.

The *Display Notification* option must be selected in the *Notification Subscriptions* dialog box of the *Home* tab if you want to receive an e-mail notification when an initiative author selects the *Notify Team Members Now* link.

> **i Note**
>
> When initiatives authors are editing an initiative in the *Initiatives* tab, they can select a *Notify Team Members Now* link to notify initiative team members when any aspect of this initiative has changed. Users receive a notification immediately, just this one time.

For more information, see Specifying How to Receive Notifications [page 179].

1.1.2.4 Desktop Settings

Use

The applications are optimized to run in 1280 x 1024 to deliver the best visual results. Other resolutions may provide varying results.

1.1.3 Starting and Exiting from the Applications

Use

If you are a user defined in a role that is known to the strategy management system, you can start the applications.

Users have access to different applications and tabs and have different permissions within the applications based on the roles to which they belong. Each role's view of the application depends on the permissions allocated to the role.

For information about roles, see Roles in the Applications [page 18].

Prerequisites

- You are a user defined in a role that is known to the strategy management system.
- To start the strategy management application, you are assigned to a role with access to at least one tab.
- To start the administration application, you are a user defined in a role that has at least one administrative permission.
- To perform all administrative tasks in the administration application, or to perform system administration tasks, you are the strategy management administrator.

- To start the Entry and Approval application, you are a user or a strategy management administrator assigned to the *SSM_Entry_And_Approval* role.
  If you are an Entry and Approval user, you are assigned to a measure set for either data entry or approval. If you are an Entry and Approval administrator, you have access to a model with an established Entry and Approval model definition and have Entry and Approval administrator status specified in the *Entry and Approval* screen.
- To start the applications directly and bypass the *Launch* page, the system administrator has set a value for the *PwDatabase* Java System Property. For information about the *PwDatabase* Java System Property, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal at https://help.sap.com/viewer/p/SAP_STRATEGY_MANAGEMENT.

Procedure

1. In an Internet Explorer URL box, enter the following:
   `http:// <nw_server>: <port>/strategy`
2. If you are prompted to log on, log on with your Web authentication user name and password.
3. If you are prompted for an authentication type, select whether your user name is authenticated from SAP BusinessObjects, from LDAP, or from Windows ActiveDirectory.
   If your user name is authenticated from SAP NetWeaver UME, you are not prompted for an authentication type.
4. In the Launch page, you see the links to applications that your role can access. Click a link to run the appropriate application.

> **Note**
>
> **Strategy management application users**: The first time the first user selects the *Home* tab, a message appears stating that the scorecard has been modified. When prompted to recalculate objective and KPI statuses, click *Yes*.
>
> **Administration application users**: Only the tasks available to you according to the permissions set for your role are available. Tasks that you do not have permission to use are unavailable.
>
> **Entry and Approval application users**: If this is the first time starting the Entry and Approval application and there are no measure sets defined, you are prompted to create them.

Starting the Strategy Management Application Directly

In an Internet Explorer URL box, enter the following URL:

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

Starting the Administration Application Directly

In an Internet Explorer URL box, enter the following:

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

Starting the Entry and Approval Application Directly

In an Internet Explorer URL box, enter the following:

`http:// <nw_server>: <port>/strategy/entryandapproval`

Exiting from the Application

From the Internet Explorer browser menu, choose *File* > *Close*.

1.1.4 Upgrading

Use

When upgrading the strategy management system, you must delete any temporary Internet files browser on your machine so that you can be sure you are viewing the most recent pages in your browser.

If the technical requirements change for a release, you are responsible for uninstalling the component and reinstalling the newer version.

Procedure

1. Open a browser window.
2. Choose *Tools* > *Internet Options* to display the *Internet Options* dialog box.
3. Click the *General* tab.
4. Choose *Delete files* to display the *Delete Files* dialog box.
5. Click *Delete all offline content*.
6. Click *OK*.
7. Click *OK* again to close the *Internet Options* dialog box.

If Excel Add-In users want to learn how to upgrade Excel Add-In, see the *Installation Guide for Excel Client Add-In* on the SAP Help Portal.

1.1.5 Configuring Application Server on a Windows Client

Use

If you installed Application on a Windows client in addition to a server, follow the steps in this section to configure Application Server on your client machine. If you are running Application Server directly on the server machine, you can skip this section.

The administrator must have the following information to modify the configuration files and set up a client/server configuration:

- The name of the Windows server, or the IP address if the client has no name resolution mechanism
- The name of the user account and password set up for the user to access the Windows server. This is the user ID and password at the operating system level (not at the Application Server level).

1.1.5.1 Finding the IP Address of the Windows Server

Use

These steps describe how to find information needed for a client installation. If you are running Application Server on a Linux/UNIX server, you can skip this section.

Procedure

1. From the command prompt on the Windows server, enter the `HOSTNAME` command. This command displays the TCP/IP host name of the local computer.
   For example:
   ```
   C:\hostname
   reservoir
   ```
2. From the command prompt on the Windows client, enter the PING command as follows:
   `PING <host_name>`
   `<host_name>` is the name of the server supplied by the `HOSTNAME` command.
   `PING` is the name of the server supplied by the `HOSTNAME` command.
   For example:
   ```
   C:\ping reservoir
   Pinging reservoir [205.181.186.210] with 32 bytes of data:
   Reply from 205.181.186.210: bytes=32 time<10ms TTL=127
   Reply from 205.181.186.210: bytes=32 time<10ms TTL=127
   Reply from 205.181.186.210: bytes=32 time<10ms TTL=127
   Reply from 205.181.186.210: bytes=32 time<10ms TTL=127
   Ping statistics for 205.181.186.210:
   Packets: Sent = 4, Received = 4, Lost = 0 <0% loss>,
   Approximate round trip time in milliseconds:
   Minimum = 0ms, Maximum = 0ms, Average = 0ms This identifies that your client
   machine is successfully able to connect to the Windows server where Application
   Server is installed.
   ```
3. If you are unsuccessful at PINGing your Windows Server by name, you may need to determine the TCP/IP address of the machine. Issue the IPCONFIG command on your Windows server.
   For example:
   ```
   C:\ipconfig
   Windows IP Configuration
   Ethernet adapter Local Area Connection:
   Connection-specific DNS Suffix . :
   IP Address . . .. : 205.181.186.210
   Subnet Mast . . . : 255.255.255.0
   Default Gateway . . . : 205.181.186.254
   ```

This provides you with the TCP/IP address information of your Windows server. Repeat Step 2 but using the TCP/IP address information determined by running the IPCONFIG command rather than the host name. If you still are not able to successfully connect, you may need to consult someone from your IT department.

1.1.5.2 LSSERVER.INI

Use

After you install Application Server on the client, you may want to edit the `LSSERVER.INI` file in the Windows directory on the client machine to change or include additional client/server configurations.

The following `LSSERVER.INI` file contains sample settings for WINSOCK to UNIX, and WINSOCK to Windows support. The `[HP9000]`, `[FINANCE]`, and `[999.999.99.99]` sections each represent the same UNIX server but are shown three different ways to give an example of its standard name (HP9000), by an alias (Finance), and by an IP address (999.999.99.99).

```
[WINDOWS]

VERSION= <version>

SERVER=

CMDSEP=|

PAGEDB=C:\PROGRAM FILES (x86)\SAP Strategy Management\APPLICATIONSERVER\HOME\PAGEDB

PAGEDBSIZE=25000

HOME=C:\PROGRAM FILES (x86)\SAP Strategy Management\APPLICATIONSERVER\HOME

EDITWKDB=C:\PROGRAM FILES (x86)\SAP Strategy Management\APPLICATIONSERVER\HOME
\LSSEDIT

[HP9000]

PROTOCOL=TCP

SERVICE=PILOT

CURSOR=LSSCOMMS

USERNAME=lss

EncryptedPassword=

[999.999.99.99]

; This is the HP9000, accessed via IP address

PROTOCOL=TCP

SERVICE=PILOT

CURSOR=LSSCMPTR

USERNAME=lss

EncryptedPassword=

LOGLEVEL=

LOGFILE=

[FINANCE]

; This is the HP9000, accessed via an alias
```

```
PROTOCOL=TCP
SERVICE=PILOT
CURSOR=LSSCMPTR
USERNAME=lss
EncryptedPassword=
[ntbox]
; This is the NT Server, accessed via WINSOCK
PROTOCOL=TCP
SERVICE=PILOT
CURSOR=LSSCMPTR
USERNAME=lss
EncryptedPassword=
```

This table describes the parameters in the file.

Parameter	Description
SERVER	<servername> is the name of Windows server where Application Server is installed. Specify a server name when there is only one server that users can access. When this parameter has a value, users do not have to enter a server name each time they log into Application Server. Keep this value empty when there is more than one server that users can access. Users are prompted to enter a server name when you log into Application Server. If users do not enter a server name, a client (not client/server) version of Application Server starts. Application Server can access a remote server by its name, by an alias, or by its IP address. The SERVER= statement in LSSERVER.INI can specify any one of these.
CURSOR	LSSCMPTR | LSSCOMMS | NONE Name of the cursor that appears during network operations. **LSSCMPTR** displays a cursor that looks like two communicating computers. **LSSCOMMS** displays a cursor that looks like a satellite dish. If you specify **NONE**, the cursor does not change during client/server operations.
USERNAME	<user_name> is the logon name for the UNIX or Windows server account (the native operating system account, not the Application Server user name). User name values are case-sensitive. Required.

Parameter	Description
EncryptedPassword	Value is either empty or is a question mark (**?**) so that you can be prompted to enter a password when logging into Application Server in a client/server configuration. Rather than be prompted to enter your password every time you start Application Server, you can create a remote server connection that stores your password in encrypted format in lsserver.ini. EncryptedPassword values are case-sensitive.
LOGFILE	<filename> is the output trace file you want to use. The default is LSSWSOCK.LOG for WINSOCK connections. Tracing can be useful for trouble-shooting initial connections or other communication issues.
LOGLEVEL	BASIC | ADVANCED Specify **BASIC** for function name and return code, or **ADVANCED** for function name, return code, and data.
Winsock Connections	
SERVICE	<service> specifies a character string, which is a name used to select the UNIX shell script that is executed on the UNIX server. It must match an entry in the lssmap file on the server. For example: SERVICE=PILOT This parameter is required and is case-sensitive in UNIX.
PROTOCOL	Value of TCP specifies access via TCP/IP. This parameter is required.
PORT	<nnnn> specifies the TCP/IP port number that the client uses to connect to the Application Server service on a UNIX or Windows server. The default setting is PORT=8325. During the installation, you were prompted to specify the port number. If you specified a number other than 8325, the port number defined on the server in the /etc/services file is not 8325. It must be specified in the PORT=<nnnn> statement in that server's section of LSSERVER.INI on the client. For a complete list of possible LSSERVER.INI parameters, see the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal at https://help.sap.com/viewer/p/SAP_STRATEGY_MANAGEMENT.

1.1.5.3 Troubleshooting Windows Client Communications

Use

If you cannot connect to your server, verify that the LSSERVER.INI options are set correctly.

For `WINSOCK`, use a generic ping program to validate your client/server connection.

Review the log file specified by the `LOGFILE` parameter. The default is `LSSWSOCK.LOG` for `WINSOCK` connections.

1.2 Administration

Use

The administration application enables strategy management administrators to create the necessary components for the strategy management application, and maintain and optimize the strategy management application. The administration application minimizes the impact on already overburdened IT staff by allowing organizations to distribute administrative tasks to many people throughout the organization, promoting self-service.

Use the administration application to define KPIs, objectives, perspectives and themes. Depending on your user role set up by the system administrator, certain users can define the relationships between strategy and data, producing goal diagrams and scorecards relevant to their group.

Implementation Considerations

There are several types of users who perform various levels of tasks in the administration application and the strategy management application. For information, see Roles in the Applications [page 18].

Grayed out options indicate that you do not have permission to use those aspects of the application. This Help covers all topics available in the application to accommodate all types of administrator users.

> **i Note**
>
> If users are running the strategy management application at the same time you are making administrative changes to it (for example, you create KPIs for a context that users are reviewing), the users do not see the updates immediately. They see the changes the next time they start the strategy management application.

Features

The administration application has the following sections:

- *Administration*, where you set up *Home* tab configurations, model connections, system and application defaults, update user responsibilities, and delete obsolete items.
  For more information, see Administration [page 24].
- *Library*, where you create and maintain objects that are used over and over again among multiple contexts. You can create and maintain perspectives and objectives and KPIs that can be used across all contexts. When you define the objects in the library, you provide general definitions that are useful to all contexts.

For more information, see Library [page 40].

- *Context Management*, where you create contexts and specify which roles can access the context. Creating a context is the first step toward building your strategy and scorecard. The context is the component that links a particular mission, vision, strategy, set of perspectives and objectives, and scorecard all for particular roles to access.
  For more information, see Context Management [page 54].
  You also develop the *Strategy* tab of the strategy management application. Since managing goals requires more than simply displaying current objectives, the interactive strategy component helps provide the missing motivational aspect of strategy. Consisting of pathways or themes, process and goal diagrams, and cause and effect, the *Strategy* tab makes the strategic plan become more than just a static impenetrable document by providing a collaborative environment to visualize, discuss, and update goals.
  For more information, see Strategy [page 103].
  You also develop the scorecard. Once you add perspectives, objectives, and KPIs to the context, you can define how to measure these items within the context.
  For more information, see Scorecards [page 75].
- *Entry and Approval*, where you set defaults for the Entry and Approval application.
  For more information, see Entry and Approval Defaults [page 128] and Setting Up an Entry and Approval System [page 125].
  The Entry and Approval application streamlines the process of populating measures and approving the data. Users enter data and monitor the data entry effort through a workflow process. Once the data entry process has been completed, the data is loaded into the performance management Application Server models from the Entry and Approval application.
  For more information, see the Entry and Approval [page 136].
- *Scheduler*, where you set schedules that define how frequently to calculate initiative status, calculate scorecard objects, restart sessions, reassign owners, load data from external sources, update Application Server measures, and send out initiatives notifications.

  > **i Note**
  >
  > Users subscribe to the notifications in the *Inbox* section of the *Home* tab for particular initiatives, objectives, and KPIs. If a milestone's activity, objective's activity, or KPI's activity is detected during the Scheduler's periodic check, any user who subscribed to that activity and that particular object receives notification in the form of an e-mail notification or a *Home Inbox* notification.

  For more information, see Scheduler [page 132].

1.2.1 Roles in the Applications

Use

Roles define each user's experience in the administration application and the strategy management application in terms of permissions, views, and accessibility. All the members in the role share the same functionality and access to the application.

To access the administration application or strategy management application, users must be assigned to roles in SAP NetWeaver. The administrator of SAP NetWeaver creates roles containing certain permissions and tabs and then assigns strategy management users to them in SAP NetWeaver Administrator. A role can provide full access to all the tabs and all the permissions in the applications, or it can provide limited access to tabs with limited permissions. This is system information that is independent of any context definitions.

When you log into the administration application or strategy management application, the system matches you to your associated roles, and displays the application in the way you are allowed to see it. If certain links in the application are unavailable, it means that you have not been assigned permission to use those aspects of the application. For example, if your role has access to the *Initiatives* tab but does not have permission to create initiatives, the *Add Initiative* link is unavailable.

There are certain types of administrators described in this Application Help. The administrators are names used to describe a certain set of permissions granted to users in a role. A user can belong to multiple roles, and can have multiple permissions assigned in a single role.

A user can have administrative permissions in the administration application while also having strategy management application permissions. A user can have any combination of these permissions:

Application	Permission
Strategy management application	**Strategy management users** - users in a role who have access to general functionality and tabs based on the definitions of the role **Initiatives authors** - users in a role who can create initiatives and assign roles to use the initiatives **Comment authors** - users in a role who can create comments and replies. The comment author can delete their own comments but not another user's comments. The strategy management administrator can delete any user's comments and replies. **Strategy management administrator** - a user who has special administrative permissions set up by the system administrator. The strategy management administrator can use all sections of the application and can delete comments and replies. For more information, see the explanation of the strategy management administrator in the section about the administration application.

Application	Permission
Administration application	**Strategy management administrator** - a user who has special administrative permissions set up by the system administrator. The strategy management administrator can use all sections of the strategy management application, administration application and Entry and Approval application. The strategy management administrator must be assigned to one user role, but has greater permission than just the role assignments. The strategy management administrator also has administrative permissions for SAP NetWeaver and Interactive Publisher. This user is sometimes called *pipadmin*. **Context administrators** - users in a role with permission to use *Context Management* > *Manage Contexts* to create contexts, assign roles to contexts, and create a system message for the Home tab For information about assigning roles to a context, see Role Assignments [page 73]. **Scorecard administrators** - users in a role with permission to use *Context Management* > *Manage Scorecards* to set scorecard defaults and create scorecards. Scorecard administrators can create KPIs, indexed KPIs, objectives, and perspectives and assign them to contexts. **Strategy administrators** - users in a role with permission to use *Context Management* > *Manage Strategies* to set strategy defaults, create goal diagrams, themes and pathways, and cause and effect diagrams
Entry and Approval application	**Entry and Approval users** - users in the *SSM_Entry_And_Approval* role who have access to general functionality. Data Entry users and approvers can enter actual and current-period target data, historical information, and future target data. **Entry and Approval administrators** - a user in the *SSM_Entry_And_Approval* role who has Entry and Approval Administrator status. The status is set up in the *Set Entry and Approval Defaults* screen. Entry and Approval administrators who are assigned to measure sets and workflow steps can also enter data, and approve or reject data. Entry and Approval administrators can create and maintain measure sets, release measure sets, set Entry and Approval defaults, load data into the Application Server model and monitor the overall data collection effort for the Application Server model for each period. **Strategy management administrator** - a user who has special administrative permissions set up by the system administrator. The strategy management administrator's tasks for Entry and Approval include defining model access and user access. In some environments, the Entry and Approval administrator may also have strategy management administrator privileges. For more information, see the explanation of the strategy management administrator.

1.2.2 Preference Setting

Use

You can set certain preferences that affect the administration application, Entry and Approval application, and strategy management application.

Prerequisites

If you are planning to change the application to a different language, your browser is set to the appropriate regional setting.

Features

You can set the following preferences:

- You can change the language in which the application appears. The next time you start the applications, it appears in the selected language.
  By default the application detects the regional settings of the client machine and uses those values within the application. For example, if you are running on a machine with French regional settings, the application opens in that language.
  If you only see English as an option, it means that you are not fully set up to access other languages.
- You can change the thousands separator and the decimal separator used to display data. The default separators are in the US format.

1.2.3 Implementing Your Strategy Management System

Use

You can start working with strategy management in different ways.

Prerequisites

System users and groups are populated in the strategy management system. For more information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Process

1. Set up and review the demonstration implementation.
   You can view the definitions of a sample scorecard first before defining your own scorecard, review the demonstration files, and allow users to run the *Scorecard* tab with sample scorecard information. Ask your administrator to set this up. For information, see *Setting Up and Reviewing the Demonstration Implementation* in the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal. These topics are for the strategy management administrator to carry out. This step is optional.
2. Set up your model and define a full scorecard implementation.

For information about implementing your strategy management system, see the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal.

1.2.3.1 Getting Started with the Sample Data

Use

You can view the definitions of a sample scorecard first before defining your own scorecard, and allow users to run the *Scorecard* tab with sample scorecard information.

For more information about starting with the demonstration files, see the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal.

Prerequisites

You are the strategy management administrator.

There are different types of administrative permissions for each topic. If one user is performing all steps, that user should be the strategy management administrator to have access to all features. If various users are carrying out the steps, they should have the exact permissions set in the individual Prerequisites sections of the related topics.

System users and groups are populated in the strategy management system. For more information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Process

1. In Application Server, build the HFPBM model by running a procedure provided at installation.
2. Create a model connection. For information, see Model Connection Development [page 28].
3. Assign roles to the *Fashions Enterprise* context. For information, see Role Assignments [page 73].
4. Assign the model connection to the *Fashions Enterprise* context.

1.2.3.2 Getting Started with a Full Scorecard Implementation

Use

These steps show the general flow of implementing a scorecard beginning with the development of the Application Server model through rolling out the context to users in the application.

Prerequisites

There are different types of administrative permissions for each topic. If one user is performing all steps, that user should be the strategy management administrator to have access to all features. If various users are carrying out the steps, they should have the exact permissions set in the individual Prerequisites sections of the related topics.

System users and groups are populated in SAP NetWeaver UME and are available as strategy management users. For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Process

1. Develop the Application Server model and create the measures for the KPIs.
   For information about developing Application Server models for the application, see an overview in the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal.
   For information about developing Application Server models, see the online Help in the Application Server Administrator program.
2. Start the administration application. For more information, see Starting and Exiting the Applications [page 10].
3. Set application defaults and system defaults. For information, see Default Settings [page 25].
4. Create a library of perspectives and objectives that can be used in any context. For information, see Library [page 40].
5. Create a model connection. For more information, see Model Connection Development [page 28].
6. Create a context and assign a model connection and roles to the context. For information, see Contexts [page 55] and Role Assignments [page 73].
7. Set scorecard defaults. For information, see Scorecard Defaults Selection [page 76].
8. Add the perspectives, objectives, KPIs, and index KPIs to the context. For information, see Adding Objects to the Context [page 81].
9. Define the perspectives, objectives, and KPIs within the context. For information, see Defining Objects in the Context [page 87].
10. Set strategy defaults. For information, see Strategy Defaults [page 104].
11. Create and publish goal diagrams. For information, see Adding a Diagram [page 107].
12. Access the application to create initiatives, and review the scorecard and strategy.

Result

In the application, any user with access to the *Initiatives* tab, *Scorecard* tab, and *Strategy* tab can work with the initiatives, objectives, and strategy you defined.

1.2.4 Administration

Use

Strategy management administrators use *Administration* to maintain the strategy management applications and settings.

Administration functions affect the entire strategy management system across all contexts.

Prerequisites

You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you did not start the application as the strategy management administrator. For information, see Roles in the Applications [page 18].

System users and groups are added to strategy management roles. For more information, see the *Installation Guide* on the SAP Help Portal.

Features

Administration of the application involves the following:

- Setting system defaults and application defaults. For more information, see Defaults Setting [page 25].
- Creating and maintaining model connections. This connects strategy management users to an Application Server user and an Application Server model. Model connections control which users can use which models.
  For more information, see Model Connection Development [page 28].
- Determining default settings for initiatives and configuring initiatives so they go into a workflow for approval when created and modified.
  For more information, see Initiative Configuration [page 33].
- Creating default *Home* tab layouts for different roles.
  For more information, see Home Tab Configuration [page 35].
- Updating user responsibilities. Change the responsible owner of objects from one owner to another. For more information, see User Responsibility Updates [page 37].
- Deleting obsolete notifications.
  For more information, see Deletion of Obsolete Items [page 39].

1.2.4.1 Defaults Setting

Use

You set defaults that affect the entire strategy management system across all contexts and all model connections.

You must set certain application defaults related to scorecards before you start defining the scorecards.

> **i Note**
>
> If you make any changes on this screen, you may be prompted to enter a comment about the activity if your system administrator has set this up. Any comments are logged in the *Auditor* tool along with the log activity. The *Auditor* tool is available at `http:// <nw_server>: <port>/strategy/tools`.

Prerequisites

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the application as a strategy management administrator.
- To be prompted for comments that are posted to the audit log, the system administrator has set the `AuditLogComments` Java System Property to `Yes` in the strategy management application in SAP NetWeaver. For more information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal. Then choose *Configuring the Application Properties*.

Features

You can do any of the following tasks when setting defaults:

General Settings

- Specify the users designated as strategy management administrators. In the *SM Administrator(s)* box, type a comma-separated list of administrators. The next time a user in this list starts the Administrator or the strategy management application, they can use all aspects of both applications.
- Specify the language in which users receive alerts and e-mail notifications by selecting the language from the *Alert and E-Mail Language* dropdown list.
- To allow users to receive a link that directs them to a view within the application, select the *Enable E-mail links* option. Links appear in the body of e-mail notifications. This is the default setting.
  When a user clicks the link, it takes the user to the view within a tab of the application. Users who click links to a tab must have access to the SAP NetWeaver server and must have access to the tabs and contexts for the view they are linking to. Otherwise that user does not have access to the live view.
- To print briefing books with the custom title page instead of the standard Strategy Management title page, select *Use custom title page for printing*. Upload a single-page PDF to use as the custom title page by selecting *Upload*.

- To add semi-annual as a periodicity option in Scorecard and Reports, select *Enable Semi-annual Periodocity*.
- To replace the standard context box in the user interface with a link that displays contexts in a collapsible tree control, select *Display Contexts as Tree*.

Scorecard Administration

You can do the following:

- Set the scoring method, which is a database-wide setting for all scorecard hierarchy levels above the KPI level. The options are Indexed Scoring and Absolute Scoring.
    - In indexed scoring, each underlying KPI is given an index value to calculate an objective score.
    - In absolute scoring, the objective score is a straightforward arithmetic calculation.

  Once a single scorecard is saved in the database, the setting for scoring method is locked. In other words, you cannot switch back and forth between the two methods. However, a tools screen at /strategy/tools/update_score.jsp allows you to change an existing database.
- Specify the number of potential status indicator colors for objectives, initiatives, KPIs, perspectives, and the scored context.
    - If indexed scoring is being used, click either 3 or 5 in the Status levels section. The default setting is 5 and all objects have the potential to display status indicators in dark red, red, yellow, green, or dark green. If you choose 3, then red, yellow, and green status indicators are available. When defining the *Index Values* for objects, the number of fields changes based on whether you are using three or five status indicators.
    - If absolute scoring is being used, there will be 4 thresholds.

  You must set this application default before you define any scorecards. Once you start creating objectives and KPIs, this setting cannot be modified.
- Specify the hierarchical levels in which perspectives, objectives, and KPIs appear in all scorecards. The default hierarchy is perspectives, then objectives, and then KPIs.
  You can rename a level using *Rename*.
  You can create a level using *New*. For example, you can create this hierarchical structure: *Perspectives* > *Key Focus Areas* > *Strategic Goals* > *Functional Goals* > *Performance Groups* > *KPIs*. You must have at least three levels.
  You can delete a level using *Delete*.
  You must set this application default before you define any scorecards. Once you start creating objectives and KPIs, this setting cannot be modified.
- Specify whether you want to create cascading scorecards and linked objectives in the application by selecting *Cascade (Cross Context Linking)*. Then select the level in the scorecard hierarchy at which you want to cascade.
  If you only have three levels, for example, the default hierarchy of Perspectives/Objectives/KPIs, then only the middle level is available for cascading. This is because it does not make sense to cascade at the top level of the hierarchy (e.g. perspectives) or the bottom level (e.g. KPIs). If there are four levels, you can cascade on the middle two.
  For information about cascading scorecards, see Cascading Scorecards [page 61].
  You must set this application default before you define any scorecards.
- Customize scorecard attributes, which includes the following:
    - Rename the *Leading/Lagging* and *Qualitative/Quantitative* attributes, add attributes, rename attributes, or remove attributes from the application.
      When the scorecard administrator creates a KPI in the *Define Scorecard* screen, the *Leading/Lagging* and *Qualitative/Quantitative* attributes appear in their customized form, or may not appear at all

depending on your selections. The scorecard administrator can select a customized attribute for the KPI. The attribute appears in the *KPI Details* screen in the *Scorecard* tab.
For example, you may want to rename the *Leading* and *Lagging* attributes to *Lead* and *Lag*, and add an attribute called *Intermediate*. You may want to remove the entire *Qualitative/Quantitative* attributes from the application.

- Create your own scorecard attributes and rename them, add options, or remove them from the application.
  Then when the scorecard administrator creates a KPI in the *Define Scorecard* screen, the attribute appears with its list of options. The scorecard administrator can select an option for the KPI.
  The attribute appears in the *KPI Details* screen in the *Scorecard* tab.
  For example, you can create an attribute called *Calculation Type* to identify the type of data for this KPI. You can specify options of *Achievement %*, *Reduction %*, *Absolute %*, and *Zero Target*.
- Add your own text fields. When the scorecard administrator creates a KPI in the *Define Scorecard* screen, the text field appears and prompts the scorecard administrator for a value.
  The attribute appears in the *KPI Details* screen in the *Scorecard* tab.
- Control the display of an *Add Subjective Assessment* link in the KPI screens of the *Scorecard* tab. This allows the KPI owner to specify their own assessment of their KPI currently displayed in the *Scorecard* tab. The KPI owner can select their own status indicator and add a note explaining the assessment. There is no numeric score associated with this assessment, there is just a status indicator.
  Any user who is not the KPI owner sees a *View Assessment* link with which they can view the information, but not modify it.
- Control the display of a trend indicator on all scorecard elements. The trend indicator represents upward, stable, or downward trend, and is calculated based on the current score of the item versus the previous score.
  The icon displays in the *Trend* column in the Scorecard tables and also in the *Details* view.
  By default, KPIs already display trend indicators in the *Scorecard* tab.
  An indicator of the history and direction of subjective scores (of all non-KPI items)
- Control the display of an *Add Subjective Assessment* link in the non-KPI Detail screens in the *Scorecard* tab. This allows the objective, perspective, or context owner to specify their own assessment of the objective, perspective, or context currently displayed in the scorecard. The owner can select their own status indicator and add a note explaining the assessment. There is no numeric score associated with this assessment, there is just a status indicator.
  The *Subjective Assessment* attribute (or whatever name you choose) appears in the *Perspective Details* view, *Objective Details* view, and *Context Details* view in the *Scorecard* tab. Any user who is not the owner of the object sees a *View Assessment* link by which they can view the information but not modify it.

You must set this application default before you define any scorecards.

Activities

To set system defaults, choose *Administration* > *Set Defaults*.

1.2.4.2 Model Connection Development

Use

A model connection is a named collection of strategy management users associated with an Application Server user, which is associated with an Application Server model.

Model connection development involves setting up the connectivity between strategy management users, the Application Server user they are associated with, and the model to use when creating or viewing scorecards.

Once you create a model connection, you can associate it with a context.

Model connections control which users can use which models. For example, two users may have access to the same model connection, but one user may be associated with an Application Server user name that allows access to one aspect of a model. The other user may be associated with a different Application Server user name that allows access to a different aspect of the model.

> **Note**
>
> If you make any changes on the *Manage Models* screen, you may be prompted to enter a comment about the activity if your system administrator has set this up. Any comments are logged in the *Auditor* tool along with the log activity. The *Auditor* tool is available at `http:// <nw_server>: <port>/strategy/tools`.

Prerequisites

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the administration application with an administrator username and password.
- Users are known to the application. This is set up by the system administrator when installing and configuring the application. For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.
- The Application Server administrator has created the model and added Application Server users to them.
- The machine where the administration application is installed has access rights to the port where Application Server is installed. If you can telnet `<hostname> 8325` from a DOS window, then you have the appropriate access rights.
- The system administrator has set the `AuditLogComments` Java System Property to `Yes` in the strategy management application in SAP NetWeaver. For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal. Then choose *Configuring the Application Properties*.

Features

You can do any of the following tasks when developing a model connection:

- Create a model connection. You can create up to 500 model connections. For more information, see Creating a Model Connection [page 31].

- Delete the selected model connection by clicking *Delete*.
- Rename the selected model connection by clicking *Rename*.
- Specify a different Application Server user for the model connection rather than the one selected. To do so, select the model connection and the Application Server user and click *Rename*.
- View a model connection's definitions by selecting it in the *Model Connections* list. By default, the definitions for the first Application Server user are displayed.
- View the Application Server users for a model connection in the *Application Server Connections* list.
- View the strategy management users assigned to an Application Server user by selecting the Application Server user name.
- Set up a model connection to use its model for reports and dashboards.
- Edit a model connection. To do so, select the model connection, then select the Application Server user, and then modify the fields.
- Add an Application Server user to the selected model connection by clicking *New* in the *Application Server Connections* section and then entering a new name and password in the *PAS User* and *Password* text boxes. Make sure the Application Server user is a user of the model you are adding to the model connection definition.
  You might want to add more than one Application Server user if you want to assign different views into the model. One Application Server might have a limited view of the model, while another user might have full view of the model. The Web authentication users assigned to an Application Server user inherit the Application Server user settings and have the same view into the model.
  If you add additional Application Server users to a model connection, and you use one or more system groups to define which authenticated users are assigned to which Application Server users, you must make sure that authenticated users are not duplicated between Application Server users. Otherwise, a connection is made with the first Application Server user found, and that user may not be the desired Application Server user.
- Remove an Application Server user from the selected model connection. To do so, select the Application Server user you want to delete and click *Delete*.
- Add a strategy management user to the selected model connection. By default, *Everyone* is selected for this connection and all strategy management users who have access to this Application Server user also have access to the model connection. Only one Application Server connection can have the *Everyone* setting for a model connection. To add specific users and system groups instead of everyone, choose whether to display by *System Groups* or *Users*. Then select the users or the groups from the list and click *Add*. These users must have access to the Application Server user name.
  Users displays the first 500 users. If there are more users to display, use the *Get Full User List* link.
- Remove a user from the selected model connection by selecting the user or system group in the right hand list in the *Groups and Users* section and click *Remove*.
- Test the connection to Application Server by selecting the model connection and Application Server user and clicking *Test Connection*. You receive a status message identifying whether the connection works as expected.

> **i Note**
>
> If the model connection is created automatically by the BW Connector Administrator, the *Password* value for the *PAS System Logon field* does not have information. You must enter the password value, and save the model connection. If you added a password for the Application Server user *GUEST*, you must enter that information also.

Activities

To develop model connections, choose ▸ *Administration* ▸ *Manage Models* ▸.

1.2.4.2.1 Relationship Between Users, Roles, Model Connections, and Contexts

Use

The model connection you specify for a context is the key link between the context, the model, and roles. A role contains an association between users and the tabs they can access and the permissions they have in the application.

Model connections are integrated with strategy management users, Application Server users, models, and contexts. The combination of all these items enables a secure and custom experience of the application and the data in the model for a strategy management user.

This list shows the progression of how users, roles, models, model connections, and contexts are linked to develop an integrated, secure, and custom environment. Other required tasks that are required but not related to users, roles, model connections, and contexts are omitted from this list. For more information about starting an implementation, see Getting Started with a Full Scorecard Implementation [page 23].

Users, roles, models, model connections, and contexts are connected as follows:

- The system administrator adds system users to SAP NetWeaver UME as strategy management users. The system administrator creates roles to specify the permissions and tabs available to strategy management users in the administration application and strategy management application.
  For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.
- The Application Server administrator creates a model and adds Application Server users with potentially special views of the data in the model.
  For more information, see the Application Server Help in the Application Server Administrator program.
- The strategy management administrator creates a model connection to specify the strategy management users who can access the model in the application. These users inherit the Application Server user's view of data in the model. For more information, see Model Connection Development [page 28].
- The context administrator creates a context to define a set of objects available for certain roles in the application. The context administrator associates the context with a particular model connection and particular roles. For information, see Contexts [page 55] and Role Assignments. [page 73]

Once the scorecard administrator creates the scorecard, the users in a particular role are able to access all the objects set up in the context according to their role's permissions as well as access a special view of the data in the model.

You must ensure that the users assigned to a model connection are also assigned to the roles in the context. If you create a model connection and allow all users to access it, then you can be sure all the roles in the context have access to the model.

1.2.4.2.2 Creating a Model Connection

Prerequisites

If you are configuring a model as a data source for *Reports* and *Dashboards*, you are a member of the `BUIJ_APP_ALL` role in SAP NetWeaver Administrator. For more information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Procedure

1. Select *Administration* > *Manage Models*.
2. Click *New* under the *Model Connections* list. The *Model Connection* text box appears in the *Connection Settings* section.
3. In the *Model Connection* text box, type a model connection name. Specify only alphanumeric characters (a-z, 0-9) up to a maximum size of 64 characters. You must not use special characters in the name, including the following: (/) forward slash, (\) back slash, (<) less than, (>) greater than, (') single quote, (") double quote, (,) comma, (:) color, and (;) semicolon. You can use underscores (_).
4. In the *PAS System Name* text box, type the name of the server where Application Server is installed. If Interactive Publisher is installed on a different server than SAP NetWeaver, then enter the IP address for Application Server.
5. In the *PAS System Logon* text box, type the name of a user on the Application Server system. On Windows, this user must be a member of the administrators group. On Linux/UNIX, this user must have permission to run the scripts and programs in the Application Server installation directory.
6. In the *Password* text box, type the password for the user.
7. In the *Port* text box, type the communications port for the UNIX or Windows server machine running Application Server. The default is 8325.

   > **Note**
   >
   > The machine where the application is installed must have access rights to this port. If you can telnet `<hostname> 8325` from a DOS window, then you have the appropriate access rights.

8. In the *Min* text box, type the number of instances of Application Server to start up with this model connection. The default setting is 0, which means that no instances start until the first URL query is submitted.
9. In the *Max* text box, type the maximum number of instances of Application Server to allow for this model connection. The default setting is 5. You can set up to 255 instances.
   You must specify a maximum number of Application Server instances that is equal to or lower than the number defined for the Application Server user. For example, if an Application Server user is allowed 5 instances, you must enter a number that is no higher than 5. To find out the maximum number of instances available to an Application Server user, issue the `SUPERVISOR SHOW USERS` command in Application Server. To change the number of instances available to an Application Server user, issue the `SUPERVISOR CHANGE USER` command with the `MAXLOGIN` keyword. For information about these commands, see the Application Server online Help.
10. In the *PAS Model* text box, type the name of the Application Server model to use for this model connection.

i Note

You cannot use a model that contains text variables.

i Note

You must already have an Application Server model created. If you do not have a model created, you can use the sample model provided with the Application Server installation. For information about configuring your system to use the sample model and model connection, see the *Server Configuration Help for SAP Strategy Management* on the SAP Help Portal. Then choose *Setting Up the Demonstration Implementation*.

11. In the *PAS User* text box, type the Application Server user who has access to the Application Server model who you want to add to this model connection.

i Note

Make sure the Application Server user is a user of the model you are adding to the model connection definition.

i Note

If you are running Application Server on a Linux/UNIX server, the UNIX or Linux user specified in the *PAS User* text box 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`.

12. In the *Password* text box, type the password for the Application Server user. If the user is Guest, you do not need to specify a password.
13. In the *INI File* text box, type the name of the Application Server initialization file to use. The default filename created at installation is `lsserver.ini`.
14. In the *Service* text box, type the service parameter specified in the `lsserver.ini` file. The default service name is *PILOT*.
15. Select *Configure Model Connection for Reporting* if you want users to use the data from this model when creating reports and dashboards.
16. Click *Test Connection*. You see a message stating that the Application Server connection is made, you are logged in, and the Application Server USE database was found.
17. By default, the *Everyone* option is selected in the *Groups and Users* section and all users are added to the model connection when you create it. Do any of the following to add users to this model connection:
    - Keep the default setting of allowing all users (*Everyone*) to use this model connection. You can skip the rest of the steps in this topic and click *Save*. Only one Application Server user can use the *Everyone* setting for a model connection. If you attempt to create a second Application Server user with the *Everyone* setting, you receive a message telling you that you must select groups or users.
    - Select *System Groups* to assign system groups.
    - Select *Users* to assign individual users. The list displays the first 500 users. If there are more users to display, click *Get full user list*. A message box explains that the retrieval may take more than 60 seconds. The *Users* list is updated to contain the entire list of users.

From the left-hand list, select a user or system group and click *Add* to add it to the right hand list.
18. Click *Save*.

Now a scorecard administrator (a user in a role with permission to create scorecards) associates a model connection with a context using *Administration* > *Manage Scorecards* > *Scorecard Defaults* > *Scorecard* section.

1.2.4.3 Initiative Configuration

An administrator configures initiatives to determine their default settings and to control whether new and modified initiatives must proceed through an approval workflow.

Prerequisites

You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the administration application with an administrator username and password.

Features

You can do any of the following tasks when configuring an initiative:

- To allow users to display initiatives across all contexts, select the *Display Initiatives Across Contexts* option. This adds a *Show All Initiatives (Across Contexts)* option in the *Show* dropdown list in the *Initiatives* tab.
  If a user selects *Show All Initiatives (Across Contexts)* in the *Initiatives* tab, then all initiatives from all contexts that are available to that user's role are displayed in the list, respecting whatever filters are applied. Users see a superset of contexts according to all their role assignments. That is, if a user is a member of the *Development* role for Context A and the *Executive* role for Context B, then that user sees both Context A and Context B in the list.
  If you have a large number of contexts with a large number of initiatives in your implementation, it may be impractical to allow users to display such a large number of initiatives at a time. To remove the *Show All Initiatives (Across Contexts)* feature, deselect *Display Initiatives Across Contexts*.
- To allow initiative authors to specify an initiative type when creating initiatives, you can select the initiatives types to make available in the *Initiatives* tab. An initiative type is a categorization that denotes the initiative's purpose. Corrective action, risk mitigation, and strategic are all examples of initiative types.
  You can rename initiative types, add your own initiative types, and delete initiative types.
  When an initiative author creates an initiative, they can assign one of the initiative types to the initiative. Initiative users see the initiative type in the table if they select that column of information for display.
- Create your own initiative attributes and rename them, add options, or remove them from the application
- Add your own text fields. When the author creates a custom initiative, the text field appears and prompts the author for a value.
  The attribute appears in the *Initiatives Summary* screen.
- Indicate which fields, such as name, description, type, start, target end, and so on, are mandatory.

- Indicate whether new and modified initiatives in predetermined contexts need to go through an approval workflow process before they become available to end users for use. When enabled, approvers receive an email notification when an owner or author makes a change to an initiative, and the email directs the approver to the specific initiative for review and approval. By default, this option in the system is set to *No approval required*. For more information, see Requiring Approval of New and Modified Initiatives [page 34].

Activities

To set initiative defaults, choose *Administration* > *Configure Initiatives*.

1.2.4.3.1 Requiring Approval of New and Modified Initiatives

Administrators can enable the initiatives workflow so that all new and modified initiatives in specific contexts must go through an approval process before they become available to end users for use. This option is set to *No approval required* by default.

Prerequisites

You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the administration application with an administrator username and password.

Context

When you enable the *Initiatives Workflow* option on the *Configure Initiatives* tab, additional fields appear that permit you to customize how the workflow operates.

- A list of contexts appears. You select the contexts in which review and approval of new initiatives and modifications to initiatives are required.
- When you select a context, you assign default approvers for that context. A context may have one, two, or three approvers. Different contexts can have different sets of default approvers and a different number of approvers.
- When you select the *Details* link beside a context, you see a list of all initiatives that exist in that context. By default, the system assigns the default approvers to each initiative when you first enable the *Initiatives Workflow* option or when a new initiative is created. However, you may choose *Select Approvers* in the dialog box to assign specific approvers to specific initiatives apart from the default approvers for that context.

- Under *Workflow Settings*, you can indicate whether initiative owners and authors can override approvers during the workflow. This allows the owners or authors to change the approvers of their initiatives to someone other than the default approvers. This setting applies to all initiatives in the system that require approval; this is not set at the context level like approvers' names are. This setting is off by default.
- Under *Initiatives Pending Approval*, you indicate whether end users can see new and modified initiatives before they are fully approved. The default is that they are hidden.
- Initiatives created before you install support package 17 are given a status of Completed and do not need to be reviewed or approved until you enable the *Initiatives Workflow* feature and then create new initiatives and modify existing initiatives.

Procedure

1. Select *Administration* > *Configure Initiatives*.
2. Select *Initiative changes in selected contexts must be approved* to enable the *Initiatives Workflow* feature.
3. Choose a context in which new and modified initiatives require approval.
4. Choose one, two, or three people as approvers for initiatives in the context you selected, then choose *OK*. At least one approver is required.
5. Repeat steps 3 and 4 for each context in which you want to set approvers.
6. Optional - To change the approvers for a specific initiative from its default approvers, choose the *Details* link beside its context, choose *Select Approvers* and select different approvers, then choose *OK* and *Close*.
7. To indicate that initiative owners and authors can replace the default approvers with other approvers before submitting the initiative for approval, select *Initiative owners and authors can override approvers*.
8. To indicate whether end users can see new and modified initiatives before they are fully approved, along with pertinent status icons, choose *Visible* or *Hidden* under *Initiatives Pending Approval*.
9. Choose *Save*.

Related Information

Initiative Configuration [page 33]
Initiative Approval Workflow [page 245]
Submitting an Initiative for Approval [page 246]
Reviewing New and Modified Initiatives [page 247]

1.2.4.4 Home Tab Configuration

Use

You can create default *Home* tab layouts and include panels containing the contents of a file for different roles.

Prerequisites

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the administration application with an administrator user name and password.
- The roles you are assigning configurations have access to the *Home* tab. For information, see Role Assignments [page 73].

Features

You can do the following:

- You can control which panels appear in the *Home* tab for certain roles, and control the location of the panels.

  > **i Note**
  >
  > Users can customize their own view by adding and removing the panels you have made available to them, and they can change the location of the panels. If a user is displaying a panel and then you remove that panel from their configuration, that user still has access to the panel.

- You can upload `SWF`, `PDF`, `JPG`, `GIF`, and `PNG` files, and make them available to certain roles from within the *External Content* panels of their *Home* tab.
  You can choose to have the selected roles see the files automatically in *External Content* panels in the *Home* tab or you can just make the file available to them so they can add it as an *External Content* panel when they want.

  > **i Note**
  >
  > Although it is possible to use Microsoft Office files such as `DOC` and `XLS` files for external content, you may receive unpredictable results. Internet Explorer handles the display of Microsoft Office files based on each user's Windows settings. The only way to ensure proper behavior when a user attempts to display external content from a Microsoft Office file is for the user to edit that particular file type and specify that only the *Browse in the same window* option is selected for the *Open* action.

- You can upload a file, and make it available to certain roles as a link from within the *External Content Links* panels of their *Home* tab.
  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.
  You can choose to have the selected roles see the links automatically in *External Content Links* panels in the *Home* tab or you can just make the link available to them so they can add it as an *External Content Links* panel when they want.
- You can remove files from the *Home* tabs of certain roles. This achieves the same effect as removing the panel from the role.
- You can view any files that you uploaded.
- You can copy a role's layout to other roles.
- Any change you make in the *Configure Home Tab* view takes effect in users' *Home* tab the next time they click *Refresh* or begin a new session in the application.

Activities

To configure the *Home* tab for certain roles, choose *Administration* > *Configure Home Tab*.

Adding, Removing, and Relocating Panels

- To add a panel to a role's *Home* tab, select the role whose *Home* tab you are configuring and click *Customize*. Then from the *Add Panel* dropdown list, select the panels to add.
- To remove a panel from a role's *Home* tab, select the role whose *Home* tab you are configuring and click *Customize*. Then click the checkbox of the panel you want to remove.
- To set the location of a role's *Home* tab panels, select the role whose *Home* tab you are configuring and click *Customize*. Then drag the panels to their new locations.

Copying a Layout from One Role to Another

- To copy a layout from one role to another, select the role whose layout you want to copy and click *Copy Layout to Other Roles*. Select the roles that will use the layout, and then click *Save*.

Adding, Removing, and Updating Files within Panels

- To upload files and make them available for selection as content or as links, click *Upload* and then browse for the file.
- To add file content to the *External Content* panel in a role's *Home* tab, select the role, then select the file from the *External Content* list, and then click *Add* in the *Selected External Content Panels* section.
- To add a link to a file in the *External Content Links* panel in a role's *Home* tab, select the role, then select the file from the *External Content* list, and then click *Add* in the *Selected External Content Links* section.
- To make a file available to a role and allow the users in the role to control whether to add the file as an *External Content* panel or *External Content Links* panel, select the role, then select the file from the *External Content* list or *External Content Links* list, and then click *Add*. Then with the role still selected, click *Customize* and select the file from the *Add Panel* dropdown list.
- To remove a file or a link from a role's *Home* tab, select the role, then select the file from the *Selected* list, and click *Remove*. Or, remove the panel from the role's configuration.
- To remove an external file permanently so that it is no longer available in any roles' *Home* tab configurations, select the file from the *External Content* list and click *Delete*.
- To view an external file, select it in the *External Content* list and click *View*.
- To update an external file, click *Upload* and upload the file again. Then select the role to be updated, and re-add the file to the appropriate *Selected* list.

1.2.4.5 User Responsibility Updates

Use

You can change the responsible owner of objects.

> **Note**
>
> If you make any changes on this screen, you may be prompted to enter a comment about the activity if your system administrator has set up this feature. Comments are logged in the *Auditor* tool along with the log activity. The *Auditor* tool is available at `http:// <nw_server>: <port>/strategy/tools`.

Prerequisites

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the Administrator application with the correct permissions.
- To be prompted for comments that are posted to the audit log, the system administrator has set the `AuditLogComments` Java System Property to `Yes` in the strategy management application in SAP NetWeaver. For more information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal. Then choose *Configuring the Application Properties*.

Features

You can do the following:

- Review all the objects for which a user is responsible.
- Select a new owner for certain objects on a permanent basis.
- Filter the list of objects.

> **Note**
>
> 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 regardless of which context is selected. The *Context* dropdown list is not relevant when viewing workflow steps of a particular owner.

- Remove owned items from a new owner and return the objects to the original owner.
- Select a new owner for certain objects on a temporary basis.
  You can temporarily change ownership of an Entry and Approval Workflow step or an initiative.
  You can set the start and end date for the temporary assignment. After the end date, the original owner is automatically reassigned to the selected items.
  Users who have been assigned as temporary owners of certain objects have an asterisk (*) next to their name. The asterisk identifies that this owner is temporarily assigned.
  Temporary reassignments take effect when the corresponding Scheduler job is run with a *Reassign Owner* scheduled task. This should be defined to run on a daily basis in order to maintain the temporary assignments. For more information, see Scheduler [page 132].
- Review temporary assignments.
- Change from one temporary owner to another, or change the start and end date of the temporary ownership.
- Revert a temporary ownership back to the permanent owner.
- Delete a temporary ownership.

Activities

- To update user responsibilities, choose *Administration* > *Update User Responsibilities*.

- To review all the objects a user is responsible for, select the user name from the *Select Owner of Items to be Updated* dropdown list. Do not filter the *Type* dropdown list by any selections.
- To select a new permanent owner for objects, select the original owner in the *Select Owner of Items to be Updated* dropdown list. Then select the new owner from the *Select New Owner* dropdown list and click *Permanent*. Then select the type of objects to view. From that list, select the objects you want to assign and click *Add*.
- To select a new temporary owner for objects, select the original owner in the *Select Owner of Items to Be Updated* dropdown list. Then select the new owner from the *Select New Owner* dropdown list and click *Temporary*. Then specify the start and end dates of the temporary ownership. Then select the type of objects to view, and from that list, select the objects you want to assign and click *Add*.
- To change from one temporary owner to another or to change the start and end date of temporary ownership, click *Assignment Maintenance* and then click *Edit* to edit the information as appropriate.
- To remove objects from a new owner and return the objects to the original owner, select the new owner, select the objects, and click *Remove*
- To review temporary assignments, choose *Assignment Maintenance*.
- To revert a temporary ownership back to the permanent owner, click *Assignment Maintenance* and then click *Revert*.
- To delete a temporary ownership, click *Assignment Maintenance* and then click *Delete*.

1.2.4.6 Deletion of Obsolete Items

Use

You can delete obsolete items.

> **i Note**
>
> If you make any changes in the *Delete Obsolete Items* screen, you may be prompted to enter a comment about the activity if your system administrator has set up this logging feature.
>
> Any comments are logged in the *Auditor* tool along with the log activity. The *Auditor* tool is available at `http:// <nw_server>: <port>/strategy/tools`.

Prerequisites

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the application as an administrator.
- To be prompted for comments that are posted to the audit log, the system administrator has set the `AuditLogComments` Java System Property to *Yes* in the strategy management application in SAP NetWeaver CE. For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal. Then choose *Configuring the Application Properties*.

Features

You can do the following:

- You can delete notifications for a particular user or all users.
- You can delete all notifications, or notifications that have a particular age, such as 30+ days old or 20+ days old.

Activities

To delete obsolete items, select *Administration* > *Delete Obsolete Items*. Select the user (or all users) whose notifications you want to delete, then select the age of the notifications, and then click *Delete*.

1.2.5 Library

Use

You create a library of perspectives, objectives, and KPIs with general definitions, enabling you to use the same object in any number of contexts.

Later, when you add the perspectives, objectives, and KPIs to contexts, you can add more definitions that are specific to the context. You can also override the general library definitions for a particular context.

Any library definitions of an object that you do not change in the contexts are available for mass maintenance. For example, if you add an object to multiple contexts, and you rename it in the library, the name is updated throughout all the contexts that use this object. If you rename the object in one of the contexts, the object in that context maintains its new name, and does not get renamed by the library update.

> **i Note**
>
> Your system may show different levels depending on how the strategy management administrator set up the application defaults. For the benefit of this discussion, the standard levels of perspectives, objectives, and KPIs are used, and any custom levels are implied in that discussion.

> **i Note**
>
> There is another way to add perspectives, objectives, and KPIs to the library. When you are working with the context using *Context Management* > *Manage Scorecards*, you can create a new perspective, objective, and KPI for the context and it is automatically added to the library at the same time. For more information, see Scorecard Development [page 80].

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Library* is unavailable to you, it means you do not have the correct permissions. For information, see Roles in the Applications [page 18].

Features

You can do the following with the library:

- Create, modify, and delete objects in the library.
  If you modify an object in the library, and the object is already added to a context, the modification is applied to the object in the context as long has that definition has not been modified for the context.
- Rename objects, or copy objects.
- Sort the list of items by clicking the arrow in the *Sort* column.

Activities

- To work in the library, choose *Library*. Then choose the bar that represents the object you want to work with.
- To create an object in the library, choose the *Add* pushbutton.
- To edit an object in the library, select the item and choose the *Edit* pushbutton.
- To rename an object in the library, select the item and choose the *Rename* pushbutton. Then choose *Apply name change to all copies of this item*.
- To copy an object in the library, select the item and choose the *Rename* pushbutton. Then choose *Create a New* `<item>` .
- To delete an object in the library, select the item and choose the *Delete* pushbutton.

More Information

Creating a Perspective [page 43]

Creating an Objective [page 45]

Creating a KPI [page 48]

Creating an Indexed KPI [page 53]

1.2.5.1 Perspectives

Use

A perspective is an indicator for the aspects of a business where an organization needs to focus to execute its strategy. Perspectives are categories of strategic objectives that provide a full view of your company such as financial, customer, internal, learning & growth. The perspectives provide a balanced framework for telling the story of the strategy in cause and effect terms.

You create a perspective in the *Library* by specifying a name, description, and responsible owner. A perspective in the library is independent of its definitions within a context. When you add a perspective to a context, you can edit the perspective from within the context to add the information that makes this perspective unique to the context.

You can use the same perspective in any number of contexts, and edit the perspective as appropriate for each context.

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Library* is unavailable to you, it means you do not have the correct permissions.

Features

You can do the following with perspectives in the library:

- Create, modify, and delete perspectives in the library.
- Rename perspectives, or copy perspectives.

Once you add perspectives to the library, you can do the following:

- Add perspectives to the context.
- Add objectives to the perspectives within the context.
- If you want to measure the perspective by a KPI, add the KPI to the perspective within the context.
- Define the associated links and the measurements for the perspectives within the context.

Activities

To work with perspectives in the library, choose *Library*. Then select the *PERSPECTIVE* bar.

- To create a perspective, click the *Add* pushbutton.
  For more information, see Creating a Perspective [page 43].

- To edit the library definitions of a perspective, select the perspective and click the *Edit* pushbutton.
- To rename a perspective, select it and click the *Rename* pushbutton. Enter a new name, and then select *Apply Name Change to All Copies of This Item*.
- To copy a perspective in the library, select it and click the *Rename* pushbutton. Enter a new name, and then select *Create a New Perspective*.
- To delete a perspective from the application, select it and click the *Delete* pushbutton.

More Information

Adding Perspectives to the Context [page 82]

Adding Objectives to the Perspectives in the Context [page 83]

Adding KPIs to a Context or Context Object [page 84]

1.2.5.1.1 Creating a Perspective

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Context

You create perspectives that represent aspects of your organization.

Procedure

1. Select *Library*.
2. Select the *PERSPECTIVE* bar.
3. Click the *Add* pushbutton.
4. Type a name and description for the perspective.

> **i Note**
>
> To maintain uniformity of perspective names, you should type a name no larger than 25 characters, including spaces.

5. From the *Responsible* dropdown list, select the user responsible for this perspective.
6. Save your changes.

1.2.5.2 Objectives

Use

An objective is an indicator of a perspective that describes a specific, measurable component of the vision and mission of the organization. Setting objectives allows you to measure and monitor the objective's performance against the KPIs and against other objectives.

The vision and mission describe the top-level desired objective of the organization, and the individual objectives describe the critical, actionable, and measurable components of that desired state within the context of perspectives. Whereas the vision and mission statements provide an organizing and mobilizing rallying cry, objectives translate the vision and mission in to measurable and actionable operational terms.

You can have up to 100 strategic objectives distributed between the perspectives. Each objective can have many KPIs from different perspectives, and each KPI can be tied to more than one objective.

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Library* is unavailable to you, it means you do not have the correct permissions.

Features

You can do the following with objectives in the library:

- Create, modify, and delete objectives in the library. You can also specify whether this is a standard objective or a cascading objective.
  For more information, see Creating an Objective [page 45] and Creating a Cascaded Objective [page 65].
- Rename objectives, or copy objectives.

Once you add objectives to the library, you can do the following:

- Add objectives to the context.
- Add KPIs to the objectives within the context.
- Define the associated links and the measurements for the objectives within the context. When you edit the objective from within the context, you add the information that makes this objective unique to the context.

You can use the same objective in the library in any number of contexts, and edit the objective as appropriate for each context.

Activities

To work with objectives in the library, choose *Library*. Then select the *OBJECTIVE* bar.

- To create an objective, click the *Add* pushbutton.
- To create this objective as a cascaded objective, select *This is a Cascaded Objective of*, and then specify the objective from which this objective cascades.
- To edit the library definitions of an objective, select the objective and click the *Edit* pushbutton.
- To rename an objective, select it and click the *Rename* pushbutton. Enter a new name, and then select *Apply Name Change to All Copies of This Item*.
- To copy an objective in the library, select it and click the *Rename* pushbutton. Enter a new name, and then select *Create a New Objective*.
- To delete an objective from the application, select it and click the *Delete* pushbutton.

More Information

Adding Objectives to the Perspectives in the Context [page 83]

Adding KPIs to a Context or Context Object [page 84]

Adding Indexed KPIs to a Context or Context Object [page 86]

1.2.5.2.1 Creating an Objective

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Context

You create objectives for your perspectives.

Procedure

1. Select *Library*.

2. Select the *OBJECTIVE* bar.
3. Click the *Add* pushbutton.
4. Type a name and description for the objective.

> **Note**
>
> To maintain uniformity of objective names, you should type a name no larger than 25 characters, including spaces.

5. From the *Responsible* dropdown list, select the user responsible for this objective.
6. Save your changes.

1.2.5.3 KPIs

Use

A KPI (key performance indicator) is a named aspect of the company strategy that can be measured by quantitative or qualitative data. A KPI is composed of five measures from the Application Server model - *Actual*, *Target*, *Score*, *Trend of Actual*, and *Gap Performance*.

You can use a KPI to measure the progress of objects in the context. You can use multiple KPIs to measure an index KPI.

The status indicator, which only appears in the strategy management application, represents the performance of the KPI. The status indicator color is determined by matching the Score value of the KPI to the appropriate Index Value specified for the KPI which is matched to a particular color. By default, when there is null or missing data for a KPI, the KPI is displayed without a status indicator. Depending on how you set up KPIs to appear when there is missing data, the KPIs may be displayed or may not be displayed. You specify this behavior in *Context Management* > *Manage Scorecards* > *Scorecard Defaults*.

The trend symbol, which only appears in the strategy management application, represents the gap performance of each KPI. If the KPI's trend indicator shows an upward arrow, it means the trend for this object is on the rise. If a trend indicator shows a solid black line, it means that the trend for this object is steady. If an object's trend indicator shows a downward arrow, it means that the trend for this object is downward. The KPI's Gap Performance measure is matched to a range in the *Trend Up* and *Trend Down* boxes. The symbol is determined by where it fits in that range.

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Features

You can do the following with KPIs:

- Create a KPI in the library. For more information, see Creating a KPI [page 48].
  If you want the same KPI to be used in all contexts, you can fully define the KPI in the library. If you want to define a basic KPI and then modify its definitions for each context, you can partially define the KPI in the library and then add the remaining definitions once the KPI is added to the context.
- Rename KPIs or copy KPIs.

Once you add KPIs to the library, you can do the following:

- Add a KPI to an objective in the context for the purpose of measuring the objective by one KPI.
- Add a KPI to a perspective in the context for the purpose of measuring the perspective by one KPI.
- Add a KPI to the context for the purpose of measuring the context by one KPI.
- Add KPIs to an indexed KPI in the context for the purpose of measuring the indexed KPI by the index values of the KPIs.

Activities

To work with KPIs in the library, choose *Library*. Then choose the *KPI* bar.

- To create a KPI, click the *Add* pushbutton.
- To edit the library definitions of a KPI, select the KPI and click the *Edit* pushbutton.
- To rename a KPI, select it and click the *Rename* pushbutton. Enter a new name, and then select *Apply Name Change to All Copies of This Item*.
- To copy a KPI in the library, select it and click the *Rename* pushbutton. Enter a new name, and then select *Create a New Objective*.
- To delete a KPI from the application, select it and click the *Delete* pushbutton.

More Information

Adding KPIs to a Context or Context Object [page 84]

Defining KPIs within the Context [page 97]

1.2.5.3.1 Creating a KPI

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Context

You can create KPIs for the library in one of these ways:

- You can fully define a KPI to use the same definitions in all contexts that use the KPI
- You can partially define the KPI, and then provide unique definitions for the remaining items on a per-context basis.

Procedure

1. Select *Library*.
2. Select the *KPI* bar.
3. Click the *Add* pushbutton.
4. Enter a name for the KPI.

   > **i Note**
   >
   > To maintain uniformity of names, you should type a name no larger than 25 characters, including spaces. Once you review the KPIs in the Scorecard component, you may need to return to this section to rename the KPI if it does not fit correctly.

5. Enter a description of the KPI.

   You can enter a textual version of the calculation that makes up the KPI. For example, *Return Rate = Returns / Units Sold*
6. From the *Responsible* dropdown list, select the user responsible for this KPI.
7. Enter any the following information that you want to use for all contexts that use the KPI. You can override these definitions for a context, if necessary.

Omit definitions for any item which you prefer to define on a context-by-context basis:

Field	Information
Associated Links	Use this section to associate links with the KPI. In the *URL* column, enter the URL for the link. You do not have to type **`http://`** because that information is automatically inserted if you omit it. In the *Title* box, enter a text name that identifies this URL. The text name appears in the application instead of the URL. The users see these associated links in the strategy management application when they display detail information about this KPI. Users can double-click the link to go to its location.
Leading/Lagging	This attribute can be customized by your strategy management administrator so you may not see this attribute, or you may see a different attribute than this one. If you have this attribute, select either *Leading* or *Lagging* to identify whether this KPI is a predictor of future performance (a leader) or an indicator of past performance (a lag). Lagging KPIs are commonly financial in nature and represent outcomes based on historical performance. Lagging KPIs, such as Revenue and Units Sold, show performance of what has happened in the past. Leading KPIs are predictors of future performance, and provide direction about which lagging KPIs require more attention. Leading KPIs can be used to forecast how lagging KPIs will perform in the future. Leading KPIs are a critical factor because they provide an early warning signal for the organization to take actions that are proactive, rather than reactive. They provide insight into the KPIs that require attention now, to prevent performance degradation in the future.
Qualitative/Quantitative	This attribute can be customized by your strategy management administrator so you may not see this attribute, or you may see a different attribute than this one. If you have this attribute, click either *Quantitative* or *Qualitative* to identify whether this KPI is quantitative or qualitative. Quantitative KPIs are fact-based measurements that are based on data in relational databases or transactional systems such as ERP or CRM. Qualitative KPIs are soft measurements because they are mostly taken from semi-structured sources such as surveys, e-mails, or Excel worksheets. It is a subjective rating of the quality of execution of a KPI. In the *Scorecard* tab, the quantitative/qualitative information is displayed in the *Type* column if the user is displaying that column.
Text field	If you see a text field, enter the appropriate value according to the label provided for the field. This information is defined by your strategy management administrator and appears in *Scorecard* > *KPI Details*.

Field	Information
Model	You can omit selecting the Application Server model if the Application Server model is different for each context. Later, when you add the KPI to the context, the model from the model connection used by the context is applied to the KPI. You can specify the Application Server model for this KPI if you generally use the same Application Server model in the model connections used by the contexts. From the *Model* dropdown list, select the Application Server model that contains the measures that make up this KPI. Anytime you add this KPI to a context, the same Application Server model is used, assuming it is the same model used for the model connection associated with the context. If you add a KPI to a context and the models are not the same, you are prompted to select a measure from the model used by the context's model connection.
Models & Metrics	If you specified an Application Server model in the *Model* dropdown list, from the *Actual* dropdown list, select the measure from the model that represents actual data for the KPI. The *Target*, *Score*, *Trend of Actual*, and *Gap Performance* dropdown lists are automatically filled in with appropriate measures. If you omitted the Application Server model, you can skip this step and assign the appropriate measure after you add this KPI to the context.
Trend Down	Specify the number that you consider to be an unacceptable gap performance value for the KPI. The KPI's *Gap Performance* value is matched to the breakpoint values for trends to determine the symbol for this KPI's trend indicator. If the KPI has a gap performance value less than the *Trend Down* value, the KPI has a black downward arrow trend indicator to identify a downward trend. If the KPI's gap performance is better than the breakpoint for the upward trend gap performance value, the KPI's trend indicator shows a black upward arrow to identify an upward trend. If the gap performance for the KPI is between the downward trend and upward trend numbers, then the KPI's trend indicator shows a solid black line to identify a steady trend.
Trend Up	Specify the number that you consider a very good gap performance value.

Field	Information
Index Values	In the *Index Values* boxes, enter numbers that represent the score breaking points to determine the color of the KPI's status indicator. The values represent breaking points for unacceptable to acceptable scores. You might see two boxes or four boxes depending on whether the administrator set up three status indicators or five. You enter numbers from large to small or from small to large, depending on the context of the KPI's score. The number for the red color may be the lowest number in the range if exploring revenues because a low revenue is considered undesirable. Or, the number for the red color may be the highest number in the range if exploring costs because high costs are considered undesirable. **i Note** You must find out the range of data values that the *Score* measure contains from your Application Server administrator so that you can set the index values correctly.
Red	Enter a number that you consider to be a very unacceptable score. If the KPI has a score that is worse than this number, the KPI will have a red status indicator.
Orange	Enter a number that you consider to be an unacceptable score. If the KPI has a score that is between this number and the number specified for the red color, this KPI's status indicator is an orange color.
Green	Enter a number that you consider to be an acceptable score. If the KPI has a score that is between this number and the index number specified for the orange color, this KPI's status indicator is yellow.
Dark Green	Enter a number that you consider to be a very acceptable score. If the KPI has a score that is between this number and the index number specified for the green color, this KPI's status indicator is green. If the KPI has a score that is more than the index number specified for the last color, this KPI's status indicator is dark green. This represents optimal performance.

1.2.5.4 Indexed KPIs

Use

An index KPI (key performance indicator) is a named aspect of the company strategy that is measured by the status of particular KPIs defined for the context.

Use index KPIs to measure the status and progress toward strategic objectives. The objectives are measured by the overall status of the KPIs that compose the index KPI.

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Library* is unavailable to you, it means you do not have the correct permissions.

Features

You can do the following with indexed KPIs in the library:

- Create, modify, and delete indexed KPIs in the library.
- Rename indexed KPIs, or copy indexed KPIs.

Once you add indexed KPIs to the library, you can do the following:

- Add indexed KPIs to the objectives within the context.
- Add KPIs to the indexed KPIs within the context.

Activities

To work with indexed KPIs in the library, choose *Library*. Then select the *KPI* bar.

- To create an indexed KPI, click the *Add* pushbutton .In the *Add KPI* dialog box, select *Indexed KPI*. For more information, see Creating an Indexed KPI [page 53].
- To edit the library definitions of an indexed KPI, select the indexed KPI and click the *Edit* pushbutton.
- To rename an indexed KPI, select it and click the *Rename* pushbutton. Enter a new name, and then select *Apply Name Change to All Copies of This Item*.
- To copy an indexed KPI in the library, select it and click the *Rename* pushbutton. Enter a new name, and then select *Create a New Perspective*.
- To delete an indexed KPI from the application, select it and click the *Delete* pushbutton.

More Information

Adding Indexed KPIs to a Context or Context Object [page 86]

1.2.5.4.1 Creating an Indexed KPI

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Context

You can create indexed KPIs that are measured by a selection of KPIs.

Procedure

1. Select *Library*.
2. Select the *KPI* bar.
3. Click the *Add* pushbutton.
4. Select *Indexed KPI*.
5. Type a name and description for the indexed KPI.

   > **i Note**
   >
   > To maintain uniformity of names, you should type a name no larger than 25 characters, including spaces.
6. From the *Responsible* dropdown list, select the user responsible for this indexed KPI.
7. Enter any the following information that you want to use for all contexts that use the indexed KPI. You can override these definitions for a context, if necessary.

Omit definitions for any item which you prefer to define on a context-by-context basis:

Field	Information
Associated Links	Use this section to associate links with the indexed KPI. In the *URL* column, enter the URL for the link. You do not have to type **`http://`** because that information is automatically inserted if you omit it. In the *Title* box, enter a text name that identifies this URL. The text name appears in the application instead of the URL. The users see these associated links in the strategy management application when they display detail information about this indexed KPI. Users can double-click the link to go to its location.
Index Values	In the *Index Values* boxes, enter sequential numbers from low (red) to high (green). For example, 1, 2, 3, 4, 5 when using five status indicators and 2, 3, 4 when using three status indicators. The number of status indicators depends on the settings in *Administration* > *Set Defaults*.

1.2.5.5 Creating a Library Item Using the Values of an Existing Item

Procedure

1. Select *Library*.
2. Select the bar that represents the item you want to create, and then select the item you want to copy.
3. Click the *Rename* pushbutton.
4. Enter a name for the copy and select *Create a New* `<item>` .
5. Save your changes.

1.2.6 Context Management

Use

Use *Context Management* to create contexts, scorecards, and strategies, and view cascade details.

Prerequisites

Each *Context Management* tab requires different permissions for the role. For specific prerequisites, see the appropriate section.

Features

You can do the following:

- Create and maintain contexts and add roles to the contexts using *Context Management* > *Manage Contexts*. You can create individual contexts, create multiple contexts using a template, and you can create cascading contexts (scorecards).
  For more information, see Contexts [page 55].
- You can set scorecard defaults and add perspectives, objectives, and KPIs to a context using the *Context Management* > *Manage Scorecards*.
  For more information, see Scorecards [page 75].
- You can set strategy defaults and add strategy functionality to a context including goal diagrams, a cause and effect diagram, and themes or pathways. Use *Context Management* > *Manage Strategies*.
  For more information, see Strategies [page 103].
- View cascade details using *Context Management* > *View Cascade Details*.

Activities

To create and maintain contexts, scorecards, and strategies, choose *Context Management*.

1.2.6.1 Contexts

Use

A context is a collection of application information that allows authorized users to analyze the strategy, scorecard, and initiatives by business unit. Within a context, users can filter the dimensions of business data.

Use *Context Management* > *Manage Contexts* to develop and maintain contexts.

Prerequisites

The strategy management administrator has set application defaults for the number of status indicators, the hierarchical levels to use within the application, and the ability to create cascaded objectives or KPIs if applicable. For information, see Defaults Setting [page 25].

You are a strategy management administrator or a context administrator. If *Context Management* > *Manage Contexts* is unavailable to you, it means you do not have the correct permissions. For information, see Roles in the Applications [page 18].

The model is created in Application Server. For information about developing Application Server models for the application, see an overview in the *Configuration Guide for SAP Strategy Management* on the SAP Help Portal.

For information about developing Application Server models, see the online help in the Application Server Administrator program.

The model connection is created. For more information, see Model Connection Development [page 28].

Features

Use *Context Management* > *Manage Contexts* for the following features:

- You can create, rename, modify, and delete individual contexts.
  For information, see Individual Contexts [page 58].
- You can create and maintain many identical or similar contexts by creating context templates and then basing new contexts on that template. Use this feature to create a large number of scorecards (contexts) within a deployment.
  For information, see Template-Based Contexts [page 69].
  You cannot use an existing context as a template.
- You can develop cascading scorecards. You can create scorecards at different levels of the organization that all have the same perspectives, objectives, and KPIs, or you can create scorecards at different levels of the organization that have different objectives or KPIs.
  For information, see Cascading Scorecards [page 61].
- You assign roles to the context. A role is a set of users with assigned permissions and accessibility into the applications and tabs. Once you assign a role, the users in the role can begin to use the context in the application. These users have a particular view of the context that is based on the tabs and permissions assigned to the role by the system administrator.
  For information, see Role Assignments [page 73].
- You can add a message to appear in the *System Message* box of the *Home* tab when the particular context is selected. Any user with access to the *Home* tab in the application sees this message.

More Information

Aspects of a Context [page 57]

1.2.6.1.1 Aspects of a Context

Definition

A context is a collection of certain application objects, grouped so that users in roles can access the set of objects as a unit in the application. The context links a mission, vision, strategy, set of perspectives and objectives, set of initiatives, and scorecard all for particular users to access.

Use

Creating a context is one of the initial steps toward building your strategy and scorecard either before or after the library of perspectives and objectives are created. For information about creating contexts, see Contexts [page 55].

Contexts have a relationship between users, roles, and model connections. For more information, see Relationship Between Users, Roles, Model Connection, and Context [page 30].

Structure

When you create a context using *Context Management* > *Manage Contexts*, the context has the following initial information:

- An identifying name.
- A user who is responsible for this context
- Roles containing users who can access the context in the strategy management application
- A model connection which contains the business data for the scorecard, including the measures that make up the KPIs. Also associated with the model connection are the users who are allowed to access the data. The model connection you specify is the key link between the context, the model, and users. Information from the model is used for the KPI data. It also controls which users can access the data associated with the model. Before you can use any other scorecard default features, you must select the model connection from the *Model Connection* dropdown list.
- (Optional) Associated URL links for Web sites or pages that supports this context
- (Optional) A description
- (Optional) A message that appears in the *System Message* box of users' *Home* tabs.

When you work with the other areas of *Context Management*, the context has the following information:

- Perspectives, objectives, and KPIs added and defined and ordered hierarchically into a scorecard.
- (Optional) A strategy, which includes any combination of goal diagrams, a cause and effect diagram, and pathways or themes
- (Optional) A status indicator applied to the context based on a KPI or index of perspectives. A context with a status indicator is called a scored context.

When you create additional contexts, you can organize them in a hierarchy.

When strategy management users create initiatives in the *Initiatives* tab, they add these initiatives to a particular context.

Integration

The strategy management application has a *Context* dropdown list in every tab of the application. The dropdown list contains the names of the contexts available to the user. When a user selects a context from the *Context* dropdown list, the application refreshes with information from the newly selected context.

For more information, see Context Selection [page 164].

1.2.6.1.2 Individual Contexts

Use

Context administrators can create contexts to meet the needs of the organization, and assign roles to the contexts. Simple context implementations involve creating individual contexts. More complex implementations involve creating a context template and then generating multiple contexts based on the same template.

Features

You can do the following to develop a context:

- You can create a context starting with no definitions, or you can create a context based on the definitions of another context (control whether to include comments and initiatives in the new context).
  For more information, see Creating a Context [page 59] and Creating a Context Based on an Existing Context [page 61].
- You can edit a context.
- You can rename a context.
- You can delete a context.
  If the context has perspectives, objectives, indexed KPIs, and KPIs associated with it, those items are not deleted from the library unless you delete them there too.
- You can set up a hierarchy of contexts and change the order that contexts appear in all *Context* dropdown lists using *Order Contexts*. By default, contexts appear in alphabetical order. Use the arrow keys to show a parent/child relationship or hierarchy. For more information, see Ordering Contexts and Applying a Hierarchy [page 60].

Activities

To develop contexts, choose *Context Management* > *Manage Contexts*.

- To create a context, click *Create/Copy*.
- To rename a selected context, click *Rename*.
- To delete a selected context, click *Delete*.

More Information

Template-Based Contexts [page 69]

Cascading Scorecards [page 61]

1.2.6.1.2.1 Creating a Context

Procedure

1. Select *Context Management* > *Manage Contexts* .
2. Click *Create/Copy* to display the *Context Creation* dialog box.
3. Select *New Context*.
4. Type a name for the context.

   Special characters are not allowed in context names including the following: (/) forward slash, (\) back slash, (<) less than, (>) greater than, (') single quote, (") double quote, (,) comma, (:) color, and (;) semicolon. You can use underscores (_).
5. From the *Model Connection* dropdown list, select the model to use for the context.
6. Save your changes.
7. In the *Manage Contexts* screen, select roles who can access this context in the application. For more information, see Role Assignments [page 73].
8. Enter the information for the *Description* text box and the *Responsible* dropdown list.
9. (Optional) If you want to associate links with this context, click *Edit* next to the *Associated Links* box and enter the following data:

Field	Description
URL	Type a URL you want to associate with this context. You do not have to type **`http://`** because that information is automatically inserted if you omit it. For example, you can type **`http://internal.company.com/`** or you can type: **`internal.company.com`**.

Field	Description
Title	Type a text name that identifies this URL. The text name appears in the application instead of the URL. **i Note** The users see these associated links in the strategy management application when displaying details about this item.

10. Add a message which all users of this context can see in a *System Message* box when they access their *Home* tab.
11. Save your changes.

Next Steps

Ordering Contexts and Applying a Hierarchy [page 60]

1.2.6.1.2.2 Ordering Contexts and Applying a Hierarchy

Prerequisites

You created more than one context.

Context

You can change the order that contexts appear in all *Context* dropdown lists. You can also indent contexts to show a parent/child relationship or hierarchy.

Procedure

1. Click *Context Management* > *Manage Contexts*.
2. Click *Order Contexts*.
3. To reorder contexts, use the up and down arrow keys.

4. To show a hierarchy between contexts, use the left and right arrow keys to indent them under a higher level context.
5. Save your changes.

1.2.6.1.2.3 Creating a Context Based on an Existing Context

Procedure

1. Select *Context Management* > *Manage Contexts*.
2. Click *Create/Copy*.
3. Select *Context Based on a Context*.
4. Choose the context you want to copy.
5. In the *Context Name* text box, type the name for the new context and click *OK*.
6. If you want to include initiatives in the new context, select *Include Initiatives*.
7. If you want to include comments in the new context, select *Include Comments*.
8. Save your changes.
9. Modify the definitions for this context as appropriate and save your changes.

1.2.6.1.3 Cascaded Scorecards

Use

Cascading scorecards are scorecards that have the same or similar objectives and KPIs, and the business information among the scorecards is hierarchical, creating a virtual cascade.

Features

You can create the following types of cascading scorecards in the application:

- You can create cascaded scorecards that are translations of a business unit (dimension), disseminated down through the levels of the unit. In this implementation, you might have a top scorecard (for example, Stores), and then store branch scorecards, and then individual scorecards for individual stores. All scorecards in the cascade stem from the highest level business unit and remain consistent throughout the cascade. The organizational alignment of all scorecards through the dimension hierarchy is apparent.

These cascaded scorecards have the same objectives and KPIs, which may be useful in an organization with many branches, where every branch has its own scorecard, but all branches have the same objectives and KPIs.
For information about creating cascaded scorecards based on a dimension, see Cascaded Scorecards Based on a Dimension Hierarchy [page 67] and Creating Cascaded Scorecards Based on a Dimension Hierarchy [page 67].

- You can create cascaded scorecards that are translations of the corporate scorecard disseminated down through the levels of the organization. In this implementation, you might have the top corporate scorecard, and then department-level scorecards, and then individual scorecards. All scorecards in the cascade stem from the corporate scorecard and remain consistent throughout the organization. The organizational alignment of all scorecards through the hierarchy is apparent.
These cascaded scorecards can have linked objectives across all scorecards. Objectives are likely to be different on different scorecards, but some (if not all) objectives across different scorecards are equivalent and linked.
You can link at any level that is not the top or bottom level of the context hierarchy. For the purpose of this discussion, we describe the default *perspectives* > *objectives* > *KPIs* hierarchy, where linking is available at the objective level.
For more information, see Cascaded Scorecards with Linked Objectives [page 62] and Creating Cascaded Scorecards with Linked Objectives [page 63].

1.2.6.1.3.1 Cascaded Scorecards with Linked Objectives

Use

Cascaded scorecards with linked objectives are ones where scorecards at different levels of the organization have different but linked objectives. The cascaded objectives are likely to be different on different scorecards, but some (if not all) objectives across different scorecards are equivalent and linked.

You can create cascaded scorecards that are linked at any level of a scorecard that is not the top or bottom level. Since your strategy management administrator has the ability to add levels and rename levels, the standard levels of perspectives, objectives, and KPIs are used for the benefit of this discussion. In this case, the only level available for linking is the objectives level.

When the discussion says that cascading occurs at the objective level, it is a way of saying it appears at a level that is not the top (perspectives by default) or the bottom (KPIs by default). Any custom levels are implied in this discussion.

You can also create multiple levels of cascaded items. For example, you can create cascaded objectives from a cascaded objective.

For example, say an organization has the following hierarchy:

Corporate scorecard

Marketing Division		
	Americas Marketing	
		US Marketing

		Canada Marketing
	AsiaPacific Marketing	
		Japan Marketing
		Hong Kong Marketing
	EMEA Marketing	
		Germany Marketing
		UK Marketing

In the following example, you might have 200 scorecards, where each scorecard has 4 perspectives, 20 objectives, and 30 KPIs. The total collection of scorecards has 4 perspectives, 2000 objectives, and 30 KPIs. The *Delight the Customer*, *Excel at Invoicing*, and *Deliver Robust Software* objectives are linked across the scorecards.

	Corporate	Finance	Development
Perspective	Customer	Customer	Customer
Objective	Delight the Customer	Excel at Invoicing	Deliver Robust Software
KPI	Repeat Order Value	Invoice Error Rate	Bug Report Rate
KPI	Customer Churn Rate	Error Correction Rate	Bug Correction Rate

1.2.6.1.3.1.1 Creating Cascaded Scorecards with Linked Objectives

Prerequisites

The strategy management administrator selected the *Cascade (Cross Context Linking)* option when setting defaults and specified whether to cascade a particular level. For information, see Defaults Setting [page 25].

Context

You can create cascaded scorecards with linked objectives using these general steps.

Procedure

1. Create the library of perspectives, objectives, and KPIs using *Library*. For more information, see Library [page 40].
2. Create cascaded objects from one object in the library. For more information, see Creating a Cascaded Objective [page 65].
3. Create the high-level context using *Context Management* > *Manage Contexts*.

   There are several methods for creating a context, depending on the results you are trying to achieve. For more information, see Creating a Context [page 59], Creating a Context Based on an Existing Context [page 61], Creating a Template [page 70], Creating a Context from a Template [page 71], or Creating Cascaded Scorecards Based on a Dimension Hierarchy. [page 67]
4. Add perspectives, objectives, and KPIs to the high-level context. Include the high-level objective that is cascaded.

   You add cascaded objects the same way you add non-cascaded objects. For information about adding objectives to the context, see Adding Objectives to the Perspectives in the Context [page 83].
5. Create the lower-level contexts using one of the methods mentioned above.

   Make any changes to the new contexts as necessary.
6. Add the appropriate cascaded object to each lower-level context. The method you use to add a cascaded object is different depending on how you created the lower-level contexts.

   Lower level contexts that are created as individual contexts:

   In each lower-level context, add the cascaded object that is appropriate for that context using *Context Management* > *Manage Scorecards*.

   Lower-level contexts that are generated from the high-level context as a copy, or using a template, or based on a dimension hierarchy:

   in each lower-level context, replace the high-level object with the appropriate cascaded object for this context. This requires deleting the high-level cascaded object from the copied context, and adding the appropriate cascaded object. For more information, see Adding Objects to the Context [page 81] and Adding Objectives to the Perspectives in the Context [page 83].

   > **Note**
   >
   > You can add only one cascaded object in a cascade group to a context.
7. If the cascaded object does not have KPIs or other definitions, add the KPIs and other definitions to each cascaded objective. For more information, see Defining Objectives in the Context [page 94].

1.2.6.1.3.1.2 Creating a Cascaded Objective

Use

You create cascaded objectives to use them in cascaded scorecards. Each cascaded objective is similar to the high level objective in the corporate scorecard and linked to the high-level objective. You modify the cascaded (linked) objective to account for the scorecards that cascade from it.

You can create multiple levels of cascaded objectives. For example, you can create a cascaded objective that cascades from a cascaded objective.

You can link at any level that is not the top or bottom level of the context hierarchy. For the purpose of this discussion, we describe the default *perspectives* > *objectives* > *KPIs* hierarchy, where linking is available at the objective level. You can use these same steps to create cascaded indexed KPIs, if applicable.

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

The strategy management administrator set an application default to use cascading in the application.

The strategy management administrator selected the *Cascade (Cross Context Linking)* option when setting defaults and specified whether to cascade objectives or KPIs (if applicable). For information, see Defaults Setting [page 25].

The objective from which you want to create cascaded objectives is created.

Procedure

1. Select *Library*.
2. Select the *OBJECTIVE* bar.
3. Click the *Add* pushbutton.
4. Type a name and description for the objective.

> **i Note**
>
> To maintain uniformity of objective names, you should type a name no larger than 25 characters, including spaces.

5. From the *Responsible* dropdown list, select the user responsible for this objective.
6. Select *This is a Cascaded Objective of*
7. From the dropdown list, select the higher-level objective from which this objective cascades.
8. Continue creating all the linked objectives for the high-level objective. Any easy way to do so is to select a cascaded objective, choose *Rename*, specify a new name, and create it as a new KPI.

The cascaded objectives appear hierarchically under the high-level objective from which they cascade. When a high-level objective is cascaded, you can expand and collapse the list to see the hierarchy. Cascaded objectives never appear at the same level as their high-level objectives.

More Information

Adding Objectives to the Perspectives in the Context [page 83]

Adding KPIs to a Context or Context Object [page 84]

Defining Objectives Within the Context [page 94]

Cascaded Scorecards [page 61]

Cascaded Scorecards with Linked Objectives [page 62]

Creating Cascaded Scorecards with Linked Objectives [page 63]

1.2.6.1.3.2 Cascaded Scorecards Based on a Dimension Hierarchy

Use

Cascaded scorecards based on a dimension hierarchy all have the same perspectives, objectives, and KPIs through the scorecards. The only difference is the data displayed for each item. For example, you might have 200 scorecards, where each scorecard has 4 perspectives, 20 objectives, and 30 KPIs. The total collection of scorecards has 4 perspectives, 20 objectives, and 30 KPIs.

Corporate scorecard	Context: *Enterprise* Objective: *Delight the Customer* KPI: *Customer Complaints* KPI: *Repeat Customers*
Cascading scorecard level 1 This scorecard has the same objectives and KPIs as the corporate scorecard, but is based on just the business information in the East.	Context: *East* Objective: *Delight the Customer* KPI: *Customer Complaints* KPI: *Repeat Customers*

Cascading scorecard level 2 This scorecard has the same objectives and KPIs as the corporate scorecard, but is based on just the business information in Boston, a lower level of East.	Context: *Boston* Objective: *Delight the Customer* KPI: *Customer Complaints* KPI: *Repeat Customers*
Cascading scorecard level 2 This scorecard has the same objectives and KPIs as the corporate scorecard, but is based on just the business information in Connecticut, a lower level of East.	Context: *Connecticut* Objective: *Delight the Customer* KPI: *Customer Complaints* KPI: *Repeat Customers*
Cascading scorecard level 1 This scorecard has the same objectives and KPIs as the corporate scorecard, but is based on just the business information in the West.	Context: *West* Objective: *Delight the Customer* KPI: *Customer Complaints* KPI: *Repeat Customers*

Process

1. Create a template and specify the context definitions, scorecard definitions, and strategy definitions you want to use for all cascaded scorecards.
   For more information, see Creating a Template [page 70].
2. Create contexts based on the template by specifying the dimension and dimension members for the contexts. Scorecards are created automatically from this hierarchy.
   For more information, see Creating Cascaded Scorecards Based on a Dimension Hierarchy [page 67].
3. Add unique definitions to the cascaded scorecards as needed.
4. To make global changes in all cascaded scorecards, first make the changes in the template and then propagate the changes to the contexts.
   For more information, see Propagating Changes in Template-Based Contexts [page 72].

1.2.6.1.3.2.1 Creating Cascaded Scorecards Based on a Dimension Hierarchy

Use

You can create multiple contexts from a template simultaneously, using dimension filters. Each context is filtered on one selected dimension member. Each context is named by its associated dimension member. The hierarchy of contexts is the same as the dimension member hierarchy.

This is one method of creating cascading scorecards, where all the perspectives, objectives, and KPIs are the same. The only difference in each context is the dimension member on which the context is based.

Another form of cascading scorecards involves multiple contexts that all share the same objectives but different KPIs, or the same KPIs but different objectives. These cascading scorecards are not created from templates. For information, see Cascaded Scorecards [page 61].

Prerequisites

A template exists and it contains context, strategy, and scorecard definitions. For information, see Creating a Template [page 70].

The strategy management administrator is in a role assigned to this template.

Procedure

1. Select *Context Management* > *Manage Contexts* .
2. Click *Create/Copy*.
3. Click *Context Based on a Template*.
4. From the *Pick a Template* list, select the template to use.
5. Select *Multiple Contexts*.
6. From the *Select Dimension* list, select the dimension whose members you want to use for each context.
7. From the *Select Members* list, select the dimension members to use as the basis for each context in the hierarchy. Each dimension member represents its own context (scorecard).
8. Save your changes.
   The contexts appear in a hierarchy in the *Contexts* list.
9. You can select each context in the hierarchy and assign different roles as needed.
10. You can select individual contexts in the *Manage Contexts*, *Manage Strategies*, and *Manage Scorecards* screens and make individual changes as needed.

You can also make a change to the template and propagate the changes to some or all contexts in the hierarchy.

More Information

Propagating Changes in Template-Based Contexts [page 72]

1.2.6.1.4 Template-Based Contexts

Use

You can create and maintain many identical or similar contexts by creating a context template and then basing new contexts on that template.

The contexts developed from a template can share the same or similar scorecard definitions, strategy components, *Home* tab layout, and so on. On screens where a *Propagate* link appears, changes made on that screen to the template can be propagated to the specified contexts.

The process involves first creating the template and then creating contexts based on the template.

> **i Note**
>
> You cannot apply a template to an existing context.

If you are developing only a few contexts that are similar, you may prefer to create the new contexts based on an existing context rather than on a template. Use this method when contexts are similar, but not identical. For more information, see Creating a Template [page 70] and Creating a Context Based on an Existing Context [page 61].

If you are creating multiple contexts that have many different elements, you create the individual contexts without applying a template. For more information, see Creating a Context [page 59].

Features

Methods of Context Development using Templates

- You can create a template and add the common context, strategy, and scorecard definitions to be used by all related contexts. Then you create contexts individually based on the template. For information, see Creating a Context from a Template [page 71].
  You can set up the contexts in a hierarchy if you want. For more information, see Ordering Contexts and Applying a Hierarchy [page 60].
- You can create a template and add the common context, strategy, and scorecard definitions to be used by all related contexts. Then you create multiple contexts based on the template using a differential of one dimension member for each context. For example, if the *Stores* dimension has 100 members, you can create 50 contexts at the same time, where each context is based on a different member of the *Stores* dimension.
  When the contexts are created, the context names are the dimension member names, the context hierarchy is the same as the dimension hierarchy, and the scorecard filter for each context is its dimension member.
  For information, see Cascaded Scorecards Based on a Dimension Hierarchy [page 66].

  > **i Note**
  >
  > This is one form of cascading scorecards, where all scorecards have the same perspectives, objectives and KPIs. Another form of cascading scorecards involves multiple contexts that all share the same objectives but different KPIs, or the same KPIs but different objectives. These cascading scorecards are not created from templates. For more information, see Cascaded Scorecards [page 61].

Template and Context Maintenance

You do the following to maintain templates and contexts that are based on templates:

- You can modify a template and then specify which template-based contexts apply the changes. Use the *Propagate* link in the *Manage Contexts* and *Scorecard Defaults* screens to apply the template changes on these screens to specific template-based contexts.
- You can modify a template-based context separately from its template. The template is not affected by this change.
- You can delete a template by selecting it in the *Manage Contexts* screen and selecting *Delete*. All associated contexts remain as functioning individual contexts.
- You can rename a template by selecting it n the *Manage Contexts* screen and selecting *Rename*.

Activities

To create and maintain contexts and templates, choose *Context Management* > *Manage Contexts*

More Information

Creating a Template [page 70]

Creating a Context from a Template [page 71]

Creating Cascading Scorecards Based on a Dimension Hierarchy [page 67]

Propagating Changes in Template-Based Contexts [page 72]

1.2.6.1.4.1 Creating a Template

Procedure

1. Select *Context Management* > *Manage Contexts*.
2. Click *Create/Copy*.
3. Select *New Context*.
4. Select the *Create as Template* check box.
5. In the text box, type a name for the template.
6. From the *Model Connection* dropdown list, select a model connection for the template.
7. Save your changes.

8. In the *Manage Contexts* screen, assign a role to access this template. The role must contain strategy management administrators only. For information about assigning roles, see Role Assignments [page 73].
9. Use the *Manage Contexts*, *Manage Strategies*, and *Manage Scorecards* screens of the administration application to define the template. In those screens, select the template from the *Templates* list and add definitions to be used by all contexts you plan to create using this template.

Next Steps

Creating a Context from a Template [page 71]

Propagating Changes in Template-Based Contexts [page 72]

1.2.6.1.4.2 Creating a Context from a Template

Prerequisites

A template exists and it contains context, strategy, and scorecard definitions to be applied to all associated contexts. For information, see Creating a Template [page 70].

The strategy management administrator is in a role assigned to this template.

Context

You create a context from a template when you want to create multiple similar contexts and be able to update aspects of the contexts in a single function.

Procedure

1. Select *Context Management* > *Manage Contexts*.
2. Click *Create/Copy*.
3. Select *Context Based on a Template*.
4. From the *Select a Template* list, select the template to use.
5. Select either *Single Context* or *Multiple Contexts*.
    - For a single context, type a name for the context in the *Context Name* text box.

- For multiple contexts, select a dimension and then select dimension members.

6. Save your changes.
7. In the *Manage Contexts* screen, assign a role to access this template. The role must contain strategy management administrators only. For information about assigning roles, see Role Assignments [page 73].
8. Use the *Manage Contexts*, *Manage Strategies*, and *Manage Scorecards* screens to modify individual aspects of the context which you do not want to update as a single template function.

Next Steps

Propagating Changes in Template-Based Contexts [page 72]

1.2.6.1.4.3 Propagating Changes in Template-Based Contexts

Prerequisites

You are the strategy management administrator assigned to a role who can access this template.

Context

You can modify an aspect of the template in the *Manage Contexts* and *Scorecard Defaults* screens and then propagate that change to some or all template-based contexts. Not all template changes are propagated to template-based contexts such as role deletions and system message changes.

If you modify a template-based context separately from its template, the template is not affected by this change.

Procedure

1. Select either *Manage Contexts* or *Scorecard Defaults*, depending on where you want to make a change.
2. In the *Templates* list, select the template.
3. Make a change to the template and save your changes.
4. Select *Propagate*.
5. Select the template-based contexts to acquire this change.
6. Save your changes.

1.2.6.1.5 Role Assignments

Use

A role is a named set of strategy management users with access to certain tabs and application permissions. Roles are defined in SAP NetWeaver Administrator by your system administrator.

You assign roles to a context to allow certain users and system groups to access the context. Since each role has a set of tabs and permissions assigned to it, when you assign a role to a context, you are also applying the role's permissions when using the context.

Any user who is a member of the role assigned to the context can use the context in the application.

Any changes to roles are reflected when users start a new session.

Prerequisites

You are a strategy management administrator or a context administrator. If *Context Management* > *Manage Contexts* is unavailable to you, it means you do not have the correct permissions.

You have created a context. For information, see Contexts [page 55].

The system administrator has created roles. For information, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Features

You can do the following with roles:

- (Required) Select a context from the *Contexts* list to specify its roles.
- Review the *Roles* list to see all defined roles. The highlighted roles are the ones assigned to the selected context.
- Select roles who can access this context in the application, respecting the permissions set for the role.

A user can be in multiple roles in one context. In this case, the user gains a superset of all of the permissions in the associated roles when using that context.

Activities

To add roles on a context, choose *Context Management* > *Manage Contexts*. Select a context from the *Contexts* list, and then select a role in the *Roles* list. To select multiple roles, press `CTRL` and then select the roles.

Example

Example 1

In this example, the Executive and Development roles are both assigned to Context A, and user Tom is a member of both the Executive role and the Development role. Therefore, user Tom can create scorecards and initiatives when using context A.

Context: **A**

- Role: **Executive**
  Member: User Tom
  Permissions: *Create Scorecards*
- Role: **Development**
  Permissions: *Create Initiatives*
  Member: User Tom

Example 2

In this example, the Executive role is assigned to Context A and the Development role is assigned to Context B. User Tom is a member of both the Executive role and the Development role. Therefore, user Tom can create scorecards when using context A and can create initiatives when using context B.

Context: **A**

- Role: **Executive**
  Member: User Tom
  Permissions: *Create Scorecards*

Context: **B**

- Role: **Development**
  Member: User Tom
  Permissions: *Create Initiatives*

Example 3

In this example, the Executive and Development roles are both assigned to Context A. The Development role is also assigned to context B. User Tom is a member of both the Executive role and the Development role. Therefore, user Tom can create scorecards and initiatives when using context A. User Tom can create initiatives but not scorecards when using context B.

Context: **A**

- Role: **Executive**
  User: Tom
  Permissions: *Create Scorecards*
- Role: **Development**
  User: Tom
  Permissions: *Create Initiatives*

Context: **B**

- Role: **Development**
  User: Tom
  Permissions: *Create Initiatives*

1.2.6.2 Scorecards

Use

Scorecard administration includes setting up scorecard defaults, adding perspectives, objectives, and KPIs to the context, and defining the perspectives, objectives, and KPIs for the context.

The objectives, perspectives, and KPIs you define are used in the *Strategy*, *Initiatives*, and *Scorecard* tabs in the strategy management application.

Prerequisites

The strategy management administrator or a context administrator (a user assigned to a role with permission to create contexts) has created a context. For more information, see Contexts [page 55].

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). For more information, see Roles in the Applications [page 18].

Features

Scorecard administration involves the following:

- You can set scorecard defaults that identify how you want to display scorecard data for this context. For information, see Scorecard Defaults Selection [page 76].
- You can add perspectives, objectives, and KPIs to a context, and define them for the context. For more information, see Adding Objects to the Context [page 81] and Defining Objects for the Context [page 87].
- If you have not created a particular perspective, objective, or KPI in the library that you need for a context, you can create the item for the context, and it is automatically added to the library. You can do this using *Context Management* > *Manage Scorecards*. For more information, see Scorecard Development [page 80]. For information about creating objects in the library, see Library [page 40].

Activities

To administer the scorecard, choose *Context Management* > *Manage Scorecards*.

1.2.6.2.1 Scorecard Defaults Selection

Use

You can set certain defaults for a context or template. For the purpose of this discussion, the references to contexts include contexts and templates.

Prerequisites

To use the *Use Measure Type Dimensions* dropdown list, the model has a *Type* dimension.

The strategy management administrator or context administrator (a user assigned to a role with permission to create contexts) has created a context. For more information, see Contexts [page 55].

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Context Management* > *Manage Scorecards* is unavailable to you, it means you do not have the correct permissions.

Features

You can do the following to set scorecard defaults:

- Select a context or template to work with the scorecard defaults for that context or template.
  If you set defaults for a template, all new template-based contexts acquire the defaults. All existing template-based contexts acquire the defaults if you click *Propagate*.
- Change the model connection for this context using the *Model Connection* dropdown list.

  > **i Note**
  >
  > When the context administrator created the context, that administrator specified the model connection to use. If you have not added KPIs to the context yet, you can change the model connection

  The *Model Connection* you specify is the key link between the context, the model, context roles, and model users. Information from the model is used for the KPI data. It also controls which users can access the data associated with the model. For more information, see Relationship Between Users, Roles, Model Connections, and Contexts [page 30].
- Specify the minimum periodicity for the KPI's measures using the *Minimum Periodicity* dropdown list.
- If you want the context to apply data from only one aspect of a dimension rather than the total dimension, you can filter the data for the context using *Edit Filters*.
  For example, say you have a *Territory* dimension that contains data for Asia, Emerging Markets, Europe, and North America. By default, the context contains information about all territories. You want to create a context for each territory, and then filter each context by the data for the appropriate territory. You create a North America context and filter it by the North America member of the *Territory* dimension. Then you create an Asia context and filter it by the Asia member of the *Territory* dimension.
  For more information, see Filtering the Scorecard View by Dimension Members [page 77].

Users can override the filter in the *Scorecard* tab of the application by clicking *Dimension Filters*.

- If you set filters, you can reset the filters to their original values by clicking *Reset Filters*. Information displayed in the application is reset to represent all the top levels of dimensions. For example, if you are currently filtering a scorecard by the *Europe* territory of the *Territory* dimension, you can reset the scorecard so that the information represents all territories.
- If the model has a *Type* dimension, you can specify a *Type* dimension with *Use Measure Type Dimension*. This allows you to use *Forecast* or *Benchmark* information in the *Scorecard* tab instead of *Target* information. The current member of the dimension replaces all instances of the target value in the *Scorecard* tab. Depending on how your implementation is set up, the *Use Measure Type Dimension* dropdown list may be unavailable to you. For more information, see Actual to Non-Target Value Comparison in the Scorecard Tab [page 78].
- Specify how to display KPIs with missing or null data in the *Scorecard* tab. You can display the KPI without the status indicator, or you can hide the entire KPI and status indicator.
- Specify how to display objectives with missing or null data in the *Scorecard* tab. You can hide the objective and status indicator, display the objective without the status indicator, or display the objective with the status indicator. If you display the objective and status indicator, you specify which status to apply to the indicator.
- Specify whether you want to allow additional *Actual* and *Target* columns in the *Scorecard* views of the *Scorecard* tab. The additional columns allow users to compare the current actual/target for the latest period with actual/target values from other time periods. For example, you can view actual/target for the latest quarter and also the previous quarter. You can add up to seven *Actual* and *Target* columns in addition to the *Actual* and *Target* columns for the latest period. Actual and target are a set. You cannot define just one column. For more information, see Specifying Additional Actual/Target Columns for Scorecards [page 79].

Activities

To set scorecard defaults, choose *Context Management* › *Manage Scorecards* › *Scorecard Defaults*.

1.2.6.2.1.1 Filtering the Scorecard View by Dimension Members

Procedure

1. Choose *Context Management* › *Manage Scorecards* › *Set Scorecard Defaults*.
2. In the *Context* list, select the context to work with.
3. Click *Edit Filters* to display the *Select One Member* dialog box.
4. From the *Dimensions* list, select the dimension you want to filter.

5. From the dropdown list, do one of the following:
   - Select *Hierarchy*, the default, to view the dimension members by hierarchy.

     > **i Note**
     >
     > If the dimension contains multiple hierarchies, then you can also select which hierarchy to display from the *Hierarchy* dropdown list. If you do not specify which hierarchy to display, then the default hierarchy is used.

   - Select *Find* to search for a member based on a string. Then in the *Search String* text box, type a string to search, and click *Search*.

     > **i Note**
     >
     > - Use a question mark (?) to match a single character.
     > - Use an asterisk (*) to match multiple characters. For example, Sa* matches Safe and Sam; H?ll* matches Hill, Hillary, and Hall; *page* matches New pages and Page hits.
     > - If you are searching for a name that has special characters in it - for example, an equals sign (=) - you can include that character in the *Search String* text box.
     > - If you are searching for a name that has a question mark (?), you cannot use that character to search because it is reserved for wildcard searches. Any matches are displayed based on a member's short name and long name.

6. From the available members list on the left, select the member you want to filter into the scorecard, and then click *Add Marked*.
7. (Optional) Continue to select a dimension from the *Dimensions* list and then select one member you want to filter into the scorecard.
8. Click *Return*.

   The filter appears in the *Filters* list box. This way, when you are reviewing the scorecard definitions in the administration application, you can see the filters that are applied.
9. Save your changes.

1.2.6.2.1.2 Actual to Non-Target Value Comparison in the Scorecard Tab

Use

The *Scorecard* tab shows actual and target details for KPIs. If your model contains a *Type* dimension that includes dimension members such as *Forecast* or *Benchmark*, you can incorporate the *Type* dimension into the *Scorecard* tab and use that *Type* dimension member as an alternative to *Target* for the KPI. This feature allows users to be able to compare actual to forecast or actual to benchmark as well as actual to target.

> **i Note**
>
> Your *Type* dimension does not need to be named *Type*. It can have any name.
>
> If your model does not have a *Type* dimension, you can skip this topic.

Prerequisites

Only the _TAR measures should be dimensioned by the *Type* dimension in the model.

Features

If you implement the *Type* dimension, the application is changed in the following ways:

- A KPI's score and status, which by default represents the deviation between actual and target, now represents the deviation between actual and the selected *Type* dimension member.
- Users can click *Dimension Filters* in the *Scorecard* tab and select which member of the *Type* dimension they want to review in the *Scorecard* tab.
- All instances of *Target* are replaced by the currently selected *Type* dimension member. The system recalculates the score based on the current selection and updates the status indicators to reflect the current selection.

For example, if you are viewing the *Scorecard* tab and you filter on *Forecast* for the *Type* dimension, the *Target*, *Previous Target*, and *Target % Change* columns are replaced with *Forecast*, *Previous Forecast*, and *Forecast % Change*.

Activities

To incorporate a *Type* dimension in the *Scorecard* tab, from the *Use Measure Type Dimension* dropdown list, select the *Type* dimension that exists in the model.

1.2.6.2.1.3 Specifying Additional Actual/Target Columns for Scorecards

Procedure

1. Choose *Context Management* > *Manage Scorecards* > *Set Scorecard Defaults*.
2. In the *Context* list, select the context to work with.
3. Click *Allow Multiple Actual and Target Columns*.
4. From the *Additional Actual and Target Columns* dropdown list, select the number of additional *Actual/ Target* columns you want to appear in the *Scorecard* tab. Additional fields appear on the screen based on the number you selected.

5. From the *Actual/Target 1* dropdown list, select the time period to use for the additional *Actual* and *Target* columns.
6. Continue selecting time periods for any other *Actual/Target* columns you want to add.
7. Save your changes.

1.2.6.2.2 Scorecard Development

Use

Scorecard development includes setting up adding perspectives, objectives, and KPIs to the context, and then defining those objects specifically for the context.

You develop scorecards using *Context Management* > *Manage Scorecards* > *Define Scorecards*.

For the purpose of this discussion, the references to developing contexts imply the development of templates as well. If you develop a template, all new template-based contexts acquire the same objects and definitions. All existing template-based contexts acquire the objects and definitions if you click *Propagate* in the screen in which you are working.

> i Note
>
> The default scorecard hierarchy of *perspectives* > *objectives* > *KPIs* is used for the benefit of this discussion.
>
> If your system administrator modified the scorecard hierarchy using *Administration* > *Set Defaults*, you may have a hierarchy that contains different names, different number of levels, or a different selection or order of levels. In either case, the same concepts apply.

Prerequisites

The strategy management administrator has specified whether to use three or five status indicators for objects, specified the hierarchical levels of information to appear in the *Scorecard* tab, and customized scorecard attributes, if applicable. For more information, see Default Settings [page 25].

The strategy management administrator or context administrator has created a context. For information, see Contexts [page 55].

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Context Management* > *Manage Scorecards* is unavailable to you, it means you do not have the correct permissions.

You created a library of perspectives, objectives, and KPIs. For more information, see Library [page 40].

You set scorecard default settings related to the display of data for a particular context. For information, see Scorecard Defaults Selection [page 76].

Process

1. Access the scorecard development screen at *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. Add the library of perspectives, objectives, KPIs, and index KPIs to the context. For information, see Adding Objects to the Context [page 81].
3. If necessary, create perspectives, objectives, and KPIs for the context using the *Add* pushbutton. They are automatically added to the library.
   The steps to add new items in the *Define Scorecards* screen is the same as the steps to add new items in the *Library*. For information about adding items, see Creating a Perspective [page 43], Creating an Objective [page 45], Creating a KPI [page 48], and Creating an Indexed KPI [page 53].
4. Define the perspectives, objectives, and KPIs within the context. For information, see Defining the Objects Within the Context [page 87].

1.2.6.2.2.1 Adding Objects to the Context

Use

Once you create the library of perspectives, objectives, indexed KPIs, and KPIs, you can add them to the context and set up the definitions for the objects.

Features

You can add the following objects to a context:

- You can add perspectives to the context. For more information, see Adding Perspectives to the Context [page 82].
- You can add objectives to perspectives in the context. For more information, see Adding Objectives to the Perspectives in the Context [page 83].
- You can add KPIs to the context, and to perspectives, objectives, and indexed KPIs in the context.
  You add KPIs to an object for the purpose of measuring the object based on the status of the KPI. If you do not want to measure an object by a KPI, you do not need to add KPIs to that object.
  Although you can add multiple KPIs to any item, you measure a context or perspective by just one KPI. You measure objectives and indexed KPIs by multiple KPIs.
  The available list of KPIs by which to measure a perspective, objective, or indexed KPI includes only the KPIs that you add to the specific object. The available list of KPIs by which to measure a context includes the KPIs that you add to the context as well as all the KPIs you add to all the perspectives, objectives, and indexed KPIs within the context.
  For information about adding KPIs, see Adding KPIs to a Context or Context Object [page 84].
- You can add indexed KPIs to the context, and to perspectives and objectives in the context. For more information, see Adding Indexed KPIs to a Context or Context Object [page 86].

You Can Add This Context Object Below:	To a Context	To a Perspective in the Context	To an Objective in the Context	To a KPI in the Context	To an Indexed KPI in the Context
Perspective	yes	no	no	no	no
Objective	no	yes	no	no	no
KPI	yes	yes	yes	no	yes
Indexed KPI	yes	yes	yes	no	no

Activities

- To add objects to the context, choose *Context Management* > *Manage Scorecards* > *Define Scorecards*.
- To add objects to the context, select the bar, select the item, and drag it to the appropriate location in the context hierarchy.
- To delete an object from the context, select it in the context hierarchy and select the *Delete* pushbutton.
- To define or modify an object within the context, select it in the context hierarchy and select the *Edit* pushbutton.

1.2.6.2.2.1.1 Adding Perspectives to the Context

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards).

Context

Once you create a library of perspectives, you can add them to contexts.

Procedure

1. Choose *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select the context to work with.
3. Select the *PERSPECTIVE* bar.
4. Select the perspective and drag the perspective to the context name. The first perspective you add becomes the last one in the list.

   Every time you add a perspective, you drag it to the context name.
5. Save your changes.

Next Steps

Creating a Perspective [page 43]

Defining Perspectives for the Context [page 91]

Adding Objectives to the Perspectives in the Context [page 83]

Adding a KPI to a Context or Context Object [page 84]

1.2.6.2.2.1.2 Adding Objectives to the Perspectives in the Context

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If the *Scorecard* section is unavailable to you, it means you do not have the correct permissions.

You created a library of perspectives and objectives.

You added perspectives to the context.

Context

Once you create a library of perspectives and objectives, you can add objectives to the perspectives in the context. If you have cascaded objectives to add to your context, you add them the same way you add non-cascaded objectives. For more information, see Cascaded Scorecards with Linked Objectives [page 62].

When you add or remove objectives in a context, this update does not automatically appear in the application until a scheduled task runs. You can schedule this task using the Scheduler to run daily, weekly, or monthly. For information, see Scheduler [page 132].

If a user tries to access the *Home* tab before the schedule runs, the first user who accesses the *Home* tab receives a message saying that the scorecard has been modified. The user is prompted to recalculate objectives and KPI status. The user should choose *Yes*. If the user chooses *No*, the *All Objectives* and *All KPIs* values are zero. These values do not change until the scheduled task runs.

Procedure

1. Select *Context Management* > *Management Scorecards* > *Define Scorecards*.
2. From the *Context* list, select the context to work with.
3. Select the *OBJECTIVE* bar.
4. Select the objective (or cascaded objective), and drag it to the perspective in the context hierarchy.

   You can add multiple objectives to a perspective.
5. Add KPIs and indexed KPIs to the objective. For more information, see Adding KPIs to a Context or Context Object [page 84] and Adding Indexed KPIs to a Context or Context Object [page 86].
6. Save your changes.

Next Steps

Creating an Objective [page 45]

Creating a Cascaded Objective [page 65]

Defining Objectives Within the Context [page 94]

1.2.6.2.2.1.3 Adding KPIs to a Context or Context Object

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Context Management* > *Manage Scorecards* is unavailable to you, it means you do not have the correct permissions.

You created a library of perspectives, objectives, indexed KPIs, and KPIs. For more information, see Library [page 40].

To add a KPI to a perspective, objective, or indexed KPI, the perspective, objective, or indexed KPI is already added to the context hierarchy.

Context

You can add KPIs to the context, and to perspectives, objectives (including cascaded objectives), or indexed KPIs within the context. You add KPIs to anything that you want to measure by a KPI.

You can measure the context or a perspective by a single KPI. The status of the KPI becomes the status of the context or perspective.

You measure objectives and indexed KPIs by multiple KPIs. The selected KPIs are indexed and calculated and the resulting score determines the status of the objective or indexed KPI.

> **i Note**
>
> When you add or remove a KPI for a context, the information is refreshed during the next scheduled *Calculate All Scorecard Objects* activity. If a user tries to access a tab that uses the KPI, the user is prompted to contact their strategy management administrator. At this time, the strategy management administrator should run the schedule to update all items in the scorecard.
>
> For information, see Scheduler [page 132].

Procedure

1. Choose *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. In the *Context* dropdown list, select the context to work with.
3. Select the *KPI* bar.
4. Select the KPI and drag it to the context or perspective, objective, or indexed KPI in the hierarchical tree. Add any number of KPIs that you want to make available for selection when defining the measurement of the context or the context object.

   > **i Note**
   >
   > If you plan to measure a context or perspective by a KPI, add at least one KPI to the context or perspective.
   >
   > If you do not plan to measure a context or perspective, you do not have to add KPIs to the context or perspective. If you plan to measure the context by perspectives or you plan to measure a perspective by objectives, you do not have to add KPIs to the item.
   >
   > You must add KPIs to objectives and indexed KPIs, if using indexed KPIs. Objectives and indexed KPIs are measured by multiple KPIs.
5. Do one of the following depending on how you created the KPI:

- If you did not specify an Application Server model for the KPI when you created the KPI in the *Library*, you are prompted to select a measure for the *Actual* dropdown list. At a minimum, select a measure from the model associated with the context's model connection.
- If you specified a model when you created the KPI and the model matches the one used by the context's model connection, the KPI is added.
- If you specified a model when you created the KPI and the model does not match the one used by the context's model connection, you are prompted to select an *Actual* measure for this KPI. Select a measure from the model associated with the context's model connection.

6. Save your changes.

Next Steps

Creating a KPI [page 48]

Defining KPIs Within the Context [page 97]

1.2.6.2.2.1.4 Adding Indexed KPIs to a Context or Context Object

Prerequisites

You are a strategy management administrator or a scorecard administrator (a user assigned to a role with permission to create scorecards). If *Context Management* > *Manage Scorecards* is unavailable to you, it means you do not have the correct permissions.

You created a library of perspectives, objectives, indexed KPIs, and KPIs. For more information, see Library [page 40].

To add an indexed KPI to a perspective or objective, the perspective or objective are already added to the context hierarchy.

Context

You can add indexed KPIs to the context, and to perspectives and objectives (including cascaded objectives) within the context. You add indexed KPIs to anything that you want to measure by an index of KPIs.

Procedure

1. Choose *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. In the *Context* dropdown list, select the context to work with.
3. Select the *KPI* bar.
4. Select the indexed KPI and drag it to the context or perspective or objective in the context hierarchy. Add any number of indexed KPIs that you want to make available for selection when defining the measurement of the context or the context object.
5. Save your changes.
6. Add KPIs to the indexed KPI. For more information, see Adding KPIs to a Context or Context Object [page 84].

Next Steps

Creating a KPI [page 48]

Creating an Indexed KPI [page 53]

Defining KPIs Within the Context [page 97]

Defining Indexed KPIs Within the Context [page 98]

1.2.6.2.2.2 Defining Objects in the Context

Use

Once you add perspectives, objectives, indexed KPIs, and KPIs to the context, you can define these objects fully for the context.

> **i Note**
>
> When you add or remove or modify an aspect of a perspective or objective that causes a status change, the information is refreshed in the application when a user starts a new session. If a user tries to access a tab that uses the perspective or objective, the user is prompted to choose a scorecard recalculation.
>
> The information does not automatically appear in the *Home* tab of the application until a scheduled task runs. You can schedule this task using the Scheduler. If a user tries to access *Home* before the schedule runs, the user receives a message saying that the scorecard has been modified. The user is prompted to recalculate perspectives, objectives, and KPI status. The user should choose *Yes*. If the user chooses *No*, the *All Objectives* and *All KPI's* values are zero. These values do not change until the scheduled task runs.
>
> When you add or remove a KPI for a context, the information is refreshed during the next scheduled *Calculate All Scorecard Objects* activity. If a user tries to access a component that uses the KPI, the user is prompted to contact their system administrator. At this time, the strategy management administrator should run the schedule to update all items in the scorecard.

For information, see Scheduler [page 132].

Prerequisites

You are a strategy management administrator or the scorecard administrator (a user assigned to a role with permission to create scorecards). If *Context Management* > *Manage Scorecards* is unavailable to you, it means you do not have the correct permissions.

Features

Perspective Setting in a Context

You can do the following with perspectives once they are added to a context:

Function	More Information
Add objectives from the library to the perspective	For information, see Adding Objectives to the Perspectives in the Context [page 83].
Add a KPI from the library to the perspective	You can add a KPI to a perspective if you want to measure the performance of the perspective by one KPI. For information, see Adding KPIs to a Context or Context Object [page 84]
Add indexed KPIs from the library to the perspective	For information, see Adding Indexed KPIs to a Context or Context Object [page 86].

Function	More Information
Edit the perspective to define it for the specific context	You can specify associated links and specify whether to measure the performance of the perspective and how to measure it. If you specify no measurement, the perspective appears in the application without a status indicator. If you define a perspective to be measured by objectives, the perspective appears with a status indicator in the strategy management application. The status is based on the associated objectives and the calculation method you set up. If you define a perspective to be measured by a KPI, the perspective appears with a status indicator in the strategy management application. The status is based on the status of the KPI. **i Note** If you want to implement a scored context, and you want the context's status to be measured by perspectives, then each perspective you want to use in the context's status must be measured. For information, see Defining Perspectives for the Context [page 91].
Remove the perspective from the context	None

Objective Setting in the Context

The following information applies to objectives as well as cascaded objectives (if applicable) that are added to perspectives in the context:

Function	More Information
Add KPIs and indexed KPIs from the library to the objectives	For information, see Adding KPIs to a Context or Context Object [page 84] and Adding Indexed KPIs to a Context or Context Object [page 86].
Edit an objective to further define it within the context	You can specify associated links and specify whether to measure the performance of the objective and how to measure it. If you specify no measurement, the objective appears in the application without a status indicator. If you define an objective to be measured by KPIs, the objective appears with a status indicator in the strategy management application. The status is based on the associated KPIs. If you define an objective to be measured by its indexed KPIs, the objective appears with a status indicator in the strategy management application. The status is based on the status of the KPIs that are associated with the indexed KPIs and the calculation method you set up. For information, see Defining Objectives Within the Context [page 94].

Function	More Information
Remove the objective from the perspective in the context	None

KPI Setting in the Context

You can do the following with KPIs once they are added to the context:

Function	More Information
Add KPIs to the context, perspectives, objectives, and indexed KPIs	You can add a KPI to the context if you want to measure the performance of the context by one KPI. You can add a KPI to a perspective if you want to measure the performance of the perspective by one KPI. You add multiple KPIs to an objective and indexed KPI to measure those objects by the associated KPIs. For information, see Adding KPIs to a Context or Context Object [page 84].
Edit a KPI to further define it within the context	For information, see Defining KPIs Within the Context [page 97].
Remove the KPI from the context	None

Indexed KPI Setting in the Context

You can do the following with indexed KPIs in the context:

Function	More Information
Add indexed KPIs to the context, perspectives, and objectives in the context	For information, see Adding Indexed KPIs to a Context or Context Object [page 86].
Edit an indexed KPI to further define it within the context	For information, see Defining Indexed KPIs Within the Context [page 98].
Remove the indexed KPI from the object in the context	None

Context Setting

You can do the following with the context:

Function	More Information
Add a KPI to the context	You can add a KPI to the context if you want to measure the performance of the context by one KPI. For more information, see Adding KPIs to a Context or Context Object [page 84]. **i Note** If you want the context's status to be measured by perspectives, then each perspective you want to use in the context's status must be measured by objectives.
Add perspectives, objectives, and indexed KPIs to the context.	For more information, see Adding Perspectives to the Context [page 82], Adding Objectives to the Perspectives in the Context [page 83], and Adding Indexed KPIs to a Context or Context Object [page 86].
Edit the context to further define it	For more information, see Defining the Context [page 100].

1.2.6.2.2.2.1 Defining Perspectives Within the Context

Prerequisites

You added objectives to this perspective in the context. For information, see Adding Objectives to the Perspectives in the Context [page 83].

If you want to measure this perspective by a KPI, you have added at lease one KPI to the perspective. For information, see Adding a KPI to a Context or Context Object [page 84].

Context

You define perspectives within a context to specify whether to measure them and how to measure them, and to specify associated links. Each perspective can have a different measurement.

When you measure a perspective, the perspective displays a status indicator in the strategy management application. Users can view the perspectives and their status indicators in the application and see if a perspective has poor, moderate, or exceptional performance.

Procedure

1. Select *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select a context.
3. In the context hierarchy, select the perspective you want to work with and click *Edit*.
4. Select a measurement option as follows:

Option	Description
No Measurement	Specifies that you do not want to measure the performance of this perspective. This perspective does not display a status indicator in the strategy management application.

Option	Description
Measure on Underlying Items	Specifies that you want to measure the perspective by an index of objectives or an indexed KPI. Then specify a calculation method and select the objectives or indexed KPIs whose scores will be used to define the performance of this perspective. Only objectives and indexed KPIs associated with this perspective are displayed in the *Objectives* list. Enter sequential numbers in the *Index Values* from low (red) to high (green). For example, 1, 2, 3, 4, 5 when using five status indicators and 2, 3, 4 when using three status indicators. The number of status indicators depends on the *Administration* > *Set Defaults* setting. When measuring by objectives, an association occurs as follows: the status color of each objective is matched to the same color in the *Index Values* list. Based on the color match, each objective is assigned that index value. The index values are then used in the specified calculation. The resulting value from the calculation is matched to the appropriate color in the *Index Values* list, and that color is used for the perspective's status indicator. **i Note** If you want to implement a scored context, and you want the context's status to be measured by an index of perspectives, then each perspective you want to use in the context's status must be measured by objectives. The calculation methods are as follows: ○ *Least Value* sets the perspective's status color by the status color of the objective with the smallest index value. Use this when a perspective's performance is only as good as its lowest performing objective. The perspective indicates poor performance if any one of its objectives has poor performance. ○ *Greatest Value* sets the perspective's status color by the status color of the objective with the greatest index value. Use this when a perspective's performance is only as good as its greatest performing objective. The perspective indicates good performance if any one of its objectives has good performance. ○ *Arithmetic Average* sets the perspective's status color by averaging the *Index Values* of the objectives. The resulting number is matched to the respective index color to determine the perspective's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when a perspective's performance is based on an averaging of all its objectives. ○ *Weighted Average* sets the perspective's status color by a weighted average of the *Index Values* of the objectives. The index values of the objectives are averaged along with weights applied to each objective. The resulting number is matched to the respective index color to determine the perspective's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when a perspective's performance is based on an averaging of all its objectives, but some objectives are more important or less important than others.

Option	Description
	If *Weighted Average* is the calculation method, then the *Weights* column appears so you can add, change, or remove the individual weights applied to each objective during the calculation. Weights define the relative importance of the objectives during the *Weighted Average* calculation method. The weighted average is calculated as: ((objective_index_value x weight) + (objective_index_value x weight) + ...) / (weight + weight + ...)
Measure on a KPI	Specifies that you want to measure the perspective using the same status color of a KPI. Only KPIs associated with this perspective are displayed in the *KPIs* list. Select the KPI to use. You cannot measure a perspective by an index KPI.

5. If you want to associate links with this perspective, click the URL rows and enter URLs and titles as appropriate.

   The users see these associated links in the *Scorecard* tab when they display detail information about this item. Users can double-click the link to go to its location.

   > **i Note**
   >
   > You do not have to type `http://` because that information is automatically inserted if you omit it. For example, you can type `http://internal.company.com/` or you can type: `internal.company.com`.

6. Save your changes.

1.2.6.2.2.2.2 Defining Objectives Within the Context

Prerequisites

You added objectives to perspectives in the context. For information, see Adding Objectives to the Perspectives in the Context [page 83].

You added the indexed KPIs and KPIs to this objective which are used to measure this objective. For information, see Adding KPIs to a Context or Context Object [page 84] and Adding Indexed KPIs to a Context or Context Object [page 86].

Context

You define objectives within a context to specify whether to measure them and how to measure them, and to specify associated links. If you have cascaded objectives in your context, you define them the same way you define objectives that are not cascaded.

How the associated KPI statuses are indexed, calculated, and weighted for the objective determines the objective's status.

When you measure an objective, the objective displays a status indicator in the strategy management application. Users can view the objectives and their status indicators in the application and see if an objective has poor, moderate, or exceptional performance.

Procedure

1. Select *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select a context.
3. In the context hierarchy, select the objective you want to work with and click *Edit*.
4. Select a measurement option as follows:

Option	Description
No Measurement	Specifies that you do not want to measure the performance of this objective. This objective does not display a status indicator in the strategy management application.

Option	Description
Measure on Underlying Items	Specifies that you want to measure the objective by KPIs associated with the objective. You then specify a calculation method and select the KPIs whose scores will be used to define the performance of this objective. Only KPIs and indexed KPIs associated with this objective are displayed in the *KPIs* list. Enter sequential numbers in the *Index Values* from low (red) to high (green). For example, 1, 2, 3, 4, 5 when using five status indicators and 2, 3, 4 when using three status indicators. The number of status indicators depends on the settings in *Administration* > *Set Defaults*. When measuring by KPIs, an association occurs as follows: the status color of each indexed KPI is matched to the same color in the *Index Values* list. Based on the color match, each KPI is assigned that index value. The index values are then used in the specified calculation. The resulting value from the calculation is matched to the appropriate color in the *Index Values* list, and that color is used for the objective's status indicator. The calculation methods are as follows: ◦ *Least Value* sets the objective's status color by the status color of the KPI with the smallest index value. Use this when an objective's performance is only as good as its lowest performing KPI. The objective indicates poor performance if any one of its KPIs has poor performance. ◦ *Greatest Value* sets the objective's status color by the status color of the KPI with the greatest index value. Use this when an objective's performance is only as good as its greatest performing KPI. ◦ *Arithmetic Average* sets the objective's status color by averaging the *Index Values* of the KPIs. The resulting number is matched to the respective index color to determine the objective's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when an objective's performance is based on an averaging of all its KPIs. ◦ *Weighted Average* sets the objective's status color by a weighted average of the *Index Values* of the KPIs. The index values of the KPIs are averaged along with weights applied to each KPI. The resulting number is matched to the respective index color to determine the objective's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when an objective's performance is based on an averaging of all its KPIs, but some KPIs are more important or less important than others. If *Weighted Average* is the calculation method, then the *Weights* column appears so you can add, change, or remove the individual weights applied to each KPI during the calculation. Weights define the relative importance of the indexed KPIs during the *Weighted Average* calculation method. The weighted average is calculated as: ((indexKPI_index_value x weight) + (indexKPI_index_value x weight) + ...) / (weight + weight + ...)

Option	Description
Measure on a KPI	Specifies that you want to measure the objective using the same status color of a KPI. You then select the KPI to use. Only KPIs associated with this objective are displayed in the *KPIs* list.

5. If you want to associate links with this objective, click the URL rows and enter URLs and titles as appropriate.

   The users see these associated links in the strategy management application when they display detail information about this item. Users can double-click the link to go to its location.

   > **i Note**
   >
   > You do not have to type `http://` because that information is automatically inserted if you omit it. For example, you can type `http://internal.company.com/` or you can type: `internal.company.com`.

6. Save your changes.

1.2.6.2.2.2.3 Defining KPIs within the Context

Prerequisites

You added objectives and perspectives to the context. For information, see Adding Objectives to the Perspectives in the Context [page 83].

You added the KPI to an objective, indexed KPI, perspective, or context. For information, see Adding KPIs to a Context or Context Object [page 84].

Context

You define KPIs within the context to measure the status and progress toward strategic objectives. KPIs can also measure the progress toward initiatives, indexed KPIs, a perspective, and the entire context.

Procedure

1. Select *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select a context.

3. In the context hierarchy, select the KPI you want to work with and click *Edit*.
4. The KPI definitions you specified in the library appear. If you fully defined the KPI in the library, you can skip this rest of these steps. If you want to modify the definitions or if you did not provide complete information, enter the definitions here.

   The fields and options for defining the KPI in the library are the same as for the context. For information about the fields and options to define a KPI, see Creating a KPI [page 48].
5. From the *Responsible* dropdown list, select the user responsible for this KPI.
6. Save your changes.

1.2.6.2.2.2.4 Defining Indexed KPIs Within the Context

Prerequisites

You added an indexed KPI to the context, perspective, or objective in the context. For information, see Adding Indexed KPIs to a Context or Context Object [page 86].

You added KPIs to the indexed KPI. For information, see Adding KPIs to a Context or Context Object [page 84].

Context

You define indexed KPIs within a context to specify how to measure them, to specify the KPIs used to measure them, and to specify associated links. Indexed KPIs that are measured can then be used to measure the performance of objectives, perspectives, and the context.

When measuring by KPIs, an association occurs as follows: the status color of each KPI is matched to the same color in the *Index Values* list. Based on the color match, each KPI is assigned that index value. The index values are then used in the specified calculation. The resulting value from the calculation is matched to the appropriate color in the *Index Values* list, and that color is used for the indexed KPI's status indicator.

Procedure

1. Select *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select a context.
3. In the context hierarchy, select the indexed KPI you want to work with and click *Edit*.
4. Select a measurement option as follows:

Option	Description
Calculation Method	Select a calculation methods as follows: ◦ *Least Value* sets the indexed KPI's status color by the status color of the KPI with the smallest index value. Use this when an indexed KPI's performance is only as good as its lowest performing KPI. The indexed KPI indicates poor performance if any one of its KPIs has poor performance. ◦ *Greatest Value* sets the indexed KPI's status color by the status color of the KPI with the greatest index value. Use this when an indexed KPI's performance is only as good as its greatest performing KPI. ◦ *Arithmetic Average* sets the indexed KPI's status color by averaging the *Index Values* of the KPIs. The resulting number is matched to the respective index color to determine the indexed KPI's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when an indexed KPI's performance is based on an averaging of all its KPIs. ◦ *Weighted Average* sets the indexed KPI's status color by a weighted average of the *Index Values* of the KPIs. The index values of the KPIs are averaged along with weights applied to each KPI. The resulting number is matched to the respective index color to determine the indexed KPI's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when an indexed KPI's performance is based on an averaging of all its KPIs, but some KPIs are more important or less important than others. If *Weighted Average* is the calculation method, then the *Weights* column appears so you can add, change, or remove the individual weights applied to each KPI during the calculation. Weights define the relative importance of the KPIs during the *Weighted Average* calculation method. The weighted average is calculated as: ((KPI_index_value x weight) + (KPI_index_value x weight) + ...) / (weight + weight + ...)
Index Values	Enter sequential numbers from low (red) to high (green). For example, 1, 2, 3, 4, 5 when using five status indicators and 2, 3, 4 when using three status indicators. The number of status indicators depends on the settings in the *Set Application Defaults* link in the *Administration* section.
KPIs list	Select the KPIs you want to use to measure this indexed KPI. Only KPIs associated with this indexed KPI are displayed in the *KPIs* list.

5. If you want to associate links with this indexed KPI, click the URL rows and enter URLs and titles as appropriate.

   The users see these associated links in the *Scorecard* tab of the application when they display detail information about this item. Users can double-click the link to go to its location.

> **i Note**
>
> You do not have to type `http://` because that information is automatically inserted if you omit it. For example, you can type `http://internal.company.com/` or you can type: `internal.company.com`.

6. Save your changes.

1.2.6.2.2.2.5 Defining the Context

Prerequisites

If measuring the context by perspectives, the perspectives are added to the context and they are being measured by underlying items. For information, see Defining Perspectives Within the Context [page 91].

If measuring the context by a KPI, the KPI is added to the context. For information, see Adding a KPI to a Context [page 84].

Context

A scored context is the overriding measurement for determining your company's status. It represents a corporate-wide score. Defining a context allows you to measure and monitor the entire context's performance based on a KPI or selected perspectives. Users can view the scored context in the application and determine if it has poor, moderate, or exceptional performance by seeing its status indicator.

You can measure a context by just one KPI, or by the performance of its associated perspectives, or you can choose to omit the measurement of the context.

Procedure

1. Select *Context Management* > *Manage Scorecards* > *Define Scorecards*.
2. From the *Context* list, select a context.
3. In the context hierarchy, select the context and click *Edit*.
4. Select a measurement option as follows:

Option	Description
No Measurement	Specifies that you do not want to measure the context. The context is displayed in the strategy management application without a status indicator.

Option	Description
Measure on Underlying Items	Specifies that you want to measure the context by an index of perspectives. Only perspectives associated with this context are displayed in the *Perspectives* list. Then specify a calculation method and select the perspectives whose scores will be used to define the performance of the context. Enter sequential numbers in the *Index Values* from low (red) to high (green). For example, 1, 2, 3, 4, 5 when using five status indicators and 2, 3, 4 when using three status indicators. The number of status indicators depends on the *Administration* > *Set Defaults* setting. When measuring by perspectives, an association occurs as follows: the status color of each perspective is matched to the same color in the *Index Values* list. Based on the color match, each perspective is assigned that index value. The index values are then used in the specified calculation. The resulting value from the calculation is matched to the appropriate color in the *Index Values* list, and that color is used for the context's status indicator. The calculation methods are as follows: ○ *Least Value* sets the context's status color by the status color of the perspective with the smallest index value. Use this when a context's performance is only as good as its lowest performing perspective. The context indicates poor performance if any one of its perspectives has poor performance. ○ *Greatest Value* sets the context's status color by the status color of the perspective with the greatest index value. Use this when a context's performance is only as good as its greatest performing perspective. ○ *Arithmetic Average* sets the context's status color by averaging the *Index Values* of the perspectives. The resulting number is matched to the respective index color to determine the context's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when a context's performance is based on an averaging of all its perspectives. ○ *Weighted Average* sets the context's status color by a weighted average of the *Index Values* of the perspectives. The index values of the perspectives are averaged along with weights applied to each perspective. The resulting number is matched to the respective index color to determine the context's status indicator color. If the result has a fraction from .0 to .49, the number is rounded down. If the result has a fraction from .5 to .99, the number is rounded up. Use this when a context's performance is based on an averaging of all its perspectives, but some perspectives are more important or less important than others. If *Weighted Average* is the calculation method, then the *Weights* column appears so you can add, change, or remove the individual weights applied to each perspective during the calculation. Weights define the relative importance of the objectives during the *Weighted Average* calculation method. The weighted average is calculated as: ((perspective_index_value x weight) + (perspective_index_value x weight) + ...) / (weight + weight + ...)

Option	Description
Measure on a KPI	Specifies that you want to measure the context using the same status color of a KPI. Then select the KPI to use. Only KPIs associated with this context are displayed in the *KPIs* list. You cannot measure a context by an index KPI.

5. If you want to associate links with this context, click the URL rows and enter URLs and titles as appropriate.

   The users see these associated links in the *Scorecard* tab of the application when they display detail information about this item. Users can double-click the link to go to its location.

   > **i Note**
   >
   > You do not have to type **`http://`** because that information is automatically inserted if you omit it. For example, you can type **`http://internal.company.com/`** or you can type: **`internal.company.com`**.

6. Save your changes.

1.2.6.3 Strategy

Use

The *Strategy* is the motivational aspect of a scorecard. It consists of pathways or themes toward objectives, process and goal diagrams, and cause and effect relationships between objectives. The *Strategy* tab in the strategy management application provides a collaborative environment to visualize, discuss, and update goals.

Once you have created a context and set the perspectives and objectives for the context, you can set up your strategy, which defines the way your organization seeks to reach its vision and mission.

Use *Context Management* > *Manage Strategy* to develop the *Strategy* tab of the strategy management application.

Prerequisites

The strategy management administrator or context administrator has created a context. For more information, see Contexts [page 55].

The strategy management administrator or scorecard administrator has created perspectives, objectives, and KPIs. For more information, see *Library*.

The strategy management administrator or scorecard administrator has added perspectives, objectives, and KPIs to the context. For more information, see Scorecard Development [page 80].

You are a strategy management administrator or a strategy administrator (a user in a role with permission to create the strategy). If the *Strategy* section is unavailable to you, it means you do not have the correct permissions. For more information, see Roles in the Applications [page 18].

Your role has access to the *Strategy* tab so you can review the results of setting up the strategy.

Features

Strategy administration involves the following:

- You can set strategy defaults including defining the mission statement and vision statements, specifying whether to implement themes or pathways or neither, specifying whether to implement a cause and effect diagram or not, and implementing goal diagrams. For more information, see Strategy Defaults [page 104].
- You can create goal diagrams. You can import existing graphics to increase familiarity and speed adoption, or easily create new one-page visualizations. Adding scores for individual elements of the goal diagram converts the familiar visualization into a performance scorecard. You can include up to three scorecard images, and you can specify names for the *Strategy* > *Goal Diagram* subtabs where the goal diagrams appear.
  Goal diagrams enable collaboration between different functional and strategic business groups. For more information, see Strategy Defaults [page 104] and Goal Diagram Implementation [page 106].
- You can implement a *Cause and Effect* diagram to depict cause-effect visualizations, which provide a better understanding of how overall goals can be achieved. The *Cause and Effect* diagram illustrates which objectives play primary, secondary, or tertiary roles in meeting other objectives. If you define cause and effect relationships between objectives, they appear in the *Strategy* > *Cause and Effect* tab. For information, see Cause and Effect Implementation [page 123].
- You can implement themes or pathways for reaching objectives. If you define themes or pathways, they appear in the *Strategy* > *Themes* subtab or *Strategy* > *Pathways* subtab. For more information, see Themes Implementation [page 120] or Pathways Implementation [page 122].

1.2.6.3.1 Strategy Defaults

Use

You set strategy defaults to specify which aspects of a strategy you want to use in the *Strategy* tab.

Prerequisites

The strategy management administrator or context administrator has created a context. For information, see Contexts [page 55].

The strategy management administrator or scorecard administrator has created perspectives, objectives, and KPIs. For information, see Scorecard Development [page 80].

You are a strategy management administrator or a strategy administrator (a user in a role with permission to create the strategy). If *Context Management* > *Manage Strategies* is unavailable to you, it means you do not have the correct permissions.

Your role has access to the *Strategy* tab so you can review the results of setting up the strategy.

Features

You can do the following to set strategy defaults.

- Select a context from the *Context* list to work with strategy defaults for a context.
- Create, edit, reorder, publish, and unpublish goal diagrams. The first diagram must be a goal diagram, but the other two diagrams can represent any type of diagram, such as a process or a corporate scorecard. For this discussion, the term goal diagram refers to any diagram in any of the three *Strategy* > *Goal Diagram* tabs in the strategy management application.
  For more information, see Goal Diagram Implementation [page 106].
- Rename a goal diagram in the *Goal Diagram* text box.
- Change the order that goal diagram tabs appear in the *Strategy* tab using *Change Order*.
- Review the *Publish Date* column to see if a goal diagram has been published, the date it was published, or if it is not published.
- Specify if you want to display a *Strategy* > *Themes* tab or *Strategy* > *Pathways* tab in the strategy management application.

  > **i Note**
  >
  > You can switch between a themes implementation, pathways implementation, or no implementation. If you set up one implementation, then switch to the other implementation, and then return to the original implementation, the items from the original implementation are retained and you do not need to redefine them.

- Specify if you want to display a *Strategy* > *Cause and Effect* tab in the strategy management application.
- Provide a vision, vision description, and associated links to appear in the *Goal Diagram*.
  Enter a phrase that summarizes the midterm to long-term direction of the organization and how the organization wants or intends to be perceived by the world. The statement is external (market-oriented), and stated in visionary, colorful terms.
  For example, the vision title "Provide the top financial services" can be used with the vision description "Become the respected leader in financial services with a focus on end-to-end customer relationships and satisfaction, resulting in optimized balance sheets for our partners".
- Define mission, mission description, and associated links to appear in the goal diagram and also the *Context Details* page of the *Scorecard* tab if you are using a scored context.
  Enter a phrase that summarizes an internally focused statement geared toward results - financial, process, or customer service-oriented - sought by the organization over the midterm to long-term. The Mission is a statement that describes, in motivating and memorable terms, the top-level targets of the organization. Mission statements focus on the financial, process, or customer service aspects sought by the organization.
  For example, this mission title "Double revenues" can be used with this mission description "To double revenues in three years through operations excellence, driven by an intense customer focus".

Activities

To set strategy defaults, choose *Context Management* > *Manage Strategies* > *Strategy Defaults*.

- To specify that you want to display a *Strategy* > *Themes* tab, choose *Display Themes*. Then use *Context Management* > *Manage Strategies* > *Themes* to develop the themes. For information about themes, see Themes Implementation [page 120].
  To omit the *Themes* tab, select *Do Not Display*.
- To specify that you want to display a *Strategy* > *Pathways* tab, choose *Display Pathways*. Then use *Context Management* > *Manage Strategies* > *Pathways* to develop the pathways. For information about pathways, see Pathways Implementation [page 122].
  To omit the *Pathways* tab, select *Do Not Display*.
- To specify that you want to display a *Strategy* > *Cause and Effect* tab, choose *Display Cause and Effect*. Then use *Context Management* > *Manage Strategies* > *Cause and Effect* to develop the Cause and Effect diagram. For information about the *Cause and Effect* diagram, see Cause and Effect Implementation [page 123].
  To omit the *Cause and Effect* diagram, select *Do Not Display*.

1.2.6.3.2 Goal Diagram Implementation

Use

You can design motivational diagrams for the *Strategy* tab using the contexts, mission, vision, perspectives and objectives, along with their associated performance scores. You can structure them as goal diagrams, process flows, geographic maps, and other organizational diagrams. These diagrams support communication and collaboration between different functional and strategic business groups of your organization.

Use *Context Management* > *Manage Strategies* to set up goal diagrams.

Prerequisites

- The strategy management administrator or scorecard administrator has added perspectives and objectives to the context and defined them within the context. For more information, see Scorecard Development [page 80].
- You are a strategy management administrator or the strategy administrator (a user assigned to a role with permission to create the strategy. If *Context Management* > *Manage Strategies* is unavailable to you, it means you do not have the correct permissions.
- To review the *Goal Diagrams*, you are assigned to a role with permission to see the *Strategy* tab in the strategy management application.
- You have set up the mission and vision statements if your implementation using these items.
  For information, see Strategy Defaults [page 104].

Features

You can do the following to implement goal diagrams:

- You can create diagrams using different formats. Objects function differently, depending on the format you use to build the diagram. For information, see Adding a Diagram [page 107].
  To build a diagram automatically using the mission, vision, perspectives, and objectives defined for the scorecard, use the *Auto* format. The diagram items appear automatically in a pre-defined T diagram. You can edit the properties of all perspectives and all objectives, but you cannot edit the properties of individual objects.
  For information, see Creating a Diagram Automatically [page 108].
  To build a diagram with your own layout using the mission, vision, perspectives, and objectives defined for the scorecard, use the *Manual* format. You add the diagram items, and control where they are placed and how they appear. You can modify the properties of individual items.
  For information, see Creating a Diagram Manually [page 110].
  To build a diagram using a custom image with overlayed, invisible hotspots, you can import an image using the *Custom Image* format. You add the diagram items and URL links as overlaying hotspots.
  For information, see Creating a Diagram from an Image [page 113].
- You can publish the diagram and then save your settings in the administration application. You can do this as many times as needed when creating and editing diagrams.
  You can unpublish a published diagram, allowing you to take an iterative approach when developing the diagrams.
  For information, see Publishing and Unpublishing Diagrams [page 118].
- You can update a diagram. For information, see Updating a Diagram to Reflect New Settings [page 119]
- You can rename goal diagrams and change the order that they appear in the *Strategy* tab. For more information, see Strategy Defaults [page 104].

Activities

- To work with *Goal Diagrams*, choose *Context Management* > *Manage Strategies* > *Strategy Defaults*.
- To create a goal diagram, click *Edit* next to the Create or Edit Goal Diagrams area. For more information, see Adding a Diagram [page 107].
- To remove a *Goal Diagram* from the *Strategy* tab, uncheck the *Unpublish* checkbox for the desired goal diagram. For more information, see Publishing and Unpublishing Diagrams [page 118].

1.2.6.3.2.1 Adding a Diagram

Procedure

1. Choose *Context Management* > *Manage Strategies* > *Strategy Defaults*.

2. From the *Context* list, choose the context with which to work.
3. Click *Edit* beneath the *Publish Date* box.
4. Provide a name for the goal diagram in the *Create Goal Diagram* dialog box and select *OK*.
5. Create the goal diagram by selecting *Auto-Layout*, *Design Manually*, or *Custom Image* from the *Format* drop-down field.

   For information, see Creating a Diagram Automatically [page 108], Creating a Diagram Manually [page 110], or Creating a Diagram From an Image [page 113].
6. When you are finished editing the diagram, choose the *Save* link to save the goal diagram.
7. If you wish to make the diagram public, choose the *Publish* link to publish the goal diagram.
8. Optional: To rename the goal diagram, choose the *Rename* link. The name appears as a subtab in the *Strategy* tab.
9. Optional: To add more diagrams, select the *New* link. You can create up to five goal diagrams.

1.2.6.3.2.2 Creating a Diagram Automatically

Prerequisites

You are running the goal diagram editor. For more information, see Adding a Diagram [page 107].

Context

You use *Auto-layout* format to have the system build a diagram using a pre-existing T template format that shows the mission, vision, perspectives, and objectives. This is the quickest way to design a diagram and make a diagram available to your organization.

Procedure

1. In the goal diagram editor, choose *Auto-layout* from the *Format* drop-down field. A default diagram is created using the perspectives and objectives from the context.
2. You can do any of the following functions as appropriate:

Function	Navigation	More Information
Add or remove objects in the diagram, including text objects	In the *Select Items to Show on Diagram* section of the navigation panel, select and/or deselect the checkboxes depending on the objects you want to display.	An object is any vision, mission, perspective, or objective that has been defined in the administration application. If you remove a perspective, its objectives are automatically removed too. If you add a perspective, the associated objectives are not automatically added unless you select them. You cannot add a context as an object when you use *Auto* format.
Change properties that affect the entire diagram such as the template type, border colors, background colors, and object shapes.	In the *Design* section of the navigation panel, select the desired property values to modify the overall diagram default values.	The default properties affect any object that are not using individually set properties. For more information, see Properties [page 116].
Change properties of individual objects, and override any default properties set for the entire diagram	Double-click the object in the diagram layout on the right side of the editor and specify the object properties.	For more information, see Properties [page 116].
Control the display of status indicators on objects in the diagram	Select the *Display Scorecard Status* checkbox and/or select *Display Scorecard Trend* to display these indicators in the diagram.	Status and trend indicators appear only for objects whose performance is measured. For example, a perspective shows a status indicator when it is measured by an index of objectives. To display status or trend indicators for the mission, the scorecard administrator must first define the context to be measured.
Create a text object	In the *Text Items* section of the navigator panel, click *New* and enter text and a URL link to add a text object to the diagram.	You use text items to incorporate additional information that does not come directly from the defined strategy. You can also use text items to add a URL link that supports the information in the diagram. In the application, users can click the link to the Web page from the published diagram. Text objects appear at the bottom of the diagram, but you can move and resize them and change their properties.

Function	Navigation	More Information
Move an object	Double-click the object and specify new coordinates in the *Properties* dialog box.	None.
Resize an object	Double-click the object and specify a new size in the *Properties* dialog box using numbers.	None.
Remove an arrow	Hover your mouse over an arrow and right-click to remove the arrow.	None.

Next Steps

Creating a Diagram Manually [page 110]

Creating a Diagram from an Image [page 113]

Publishing and Unpublishing Diagrams [page 118]

1.2.6.3.2.3 Creating a Diagram Manually

Prerequisites

You are running the goal diagram editor. For more information, see Adding a Diagram [page 107].

Context

You use *Design Manually* format to build your own diagram showing any combination of mission and vision statements, perspectives, and objectives. This format gives you the most flexibility over the layout, and you can make the diagram as simple or complex as required, within the range of available design options.

Procedure

1. In the goal diagram editor, choose *Design Manually* from the *Format* drop-down field.

   The diagram is initially populated with the default scorecard objects.

> ⚠ Caution
>
> If you switch back to Auto-layout format after making layout changes in Design Manually format, you will lose the following: resizing of objects, moving of objects, and arrow modifications.

2. You can do any of the following functions as appropriate:

Function	Navigation	More Information
Add or remove objects in the diagram	In the *Select Items to Show on Diagram* section of the navigation panel, select and/or deselect the checkboxes depending on the objects you want to display.	An object is any vision, mission, perspective, or objective that has been defined in the administration application. If you remove a perspective, its objectives are **not** automatically removed. If you add a perspective, the associated objectives are not automatically added unless you select them. KPIs are not automatically added to the diagram.
Change properties that affect the entire diagram such as the template type, border colors, background colors, and object shapes.	In the *Design* section of the navigation panel, select the desired property values to modify the overall diagram default values.	The default properties affect any object of a particular type that are not using individually set properties. For more information, see Properties [page 116].
Change properties of individual objects, and override any default properties set for the entire diagram	Double-click the object in the diagram layout on the right side of the editor and specify the object properties. These properties override any default properties.	For more information, see Properties [page 116].
Control the display of status indicators on objects in the diagram	Select the *Display Scorecard Status* checkbox and/or select the *Display Scorecard Trend* to display these indicators in the diagram.	Status and trend indicators appear only for objects whose performance is measured. For example, a perspective shows a status indicator when it is measured by an index of objectives. To display status or trend indicators for the mission, the scorecard administrator must first define the context to be measured by an index of perspectives or by an indexed KPI.

Function	Navigation	More Information
Create a text object	In the *Text Items* section of the navigator panel, click *New* and enter text and a URL link to add a text object to the diagram.	You use text items to incorporate additional information that does not come directly from the defined strategy. You can also use text items to add a URL link that supports the information in the diagram. In the application, users can click the link to the Web page from the published diagram. Text objects appear at the bottom of the diagram, but you can move and resize them and change their properties, and add arrows to and from them.
Move an object	In the right-side design area, select the object and drag it to a new location. You can also double-click it and specify new coordinates in the *Properties* dialog box.	None.
Resize an object	In the right-side design area, select the object and use the resize cursor to change its size. You can also double-click it and specify a new size in the *Properties* dialog box using numbers.	None.
Draw arrows to show the relationship between objects	In the right-side design area, select an object, then select a circular point on the object and drag it to the associated object.	An arrow appears between the two objects. You can use the *Properties* dialog box to change the color of arrows. To delete an arrow, right-click it.

Next Steps

Creating a Diagram Automatically [page 108]

Creating a Diagram from an Image [page 113]

Publishing and Unpublishing Diagrams [page 118]

1.2.6.3.2.4 Creating a Diagram from an Image

Prerequisites

The diagram image is no larger than 930 by 600 pixels. With larger images, users are required to scroll to see the full image in the *Strategy* tab.

You are running the goal diagram editor. For more information, see Adding a Diagram [page 107].

Context

You use the *Custom Image* format to create a diagram based on a custom image that you import into the application. This allows you to visualize the organization's overall strategy in a way that is visually consistent with the organization's branding.

Custom Image format is good for any goal, process, map or organizational diagram for which you have a pre-existing image.

You can also use this format to build a high-level diagram that links to the current context as well as to other contexts as defined in the administration application.

Procedure

1. In the goal diagram editor, choose *Custom Image* from the *Format* drop-down field.

   > ⚠ Caution
   >
   > Switching back to *Auto-layout* or *Design Manually* will cause you to lose any modifications made to your custom image objects.

2. In the *Design* section of the navigational panel, select *Browse* next to the *File Name* field to select a file for your custom image.

   You can import an image that is one of these file formats: BMP, GIF, JPEG, or PNG. You can use only one imported image per diagram.
3. In the *Select Items to Show on Diagram* section of the navigational panel, select the objects you want to overlay on the diagram. You can select the context and KPIs if your diagram contains those objects.
4. Drag each hotspot object to the appropriate area of the diagram so that the object overlays the image. The overlaid objects function as hotspots on the image.

   Hotspots are invisible in the published diagram, but allow users to click a part of the custom image and drill down into the Detail page for the mapped object.

i Note

Seeing all of the hotspot objects can be difficult. Maximize the diagram window and drag all of the hotspot objects to the side of the image where you can see them. Adjust their size and then drag them back one by one to overlay them onto your image.

5. You can do any of the following functions as appropriate:

Function	Navigation	More Information
Add or remove objects in the diagram, including text objects	In the *Select Items to Show on Diagram* section of the navigation panel, select or deselect the checkboxes depending on the objects you want to display.	An object is any vision, mission, perspective, objective, or KPI that has been defined in the administration application. If you remove a perspective hotspot object from the diagram, its associated objectives still remain available as hotspots in the diagram.
Change the image	In the *Design* section of the navigation panel, select the *Browse* button next to the *File Name* field to select a new file for the image.	You may need to readjust the position and size of all hotspot objects.
Change the font color of all overlaid hotspot objects	Choose *Action* > *Properties* and specify the *Border* color.	The font color is only useful while developing the diagram. When users see the diagram in the *Strategy* tab, the text is invisible. For more information, see Properties [page 116].
Change the font color of a single overlaid hotspot object	Double-click the object in the display area of the diagram and specify the *Border* color. This property overrides any default property.	The font color is only useful while developing the diagram. When users see the diagram in the *Strategy* tab, the text is invisible. For more information, see Properties [page 116].

Function	Navigation	More Information
Control the display of status indicators on objects in the diagram	Select the *Display Scorecard Status* checkbox and/or select the *Display Scorecard Trend* to display these indicators in the diagram.	Status and/or trend indicators appear only for objects whose performance is measured. For example, a perspective shows a status indicator when it is measured by an index of objectives. To display status and/or trend indicators for the mission, the scorecard administrator must first define the context to be measured by an index of perspectives or by an indexed KPI.
Create a text object	In the *Text Items* section of the navigator panel, click *New* and enter text and a URL link to add a text object to the diagram.	You use text items to incorporate additional information that does not come directly from the defined strategy. You can also use text items to add a URL link that supports the information in the diagram. In the application, users can click the link to the Web page from the published diagram. When you exit the dialog box, drag each text object to the appropriate area of the diagram so that the object overlays the image. The overlaid text object functions as a hotspot on your image.
Move an object	Select the object and drag it to a new location. You can also double-click it and specify new coordinates in the *Properties* dialog box.	None.
Resize an object	Select the object and use the resize cursor to change its size. You can also double-click it and specify a new size in the *Properties* dialog box using numbers.	None.

Next Steps

Creating a Diagram Automatically [page 108]

Creating a Diagram Manually [page 110]

Publishing and Unpublishing Diagrams [page 118]

1.2.6.3.2.5 Properties

Use

You can set properties for the diagram, set properties for all objects of a particular type, and for individual objects. The properties you set for a single object always override the diagram properties or object type properties.

If an object has the *Default* value for a property, it means the object does not have an individual setting and is using the default value from the diagram.

Usage of properties in *Custom Image* format is limited to size, location, and color (which only appear in development mode). The hotspot is invisible in the published diagram.

Custom Image and *Design Manually* diagrams are the only ones in which you can add KPIs and the context as hotspot objects that overlay the image (in addition to mission, vision, perspectives, and objectives and text objects). You can set KPI properties individually for an image, but not for all KPIs altogether in the image. You can also set the context properties.

Features

You can define the following properties in *Auto* and *Manual* formats for individual objects. If there is a property that can be used in a *Custom Image* format, it is noted in the text.

Field	Description
Shape	Specifies the geometric form of the object. The *None* setting specifies that you do not want to use this property. **Note** If you are displaying status or trend indicators, their position in the published diagram is based on the lower-right corner of the invisible object contours, regardless of the shape of the object itself. The object contours are defined by the points you see when you select the object.
Border	Specifies the shape color and text font color of the object. In *Custom Image* format, the hotspot object text is visible only in the diagram editor.
Background	Specifies the background color of the shape, or diagram if setting diagram properties. In *Custom Image* format, *Background* specifies the color of the area behind the image.

Field	Description
Location	Location *X* is the horizontal location of the object in pixels. The number is oriented from the left side of the window, which represents a value of 0. Location *Y* is the vertical location of the object in pixels. The number is oriented from the top of the window, which represents a value of 0. For example, if X is 200 and Y is 300, the box is located 200 pixels from the left and 300 pixels down from the top. If using *Manual* or *Custom Image* format, you can use the mouse to drag the object to a new location, if desired.
Size	Size *W* is the width of the object in pixels. Size *H* is the height of the object in pixels. If using *Manual* or *Custom Image* format, you can use the mouse to resize the object.
Text Shape	Specifies the inner geometric form of the selected mission, vision, or text object.
Text Border	Specifies the inner shape color of the selected mission, vision, or text object.
Text Background	Specifies the inner background color of the selected mission, vision, or text object.

You can define the following properties in *Auto-layout* and *Design Manually* formats for the entire diagram. You can also define the *Shape*, *Border*, and *Background* fields for the diagram. For information about these fields, see the table above.

Field	Description
Auto-Layout Template	You can specify whether to use a T Template or a Stacked Template. These templates govern the layout and relationships of perspectives and objectives in the diagram. You must be in *Auto-layout* mode to choose a template.
Display Scorecard Status	Specifies that you want to display status indicators on the diagram.
Display Scorecard Trend	Specifies that you want to display trend indicators on the diagram.
Custom Image File Name	You can select a custom image for the diagram. You must be in *Custom Image* mode to choose an image file. The color and shape settings are for hotspots, which are invisible in the published diagram. Only the imported image is visible. However, you may want to change the default colors and shapes of the hotspots so that you can more easily see and move them into place.

Field	Description
Arrow Defaults	You can choose a color for the arrows. This is a global setting and updates all arrows except those that have been modified individually using Properties for Arrow.

⚠ Caution

Do not choose *Auto-layout* mode after changing the location or size of an object. *Auto-layout* organizes diagram objects into a predefined layout and cannot be undone.

Activities

To set the properties of objects, double-click the object.

To select the properties of all the objects in the diagram not using their own properties, and to set general diagram properties, choose *Action* > *Properties*.

1.2.6.3.2.6 Publishing and Unpublishing Diagrams

Use

You can publish a diagram to make it available in the *Strategy* tab of the strategy management application. Users who access the *Strategy* tab see the diagram on the *Goal Diagram* tab.

You can unpublish, reorder, and rename published diagrams.

The *Publish Date* column displays the latest date the diagram was published and saved.

You can unpublish a diagram to remove its *Goal Diagram* tab from the *Strategy* tab without deleting the diagram from the *Strategy Defaults* section of the administration application. You can republish the diagram at any time, if desired.

If there is no date in the *Publish Date* column next to a goal diagram, the diagram is not published.

Prerequisites

You are running the goal diagram editor. For more information, see Adding a Diagram [page 107].

Procedure

Publishing a Diagram

1. In *Context Management* > *Manage Strategies* > *Strategy Defaults* , click *Edit* below the *Published Date* field.
2. In the *Goal Diagrams* drop-down field, select the goal diagram you want to publish.
3. Select the checkbox for the *Published* field.
4. Select the *Save* link.
5. Close the goal diagram editor.

Unpublishing a Diagram

1. In *Context Management* > *Manage Strategies* > *Strategy Defaults* , click *Edit* below the *Published Date* field.
2. In the *Goal Diagrams* drop-down field, select the goal diagram you want to unpublish.
3. Deselect the checkbox for the *Published* field.
4. Select the *Save* link.
5. Close the goal diagram editor.

1.2.6.3.2.7 Updating a Diagram to Reflect New Settings

Prerequisites

You are running the goal diagram editor. For more information, see Adding a Diagram [page 107].

Context

You must update the diagram if you add, change, or delete any definitions for the mission, vision, perspectives and objectives in the administration application.

If a diagram is open for editing when you update the settings in the administration application, you must close and reopen the diagram to see the changes reflected in the diagram.

Procedure

1. In the goal diagram editor, review the *Select Items to Show on Diagram* section of the navigation panel on the left.
2. If you added any new definitions in the administration application, select them to add them to the diagram.

3. Check the diagram to see if you need to make any layout adjustments based on the additions, changes, or deletions of strategy objects. Observe the following:
    - **If an object is added:** In *Auto* format, the new object is added to the diagram and the layout is automatically adjusted. In *Manual* format, you must move the new object to its desired location and may need to make other layout changes to accommodate the added information. In *Custom Image* mode, you must move the new hotspot object into place.
    - **If an object changes:** In *Auto* format, the layout is automatically adjusted. In *Manual* format, you may need to resize the object or move other objects to accommodate the updated information. In *Custom Image* format, you may need to adjust the size or placement of the hotspot object.
    - **If an object is deleted:** In *Auto* format, the layout is automatically adjusted. In *Manual* format, you may need to resize the object or move other objects to accommodate the deleted information. In *Custom Image* format, you may need to adjust the size or placement of other hotspot objects.
4. Save and publish the diagram.

Next Steps

Publishing and Unpublishing Diagrams [page 118]

1.2.6.3.2.8 Troubleshooting

Use

This topic describes common problems and solutions:

- When editing a goal diagram, you expect to see all objects, but there are only a few objects in the diagram.
  To select more objects to appear in the diagram, choose *Action* > *Show Items*.
- You carry out a function that you cannot undo.
  To undo a function, choose *Action* > *Show Items*, hide the object, close the dialog box, then return to the dialog box and make it visible again.
- A KPI, objective, or perspective has been removed from the context, but the goal diagram still shows the item.
  If the goal diagram is open for editing when the administration application is refreshed after the object is removed, you must close the goal diagram editing session, reopen it, and save the diagram to see the changes reflected in the diagram.

1.2.6.3.3 Themes Implementation

Use

Use themes to describe a major component of a strategy, as articulated at the highest level in the vision. Themes depict the progressive stages in realizing an organization's long-term vision and provide an understanding of the phases in which particular objectives play primary roles. You can create themes from an organization's internal processes or the customer value proposition, and also from key financial goals. Themes represent vertically linked groupings of objectives across several perspectives. Themes are phrases that are easy for the organization to remember and internalize. Examples: *Know Our Customers*, *Reach Our Customers*, and *World-Class Customer Service*.

Use *Context Management* > *Manage Strategies* > *Themes and Pathways* to set up themes.

Prerequisites

- The strategy management administrator or scorecard administrator has added perspectives and objectives to the context and defined them within the context. For more information, see Scorecard Development [page 80].
- You are a strategy management administrator or the strategy administrator (a user assigned to a role with permission to create the strategy. If *Context Management* > *Manage Strategies* is unavailable to you, it means you do not have the correct permissions.
- You have selected the *Display Themes* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*. For more information, see Strategy Defaults [page 104].
- To review the *Themes* diagram, you are assigned to a role with permission to see the *Strategy* tab in the strategy management application.

Features

You can do the following to set themes:

- Select a context to work with.
- Create up to 12 themes.
- Publish or unpublish themes using *Publish All Themes*.
  Strategy administrators can still see unpublished themes in *Strategy* > *Themes*.
- Edit a theme selected in the *Themes* list.
- Rename a selected theme selected using *Rename*.
- Delete a selected theme using *Delete*.

Activities

- To set up a *Themes* diagram, choose *Context Management* > *Manage Strategies* > *Themes and Pathways*.
- To create a theme, click *New* and enter a name for it. Then select the objectives, and enter a description, responsible user, add associated links, and save your changes.
- To remove the *Themes* diagram from the *Strategy* tab, select the *Do Not Display* option or *Display Pathways* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*.

1.2.6.3.4 Pathways Implementation

Use

Pathways are an extension of themes, with the dimension of time. Pathways depict the progressive stages in realizing an organization's long-term vision and provide an understanding of the phases in which particular objectives play primary roles. You can apply targets for desired performance to directly visualize how well the organization is progressing towards realizing its vision.

A pathway is a descriptive statement representing a major component of a strategy, as articulated at the highest level in the vision. Pathways are defined from an organization's internal processes or the customer value proposition, but may also be drawn from key financial goals. The key is that pathways represent vertically linked groupings of objectives across several scorecard perspectives. Pathways are stated as catchy phrases that are easy for the organization to remember and internalize. For example, *Know Our Customers*, or *Reach Our Customers*, or *World-Class Customer Service*.

Use *Context Management* > *Manage Strategies* > *Themes and Pathways* to set up pathways.

Prerequisites

- The strategy management administrator or scorecard administrator has added perspectives and objectives to the context and defined them within the context. For more information, see Scorecard Development [page 80].
- You are a strategy management administrator or the strategy administrator (a user assigned to a role with permission to create the strategy. If *Context Management* > *Manage Strategies* is unavailable to you, it means you do not have the correct permissions.
- You have selected the *Display Pathways* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*. For more information, see Strategy Defaults [page 104].
- To review the *Pathways* diagram, you are assigned to a role with permission to see the *Strategy* tab in the strategy management application.

Features

You can do the following to set pathways:

- Select a context to work with.
- Create at least three pathways.
  If you create fewer than three pathways, they are unavailable in the application.
- Publish or unpublish pathways using *Publish All Pathways*.
  Strategy administrators can still see unpublished pathways in *Strategy* > *Pathways*.
- Specify a pathway peak date for each pathway. The peak of each pathway is charted according to its peak date along the horizontal timeline. Use the *Pathway Peak Date* dropdown lists to specify the peak date. You can review the peak dates defined for the pathways in the *Peak Dates* list.

- Choose whether to display a plan line on the current date in the pathway diagram using *Display Plan Line (Current Date)*. This line appears the first time a user clicks a pathway.
  If you implement the plan line, it appears on the pathway diagram at the current date. If you also have a Goal Diagram set for the *Goal Diagram 1* tab in the *Strategy* tab, then the Plan line label is a link. When the user clicks the *Plan* link, the user is sent to the *Goal Diagram 1* subtab in the *Strategy* tab.
- Choose whether to display an actual line that identifies the actual progress in terms of where you are in the pathway diagram. You add an actual line by selecting *Display Actual Line* and then select a month and year from the dropdown lists that represent the actual progress location in the pathway diagram.
  If you implement the actual line, it appears on the pathway diagram at the actual date, rather than the current date. This line appears the first time a user clicks a pathway. The actual line is red if you are currently working on a pathway that is behind plan, black if the actual line is directly on target with the plan line, and green if the actual line is ahead of plan. Users can click the *Actual* link and go to the *Context Details* page of the *Scorecard* tab.
  For example, assume pathway 1 starts on January 2011, pathway 2 starts on January 2012, and pathway 3 starts on January 2013. The plan date (current date) is December, 2011. If you were on target, you would specify today's date (December, 2011) and the actual line would be just before pathway 2.
  If you had a slower progress, you would specify a date prior to today's date. If you are developmentally only at pathway 1, you would specify an actual date of January 2011. The actual line would be drawn in red at pathway 1 at January 2011, and the plan line would be drawn at the current date of December 2011, which is just before pathway 2.
  If you are developmentally ahead, you would specify a date further out than today's date. If you are already at pathway 2, and you specify a date of January 2012, the actual line would be drawn in green at January 2012. The plan line would be drawn at the current date of December 2011, which is just before pathway 2.
- Edit a theme selected in the *Pathways* list.
- Rename a selected pathway selected using *Rename*.
- Delete a selected pathway using *Delete*.

Activities

- To set up a *Pathways* diagram, choose *Context Management* > *Manage Strategies* > *Themes and Pathways*.
- To create a pathway, click *New* and enter a name for it. Then select the objectives, and enter a pathway peak date, description, responsible user, add associated links, and save your changes.
- To remove the *Pathways* diagram from the *Strategy* tab, select the *Do Not Display* option or *Display Themes* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*.

1.2.6.3.5 Cause and Effect Implementation

Use

You can create a Cause and Effect diagram that shows the cause and effect relationships between objectives. A cause objective is one that impacts the current objective. An effect objective is one that is impacted by the current objective.

Use *Context Management* > *Manage Strategies* > *Cause and Effect* to specify the objectives that impact an objective and the objectives that are impacted by the objective.

Prerequisites

- The strategy management administrator or scorecard administrator has added perspectives and objectives to the context and defined them within the context. For more information, see Scorecard Development [page 80].
- You are a strategy management administrator or the strategy administrator (a user assigned to a role with permission to create the strategy. If *Context Management* > *Manage Strategies* is unavailable to you, it means you do not have the correct permissions.
- You have selected the *Display Cause and Effect* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*. For more information, see Strategy Defaults [page 104].
- To review the *Cause and Effect* diagram, you are assigned to a role with permission to see the *Strategy* tab in the strategy management application.

Features

You can do the following to implement a *Cause and Effect* diagram for the *Strategy* tab:

- Select a context from the *Context* list to work with.
- Select an objective from the *Objective* list and set up the cause and effect relationships for an objective using the *Edit* links.
  The *Objective* list shows all the objectives added to this context.
- Add, remove, or change the cause relationships and effect relationships for the selected objective using the *Edit* link.
- Review the causes and effects assigned to an objective by selecting the objective. The *Causes* list shows you the objectives that impact the selected objective. The *Effects* list shows the objectives that are impacted by the selected objective. If the *Causes* or *Effects* box is empty, it means you have not defined any relationships.

Activities

- To set up a Cause and Effect diagram, choose *Context Management* > *Manage Strategies* > *Cause and Effect*.
- To specify the objectives that impact an objective (the causes), select the objective, and click *Edit* next to the *Causes* list.
- To specify the objectives that are impacted by the selected objective, click *Edit* next to the *Effects* list.
- To remove the Cause and Effect diagram from the *Strategy* tab, select the *Do Not Display* option in *Context Management* > *Manage Strategies* > *Strategy Defaults*.

1.2.7 Setting Up an Entry and Approval System

Use

To set up an Entry and Approval system, you need to create models, model connections, and a context in the administration application. You also need to use *Entry and Approval* in the administration application to set default settings for the Entry and Approval application and the performance management model.

After you set up the Entry and Approval system, you can use the Entry and Approval application to manually enter data into a performance management model and monitor the data entry effort through a workflow process. Once the data entry process has been completed, you can load the data into the performance management model using Entry and Approval. For more information about the Entry and Approval application, see Entry and Approval [page 136].

Prerequisites

You are the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the administration application as the administrator.

The model exists and is built for use with the application; the *Actual* and *Target* measures have short names that end in `_ACT` and `_TAR` respectively.

A role called `SSM_Entry_And_Approval` is created. The role contains all Entry and Approval administrators, data entry users, approvers, and yourself. This special role limits the users who can be assigned to workflow steps. Only the users of that role appear for selection in the *Entry and Approval Administrators* section of the *Set Entry and Approval Defaults* screen. In addition, only the users in that role appear in the *Create Measures Set* dialog box in the Entry and Approval application. The `SSM_Entry_And_Approval` may be renamed by the system administrator. If there is no `SSM_Entry_And_Approval` role (or renamed version), then all users appear. For information about creating the `SSM_Entry_And_Approval` role, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Process

1. Create a model connection for each Entry and Approval model. For more information, see Creating a Model Connection for an Entry and Approval Model [page 127].
   Entry and Approval requires a model connection to Application Server that can read dimension member and measure names without restrictions. You must make sure you have an `MMADMIN` user in `MASTERDB` and you must create a special model connection with that Application Server user for every model you want to use in Entry and Approval. This feature ensures that the Entry and Approval connection has access to all the information that is required. Users are connected to the model with the correct privileges and receive the full set of metadata. The model connection associated with the `MMADMIN` user has limited access to Interactive Publisher functions and features, which ensures a secure environment.
2. Create a second, regular model connection to the performance management model with a standard Application Server user.

3. Create a context associated with the performance management model and the non- `MMADMIN` model connection. You must define a context prior to using Entry and Approval to ensure proper delivery of *Home Inbox* notifications and e-mails when measure sets are released and data is submitted for approval.
   For more information, see Creating a Context [page 59].
4. Set up entry and approval defaults. For more information, see Entry and Approval Defaults [page 128] and Setting Entry and Approval Defaults [page 129].
5. Launch Entry and Approval to begin working with the application. For more information, see Starting and Exiting the Applications [page 10].

1.2.7.1 Entry and Approval Roles and Permissions

Use

There are several types of Entry and Approval users with separate sets of privileges.

Features

Strategy management administrators have the following prerequisites, tasks, and permissions:

- You are running the administration application as the strategy management administrator. If *Administration* is unavailable to you, it means you are not running the application as the administrator.
- You have access to the model in Application Server.
- You can use the *Entry and Approval* screen to set up Entry and Approval administrators. You can add yourself and other users as an Entry and Approval administrator. This allows you to set defaults in the Entry and Approval application or the administration application.
- You can use the *Entry and Approval* screen to define the settings for each performance management model to be accessed by Entry and Approval. You can add and remove performance management models.

Entry and Approval administrators have the following prerequisites, tasks, and permissions:

- You have access to the performance management model.
- You can control all management and administrative functions within the Entry and Approval application for a particular model. This includes:
  - Creating and editing measure sets, entering historical data, entering target data, releasing measure sets, and loading the Application Server model.
  - Specifying which users have data entry privileges for each measure set.
- You can update existing definitions for a selected Application Server model by clicking *Set Defaults* in the Entry and Approval application. Only Entry and Approval administrators can see this link. Entry and Approval administrators cannot add or remove models or define a new Entry and Approval definition when accessing the defaults from the Entry and Approval application. These functions are limited to the strategy management administrator in the administration application.
- You are added to the `SSM_Entry_And_Approval` role. This special role limits the users who can be assigned to workflow steps. Only the users of the `SSM_Entry_And_Approval` role appear for selection in the *Entry and Approval Administrators* section of the *Entry and Approval* screen. Only the members of that role appear in the *Create Measures Set* dialog box in the Entry and Approval application.

For information about creating the `SSM_Entry_And_Approval` role, see the *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Data Entry users and approvers have the following tasks and permissions:

- You do not have to access to the performance management model.
- You are added to the `SSM_Entry_And_Approval` role.
- Data Entry users can enter values.
- Approvers can approve or reject data.

1.2.7.2 Creating a Model Connection for an Entry and Approval Model

Procedure

1. Create a standard model connection with the following exceptions:
   - You can specify any name for the model connection name. It does not need to match the model name.
   - For the *PAS User*, type **`MMADMIN`**.
     `MMADMIN` is a special user that exists by default in `MASTERDB`. This user has special privileges to authorize models to be used for Entry and Approval. The model connection should have only one client/server connection.
   - In the *Password* text box, type the password for `MMADMIN` if one has been set up. By default, there is no password.
   - For the model name, specify the model you want to use in Entry and Approval.

     > **i Note**
     >
     > You cannot use a model that contains text variables.

     > **i Note**
     >
     > The measures in the model must have either monthly, quarterly, or yearly data. Entry and Approval does not support measures with any other periodicity.
   - For *Groups and Users*, keep the default setting of allowing all users (*Everyone*) to use this model connection. Everyone who uses Entry and Approval must have access to the model. This is a limited-access model connection that gives users the ability to read measures and dimensions in the model.
2. Repeat these steps for any other model you want to use in Entry and Approval.

Next Steps

Creating a Model Connection [page 31]

1.2.7.3 Entry and Approval Defaults

Use

Use *Entry and Approval* in the administration application to set default settings for the Entry and Approval application and the performance management model.

You set defaults after you have set up your Entry and Approval system. For more information, see Setting Up an Entry and Approval System [page 125].

Once you set defaults, users can then use the Entry and Approval application to manually enter data into a performance management model and monitor the data entry effort through a workflow process. Once the data entry process has been completed, you can load the data into the performance management model using Entry and Approval.

> **i Note**
>
> The Entry and Approval administrator can also set defaults in the Entry and Approval application for the currently selected model by clicking *Set Defaults*.

Features

You can do the following using *Entry and Approval* in the administration application:

- Set default settings for each performance management model that is updated by the Entry and Approval application. You can set the current period and overall date range for the data, the general workflow steps to be followed in Entry and Approval, as well as which users to function as Entry and Approval administrators. For more information, see Setting Entry and Approval Defaults [page 129].
- Delete all settings and database records from the Entry and Approval database by selecting the model and then clicking *Remove*.
- Update the following Entry and Approval defaults on an ongoing basis:
  - You need to update the current period. The current period is the month that falls under the Entry and Approval workflow process.
    Once the current period is defined and the workflow process starts in Entry and Approval, the default period cannot be changed until the workflow process is completed.
  - You may need to change the Application Server model date range, depending on how you have defined your model and the requirements of your data.
    If you are entering and loading data monthly, you need to set the start and end dates for the new current period on a monthly basis.
    If you have previously loaded historical data, you should set the start date to the current period unless you have additional historical data to load.
    If you have target data beyond the current period, set the end date to correspond to the target end date. If you do not have target data, or if the target data is included in the current period, set the end date the same as the current period.

  > **i Note**
  >
  > If there are released measure sets that are not completed for the current model, you cannot update Entry and Approval defaults for that model.

You can launch the Entry and Approval application from the *Launch* page to control all management and administrative functions within the Entry and Approval application for a particular model. For more information, see Starting and Exiting from the Applications [page 10].

1.2.7.4 Setting Entry and Approval Defaults

Prerequisites

- Your role has the appropriate permission to use Entry and Approval. For more information, see Entry and Approval Roles and Permissions [page 126].
- You are displaying the Entry and Approval defaults by selecting Entry and Approval in the administration application or by clicking *Set Defaults* in the Entry and Approval application.

Context

You set up Entry and Approval defaults to set up the performance management model and the Entry and Approval application.

You can set the Entry and Approval defaults in the administration application or in the Entry and Approval application. The only difference appears in the administration application where you can add a model to use in the Entry and Approval application.

Procedure

1. (For users setting defaults in the administration application) If you have not yet added the model you want to work with, follow one of these steps to add it:
   - To add a model using similar settings from an existing model already added to Entry and Approval, highlight that model in the *Select Models* list and click *Add*. Type a name for the model and choose *Create with Current Values* to copy the defined values from the existing model. Click *OK*.
   - To add a model using new settings, click *Add* and type the name of the model. Select *Create with Default values*. Click *OK*.
2. In the *Select Models* list, select the model you want to work with.

   > **i Note**
   >
   > The *Select Models* list shows the Application Server models for which you have defined Entry and Approval settings and created an Entry and Approval model.

3. In the *Name* text box, type the name as you want it to appear in the Entry and Approval application.

By default, this is the same name as the performance management model name. Specify only alphanumeric characters (a-z, 0-9) up to a maximum size of 64 characters. You must not use special characters in the name, including the following: (/) forward slash, (\) back slash, (<) less than, (>) greater than, (') single quote, (") double quote, (,) comma, (:) color, and (;) semicolon. You can use underscores (_).

4. From the *Fiscal Year Start* dropdown list, select the first month of the model's fiscal year. If you do not select a month, the month of January is used when you save the definition.
5. Define the *Current Period* and the *Date Range* in the Application Server model. The two settings work together in the following ways:

   The current period is the month that falls under the Entry and Approval workflow process. Once the current period is defined and the workflow process starts in Entry and Approval, the default period cannot be changed until the workflow process is completed.

   If the Application Server model has quarterly or yearly measures, set the current period as the first month in the active quarter or year. For example, if you are using a standard January-December calendar with quarterly measures, and you are in the third quarter, you would set your current period as July of current fiscal year. With yearly measures, you would set your current period as January of the fiscal year. If the current period is not set to the first month of the quarter or year, the *Display Previous Period Actual* column in the Data Entry table shows *N/A* for the previous period, even if there is data for that period.

   If you are entering and loading data monthly, on an iterative basis, you can set the start- and end-dates the same as the current period. Each month, at the start of a new workflow process, you would update all three defaults to the new period.

   If you have historical data to load, set the start-date to the time period corresponding to your historical data. For example, if you have historical data from June 2010 to December 2010, set the current period to January 2011 and the start-date of the Application Server model date range to June 2010. For quarterly or yearly measures, the start-date is always the first month of the quarter or year of the historical period. Historical data can only be entered by the Entry and Approval administrator and does not fall under the workflow process.

   If you plan to enter target data beyond the current period, set the end-date to correspond to the target end-date. For example, if you target data through the end of the current fiscal year 2011, set the end-date to December 2011. Target data can only be entered by the Entry and Approval administrator or if *Input future data (target)* is selected and does not fall under the workflow process.
6. In the *Workflow Steps* section, type the names of additional steps after Step 1 *Data Entry*. *Data Entry* is always required as the first step. Additional steps might include *Review*, *Approval*, and *Final Approval* steps.

   These steps function as a master list and should reflect the workflow process you have established in your organization. For example, you can have two steps such as *Data Entry* and *Final Approval*, or you can include interim *Review* or *Approval* steps. When setting Entry and Approval defaults, you want to establish all the possible steps you might require for any given measure set, as defined in Entry and Approval. A measure set can use all of these workflow steps or just a subset. For more information about creating measure sets, see Entry and Approval [page 136].
7. Select any of these *Data Entry Permissions*:
   - Select the *Input Current Period Data via Excel* permission to allow users to enter data using Microsoft Excel in addition to the *Data Entry* screen in the Entry and Approval application. This option controls the display of the *Download to Excel* button in the Entry and Approval *Data Entry* window.

- Select the *Input/Overwrite Current Period Target Data* permission to allow data entry users to enter or overwrite target data for the current period. In the Entry and Approval *Data Entry* window, this option makes the *Target* column available and users can enter target data for the current period.
  Deselect this option if you do not want to allow users to enter target data for the current period. In the *Data Entry* window, the *Target* column is unavailable if users do not have permission to enter target data. If the *Target* column is empty and does not show cells for data entry, it means that the target measure is not part of the measure set.
- Select the *Input Historical Data (Actual and Target)* permission to allow data entry users to enter actual and target historical data. This option controls the display of the *Historical Data* button in the Entry and Approval *My Measure Sets* window. The *Historical Data* button displays an Excel spreadsheet where you enter actual and target numbers for historical data. The spreadsheet acts as a template that temporarily holds the data until it is passed to Entry and Approval. There is no workflow control over any data entered via these spreadsheets.

  > i Note
  >
  > Entry and Approval administrators can always enter actual and target historical data.

- Select the *Input Future Data (Target)* permission to allow data entry users to enter future target data. This option controls the display of the *Target Data* button in the Entry and Approval *My Measure Sets* window. The *Target Data* button displays an Excel spreadsheet where you enter target data. The spreadsheet acts as a template that temporarily holds the data until it is passed to Entry and Approval. There is no workflow control over any data entered via these spreadsheets.

  > i Note
  >
  > Entry and Approval administrators can always enter actual and target historical data.

8. In the *Entry and Approval Administrators* section, from the list of *All Users* select the Entry and Approval administrator for this model, and click *>>* to add the name to the *Selected Users* list. By default, all users are displayed in the *All Users* list. If your system administrator created a special `SSM_Entry_And_Approval` role, then only the users from that role are displayed.

   > i Note
   >
   > - To create measure sets and load the database with the approved data, the Entry and Approval administrator must be an Application Server user with access to the model in Application Server.
   > - To use the Entry and Approval application with administrative permissions, you must also add the administrator of strategy management, to the *Selected Users* list.

9. To select the measures that you want to appear in the *Create Measure Set* dialog box, select measures from the *Measures* list, and click *>>*.

   > i Note
   >
   > In cases where some but not all measures require data entry, it is useful to filter the measures view when creating measure sets. This makes it easier for Entry and Approval administrators to select the appropriate measures. Rather than displaying all measures when creating measure sets, only the ones requiring data entry are displayed.

10. Save the Entry and Approval default settings for the selected model.

1.2.8 Scheduler

Use

Use the *Scheduler* to set schedules that define how frequently the system executes certain administrative tasks.

In response to the schedule, the application distributes e-mail notifications and *Home* tab *Inbox* notifications to subscribers when updates are detected. If milestone activity, objective activity, or KPI activity is detected during the *Scheduler's* periodic check, any user who subscribed to that activity and that particular object receives notification. Users receive notification in the form of an e-mail notification or *Home* tab *Inbox* notification depending on how the users set up their notification methods.

> **Note**
>
> Users can also subscribe to receive immediate nonscheduled notifications in the *Home* tab *Inbox*. When a user subscribes to e-mail notifications or *Home* tab *Inbox* notifications, they automatically receive notifications at these times:
>
> - An initiative's date, status, or milestones changed
> - A comment was added to an initiative
> - A comment is added to an objective
> - A comment is added to a KPI

Prerequisites

- You are the strategy management administrator. If the *Scheduler* is unavailable to you, it means you are not running the administration application as a strategy management administrator. For information, see Roles in the Applications [page 18].
- For e-mail notification to function correctly, the system administrator has set up mail connectivity. For more information, see the installation guide. *Installation Guide for SAP Strategy Management* on the SAP Help Portal.

Features

You can set up schedules to do the following:

- Recalculate the initiative statuses in the *Home* tab using the *Calculate Initiative Status* activity.
- Recalculate the scorecard status using the *Calculate All Scorecard Objects* activity. At the scheduled date and time, the system refreshes any objects that have been added or removed or modified since the last session or since the last scheduled activity.
- Close all connections that are open between Interactive Publisher and Application Server using the *Restart JPIP Sessions* activity.

- Update temporary user reassignments that are set in the *Update User Responsibilities* screen. The *Reassign Owner* activity adds temporary assignments, deletes temporary assignments, and returns temporary assignments back to the original owner.
  The start dates and end dates of all temporary assignments are reviewed. Any added, deleted, or expired reassignment that occurs on or before the schedule time is updated.
  For example, you can set a daily schedule to review assignments at 9:00 PM. If the schedule runs and detects a new temporary owner starting that day, the temporary assignment is carried out. If the schedule detects that a temporary assignment is ending that day, then the temporary assignment reverts back to the original owner.
  For information about temporary assignments, see User Responsibility Updates [page 37].
- Notify subscribers when objective statuses and KPI statuses have changed from one period to another using the *Scorecard Notifications* activity.
  For more information, see Objective and KPI Status Notification Scheduling [page 135].
- Notify subscribers when initiative milestones are coming due period using the *Initiatives Notifications* activity.
  For more information, see Milestone Notification Scheduling [page 134].

You can view the schedule set up for a task in the *Runs* column. If a task is not scheduled, or it is disabled, the *Runs* column shows a dash (-).

You can enable or disable all *Scheduler* notifications for a task type by selecting or deselecting *Enabled* next to the task. If you select this option, then the system notifies subscribing users about activity when the criteria is met. If you deselect this option, then the *Scheduler* does not run the schedule for this task and the system does not notify subscribers about activity.

You can edit a schedule for an activity by clicking *Edit* next to the activity.

Activities

To set up a schedule for a particular activity, click *Add Task* next to the activity, then click *Edit* and enter schedule information in the available fields.

More Information

Scheduling Activities [page 134]

1.2.8.1 Scheduling Activities

Procedure

1. Select ▶ *Administration* ▶ *Scheduler* ◀.
2. Click *Add Task* to add the task and enable it using a default schedule of Monthly at 12:01 every day. If this is an initiative notification, the default number of days for notifying subscribers is three.
3. Click *Edit* on the activity you want to schedule.
4. From the *Frequency* dropdown list, select the regularity at which you want the *Scheduler* to run that particular activity.

   For example, if your objective and KPI data is updated monthly, you may want to have the *Scheduler* check monthly for new data.
5. From the *Time* dropdown lists, select the hour and minute of day to run the activity.

   The hours follow a 24-hour clock. For example, you would select 19:00 for 7 PM.
6. Do one of the following to select the day on which the system runs the activity based on the frequency selected in the *Set to run* dropdown list:
   - If you selected *Daily*, you can skip this step because the system checks daily.
   - If you selected *Weekly*, from the *Every* dropdown list, select the day of the week you want the system to check for scorecard updates every week.
   - If you selected *Monthly*, from the *Every day* dropdown list, select the day of the month from 1 to 31 that you want the system to check for scorecard updates every month.
7. (For initiatives notifications) In the *Notification Days* text box, type the number of days before a due date to start notifying subscribers.
8. Make sure the *Enabled* option is selected.
9. Save your changes.

1.2.8.2 Milestone Notification Scheduling

Use

You can set up a schedule to notify subscribers when an initiative's milestones are coming due.

For example, you can set up an initiative notification to review milestones daily and start notifying users three days before a due date. The *Scheduler* reviews milestone due dates daily. If the *Scheduler* finds a milestone due in three days, subscribing users receive notification daily starting today, then tomorrow, then the next day (which is the due date). Then the user stops receiving notifications about this initiative's milestone. The user was effectively warned daily for three days before the due date that the milestone is in danger of slipping behind schedule.

Features

You set up a milestone schedule with the following features:

- You set the number of days prior to the milestone due date that you want to send out initiatives notifications.
- You specify the frequency you want the *Scheduler* to review initiative due dates.

During a periodic check, if the *Scheduler* finds an initiative that is due within the notification days, all users who have subscribed to that initiative and who have selected the *A milestone will slip behind schedule in x days* subscription option in the Home component are notified.

Notifications start on the *n*th day before the milestone is due.

Activities

To schedule initiative notifications, click *Add Task* next to the *Initiatives Notifications* activity. Then click *Edit* and enter schedule information in the available fields.

More Information

Scheduling Activities [page 134]

1.2.8.3 Objective and KPI Status Notification Scheduling

Use

Whenever new data is loaded into a model, you can expect that objective and KPI statuses change. The loading of data is typically done on a schedule, so you might want to set up a scorecard notification schedule to coincide with the data load schedule.

Features

You specify the frequency you want the Scheduler to compare this month's data to last month's data.

During a periodic check, if the Scheduler finds objectives or KPIs whose status has changed, all users who have subscribed to that objective or KPI and who have selected the *An objective status changed from last period* or *A KPI status changed from last period* subscription option are notified.

Activities

To schedule objective and KPI notifications, click *Add Task* next to the *Scorecard Notifications* activity. Then click *Edit* and enter schedule information in the available fields.

More Information

Scheduling Activities [page 134]

1.3 Entry and Approval

Use

The Entry and Approval application streamlines the process of populating measures, reduces the amount of time spent on measure collection, and alleviates costly errors through a system of workflow steps. It allows organizations to collect measures without needing to integrate transactional systems or establish a data warehouse for just one or two measures.

The Entry and Approval application allows you to collect, enter, approve, and publish measures. The application shows the progress to-date of all measure data collected for the selected model. You can see which step is active, who owns it, and where it is in the workflow process. The Entry and Approval application supports data entry for measures with up to 5 dimensions.

Entry and Approval administrators can also create and edit measures sets, release measure sets, update defaults for the model, and load the Application Server model.

Features

Depending on the settings defined by the Entry and Approval administrator and the workflow steps you are assigned to, you can do some or all of the following in the Entry and Approval application:

- Data Entry users and approvers can use the *My Measure Sets* table to enter actual and current-period target data, historical information, and future target data.
- All users can review the entire list of measure sets in the *All Measure Sets* table. This table shows every measure set created by the Entry and Approval administrator for the current period for all users.
- Approvers can review and approve or reject data by clicking the arrow on the active step and displaying the *Approval* screen.
- Any user can open an Approval Log, showing the full audit trail of the selected measure set, by clicking *Approval Log*. The log captures detailed user interactions, including time stamps for approval, rejection and uploading of measures.
  The *Details* button on the Approval Log captures detailed user interactions, including time stamps for approval, rejection and uploading of measures. Users 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) both the previous value and new value are captured. The *Details* button is available only if the system administrator has configured the `EAValueAuditFlag` Java System Property for the strategy management application in SAP NetWeaver.

- Entry and Approval administrators who are assigned to measure sets and workflow steps can also enter data, and approve or reject as dictated by the particular step.
- Entry and Approval administrators can create and maintain measure sets, release measure sets, set Entry and Approval defaults, load data into the Application Server model and monitor the overall data collection effort for the Application Server model for each period.

The administrator of the strategy management application can access Entry and Approval from the Administrator.

More Information

Data Entry [page 137]

Data Approval [page 148]

Entry and Approval Administration [page 151]

1.3.1 Data Entry

Use

Data Entry users, reviewers, and approvers can enter actual and current-period target data, historical information, and future target data.

Features

Data Entry users, reviewers, and approvers have some or all of the following features, depending on settings defined by the Entry and Approval administrator:

- You can enter actual and current-period target data by clicking the yellow arrow on the active step to open the *Data Entry* screen. For more information, see Data Entry Screen [page 138].
- You enter historical information for the measure set by launching a Microsoft Excel spreadsheet using the *Historical Data* button. For more information, see Historical Data Entry [page 142].
- You can enter target data for later time periods by launching an Excel spreadsheet using the *Target Data* button. For more information, see Future Target Data Entry [page 144].
- The *My Measure Sets* table shows the measure sets assigned to you. The yellow arrow shows that the measure set is assigned to you and active in the current step. The gray arrow shows that the measure step is active for another user. The link from your name gives viewing privileges even when the measure set is active for another user, if you are assigned to one of the workflow steps in the measure set.

- The *All Measure Sets* table shows every measure set that has been created by the Entry and Approval administrator for the current period, including those assigned to other users.
- The *Completed* column shows a check when the measure set data is ready to be loaded into the Application Server model.
- You can choose a model from the *Database* dropdown list. Measure sets are listed on a model by model basis. If there is only one model, it is selected by default.
- You can refresh the view and repopulate the *Measure Sets* table with the latest status by clicking *Refresh* in the header bar.

1.3.1.1 Data Entry Screen

Use

Use the *Data Entry* screen to enter actual and target data for the measure set for the current period.

Prerequisites

To view the *Data Entry* screen, you are assigned to one of the workflow steps. The gray arrow in the *Measure Sets* table indicates that you are not assigned to the active step, but you can view it.

To enter data, you are assigned to the active Data Entry workflow step. The yellow arrow in the *Measure Sets* table indicates that you are assigned to the active step.

To see the *Download to Excel* link in the Data Entry table, you have permission to enter data using an Excel spreadsheet. Entry and Approval administrators activate this option by selecting *Input Current Period Data via Excel* in *Set Entry and Approval Defaults*. For information, see Entry and Approval Default Settings [page 153].

Features

You can do the following in the *Data Entry* screen:

- You enter actual data in the *Actual* column. If the actual measure is not part of the measure set, the *Actual* column does not have a field for data entry.
- You enter data in the *Target* column. The *Target* column is active only if the target measure is part of the measure set and the Entry and Approval administrator selected *Input/Overwrite Current Period Target Data* in *Set Entry and Approval Defaults* for this measure set. You enter data according to the following conditions:
    - If the *Target* column has a similar cell background as the *Actual* column, it means you can enter target data.
    - If the *Target* column has a gray background and is empty, it means that you do not have permission to enter target data.
    - If the *Target* column has a gray background with numbers, it means there is target data but you do not have permission to enter target data.

    - If the *Target* column is empty and does not show cells for data entry, it means that the target measure is not part of the measure set.
- You can enter data via an Excel spreadsheet using the *Download to Excel* link rather than using the table in the *Data Entry* screen.
- You can use the *Historical Data* link to see data from previous periods and the *Approval Log* link to see the progress of the measure set through the workflow process. When selected, the *Display Previous Actual* option displays the previous actual data values in the *Data Entry* table.
- Once the data entry is complete, you can submit the data by clicking *Submit for Approval* to move the data to the next step in the workflow process. If the measure set has only the Data Entry step, submitting the data completes the workflow process and the data is ready for the Entry and Approval administrator to load it into the Application Server model. If there are interim approval steps, the data is forwarded to a reviewer who can either accept or reject the data.
  As part of the submission, use the *Add a note* screen to capture comments for the *Approval Log*.
  Once a measure set is submitted for approval, it is no longer accessible for data entry and the *Actual* and *Target* cells are inactive.

> **i Note**
>
> In the table, dimensions with long names are truncated to 16 characters.

1.3.1.1.1 Entering Actual Data and Current-Period Target Data

Procedure

1. In the Entry and Approval main window, from the *Database* dropdown list, choose the model.
2. In the *Measure Sets* table, click the active yellow arrow to open the *Data Entry* screen.
3. In the *Actual* column, enter your data. Or, you can enter data using an Excel spreadsheet.

   > **i Note**
   >
   > Entry and Approval does not support a space as the thousands separator (for example 100 000). If you are running Entry and Approval in a language other than English, you must use something other than a space for the thousands separator.
4. If the measure set has target data and you have user permission to enter target data, enter it in the *Target* column.
5. To see the previous period *Actual* numbers in the *Data Entry* table, select the *Display Previous Period Actual* box. A new column opens in the table. If there is no data for the previous period, *N/A* displays in the column.
6. To see both *Actual* and *Target* numbers for all previous periods, click *Historical Data*. The historical record appears in a new window.

7. Do one of the following depending on whether you enter all your data during the current session:
   - If you have entered all your data, click *Submit for Approval* to pass the data to the next step in the workflow.
   - The *Save Data* functionality is valid only when the worksheet is opened from the Entry and Approval application. If you have not entered all your data during the current session, you still may want to click *Save Data* to upload your work to the server. The saved data will be available the next time the worksheet opens from the application. You can create a local copy of the data entry worksheet but it is a reference version only. If you do not want to save your initial work to the server, you can copy from the local version to a new worksheet opened from the Entry and Approval application.
8. Use the *Add a Note* dialog box to enter any relevant information for the recipient. Click *Submit*. The measure set is no longer accessible for data entry and the *Actual* and *Target* cells are inactive.
9. To enter data for another measure set, select it from the *Select a Measure* set to display below dropdown list. Or, select a different model from the *Database* dropdown list and then select a measure set.
10. To return to the Entry and Approval main window, click *Entry and Approval Home*.

1.3.1.1.2 Data Entry in Excel

Use

Use an Excel spreadsheet to enter actual and target data for the measure set for the current period, rather than the *Data Entry* window.

Prerequisites

A measure set should not have more than 500 rows. If you exceed this number, the *Download to Excel* link becomes unavailable for the measure set, even if you have permission to enter data using Excel.

You have permission to enter data using an Excel spreadsheet, and you can see the *Download to Excel* link in the *Data Entry* table. Entry and Approval administrators activate this option by selecting *Input Current Period Data via Excel* in *Set Entry and Approval Defaults*. For information, see Entry and Approval Default Settings [page 153].

You are assigned to the active Data Entry workflow step. The yellow arrow in the *Measure Sets* table indicates that you are assigned to the active step.

Features

You can do the following:

- For the current period, you enter actual data in the *Actual* column. If the actual measure is not part of the measure set, the *Actual* column has a gray background in the worksheet.

- You can enter data in the *Target* column. The *Target* column is active only if the target measure is part of the measure set and the Entry and Approval administrator selected *Input/Overwrite Current Period Target Data* in *Set Entry and Approval Defaults* for this measure set. You enter data in the *Target* column, according to the following conditions:
    - If the *Target* column has available cells, it means you can enter target data.
    - If the *Target* header is unavailable, it means that you do not have permission to enter target data.
    - If the *Target* header is unavailable, but the column has numbers, it means there is target data but you do not have permission to enter target data.
    - If the *Target* column has a gray background, it means that the target measure is not part of the measure set.
- If you have many rows, you can organize the rows by column to find the measures using the *Sort Rows* option in Excel.

> **i Note**
>
> If you want to organize rows using the Excel features, you must unprotect the sheet first.

Activities

Enter actual and current-period target data and click *Save Data* to save the data in the strategy management application. You must then populate the *Data Entry* table with the new values by clicking *Refresh* in the *Data Entry* screen.

1.3.1.1.3 Entering Actual Data and Current-Period Target Data in Excel

Procedure

1. In the Entry and Approval main window, from the *Database* dropdown list, choose the model.
2. In the *Measure Sets* table, click the active yellow arrow to open the *Data Entry* screen.
3. Click *Download to Excel*. At the username and password prompt, specify your Web authentication username and password. Click *OK*. Then, at the *Excel Data Entry* logon, specify your Web authentication username and password. Click *OK*. The data entry worksheet opens.

> **i Note**
>
> If your browser settings for ActiveX scripting are set to *Prompt* you are prompted to accept the ActiveX every session, but only the first time per session. The ActiveX prompt may push the connection dialog box behind the Entry and Approval window. Press `ALT` + `TAB` to the Excel icon to continue.

4. In the *Actual* column, enter your actual data. If you have many rows, click *Sort Rows* to organize the rows by column.
5. If the measure set has target data and you have user permission to enter target data, enter it in the *Target* column.
6. Do one of the following, depending on whether you enter all your data during the current session:
   - If you have entered all your data, click *Save Data* to save your changes. Then, select *File* > *Exit* to close the spreadsheet. When prompted to save the Excel spreadsheet, click *No*.
   - The *Save Data* functionality is valid only when the worksheet is opened from the Entry and Approval application. If you have not entered all your data during the current session, you still may want to click *Save Data* to upload your work to the server. The saved data will be available the next time the worksheet opens from the application. You can create a local copy of the data entry worksheet but it is a reference version only. If you do not want to save your initial work to the server, you can copy from the local version to a new worksheet opened from the Entry and Approval application.
7. Return to the Entry and Approval Data Entry window, and click *Refresh* to update the table.
8. Submit the data for approval.
9. Use the *Add a Note* dialog box to enter any relevant information for the recipient. Click *Submit*. The measure set is no longer accessible for data entry and the *Actual* and *Target* cells are inactive.
10. To enter data for another measure set, select it from the *Select a Measure* set to display below dropdown list. Or, select a different model from the *Database* dropdown list and then select a measure set.
11. To return to the Entry and Approval main window, click *Entry and Approval Home*.

1.3.1.2 Historical Data Entry

Use

Use the Historical Data Entry Excel spreadsheet to enter data from earlier time periods. Historical data is defined as the period range from the start period of the Application Server model *Date Range* through the *Current Period* minus one.

> **i Note**
>
> There is no workflow control over any data entered via this spreadsheet. If you are an Entry and Approval administrator, consider how or when users should enter historical data. Any data from the current period, once it goes through workflow control, becomes “historical” when the current period has moved on to the next month. If users have permission to enter historical data, the data can later be modified without oversight if these permissions are still in place. After the initial loading of the Application Server model with the historical data, you may want to reset the date range to the current period only. Or, you may want to revoke permission for users to enter historical data.

Prerequisites

The *Historical Data* link may or may not be visible, depending on defaults settings determined by the Entry and Approval administrator.

The Entry and Approval administrator has set the date range to start before the current period.

A measure set should not have more than 500 rows. If you exceed this number, the system disables the *Historical Data* link for the measure set, even if you have permission to enter historical data.

You have permission to enter historical data and you can see the *Historical Data* link in the Entry and Approval main window. Entry and Approval administrators activate this option by selecting *Input historical data (actual and target)* in *Set Entry and Approval Defaults*. Entry and Approval administrators always have permission to enter historical data, regardless of the settings.

Features

Historical data entry has these features:

- For each historical period, you enter actual data in the *Actual* column and target data in the *Target* column. If either the *Actual* or *Target* columns have a gray background, it means that the actual or target measures may exist but are not included in the measure set.
  The worksheet heading displays information about the measure set, the start date and end date of the entire period, and the current period.
- If you have many rows, you can organize the rows by column to find the measures using the *Sort Rows* option in Excel.

  > i Note
  >
  > If you want to organize rows using the Excel features, you must unprotect the sheet first.

- The Excel spreadsheet acts as a template that holds the data temporarily until it is passed to Entry and Approval.

More Information

Entering Historical Data [page 144]

Entry and Approval Default Settings [page 153]

1.3.1.2.1 Entering Historical Data

Procedure

1. In the Entry and Approval main window, from the *Database* dropdown list, choose the model.
2. In the *Measure Sets* table, click *Historical Data*. Then, in the *Measure Sets* dialog box, choose the measure set for which you adding historical data. If you do not see the measure set listed, the measure set does not include an historical period.
3. Click *OK*.
4. Depending on your system setup, you may be prompted for a username and password. Enter the appropriate values and click *OK*.
5. At the Excel Data Entry logon, specify your Web authentication username and password. Click *OK*. The historical data worksheet opens.

   > **i Note**
   >
   > If your browser settings for ActiveX scripting are set to *Prompt* you are prompted to accept the ActiveX every session, but only the first time per session. The ActiveX prompt may push the connection dialog box behind the Entry and Approval window. Press `ALT` + `TAB` to the Excel icon to continue.

6. Use the *Actual* and *Target* columns to enter your data. If you have many rows, click *Sort Rows* to organize the rows by column to find the measures.
7. Do one of the following depending on whether you enter all your data during the current session:
   - If you have entered all your data, click *Save Data* to save your changes. Then, select *File* > *Exit* to close the spreadsheet. When prompted to save the Excel spreadsheet, click *No*.
   - The *Save Data* functionality is valid only when the worksheet is opened from the Entry and Approval application. If you have not entered all your data during the current session, you still may want to click *Save Data* to upload your work to the server. The saved data is available the next time the worksheet opens from the application. You can create a local copy of the data entry worksheet but it is a reference version only. If you do not want to save your initial work to the server, you can copy from the local version to a new worksheet opened from the Entry and Approval application.

1.3.1.3 Future Target Data Entry

Use

You can enter future target data using an Excel spreadsheet. Target data is defined as the period range from the current period of the Application Server model date range through the end date as long as the end date is after the current period.

⚠ Caution

There is no workflow control over any future data entered via the Excel spreadsheet. You may want to consider how or when users enter this data. Users can change the data without oversight if these permissions are in place. After the initial loading of the Application Server model with the future data, you may want to reset the date range to the current period only. Alternatively, you may want to revoke permission for users to enter future data.

Prerequisites

The *Target Data* link may or may not be visible depending on defaults settings determined by the Entry and Approval administrator.

The Entry and Approval administrator has set the date range to end in a period after the current period.

A measure set should not have more than 500 rows. If you exceed this number, the system disables the *Target Data* link for the measure set, even if you have permission to enter target data.

You have permission to enter future target data and you can see the *Target Data* link in the Entry and Approval main window. Entry and Approval administrators activate this option by selecting *Input historical data (actual and target)* in *Set Entry and Approval Defaults*. Entry and Approval administrators always have permission to enter historical data, regardless of the settings.

Features

Future target data entry has these features:

- For the current period and each future period, you enter target data in the *Target* column. The *Actual* column has a gray background in the worksheet, and you cannot enter any actual data.
- If you have many rows, you can organize the rows by column to find the measures using the *Sort Rows* option in Excel.

  ℹ Note

  If you want to organize rows using the Excel features, you must unprotect the sheet first.
- The Excel spreadsheet acts as a template that holds the data temporarily until it is passed to Entry and Approval.
- The worksheet heading displays information about the measure set, the start date and end date of the entire period, and the current period.

More Information

Entering Future Target Data [page 146]

Entry and Approval Default Settings [page 153]

1.3.1.3.1 Entering Future Target Data

Procedure

1. In the Entry and Approval main window, from the *Database* dropdown list, choose the model.
2. In the *Measure Sets* table, click *Target Data* to display the *Measure Sets* dialog box.
3. Choose the measure set for which you are adding target data and click *OK*.

   If you do not see the measure set listed, it means that the measure set has no target measures assigned.
4. At the username and password prompts, specify your Web authentication username and password and click *OK*.
5. At the Excel Data Entry logon, specify your Web authentication username and password and click *OK*. The target worksheet opens.

   > **i Note**
   >
   > If your browser settings for ActiveX scripting are set to *Prompt* instead of *Enable*, you are prompted to accept the ActiveX every session, but only the first time per session. The ActiveX prompt may push the connection dialog box behind the Entry and Approval window. Press `ALT` + `TAB` and switch to the Excel icon to continue.
6. Use the *Target* column to enter your data.

   If you have many rows, click *Sort Rows* to organize the rows by column to find the measures for which you are entering data.
7. Do one of the following depending on whether you enter all your data during the current session:
   - If you have entered all your data, click *Save Data* to save your changes Then, select *File* > *Exit* to close the spreadsheet. When prompted to save the Excel spreadsheet, click *No*.
   - The *Save Data* functionality is valid only when the worksheet is opened from the Entry and Approval application. If you have not entered all your data during the current session, you still may want to click *Save Data* to upload your work to the server. The saved data is available the next time the worksheet opens from the application. You can create a local copy of the data entry worksheet but it is a reference version only. If you do not want to save your initial work to the server, you can copy from the local version to a new worksheet opened from the Entry and Approval application.

1.3.1.4 Historical Data Overview

Use

Use the *Historical Data* overview to see a listing of all data for the selected measure set that was loaded into the Application Server model in previous time periods.

Prerequisites

You are part of a measure set's workflow process and assigned to a workflow step.

Features

The *Historical Data* view shows the following information:

- Measure and dimension member combinations that comprise the measure set
- Historical time periods reported in the view
- Any actual and target values entered during that time period

Activities

To see the *Historical Data* overview, click *Historical Data* in the *Data Entry* window for the selected measure set.

1.3.1.5 Notification Subscriptions

Use

You receive a notification any time a measure set becomes active for a workflow step to which you are assigned. Notifications appear in the *My Notifications* section of the *Home* tab or they are delivered in e-mail, or both, depending on your subscriptions settings. Notifications apprize users of next steps and keep the measures process moving forward.

Prerequisites

You have access to the *Home* tab. If you do not see the *Home* tab in the application, it means that your administrator has not given you access to it.

Features

You can do the following to specify how you want to receive notifications:

- You can specify that you want to receive notifications in the *Home* tab.
- You can specify that you want to receive notifications in the *Home* tab and also by e-mail.

Users assigned to the data entry step receive a notification when the measure set is released.

Users assigned to the approval step receive a notification when the measure set has data and is ready for approval.

Users assigned to the data entry step receive a notification if the measure set is rejected and the measure set returns to the user for data entry.

More Information

Specifying How to Receive Notifications [page 179]

E-Mail Notification [page 181]

1.3.2 Data Approval

Use

Use the *Approval* screen to approve or reject the selected measure set's data for the current period.

Depending on your setup, the Approval step may be called *Approval* or some other name.

Prerequisites

The measure set has an Approval step (if there is no Approval step, the measure set moves directly from *Data Entry* to *Completed* status), and you are assigned to the active Approval workflow step. The colored arrow in the *Measure Sets* table indicates that you are assigned to the active step.

Features

You can do the following in the *Approval* screen:

- You can review and approve or reject entered data by clicking the yellow arrow on the active step and displaying the *Approval* screen. As part of the approval, use the *Add a Note* screen to capture comments for the *Approval Log*.
  Approve accepts the data and moves it forward in the workflow process. *Reject* rejects the data and moves it backward in the workflow process. The measure set moves forward or backward as follows:
  - If approved, the measure set moves forward to the next step in the process. If the next step is another Approval step, then that reviewer must either approve or reject the data. If the next step completes the workflow, the data is ready for the Entry and Approval administrator to load it into the Application Server model.
  - If rejected, the measure set moves back to the previous step in the process. If the previous step is the Data Entry step, the measure set is returned for a new round of data entry. If the previous step is an

Approval step, the measure set is returned to the previous reviewer. The previous reviewer can in turn either reject the data or approve it again.

You can also use the *Historical Data* link to see data from previous periods and the *Approval Log* link to see the progress of the measure set through the workflow process. You do not have permission to enter or update data when it is in the Approval step.

- You can view the *Approval Log*, which shows the full audit trail of the selected measure set, by clicking *Approval Log*. The log captures detailed user interactions, including time stamps for approval, rejection and uploading of measures.
- You can review the measure set's historical data.

> **i Note**
>
> In the table, dimensions with long names are truncated to 16 characters.

More Information

Approving or Rejecting Data [page 149]

Approval Log [page 150]

Historical Data Overview [page 146]

1.3.2.1 Approving or Rejecting Data

Procedure

1. From the *Database* dropdown list in the Entry and Approval main window, choose the model. If there is only one model, it is selected by default.
2. In the *Measure Sets* table, click the active yellow arrow to open the *Approval* screen.
3. Do one of the following actions:
    - Click *Approve* to accept all the entered data.
    - Click *Reject* to reject the data.
4. In the *Add a Note* dialog box, enter any relevant information for the recipient.
5. Click either *Approve* or *Reject*, depending on the status.
6. To review data for another measure set, choose it from the *Select a measure set to display below* dropdown list. Or, choose a different model from the *Database* dropdown list and then select a measure set.
7. To return to the Entry and Approval main window, click *Entry and Approval Home*.

1.3.2.2 Approval Log

Use

Use the *Approval Log* to see the record of activity for a measure set. The log provides a full audit trail that captures detailed user interactions, including time stamps for approval, rejection and uploading of measures.

Prerequisites

You are an administrator or user assigned to a workflow step for the selected measure set.

You are an Entry and Approval administrator to be able to view all approval logs.

To view and use the *Details* button, the system administrator has configured the `EAValueAuditFlag` Java System Property for the strategy management application in SAP NetWeaver.

Features

The *Approval Log* shows the following activity for the selected period:

- The status of the measure set in the workflow process (released, data entered, approved, or rejected).
- The owner who performed the activity for a given workflow step.
- The date and time the workflow step was completed.
- Any notes that were added when completing a workflow step.

The *Details* button, if available, displays a detailed log about data entered in the Entry and Approval Data Entry screen or Excel spreadsheet for the current time period.

You can see records for every data value written from the 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 data for quarterly or yearly measures is listed in the first month of the quarter or year.

Activities

- To view the *Approval Log* from the Entry and Approval main window, click *Approval Log*. From the *Measure Set* dropdown list, select the measure set whose log you want to view. From the *Period* dropdown list, select the period to view. All activity for this measure set in this time period is displayed.
- To view the *Approval Log* from the *Data Entry* or *Approval* screen of the selected measure set, click *Approval Log* to display the activity log for current time period.

1.3.3 Entry and Approval Administration

Use

Entry and Approval administrators perform a basic set of tasks for each Application Server model to which they are assigned oversight. For information on the general flow of Entry and Approval administrator tasks, see Administration Process [page 152].

Prerequisites

You are an Entry and Approval administrator assigned to an Application Server model.

The strategy management administrator has completed the initial setup of the Application Server model.

In some environments, the Entry and Approval administrator may also have strategy management administrator privileges, including the ability to define model and user access.

Features

You can do the following in the Entry and Approval main window:

- If you have not assigned yourself to a measure set, you see only the *All Measure Sets* table.
- You can create and edit measure sets for the selected model, including which users have data entry privileges for each measure set, by choosing the model from the *Database* dropdown list and clicking *Create Measure Sets*.
- You can release a single measure set for data entry using the yellow *Release Now* arrow. For more information, see Maintaining Measure Sets [page 158].
- You can open a measure set for editing using the link from the measure set name in the *Measure Set* column.
- You enter historical information for the measure set by launching an Excel spreadsheet using the *Historical Data* button. For more information, see Historical Data Entry [page 142].
- You can enter target data for later time periods by launching an Excel spreadsheet using the *Target Data* button. For more information, see Future Target Data Entry [page 144].
- You can release all currently unreleased measure sets for data entry using the *Release All* button.
- You can load the Application Server model with the current data using the *Load Model* button.
- You can launch a window to define settings by choosing the model from the *Database* dropdown list and clicking *Set Defaults*. These settings include the available measures, workflow steps, current period and date range, and data entry permissions.
- You can reassign users and resetting measure sets.
- You can update existing definitions for a selected model, including available measures, workflow steps, and time period.
- You can monitor the overall data collection effort for the Application Server model for each period

The administrator can also open an *Approval Log* showing the full audit trail of the selected measure set, by clicking *Approval Log*. The log captures detailed user interactions, including time stamps for approval, rejection and uploading of measures. This is the same feature that users have.

More Information

Administration Process [page 152]

Entry and Approval Default Settings [page 153]

Measure Set Development [page 154]

Application Server Model Loading and Updating [page 160]

1.3.3.1 Administration Process

Use

Entry and Approval administrators perform a basic set of tasks for each Application Server model to which they are assigned oversight. The process below identifies the general flow of Entry and Approval administrator tasks.

Prerequisites

You are an Entry and Approval administrator assigned to an Application Server model.

The strategy management administrator has completed the initial setup of the Application Server model.

In some environments, the Entry and Approval administrator may also have strategy management administrator privileges, including the ability to define model and user access.

Process

1. Set Entry and Approval defaults for the current cycle of data entry.
2. Create measure sets and assign users to workflow steps.
3. Optional: Enter historical data and future target data for each measure set.
4. Release measure sets into the workflow process.
5. Optional: Reassign workflow steps, as needed.
6. Monitor the workflow process, and when measure sets are complete, load the data into the Application Server model.
7. Change the current period and otherwise update the Entry and Approval default settings for the next cycle of data entry.

More Information

[Entry and Approval Default Settings [page 153]]
[Creating Measure Sets and Assigning Users to Workflow Steps [page 155]]
[Maintaining Measure Sets [page 158]]
[Historical Data Entry [page 142]]
[Future Target Data Entry [page 144]]
[Loading Data Into an Application Server Model [page 161]]

1.3.3.2 Entry and Approval Default Settings

Use

Use *Set Defaults* to update default settings for the Entry and Approval application and the selected performance management model.

Once you set defaults, users can then use the Entry and Approval application to manually enter data into a performance management model and monitor the data entry effort through a workflow process. Once the data entry process has been completed, you can load the data into the performance management model using the Entry and Approval application.

> **i Note**
>
> The Entry and Approval administrator can also set defaults in the administration application for the currently selected model by clicking *Entry and Approval*.

Prerequisites

- You are an Entry and Approval administrator assigned to an Application Server model.
- The strategy management administrator has completed the initial setup of the Application Server model.

> **i Note**
>
> In some environments, the Entry and Approval administrator may also have strategy management administrator privileges, including the ability to define model and user access.

Features

You can do the following to set Entry and Approval defaults:

- Set default settings for each performance management model that is updated by the Entry and Approval application. You can set the current period and overall date range for the data, the general workflow steps to be followed in Entry and Approval, as well as which users to function as Entry and Approval administrators. For more information, see Setting Entry and Approval Defaults [page 129].
- Update the following Entry and Approval defaults on an ongoing basis:
  - You need to update the current period. The current period is the month that falls under the Entry and Approval workflow process.
    Once the current period is defined and the workflow process starts in Entry and Approval, the default period cannot be changed until the workflow process is completed.
  - You may need to change the Application Server model date range, depending on how you have defined your model and the requirements of your data.
    If you are entering and loading data monthly, you need to set the start and end dates for the new current period on a monthly basis.
    If you have previously loaded historical data, you should set the start date to the current period unless you have additional historical data to load.
    If you have target data beyond the current period, set the end date to correspond to the target end date. If you do not have target data or if the target data is included in the current period, set the end date the same as the current period.

> **i Note**
>
> If there are released measure sets that are not completed for the current model, you cannot update Entry and Approval defaults for that model.

1.3.3.3 Measure Set Development

Use

You create measure sets to group dimension member combinations for the purpose of data entry. You can create as many measure sets for a particular Application Server model as are necessary for optimal data entry and review.

The underlying Application Server model controls the list of periodicity/dimension(s), the corresponding measures, and whether data entry is allowed at the base level only or at all dimension levels.

Each measure set has its own workflow tasks. Tasks include the required data entry step and any optional approval steps for monitoring the entered data. You define the total number of steps when setting Entry and Approval defaults, but any given measure set may contain all or a subset of the approval steps. When assigning resources, think not only about the user responsible for the data entry but all the steps in the workflow process.

Features

You can do the following to develop measure sets:

- Create measure sets with one measure or multiple measures.
  You can group any number of dimension member combinations in a measure set as long as the measures have the same dimensionality and periodicity. Conversely, a single measure can be split across multiple measure sets.
  There is a limit of 500 members (rows) per measure set if users plan to use the Excel spreadsheet for data entry. Exceeding that number requires that users enter data in the *Data Entry* screen only. The system disables the *Historical Data* and *Future Target Data* Excel spreadsheets for a measure set exceeding 500 rows.
- Maintain measure sets by editing them, releasing them, reassigning a workflow step, deleting them, or resetting them. For more information, see Maintaining Measure Sets [page 158].

Example

A measure set is created for the *Ecosys Count* measure combined with the dimensions *Account_Type* and *Territory*. The *Account_Type* dimension has three members: *Distributor*, *ISV_PM*, and *SP-Sell*. The *Territory* dimension has four members: *Asia*, *Emerging Channels*, *Europe*, and *North America*.

If responsibility is divided up by territory, four measure sets might be created, one for each territory. Each territory would then contain all three account types. However, when assigning resources, think not only about the user responsible for the data entry but also all the steps in the workflow process. If the sales manager for Europe is responsible for all accounts in that territory, but there is a different reviewer for each European account, separate measure sets would be required, one for *Europe/Distributor*, one for *Europe/SISV-PM*, and one for *Europe/SP-Sell*.

More Information

Setting Entry and Approval Defaults [page 129]

Creating Measure Sets and Assigning Users to Workflow Steps [page 155]

Maintaining Measure Sets [page 158]

1.3.3.3.1 Creating Measure Sets and Assigning Users to Workflow Steps

Use

You create measure sets to group dimension member combinations for the purpose of data entry during the workflow process.

Prerequisites

You are an Entry and Approval administrator assigned to an Application Server model.

You have set defaults that specify which measures are available for the measure sets.

Procedure

1. In the Entry and Approval application, from the *Database* dropdown list, choose the model.
2. Click *Create Measure Sets*.
3. From the *Dimensions* dropdown, select the periodicity and dimension combinations that contain the measures you want to add to the measure set. A measure set can contain measures from one periodicity and multiple dimensions.
4. In the *Measure Set* text box, type a name for the measure set. The measure set name has a limit of 24 characters including spaces.
5. Add one or more combinations of a measure and its associated dimensions to the measure set. If dimensions have members, then the measure is associated with dimension members. From the *Measures* dropdown list, select a measure. Or, select *ALL* to display all actual and target measures.

   > **Note**
   >
   > - If there is only one measure associated with the periodicity and dimension selection, then only that measure is available from the drop-list.
   > - The *ALL* option is available only if the measures are associated with the same level of the dimension. If the measures are associated with different levels of a dimension, then *ALL* is not available from the list.

6. From each dimension dropdown list, select a dimension member to display in the table. If a dimension has no dimension members, then only the dimension name is listed. Dimension members are organized as follows:
   - If the Application Server model allows data to be entered at the base level only, select a single dimension from the *INPUT* list to display in the table. Or, select *ALL MEMBERS* to display all dimension members in the table.
   - If the Application Server model allows data to be entered at all levels, and the model has even dimension hierarchies, the dropdown list groups dimension members by input level and output level, and lists the dimension level names for that dimension. From the *INPUT* and *OUTPUT* lists, select a single dimension to display in the table. From the *LEVEL* list, select a dimension level, and all members from that level are listed in the table. Or, select *ALL MEMBERS* to display all dimension members in the table.
   - If the Application Server model allows data to be entered at all levels, and the model has uneven hierarchies, the *Dimension name* dropdown list groups dimension members by input level and output level. From the *INPUT* and *OUTPUT* lists, select a single dimension to display in the table. Or, select *ALL MEMBERS* to display all dimension members in the table.

     > **Note**
     >
     > For uneven hierarchies, any dimension member without children is listed under *INPUT* in Entry and Approval, even if it is at the output level in the Application Server model.

7. Once you have a combination of measures and dimensions listed in the table, do any of the following to add rows to the measure set:
    - Select individual checkboxes in the first column to add those rows to the measure set.
    - Select the *All* box to select all rows.
    - Select a range of rows by typing the range in the *Select Range* text box and clicking *Select*.
    - Reassign rows to this measure set from a different measure set that is not yet released. To do so, click *Update Measure Set Rows* to remove them from the not-yet-released measure set and add them to the new measure set. If there are no rows that meet this criteria, this button is unavailable for selection.

    > **i Note**
    >
    > - Any previously assigned rows show their measure set names in the *Measure Set* column.
    > - When you select a checkbox, the measure set name appears in the *Measure Set* column for that row.
    > - If you click *Update Measure Set Rows*, the measure set is automatically saved. If you no longer want the measure set, follow the steps to delete it.
    > - If a measure set has been released, any rows associated with that measure set has grayed checkboxes and you cannot select them for the new measure set.
    > - There is a limit of 500 rows in the measure set if you plan for users to enter data with the Excel spreadsheet. If you exceed that number, you can still save the measure set but users can enter data only in the Data Entry screen. The system disables historical and future target Excel spreadsheets for a measure set larger than 500 rows.
    > - **Important:** Once a measure is included in a measure set, you cannot change that measure's periodicity or dimensionality in the underlying Application Server model. The system stores data according to the measure. Changing its configuration causes a script error and failure of the data.

8. In the *Resources* section, assign users to workflow steps. Select a name from the left-hand list and click the *Add* arrow next to the appropriate workflow step to add the name to that step. Optionally, you can click the *Remove* arrow to remove a name from a step.

    > **i Note**
    >
    > - Each step can have only one user assigned to it.
    > - Data entry is a required step and you must assign a user to this step before you can save the measure set. All other workflow steps are optional.
    > - In the Entry and Approval main window, only the first 15 characters of the name display in the *My Measure Sets* and *All Measure Sets* tables.
    > - By default, all users are listed in the *Resources* section. If the strategy management administrator set up a role called `SSM_Entry_And_Approval`, then only the members of that role are listed in the *Resources* section.

9. Optional: Click the *Show Current Selections* link to view your current selections for this measure set. **Tip:** If you are building a measure set from combinations that cross a number of different dimension members, it is helpful to show the current selections so that you can preview everything that has been added so far.

    > **i Note**
    >
    > The *Show Current Selections* link only shows saved rows. To show current selections, you must first assign a data entry person and also save your current selections by clicking *Update Measure Set Rows*.

    When you are finished previewing your selections, click the *Back to Row Selections* link to return to the default view.

10. Save the measure set and return to the Entry and Approval main window. If you creating multiple measure sets for this model, click *Save & New* to create another measure set.

The measure set is now held in Setup mode until you release it into the workflow process.

1.3.3.3.2 Maintaining Measure Sets

Use

You can maintain measure sets by editing them, releasing them, reassigning a workflow step, deleting them, or resetting them.

Prerequisites

You are an Entry and Approval administrator assigned to an Application Server model.

You have set defaults that specify which measures are available for the measure sets.

Procedure

You can do the following in the Entry and Approval application to develop measure sets:

Function	Navigation	More Information
Create a measure set	Click *Create Measure Sets*.	For more information, see Creating a Measure Set and Assigning Users to Workflow Steps [page 155].

Function	Navigation	More Information
Edit a measure set	In the *Measure Sets* table, click the measure set to edit. In the *Edit Measure Set* dialog box, click *Back to Row Selections* to go to edit mode.	Use the *Edit Measure Set* dialog box to change the settings on saved measure sets. The measure set has the status of *Not Released*, or has been reset to *Not Released*. If a measure set is already released, you can reassign resources only. You can add or remove measures from the same periodicity/dimension(s) but you cannot select a different periodicity/dimension(s) with a new set of measures. Once a measure is included in a measure set, you cannot change that measure's periodicity or dimensionality in the underlying Application Server model. The system stores data according to the measure, and changing its configuration causes a script error and failure of the data. If you want to change the periodicity or dimensionality, you have to create another measure set.
Release a measure set	In the *My Measures Sets* table, click *Release Now* for each measure set you want to release. Or, click *Release All*.	You can release one or all measure sets into the workflow process at the data entry step. You can release a measure set at these times: • It is new. • It has gone through a workflow process and its current period has been reset in *Set Entry and Approval Defaults* and it is ready to be re-released. • It has gone through the workflow process and the measure set status has been reset to *Not Released*. A measure set is dormant until it is released into the workflow process. Each user assigned to a data entry step receives an e-mail notification (if mail domain properties to notify users has been implemented by the strategy management administrator). For more information, see Setting Entry and Approval Defaults [page 129].
Reassign a workflow step	In the *All Measure Sets* table, click the measure set you want to edit. In the *Resources* section, assign a different user to a workflow step by selecting a name and clicking the right arrow.	Once a measure set has been released, you can change the user previously associated with a workflow step. You can reassign any steps, no matter what stage the measure set is in the workflow process. You cannot assign new users to additional steps.

Function	Navigation	More Information
Reset a measure set to move the measure set back to a former step	Click *Reset*.	You can reset a measure set back to a previous workflow step even after the step is completed, after the current period has changed, or after the Application Server model has been loaded. You can reset all the way back to *Not Released* status.
Delete a measure set	In the *All Measure Sets* table, click the measure set you want to delete. In the *Edit Measure Set* dialog box, click *Delete*.	⚠ Caution The measure set is deleted even if it has been released into the workflow process.

1.3.3.4 Application Server Model Loading and Updating

Use

You can update a model with data from its measure sets.

Prerequisites

You are an Entry and Approval administrator assigned to an Application Server model.

Strategy management users are not connected to the model. If any user is connected, loading the model breaks the connection.

You are currently running the Entry and Approval main window.

Features

You can do the following when loading the Application Server model:

- You can load the Application Server model at any time and as often as required. With each load, data already in the model is replaced with the data in the Entry and Approval database table and new any data is added.
- You can load the Application Server model now or you can schedule the Application Server model load to update at a later time.
- You can load an Application Server model even if some measure sets are incomplete.
- Actual data for the current period is loaded only if the measure set has been marked as complete, protecting the integrity of the workflow process.
- All target data is loaded even if it is being entered on a period by period basis and the measure set is still in the workflow process.

- Actual data for historical periods is always loaded.

More Information

Loading Data Into an Application Server Model [page 161]

1.3.3.4.1 Loading Data Into an Application Server Model

Procedure

1. From the *Database* dropdown list, choose the model.
2. Click *Load Model*.
3. If some measure sets are incomplete, you are asked if you want to load the model anyway. Click *OK* to continue.
4. In the *Load Options* section, select one of the following depending on how you want to load the model:
   - *Load Model Now* updates the Application Server model immediately.
   - *Schedule Model Load* updates the Application Server model at a later time. From the dropdown lists, choose the *Run Date*, *Run Time*, and *Frequency* for the Application Server model load. You can also assign the task a name.

1.4 Standard Features of the Tabs

Use

You can use various standard features throughout most strategy management tabs.

> **i Note**
>
> You work with the tabs using the buttons provided by the application rather than the buttons provided by the browser window. Do not use the *Back*, *Forward*, *Refresh, or Reload* buttons provided by the browser window or else you have unexpected results that are not intended by the application.

Prerequisites

To use the *Add* link in the *Comments* section and the *New* or *Reply* button in the *Comments* dialog box, your role has permission to create comments. This permission is provided by your strategy management administrator.

To see the views marked by the *Mark This Page* link, you have access to the *Home* tab. This access is provided by your strategy management administrator.

Features

You can use the following standard features in any tab:

Feature	Navigation	More Information
Select a different context to work with	From the *Context* dropdown list, select the context	For more information, see Context Selection [page 164].
Read comments and replies about an object	In Initiatives, click *View Comment*. In other tabs, click the number next to the *Comments* label, where applicable.	Use comments to share important information that is not covered in the description. For more information, see Reviewing Comments and Replies [page 166].
Add comments or replies about a selected item	In Initiatives, click *Add Comment*. In other tabs, click the *Add* link next to the *Comments* label, where applicable.	For more information, see Adding, Editing, and Removing Comments and Replies [page 165]
Print a view	Click *Print*	This link is available in some tabs. For more information, see Printing Objects [page 170].
Export a view to a `TXT` file	In *Initiatives* or *Scorecard*, click *Export*.	For more information, see Exporting to TXT [page 169].
Add a view to the default *Briefing Book*	Click the *Book* icon and then choose *Capture to Book*	You must have already created a *Briefing Book*. For information, see Adding content to a briefing book [page 251].
Set a default briefing book	Click the *Book* icon and then choose *Set Default Book*	You must have already created a *Briefing Book*.

Feature	Navigation	More Information
Set standard user preferences such as items to open upon startup, accessibility options that make using the application easier, and language and re-gionsettings	Click *Preferences*, then set the particular settings you desire.	For more information, see User Preferences [page 163].
Go to other strategy management tabs	Click the appropriate tab.	None
Bookmark a view as a URL or as a link in the *Home* tab	Click *Mark this Page*.	For more information, see Book-marking a View [page 168].
Read an e-mail notification	None	For more information, see E-Mail Notification [page 181].

1.4.1 User Preferences

You can set defaults for items that appear upon starting the application. You can also customize the display of the interface of Strategy Management screens and set options based on language and region.

Features

Category of Preference	Available Settings
Startup	You can set the following types of items that will display by default upon starting the application: • Context • Tab • Report • Dashboard • Briefing book You can also choose to display tooltips on charts by default.
Accessibility	You can make selections for the following items that may help you use the application more effectively: • Theme • Color palette to more clearly identify levels within score-card rows
Language and Region	• Language • Number format

Activities

To view and modify your user preferences, perform the following steps:

1. Choose *Preferences*.
2. Select an item from one or more of the dropdown lists, then choose *Save*.

You may be asked to confirm your selections and to restart the application.

1.4.2 Context Selection

Use

A context represents a combination of one scorecard, goal diagrams, a cause and effect diagram, themes or pathways, and associated initiatives. It may be a subset of these items, depending on the way the context is set up and the tabs that are available to you. When you select a context, you refresh the current window with the information and objects associated with that context.

Prerequisites

Your context administrator has assigned your role to at least one context. If your *Context* dropdown list is read-only, it means that there is only one context available to you.

Features

When you start the application, a default context is used. The default context is set using *Preferences* > *Startup*.

During a session, you can switch to a different context by selecting one from the *Context* dropdown list in any application.

For example, if you are displaying the *Scorecard* tab with the *Corporate* context, and you choose the *Finance* context, you remain in the *Scorecard* tab but you view the KPIs and objectives associated with the *Finance* context. If you switch to the *Initiatives* tab, you view the initiatives for the *Finance* context.

More Information

Standard Features of the Tabs [page 161]

1.4.3 Adding, Editing, and Removing Comments and Replies

Use

You can add a comment or reply for the selected object. For example, if you are displaying the *Initiatives* tab, you can select an initiative and add a comment.

New, modified, or deleted comments are automatically refreshed whenever you restart a new application session, or you switch from one context to another.

Prerequisites

Your role has permission to create comments and replies. If you do not see a *New* or *Reply* pushbutton in the *Comments* dialog box, then you do not have the ability to create comments.

Procedure

Do any of the following:

Function	Navigation	More Information
Add a comment	Click the link to add comments, or click the link to view comments, and then click *New*.	When adding a comment, you can control whether the comment expires and the date on which it expires. You can indicate whether the comment applies to a specific reporting period. You can later filter by reporting period, if necessary. You must select at least one role who can review this comment. As the author of the comment, you can also see this comment even if you are not a member of the group that you assigned to the comment. If you enter a URL, it appears as a live title link in the information window when you select the comment in the *Comment* dialog box.

Function	Navigation	More Information
Reply to a comment	Click the link to view comments, and then click *Reply*.	Once a comment has a reply, the comment owner can no longer edit the comment.
Edit a comment	Click the link to view comments, and then click *Edit*	When editing comments, you can filter on all items, including the context and type. The user (owner) who creates a comment can edit that comment only if it does not have any replies associated with it. No one can edit replies.
Delete a comment or reply	Click the link to view comments, and then click *Delete*.	The user (owner) who creates a comment can delete that comment only if it does not have any replies associated with it. The user (owner) who creates a reply cannot delete that reply. i Note The strategy management administrator can delete any comments or replies.

More Information

Reviewing Comments and Replies [page 166]

Standard Features of the Tabs [page 161]

1.4.4 Reviewing Comments and Replies

Context

A comment is an annotation that you can review about an objective, perspective, KPI, initiative, pathway, theme, goal diagram, or cause and effect diagram. A reply is an annotation about a comment.

You can view comments and replies.

If there are over 100 comments and replies about an object, it may take a little while for the comments and replies to appear.

New, modified, or deleted comments are automatically refreshed whenever you restart a new application session or you switch from this context to another and then back to this context.

Procedure

1. Select the object containing comments, and then click the link to view comments.

   The link to view comments differs between tabs, and does not appear in every tab.
2. You can do the following to review comments in the *View comments* dialog box:

Function	Navigation	More Information
Review comments and replies	Select a comment or reply from the *Subject* column. The actual comment appears in the *Details* box.	You see the comments and replies about this item that you created or that another user created and gave access to you. You can review unread comments and comments that you have already reviewed.
Review comments and replies from a different context	Select a context from the *Context* dropdown list.	None
Review comments and replies about a particular object in this tab or another tab	Select the type of object from the *Type* dropdown list. Then select the specific object from the *Name* dropdown list.	None
Review all comments or just unread comments	Click *Display only unread comments* to isolate the list to unread comments.	None
Control the display of expired comments	Click *Include Expired*.	Expired and non-expired comments are displayed together. You can review the *Expiration Date* to find out if a comment never expires, or expires on a particular date. If a comment is expired, all of its replies are expired too.
View the reporting period associated with comments that have one	Click *Display reporting period*.	You can filter comments by reporting period. Click *Advanced Filters*, then select a reporting period.

Function	Navigation	More Information
Display comments created by a particular user	Click *Advanced Filters*, then select the author from the *Author* dropdown list.	None
Display comments created within a particular date range	Click *Advanced Filters*. Select the start and end date by clicking the *Creation Date* calendar icons and then clicking *Search*.	None
Display comments that expire within a particular date range	Click *Advanced Filters*. Select the start and end date by clicking the *Expiration Date* calendar icons and then clicking *Search*.	None
Display comments whose subject contains a particular keyword	Click *Advanced Filters*. Enter a search string in the *Keyword* dropdown list and click *Search*.	None
Control the display of filter options	Display all filter options by clicking *Advanced Filters* . Collapse the list by clicking *Basic Filters*.	None
Reset filters	While the *Advanced Filters*. are displayed, click *Reset Filters*.	All filters reset to their original settings.
Select a comment's associated links	Click *Advanced Filters*. Select the comment. In the *Details* section, click any of the associated links.	The URL is displayed in a new browser window.

1.4.5 Bookmarking a View

Use

You can bookmark any view. The bookmark can be a URL that you can distribute, or it can be a link in the *My Bookmarks* section of your *Home* tab.

Prerequisites

The system administrator has given you access to the *Home* tab. If you have a *Mark This Page* link, it means that you have access to the *Home* tab.

Features

You can add a report view as a link in the *My Bookmarks* section of your *Home* tab.

Activities

To bookmark a view, click *Mark This Page*. Then do one of the following

- To create an internal link that appears in the *My Bookmarks* section of your *Home* tab, click *Internal* and specify a name for the bookmark.
- To create a URL link to the view instead, click *External*. The URL is generated so you can copy and paste it.

1.4.6 Exporting to TXT

You can export a report to a text (TXT) file. This allows you to analyze the report data on your local system.

Activities

In a report, choose *Actions* › *Export to TXT* or click the *Export* link, depending on the application.

Save the file to a location on your local system.

You can display and analyze the report data in the relevant spreadsheet application.

> ⚠ Caution
>
> When exporting report data to a double byte language, for example, Chinese, the data does not display correctly when you open directly in Microsoft Excel.
>
> Solution:
>
> 1. Open Microsoft Excel and create a blank worksheet.
> 2. Select the *Data* tab.
> 3. In the *Get External Data* section, choose *From Text*.
> 4. Select the TXT file and choose *Import*.
> 5. Select the *Delimited* option and ensure that Unicode (UTF-8) is selected for file origin.
>   This should already be selected as Microsoft Excel auto detects this file type. This is the file type that was set when the TXT was exported.
> 6. Choose *Next*.
> 7. Under delimiters, select *Comma*.
> 8. Choose *Finish* and *OK*.
>
> The TXT file is imported and displays all Chinese characters correctly.

1.5 Printing Objects

Prerequisites

You have a PDF reader installed.

Context

You want to print objects in PDF format.

Procedure

1. To print an object, for example, a workspace, report, or dashboard, from the toolbar, choose .
2. In the dialog box that appears, the document title corresponds to the name of the tab you are printing.

   > **i Note**
   >
   > **For workspaces only:** The name of the document is the name of the workspace combined with the name of the current view.

3. Choose *Print*.

   A PDF version of the content is generated.
4. Open and print the PDF document directly, or save it to your local system.

1.6 Home

Use

The *Home* tab provides you with a personal view into individual and organizational performance of the scorecard.

> **i Note**
>
> If any KPIs or objectives have been added or removed from the context you are viewing, and you access the *Home* tab before the automatic update schedule has occurred, you see a message saying that the

scorecard has been modified and you are prompted to recalculate objectives and KPI status. Make sure you recalculate the objectives and KPIs to avoid displaying zeros in the *All Objectives* and *All KPIs* section.

> **i Note**
>
> The *Print* feature in the *Home* tab only applies to *My Performance Summary*.

Prerequisites

- The strategy management administrator has given your role access to some or all of the panels in the *Home* tab. If you do not see a particular panel mentioned here, it means that your administrator did not give you access to it or you removed the panel from your personalized view.

Features

The *Home* tab has the following features:

- You can review the performance summary of initiatives, objectives, and KPIs, and personalize the panel to track objectives, initiatives and KPIs that are important to you.
  For more information, see My Performance Summary [page 173].
- You can review your bookmarks, which are captured views of the application.
  For more information, see My Bookmarks [page 172].
- You can view the system message.
  For more information, see System Message [page 183].
- You can subscribe to notifications and view notifications, which tell you about changes to objectives, initiatives, and KPIs. Entry and Approval users can also receive notification about measure set status. You can be notified by an *Inbox* entry and by an e-mail notification.
  For more information, see Inbox [page 176].
- You can view content in the *External Content* panels if your strategy management administrator has made them available for your role. You can also zoom in for a closer view.
  For more information, see External Content [page 182].
- You can click links in the *External Content Links* panel and view their content if your strategy management administrator has made them available for your role.
  For information, see External Content Links [page 183].
- You can add and remove panels for display using the *Personalize* link.
- You can quickly remove a panel from the display by unlocking the panels and then clicking the *Close* button on the panel.
- You can move a panel to a different location by deselecting the *Lock Panels* checkbox and then moving the panel. Lock all panels in place by selecting *Lock Panels*.
- You can minimize and maximize the panels using the *Minimize* and *Maximize* buttons.

More Information

Standard Features of the Tabs [page 161]

1.6.1 My Bookmarks

Use

Use *My Bookmarks* to review the bookmarks you marked throughout the application.

Any view in which you select *Mark This Page* and specify a name appears as a link in the *My Bookmarks* panel of the *Home* tab. You can click any link to go to that view.

Prerequisites

The strategy management administrator has given your role access to the *My Bookmarks* panel.

You have included the *My Bookmarks* panel in your display using the *Personalize* link.

You have bookmarked views and they appear in the *My Bookmarks* panel.

Features

You can do the following in the *My Bookmarks* panel:

- Select a link that you bookmarked to go to that view.
- Rename a link that you bookmarked.
- Delete a link that you bookmarked.

Activities

- To select a bookmarked link and go to that view, click the link. For example, if you select a scorecard bookmark, you go to the view in the *Scorecard* tab.
- To rename a bookmark, select . Select the link you want to rename and click *Rename*.
- To delete a bookmark, select . Select the link you want to delete and click *Delete*.

1.6.2 My Performance Summary

Use

Use *My Performance Summary* to quickly see the status of selected initiatives, objectives, and KPIs that you are interested in. *My Performance Summary* displays a link for the initiatives, objectives, and KPIs that are in the trouble zone so you can quickly review any problem areas. This section also displays the status for certain initiatives, objectives, and KPIs that you choose to monitor.

Prerequisites

The strategy management administrator has given your role access to the *My Performance Summary* panel.

You have included the *My Performance Summary* panel in your view using the *Personalize* link.

Features

The *My Performance Summary* panel has these features:

- You can review the status of items in *My Performance Summary*.
  For more information, see Working with My Performance Summary [page 174].
- You can specify particular initiatives, objectives, and KPIs to monitor using the *Personalize* button on the panel.
- You can print the contents of *My Performance Summary* by choosing *Print* from the toolbar.
  For more information, see Printing Objects [page 170].
- You can refresh the results by clicking the *Refresh* button on the panel.

1.6.2.1 Working with My Performance Summary

Procedure

You can do the following in *My Performance Summary*:

Function	Navigation	More Information
Review the number of initiatives, perspectives, objectives, and KPIs that are underperforming in relation to the total number of items, and the areas in which they are underperforming.	Review the *Initiatives* line, *Perspectives* line, *Objectives* line, and *KPIs* line respectively	The number next to the object represents the total number of defined objects of that type. The numbers next to *behind schedule*, *below target*, *over budget*, and *trending down* represent the number of objects that fit the status.
Go to the *Initiatives* tab with a view that displays only the initiatives that are behind schedule	On the *Initiatives* line, click *behind schedule*, The *Initiatives* tab is displayed with the appropriate filter. Click *Advanced Filters*, and then click *Go* to see the initiatives behind schedule.	An initiative's schedule status is based on the schedule status of its milestones and submilestones. If any of the initiative's milestones are behind schedule, the initiative is considered behind schedule and displays a red status.
Go to the *Initiatives* tab with a view that displays only the initiatives that are over budget	On the *Initiatives* line, click *over budget*. The *Initiatives* tab is displayed with the appropriate filter. Click *Advanced Filters*, and then click *Go* to see the initiatives over budget.	An initiative is considered over budget if its actual number is greater than its budget number. These numbers are defined for the initiative when it is created. The following initiatives are considered within budget and do not appear in the *Initiatives* tab filtered view: • Initiatives whose actual is less than budget • Initiatives whose actual is equal to budget • Initiatives whose actual and budget values are both 0 or empty values (that is, there is no cost associated with this initiative)
Go to a *Detail* view in the *Scorecard* tab to see details about an underperforming perspective, objective, or KPI	Click <num> *below target* on the particular row	For more information, see Perspective Details [page 214], Objective Details [page 212], and KPI Details [page 206].

Function	Navigation	More Information
Go to the *Scorecard* tab with a view that displays only the KPIs that have a downward trend	On the *KPIs* line, click <num> *trending down*	The trend of each KPI is determined by its gap performance value, and where that number lies in a range of values that represent upward trends, stable trends, and downward trends. For more information, see KPI Details [page 206].
Select particular initiatives, objectives, and KPIs to monitor	Click the *Organize* icon. Then, in the *Performance Summary* dialog box, select the items you want to monitor and click *>* to add them to the selected list.	The *My Initiatives*, *My Objectives*, and *My KPIs* sections appear with the list of selected items depending on what you selected.
Review *My Initiatives* if displayed	None	The *My Initiatives* section shows each selected initiative with its performance status (if a status has been applied to the initiative), schedule status, and budget status. You can click the initiative name to go to the *Initiatives* tab with a view that displays the initiative selected.
Review *My Objectives* if displayed	None	The *My Objectives* section shows each selected objective with its performance status. An objective's status is determined by the statuses of the underlying KPIs. You can click the objective name to go to the *Detail* view in the *Scorecard* tab. For information, see Objective Details [page 212].

Function	Navigation	More Information
Review *My KPIs* if displayed	None	The *My KPIs* section shows each selected KPI with its performance status and trend status. A KPI's status is determined by its score value, which is the deviation between its actual and target values. The KPI's score is matched to a number in the color index, and the corresponding color becomes the KPI's status indicator color. A KPI's trend represents the gap performance value for this KPI and where that value lies within the range of high and low trend expectations. The trend indicator is a black arrow pointing up or down, or a solid black line. An upward arrow means that the trend is rising, a downward arrow means that the trend is moving down, and a flat line represents that the trend is stable. If a KPI does not display a trend indicator, it means that there is no trend data for the KPI. You can click the KPI name to display details about this KPI in the *Details* view in the *Scorecard* tab. For information, see KPI Details [page 206].

1.6.3 Inbox

Use

Use the *Inbox* to subscribe to notifications about initiatives, objectives, perspectives, and KPIs and maintain your notifications.

The *Inbox* section displays all the notifications to which you subscribed. The newest notification appears at the top of the list.

New, modified, or deleted notifications are automatically refreshed whenever you restart a new application session, or you switch from this context to another and then back to this context.

Prerequisites

The strategy management administrator has given your role access to the *Inbox* panel.

You have included the *Inbox* panel in your view using the *Personalize* link.

Features

You can do the following in the *Inbox* panel:

Function	More Information
Specify how many messages to show per page in the *Inbox*, and specify how to sort the messages	Use  on the *Inbox* panel. When you set the number of notifications to display and the maximum number of notifications is reached, older notifications are removed and the newest ones are displayed. You can sort messages by time, type, or object.
Mark a notification as read	Select the notification and click *Mark as Read*.
Select how you want to receive notification	You can receive a notification on the *Home* tab, or a combination of the *Home* tab notification and e-mail notification. Use the *Manage Subscription* link to specify how you want to receive notification. For more information, see Specifying How to Receive Notifications [page 179].
Subscribe to notifications for initiatives	You can subscribe to be notified at these times using the *Manage Subscription* link: • If the date, tasks, or milestones of an initiative you subscribe to changes. • If a user comments on an initiative that you subscribe to. • If a milestone or submilestone for an initiative you subscribe to is due within `<num>` calendar days, and is currently incomplete. For more information, see Subscribing to Notifications for Initiatives [page 179].

Function	More Information
Subscribe to notifications for perspectives, objectives, and KPIs	You can subscribe to be notified at these times using the *Manage Subscription* link: • If the status of an objective, perspective, or KPI you subscribe to changes from last period to this period. • If a user comments on an objective, perspective, or KPI you subscribe to. For more information, see Subscribing to Notifications for Objectives, Perspectives, and KPIs [page 180].
Receive other notifications	As long as you have chosen a method for receiving notification, you receive a notification at the following times: • When an Entry and Approval measure set has moved in the workflow process, and the change affects you. For example, if a measure set is released and you are the data entry person for that measure set, you are notified when the measure set is released. The notification identifies whether the measure set is ready for data entry, ready for approval, or has been rejected. • When an object you are associated with has been reassigned • When an initiative author edits an initiative and chooses the *Notify Team Members Now* link, and you are a team member for this initiative. This initiative does not have to be in your *Selected Initiatives* list because the notification is a special feature that occurs for team members only.
Display a notification	You can review the notification in the *Inbox* panel. You can display detailed information about the notification by clicking *View*. An information box appears with information about the updates that occurred and the user who made the change.
Jump to the objective, perspective, initiative, or KPI that prompted the notification	When you receive a notification, you can jump to the tab to review the changes.
Review an e-mail notification	For more information, see E-mail Notification [page 181].
Delete notifications using *Delete*	Select the appropriate items and click *Delete*.

1.6.3.1 Specifying How to Receive Notifications

Procedure

1. In the *Inbox* panel of the *Home* tab, click *Manage Subscriptions* to display the *Subscribe* dialog box.
2. Select one option:

Field	Description
Display Notifications in Home Inbox	Displays notifications in your *Inbox* when any subscription events occur.
Display Notifications in Home Inbox and Send E-mail	Displays notifications in your *Inbox* and also sends e-mail to you when any subscription events occur.

Next Steps

E-Mail Notification [page 181]

1.6.3.2 Subscribing to Notifications for Initiatives

Procedure

1. In the *Inbox*, click *Manage Subscription*.
2. Select one or more initiatives and click the right arrow button >> to add it to the list.
3. Enter the desired options.

Field	Description
Dates, Tasks or Milestones Changed	You are notified when a date, status, or milestone is changed for any of the selected initiatives.

Field	Description
Milestone Will Slip Behind Schedule in `<num>` *Days*	You are notified if a milestone or submilestone from any of the selected initiatives is due within `<num>` calendar days and is currently incomplete. The default number of days is three calendar days, but your administrator has the capability to change that number. When using the *Milestone Will Slip Behind Schedule in* `<num>` *Days* feature, you are notified nightly every night for the remaining `<num>` days. If you complete a milestone or submilestone before the `<num>` days are up, or if the `<num>` days transpire and the milestone or submilestone becomes behind schedule, you are no longer notified. If more than one milestone or submilestone in the same initiative triggers the notification, you receive only one notification for that initiative.
Comment Is Added	You are notified immediately when a comment is added to any of the selected initiatives.

1.6.3.3 Subscribing to Notifications for Perspectives, Objectives, and KPIs

Procedure

1. In the *Inbox*, click *Manage Subscription* to display the *Manage Subscription* dialog box.
2. Select whether to receive notifications only in your home inbox or in both your home inbox and by e-mail.
3. Select the *Perspective*, *Objective*, or *KPI* tab.
4. Select objectives, perspectives, or KPIs, and move them to the *Selected Items* list.
5. Select one or more options.

Field	Description
[Perspective, Objective, KPI] Status Changed from Last Period	You are notified nightly if the status of the selection changes from last period to this period.
[Perspective, Objective, KPI] Comment is Added	You are notified immediately if a comment is added to your selections.

Field	Description
[Objective only] Subjective Assessment is added or modified	You are notified immediately if a subjective assessment is added to specific scorecard items. This option appears only when a system adminstrator has enabled subjective assessment functionality when setting defaults for your system.

Related Information

Defaults Setting [page 25]

1.6.3.4 E-Mail Notification

Use

You can receive e-mail notifications if you subscribe to them in the *Inbox* in the *Home* tab.

Prerequisites

Your administrator has set up the *Enable E-Mail Links* feature. If you see a link in the e-mail, it means that your administrator has set up the feature.

Features

When you receive an e-mail that originates from strategy management notifications, the subject of the e-mail says one of the following:

- *Strategy Management Initiatives Notification* displays in the subject line when an initiative or milestone you subscribe to has changed or becomes overdue. The message tells you which initiative has been updated, who updated the initiative, and what type of update occurred. You also see a link to the actual initiative.
- *Strategy Management Initiatives Notification* displays when an initiative team member edits an initiative and clicks the *Notify Team Members* link.
- *Strategy Management Scorecard Notification* displays in the subject line when a comment is added to the Scorecard objective or KPI.
- *Strategy Management Scorecard Notification* displays when the data of the *Scorecard* has changed and you subscribe to be notified. The message tells you the name of the context, the name of the objective or KPI, and the current and previous status of the objective or KPI.

- *Strategy Management Entry and Approval Notification* displays whenever a measure set moves in the workflow process, and the change affects you.
  If the measure set is released and moved to data entry and you are assigned to that data entry, the e-mail content informs you what to do next.
- *Strategy Management Notification* displays in the subject line when the message comes from the application.
- The e-mail may also have a link that you can click to go to the live view in a particular tab in the application.

1.6.4 External Content

Use

You can review the contents of *External Contents* panels in the *Home* tab if your strategy management administrator has given you access to them.

Prerequisites

Your strategy management administrator has uploaded external content and made it available to your role.

You have included the *External Content* panel in your display using the *Personalize* link.

Features

You can view the contents of the *External Content* panel.

Activities

To add an *External Content* panel to your layout, click *Personalize*. Then select the check box of the panel you want to add.

To remove an *External Content* panel from your layout, click *Personalize*, and then deselect the check box of the panel you want to remove.

1.6.5 External Content Links

Use

You can review the links in the *External Content Links* panels in the *Home* tab if your strategy management administrator has given you access to them.

Prerequisites

Your strategy management administrator has uploaded files and made it available to your role as a link.

You have included the *External Content Links* panel in your display using the *Personalize* link.

Features

You can click a link in the *External Content Links* panel and view the content if the strategy management administrator has set them up to appear automatically in your default *Home* tab layout.

Activities

To add an *External Content Links* panel to your layout, click *Personalize*. Then select the check box of the panel you want to add.

To remove an *External Content Links* panel from your layout, click *Personalize*, and then deselect the check box of the panel you want to remove.

1.6.6 System Message

Use

You can use the *System Message* panel to read the key message about this context.

Prerequisites

The strategy management administrator has given your role access to the *System Message* panel.

You have included the *System Message* panel in your view using the *Personalize* link.

The context administrator has set up a system message for this context.

Features

Review the *System Message* panel to understand the key message about this context.

1.7 Strategy

Use

As managing goals requires more than simply displaying current objectives, the *Strategy* tab helps provide the often missing motivational aspect of strategy. Consisting of pathways, process and goal diagrams, and cause and effect, the *Strategy* tab makes the strategic plan become more than just a static impenetrable document by providing a collaborative environment to visualize, discuss and update goals.

Goal diagrams and pathways help motivate employees and foster a sense of ownership by communicating the organization's vision and mission, as well as the underlying steps to achieving them. Goal diagrams are designed to make strategic objectives an integral part of every employee's daily work plan, telling the story of how an organization, working in unison, can achieve its mission and vision. The goal diagrams in SAP Strategy Management enable drill-down into supporting initiatives, including in-depth descriptions of each objective and its importance, providing the critical link between strategy and operations. Linkage to other associated documentation preserves the evolution and planning process of the strategy for future use.

Pathways provide a visualization of the progressive stages in realizing the long-term vision of the organization, and provide an understanding the phases in which particular objectives play primary contributory roles.

Prerequisites

Your strategy administrator has set up one or more of these subtabs for your context: the *Goal Diagram* subtabs, the *Themes* or *Pathways* subtab, and the *Cause & Effect* subtab.

Features

You can do the following in the *Strategy* tab:

- Review themes or pathways, which depict the progressive stages in realizing an organization's long term vision and provide an understanding of the phases in which particular objectives play primary roles. By applying targets for desired performance, pathways allow managers to directly visualize how well the organization is progressing towards realizing its vision.

- Review goal diagrams, process diagrams, and other goal summaries, which allow for organizations to intuitively visualize their strategic plan.
  Goal diagrams enable collaboration between different functional and strategic business groups. Documenting and publishing the strategy - even before KPIs have been defined and operational systems integrated - helps motivate the workforce and lay the foundation for successful adoption.
  The goal diagram subtabs may be named *Goal Diagram* or they may have different names if your strategy administrator changed them. For the purpose of this discussion, we use the term *Goal Diagram* to represent any tab depicting interactive goal diagrams with optional scoring, process diagrams, and goal summaries.
- Review the *Cause & Effect* diagram, which provides a better understanding of how to achieve overall goals by illustrating which objectives play primary, secondary, or tertiary roles in meeting other objectives.
- Use functions that are standard to most strategy management tabs. For more information, see Standard Features of the Tabs [page 161]

This online Help describes all subtabs of the *Strategy* tab although you may only see a subset of the subtabs depending on your setup.

More Information

Themes [page 190]

Pathways [page 191]

Goal Diagrams [page 185]

Cause & Effect [page 192]

1.7.1 Goal Diagrams

Use

Use the *Goal Diagram* to view system-generated or externally created goal diagrams, process diagrams, and other goal summaries, which allow organizations to intuitively visualize their strategic plan. A goal diagram enables collaboration between different functional and strategic business groups. The goal diagram is a visual representation of an organization's strategy, and the processes and systems necessary to implement that strategy. A goal diagram can be used to communicate, motivate, and align the organization to ensure successful execution.

Prerequisites

Your strategy administrator has set up one or more goal diagrams for this context.

Features

The *Goal Diagram* has the following features:

- You can access up to three goal diagrams. By default, the names are *Goal Diagram 1*, *Goal Diagram 2*, and *Goal Diagram 3*. Your strategy administrator may have changed the default names. The first diagram always shows the goal diagram. The other two diagrams, if they exist, can also be goal diagrams, process diagrams, organization charts, or something else.

  > **i Note**
  >
  > Each item in the goal diagram is framed by a visible or invisible rectangle. The status indicator appears in the lower-right corner of the rectangle. If your goal diagram has a different shape than the standard rectangle, for example oval, the status indicators do not move to conform to that shape.

- You can display an information box for an object in the goal diagram by clicking the object. An information box shows the responsible user, description, comments, and associated items. You can click an associated item to go to the *Scorecard* tab or *Initiative* tab, respectively. You can click the comments link to read comments and replies about the object. If you have the correct permissions, you can make a comment or reply to a comment about this object.
- The objectives, perspectives, and mission shown in the goal diagram and in the information boxes may show status indicators if your strategy administrator has set up certain options when creating the goal diagram.

Activities

- To display a goal diagram, click *Goal Diagram* in the *Strategy* tab.
- To review details about an objective, perspective, or mission, select the objective, perspective, or mission. An information box appears.

More Information

Reviewing Details About Objectives [page 187]

Reviewing Details About Perspectives [page 188]

Reviewing Context Details in Custom Diagrams [page 189]

Reviewing Context Details in Auto-Generated Goal Diagrams [page 189]

1.7.1.1 Reviewing Details About Objectives

Use

You can review details associated with a strategic objective shown on a goal diagram to better understand the KPIs used to derive the score for the objective.

Prerequisites

- To review KPIs in the *Scorecard* tab, you can access the *Scorecard* tab.
- To review initiatives in the *Initiatives* tab, you have access to the *Initiatives* tab.

Procedure

In the goal diagram, select an objective to display an information box listing the following information:

Field	Description
Objective status indicator	Shows the status of the objective. To review the status of this objective and the associated KPIs, select the status indicator to display the *Objective Details* in the *Scorecard* tab. If an objective does not have a status indicator, it means that this objective does not have KPIs assigned to it.
Comments	Displays the *Comments* dialog box, where you can read comments and replies about this objective. If you have the correct permissions, you can make a comment or reply to a comment about this objective.
Responsible	Shows the user responsible for this objective.
Initiatives	Lists the initiatives that support this objective. To see the initiatives for the objective in the *Initiatives* tab, select the initiative.
KPIs	Lists the KPIs associated with this objective. To see details about a KPI, select the KPI to go to the *KPI Details* view in the *Scorecard* tab. This helps you understand what is driving the performance of a specific KPI. If there are no KPIs listed, it means the objective does not have KPIs assigned to it.

1.7.1.2 Reviewing Details About Perspectives

Use

You can review details about perspectives in the goal diagram.

Prerequisites

- To review KPIs or objectives in the *Scorecard* tab, you have access to the *Scorecard* tab.
- To review initiatives in the *Initiatives* tab, you have access to the *Initiatives* tab.

Procedure

In the *Goal Diagram*, select a perspective to display an information box with the following information:

Field	Description
Status indicator	Shows the status of the perspective. To go directly to the *Perspective Details* in the *Scorecard* tab, select the status indicator. You can review the KPI or the objectives associated with this perspective and the status of the perspective. If the scorecard administrator did not set up this perspective to be measured by a KPI or by objectives, it does not display a status indicator.
Comments	Displays the *Comments* dialog box where you can read comments and replies about this perspective. If you have the correct permissions, you can comment or reply to a comment about this perspective.
Responsible	User responsible for this perspective.
Objectives	Lists the objectives associated with this perspective. To go to the *Objective Details* in the *Scorecard* tab, select an objective. The screen shows details about the selected objective. If an objective does not have a status indicator, it means that this objective may not be associated with any KPIs.

1.7.1.3 Reviewing Context Details in Auto-Generated Goal Diagrams

Procedure

In the goal diagram, click the mission statement. An information box appears as follows:

Field	Description
Status indicator	Shows the status of the context. The score can be based on the status of one KPI, or based on indexed KPIs, or an index of perspectives. To go to the *Context Details* in the *Scorecard* tab, select the status indicator. You can review the objects associated with this context. If the scorecard administrator did not set up this context to be measured, or if the strategy administrator did not select the option to display status indicators, it does not display a status indicator.
Comments	Displays the *Comments* dialog box where you can read comments and replies about the scored context. If you have the correct permissions, you can comment or reply to a comment about the context.
Responsible	User responsible for this context.

1.7.1.4 Reviewing Context Details in Custom Diagrams

Procedure

In the goal diagram, click the mission statement. An information box appears as follows:

Field	Description
Context name	Name of the context this goal diagram represents.
Status indicator	Shows the status of the context. The score can be based on the status of one KPI, or based on indexed KPIs, or an index of perspectives. To display the *Context Details* in the *Scorecard* tab, select the status indicator. If the scorecard administrator did not set up this context to be measured, or if the strategy administrator did not select the option to display status indicators, the context does not display a status indicator.

Field	Description
Comments	Displays the *Comments* dialog box, where you can read comments and replies about the scored context. If you have the correct permissions, you can make a comment or reply to a comment about the context.
Responsible	User responsible for this context.
Perspectives	List of perspectives associated with this context. If a perspective appears as a link, it means that this perspective is being measured. To go to the *Perspective Details* in the *Scorecard* tab, select the perspective.

1.7.2 Themes

Use

Use *Themes* to review descriptive statements representing major components of a strategy, as articulated at the highest level in the vision. Your organization might have themes about your organization's internal processes, the customer value proposition, or key financial goals. Themes represent vertically linked groupings of objectives across several scorecard perspectives.

Prerequisites

- The strategy administrator has set up themes for this context.
- To review details about the KPIs of an objective used by a theme, you have access to the *Scorecard* tab.
- To review the initiatives associated with an objective for a theme, you have access to the *Initiatives* tab.

Features

You can do the following with themes:

- Focus on a theme to review its associated objectives.
- Review the theme's description, responsible user, and associated links.
- Focus on a theme's objective by selecting an objective. An information box shows the responsible user, description, comments, associated KPIs, and associated initiatives. You can click a KPI or initiative to go to the *Scorecard* tab or *Initiative* tab, respectively. You can click the comments link to read comments and replies about the objective. If you have the correct permissions, you can make a comment or reply to a comment about this objective.

Activities

To display themes, click *Themes* in the *Strategy* tab.

1.7.3 Pathways

Use

Use *Pathways* to review descriptive statements representing a major component of a strategy as articulated at the highest level in the vision. Pathways reflect the path of an organization's internal processes, or the customer value proposition, or the path toward key financial goals. Pathways represent vertically linked groupings of objectives across multiple perspectives.

Pathways are phrases that are easy for the organization to remember and internalize. Pathways are an extension of themes, with the addition of the dimension of time.

Prerequisites

- Your strategy administrator has set up *Pathways* for this context.
- To view the plan line and actual line, your strategy administrator has implemented the plan line and actual line when setting pathways.
- To use the *Actual* line as a link, the scorecard administrator has created a scored context and the system administrator has set up your role to access the *Scorecard* tab.

Features

The *Pathways* tab has the following features:

- The name of each pathway appears above each curve. The dates below each curve represent the peak date for that pathway. The peak date is the date on which this pathway is being implemented.
- The actual and plan lines point out the progress of pathways at one point in time. The lines help to show the pathways in progress, and the extent to which they are in progress.
  - The actual line represents the progress toward the pathway in relation to its peak date and the current date. The actual line is like a “You are here” designation on a map. The actual line appears in red when progress is behind the current plan date. The actual line is shown in black directly on the plan line when the progress is exactly on mark with the current date. If the plan date and actual date are the same, the line would have a label *On Plan*. The actual line is shown in green when the progress is ahead of the current date.

    You can select the *Actual* link to go to the *Scorecard* > *Context Details* view, where you can review the status of the context.
  - The plan line represents today's date. If you select the *Plan* link, it displays the *Strategy* > *Goal Diagram* view.

- You can review details about a pathway by clicking the pathway text. An information box appears and shows the peak date, responsible user, and associated objectives. You can click an objective to go to its *Scorecard* > *Objectives Detail* view.

Activities

To display pathways, click *Pathways* in the *Strategy* tab.

1.7.4 Cause & Effect

Use

Use the *Cause & Effect* diagram to explore the cause and effect relationships between objectives.

The *Cause & Effect* diagram shows the objective and its direct and indirect relationships of the objectives that impact the objective (causes) or the objectives that this objective impacts (effects).

Prerequisites

Your strategy administrator has set up the *Cause & Effect* diagram for this context.

Features

You can do the following in the *Cause & Effect* diagram:

- Select the objective whose causes and effects you want to view.
  When you select the objective from the *Select Focus* dropdown list, you see the objectives that have a cause and effect on the objective.
- Display the objectives that cause an impact on an objective by expanding the view on the left side of the objective.
  The causes represent the objectives that impact the selected objective, that is the objectives that cause an outcome for the objective. To see the objectives that indirectly impact the objective, continue to expand the view on the objectives.
- Display the effect this objective has on other objectives by expanding the view on the right side of the objective.
  The effects represent the objectives that this objective impacts, that is the objectives that are affected by this objective. This objective impacts the outcome for the direct objectives and indirectly impacts the outcome for the indirect objectives.
- Display information about an objective by clicking the arrow in the lower right corner of the node and choosing *Show Details*. You can display the details about an objective, including the responsible user,

description, KPIs, and number of comments. You can display the *Comments* dialog box by clicking the number of comments. You can go to a *KPI Detail* page by clicking a KPI. You can also click an associated initiative to go to the *Initiatives* tab.

- Display an objective's *Details* view in the *Scorecard* tab by clicking the arrow in the lower right corner of the node and choosing *Analyze in Scorecard*.
- Focus on a different objective by clicking the arrow in the lower right corner of the node and choosing *Focus*. The *Cause & Effect* diagram now focuses on that objective. You can also change the focus by selecting a different objective from the *Select Focus* dropdown list.

Activities

To display the *Cause & Effect* diagram, select *Cause & Effect* in the *Strategy* tab.

1.8 Scorecard

Use

A scorecard helps organizations monitor performance by tying a company's strategy to key objectives and measures. Scorecards enable executives to communicate their strategy to the organization as well as monitor their resources toward executing on that strategy.

The *Scorecard* tab provides a view of progress toward specific outcomes across functional and business units.

> **i Note**
>
> The default scorecard hierarchy of *perspectives* > *objectives* > *KPIs* is used for the benefit of this discussion.
>
> If your system administrator modified the scorecard hierarchy, you may have a hierarchy that contains different names, different number of levels, or a different selection or order of levels. In either case, the same concepts apply.

Features

The *Scorecard* tab has these features:

- You can monitor perspective, objective, and KPI statuses, trends, scores, and other information using the *Scorecard* link. For more information, see Scorecard Views [page 194].
- You can compare scorecards across multiple contexts to look for any inconsistencies in performance across your areas of responsibility and investigate further using the *Scorecard Comparison* link. For more information, see Scorecard Comparison View [page 205].

- You can filter the view to look at just the information you are interested in.
  For more information, see Filters [page 216].
- Depending on how many levels of status indicators your administrator set up, the status indicator might be colored one of three colors or one of five colors.
  The table below shows the color representations based on the number of potential status colors:

3 Colors	5 Colors	Description
Red	Red	Well below expectations
Not applicable	Orange	Below expectations
Yellow	Yellow	Meets expectations
Not applicable	Green	Above expectations
Green	Dark Green	Well above expectations

- You can use functions that are standard to most strategy management tabs. For more information, see Standard Features of the Tabs [page 161]

> **i Note**
>
> Use the *Home* tab to subscribe to particular perspectives, objectives, and KPIs so you can keep track of them. In the *Home* tab, you can receive notification when there is activity, such as a status changes or a comment is added.

Activities

To work with the scorecard, click the *Scorecard* tab.

- To display an overview of the perspectives, objectives, and KPIs, select the *Scorecard* link.
  - To display perspectives, objectives, and KPIs in a hierarchical view, choose .
  - To display objectives and all items associated with them in a visual and hierarchical view, choose .
- To display a comparison of scorecards across multiple contexts, select the *Scorecard Comparison* link.

1.8.1 Scorecard Views

Use

You can monitor perspective, objective, and KPI statuses and get a complete overview of how the strategy is being executed using the *Scorecard* tab.

Features

You can look at the scorecard information in the following ways:

- To display the context, perspectives, objectives, and KPIs in a hierarchical table, use . The table shows columns of data such as the trend, status, actual, budget, and score values although you can specify which columns you want to display.
  For more information, see Hierarchy View [page 195].
- To monitor objectives performance toward goals and show the statuses and associated KPIs, use .
  For more information, see Objectives View [page 202].
- You can access a *Detail* view for any object. The *Detail* view shows you information such as the measurements behind the status, associated links, responsible user, description, and comments, and allows you to perform deeper analysis.
  For more information, see Detail Views [page 206].

Activities

- To go to the *Hierarchy* view, choose .
- To go to the *Objectives* view, choose .
- To go to a *Detail* view, select the appropriate context, perspective, objective, KPI, or indexed KPI.

Related Information

Indexed Scoring vs. Absolute Scoring [page 203]

1.8.1.1 Hierarchy View

Use

The *Hierarchy* view is a hierarchical view of the selected context, its perspectives, and other items such as objectives, KPIs, and initiatives. This view provides insight from the strategic vision down to the operational level.

If you include initiatives in the view, you gain insight to where resources are being used to reach strategic goals. This view answers questions such as “Are resources focused evenly across all aspects of the strategy?”, “Are some areas of strategy receiving insufficient attention?” and “For the objectives that are not being met, what initiatives are in place to improve achievement in those areas and how well are those initiatives being executed?”

Features

The *Hierarchy* view has the following features:

Format

You can control which columns of information appear in the table using .

> **i Note**
>
> Your selections also affect the columns displayed in the *Detail* views that contain tables.

If your scorecard administrator set up additional *Actual* and *Target* columns to compare actual and targets for other time periods, you can add those columns to the view using .

For information about layouts and columns, see Format Selections [page 198].

Context

The context appears in the first row of the table.

If your scorecard administrator set up the context to be scored, the context shows a status indicator in the *Status* column. The scored context provides a general status about the whole scorecard.

The context is a link to the *Context Details* view where you can see the detailed information about the context, such as the calculation method and objects used to measure the context's performance.

For more information, see Context Details [page 215].

Perspectives

Each perspective shows the objects associated with it, such as objectives and KPIs.

If your scorecard administrator set up a perspective to be measured by a KPI or by objectives, the perspective shows a status indicator.

The perspective is a link to the *Perspective Details* view, where you can see detailed information about the perspective such as the KPI or objectives used to determine the status of the perspective.

For more information, see Perspective Details [page 214].

Objectives

Each objective shows the objects associated with it such as indexed KPIs or KPIs. The objectives display status indicators that represent their performance. Each objective is a link to its *Objective Details* view where you can see which KPIs are associated with the objective and the calculation method used to derive the objective status indicator color.

For more information, see Objective Details [page 212].

KPIs

The KPIs display status indicators that represent their performance. Each KPI is a link to its *KPI Details* view where you can see the measures that define the KPI's performance, the score that compose the KPI's status indicator color, and other important information about the KPI.

For more information, see KPI Details [page 206].

To see the initiatives associated with a particular KPI, click the *Initiatives* link in the *Associated Initiatives* column. The *Initiatives* tab appears.

> **i Note**
>
> You can control the display of the *Associated Initiatives* column in the *Select Format* dialog box. If you select the *Associated Initiatives* option but the column does not appear, it means your view already includes initiatives in the scorecard hierarchy from the *Include Initiatives* option.

Indexed KPIs

The indexed KPIs have status indicators that represent their performance. Each indexed KPI is a link to its *Indexed KPI Details* view where you can see the KPIs associated with the indexed KPI and the calculation method used to compose the indexed KPI's status indicator color.

The performance of an indexed KPI is based on the performance of its underlying KPIs. You can use the (-) sign or (+) to see the KPIs associated with the indexed KPI. Since indexed KPIs are not associated directly with measures the way KPIs are, an indexed KPI does not show any values.

For more information, see Indexed KPI Details [page 211].

Initiatives

If you choose *Include Initiatives* in the *Select Formats* dialog, initiatives appear under the perspectives or objectives they are associated with. This association is defined when the initiative is created.

The initiatives may show status indicators to represent their performance. The initiative author controls whether an initiative has a status indicator, and controls whether to measure the initiative by the status of a KPI, or by a subjective status.

You can view an initiative's schedule status and budget status if you select those columns using *Select Formats*.

Each initiative is a link to its *Initiatives Summary* view in the *Initiatives* tab.

If an initiative author associates a KPI with an initiative, the *Associated Initiative* column shows a link to the *Initiatives* tab.

For more information, see Initiatives Summary [page 220].

Other Features

The *Hierarchy* view has these additional features:

- You can filter the view.
  For more information, see Filters [page 216].
- If you are displaying the *Unread Comments* column and you see a number in the column, it represents the number of unread comments for the item. You can read the comments by clicking the number. You can also create comments and reply to comments if you have the correct permission.
  For more information, see Reviewing Comments and Replies [page 166].
- You can restore defaults for a particular layout by selecting and then selecting *Restore Defaults*.
- You can sort KPIs by any column that appears as a link.
- You can use the legend to understand different statuses and trends.
- Rows are indented to show hierarchy.

Activities

To go to the *Hierarchy* view, choose  in the *Scorecard* tab.

More Information

Standard Features of the Tabs [page 161]

1.8.1.1.1 Format Selections

Use

You can specify the columns you want to appear in the *Hierarchy* view.

Features

This table describes all the format selections. If an option is unavailable, it means the option is not applicable to the selected layout.

Option	Description
Trend	Show the trend of a KPI, either upward, stable, or downward. The trend symbol represents the gap performance of each KPI. The KPI's *Gap Performance* measure is matched to the *Stable Gap Performance Range*. The symbol is determined by where it fits in that range. If a KPI does not have a trend symbol, it means the scorecard administrator did not set the values for the KPI. Each KPI may have a trend status indicator that has a trend symbol based on the *Gap Performance* value. The *KPI Details* view shows details about how the trend indicator is determined. For more information, see KPI Details [page 206]. Index KPIs do not have a trend indicator.
KPI Status	Shows the status indicator for the KPI, which identifies performance. The color is determined by comparing the score value of the KPI to the appropriate thresholds specified in the KPI definition.

Option	Description
Non-KPI Status	For all levels above KPIs, the status color is determined by the underlying items. For example, in a classic Perspective/Objective/KPI scorecard hierarchy, objective scores are based on underlying KPIs and perspective scores are based on underlying objectives. When **Indexed Scoring** is used, the color is determined by matching the score value of the underlying items to appropriate index values. For example, if an objective is measured on the average of underlying KPIs, the color of each KPI is assigned an index value and the index values are averaged to score the objective. When **Absolute Scoring** is used, the color is determined directly from the underlying items. For example, if an objective is measured on the average of underlying KPIs, the KPI scores are simply averaged and then compared to the thresholds set in the objective definition.
Actual	The actual value for a KPI, along with the target value, determines the KPI's score.
Target	The actual value for a KPI, along with the target value, determines the KPI's score. If you do not see a *Target* column in the table, but you do see a *Forecast* or *Benchmark* column (or something similar), it means your site is set up to use a *Type* dimension. The *Type* dimension has members that allow you to switch what is being compared to actual, such as target, forecast, or benchmark. The *Dimension Filters* allow you to switch from one Type dimension member to another.
Score	The score determines the status indicator color. How this row's score rates in relation to the breakpoint values shown in the *Details* view determines the color of its status indicator. For a scored context, the score is determined by the status of the underlying measured perspectives of the context, or by the status of one KPI. For a perspective, the score is determined by the status of the underlying objectives of the perspective, or by the status of one KPI. For an objective, the score is determined by the status of the underlying KPIs of the objective. For more information, see Indexed Scoring vs. Absolute Scoring [page 203]. For KPIs, the deviation between the actual value and target value is the KPI's score. For index KPIs, the score is determined by the status of the underlying KPIs of the index KPI. The scorecard administrator determines whether the context or the perspectives has scores and how the scores are determined.
Previous Actual	The actual value for a KPI from the previous time frame. The previous time frame is determined by the current reporting date you set in the *Hierarchy* view in relation to the periodicity for which data is stored for the *Actual* measure. If data is being reported quarterly and you are displaying a current date of June 30, then the previous actual represents the value at the end of March 31.
Actual % Change	Percentage that the actual value of a KPI changed from the previous period to the current period.

Option	Description
Previous Target	The target value for a KPI from the previous time frame. For information about the previous time frame, see the description of *Previous Actual*.
Target % Change	Percentage that the target value of a KPI changed from the previous period to the current period.
Lead/Lag	Lagging KPIs are commonly financial in nature and represent outcomes based on historical performance. Lagging KPIs, such as Revenue and Units Sold, show performance of what has happened in the past (yesterday, last week, last quarter). Leading KPIs are predictors of future performance, and provide direction about which lagging KPIs require more attention. Leading KPIs can be used to forecast how lagging measures will perform in the future. Leading KPIs are a critical factor because they provide an early warning signal for the organization to take actions that are proactive, rather than reactive. They provide insight into the KPIs that require attention now, so as to prevent performance degradation in the future.
Type	Quantitative KPIs are considered fact-based measurements like number of trouble tickets closed that are based on relational databases or transactional systems such as ERP or CRM. Qualitative KPIs, like customer satisfaction, are softer and more subjective. Qualitative KPIs are soft measures because they are mostly taken from semistructured sources such as surveys, e-mails, or Excel worksheets. It is a subjective rating of the quality of execution of a KPI. Quantitative KPIs are considered either financial or operations, while qualitative KPIs do not have this distinction.
Unread Comments	Shows the number of unread comments, if any. You can select this number to display the *Comments* dialog box so you can read the comments. For more information, see Reviewing Comments and Replies [page 166].
Associated Initiative	If an initiative author associated a KPI with an initiative, the KPI shows a link to the *Initiatives* tab.
Responsible	The name of a user who is responsible for this item.
Abnormal Performance	Shows an exclamation point (!) to alert you about an underlying problem. The exclamation point is called a **below-the-horizon indicator.** An item has abnormal performance if at least one association used to measure its performance is at least two statuses below the status of the overall item. This gives a clear visual indicator that while the item may be performing satisfactorily, there is an associated element that is in need of attention. For KPIs, the indicator appears if one or more dimension members are two or more levels below the status of the overall KPI. For objectives, the indicator appears if one or more KPIs are two or more levels below the status of the overall objective.

Option	Description
Budget Status	Shows whether the initiative is under budget, on budget, or over budget. The colors of the status indicators are determined as follows: • If the actual value is greater than the budget, then the status is red because this initiative is over budget. • If the actual value is less than budget, then the status is green because this initiative is under budget. • If the actual value is equal to budget, then the status is yellow because this initiative is on budget. • If the actual value and budget value are both 0 or empty (there is no cost associated with this initiative), then no status is displayed.
Schedule Status	Shows whether the initiative is ahead of schedule, on schedule, or behind schedule. An initiative's schedule status is determined differently based on whether it is active (has no actual end date) or completed (has an actual end date). If an initiative is active, the initiative derives its schedule status from the milestone that is the most behind schedule. If any of its milestones are behind schedule (red), the initiative is considered behind schedule and has a red status. If any of its milestones are either on time (yellow) or ahead of schedule (green), the initiative is considered ahead of schedule and is green. If all milestones are on time (yellow), the initiative is considered on time and is yellow. If it does not have any milestones assigned, the initiative does not show any schedule status. If an initiative is completed, then the initiative derives its schedule status by whether its target end date is before or after the actual end date. If its actual end date is before the target end date, the initiative is ahead (green). If its actual end date is after the target end date, the initiative is behind (red). If its actual end date is the same as the target end date, the initiative is on time (yellow).
Start	Start date of the initiative.
Target End	Expected end date of the initiative.
Actual End	End date of a completed initiative.
Include Initiatives	Includes initiatives in the scorecard hierarchy.

Activities

To add or remove columns in the table, or reset columns to the default view, choose .

1.8.1.2 Objectives View

Use

Use the *Objectives* view to review the objectives for the current context. Objectives are a higher level view of the performance management initiative. The progress of an objective is determined by analyzing the performance of the KPIs associated with the objective.

Features

The *Objectives* view has the following features:

- You can review the objectives and their statuses.
  For more information, see Objective Details [page 212] and Indexed Scoring vs. Absolute Scoring [page 203].
- You can highlight the objectives associated with a particular pathway or theme, depending on whether pathways or themes are implemented on your system. If pathways are implemented, use the *Pathways* dropdown list to select a pathway and highlight the objectives associated with that pathway. If themes are implemented, use the *Themes* dropdown list to select a theme and highlight the objectives associated with that theme.
- You can identify an objective with abnormal performance if the objective has an exclamation point (!). Exclamation points serve as alerts that at least one associated KPI is underperforming and requires attention.
- You can see the perspectives that are associated with each objective. The objectives are displayed below their perspectives.
- You can filter the objectives.
  For more information, see Filters [page 216].
- If your scorecard administrator has set up objectives to be measured by KPIs, the objective shows a status indicator. The objective is a pushbutton that displays the *Objective Details* view, where you can see which KPIs are associated with the objective and the calculation method used to derive the objective's status indicator color.
  For more information, see Objective Details [page 212].
- If your scorecard administrator has set up perspectives to be measured by an index of objectives, the perspective shows a status indicator. The perspective is a link that displays the *Perspective Details* view, where you can see the objectives associated with the perspective and the calculation method used to compose the perspective's status indicator color.
  For more information, see Perspective Details [page 214].
- If your scorecard administrator set up a scored context that is measured by an index of perspectives, the scored context is displayed as a rectangular box at the top of the *Objectives* view. The scored context provides a general status about the whole scorecard. The scored context is a pushbutton that displays the *Context Details* view where you can see the perspectives associated with the context and the calculation method used to compose the context's status indicator color.
  For more information, see Context Details [page 215].
- An objective may show an exclamation point (!) if there is an underlying problem.
  Exclamation points show abnormal performance. They serve as alerts that at least one associated KPI is underperforming and requires attention. An objective with a positive status indicator, such as green, and

an exclamation point suggests that there may be a reason to review details about the objective to review its KPIs. An objective with a dark green status indicator and an exclamation point has at least one KPI that is either yellow, red, or dark red. An objective with a green status indicator and an exclamation point has at least one KPI that is either orange or red. An objective with a yellow status indicator and an exclamation point has a KPI that is dark red. If the objective has an orange or red status indicator, no exclamation point is displayed because the status indicator color is an obvious indicator that the objective is performing poorly.

- If an objective displays a *Comments* number, it means that someone has added a comment about the objective. The number represents the number of unread comments. You can click the link to read the comments.
  For more information, see Reviewing Comments and Replies [page 166].

Activities

- To go to the *Objectives* view, choose in the *Scorecard* tab.
- To display details about an objective, click the objective with a status indicator. The *Objectives Details* view appears.
- To display details about a perspective that is being measured, click the perspective with a status indicator. The *Perspective Details* view appears.

More Information

Standard Features of the Tabs [page 161]

1.8.1.3 Indexed Scoring vs. Absolute Scoring

For scorecard levels above KPIs, for example, objectives and perspectives, you may choose to use either indexed scoring or absolute scoring.

In most cases, indexed scoring is appropriate because it accounts for disparate scores, but if scores always fall within narrow ranges, absolute scoring may be considered appropriate. In the example below, an objective has 5 underlying KPIs with widely ranging scores:

Sample KPIs and Details

KPI	Status	Actual	Target	Score
Customer loyalty rate	Yellow	0.83	0.82	1.21
Customer traffic	Dark Green	34,474	28,663	20.27
Return rate	Dark Green	0.0098	0.0129	-24.09

KPI	Status	Actual	Target	Score
Revenue per customer	Red	89.33	100.0	-10.67
Units per customer	Yellow	2.21	2.12	4.1

In the example above, an average score using absolute scoring would be -9.18. The score is compared to predetermined thresholds like:

Thresholds and Colors

Threshold	Color
Greater than 20	Dark Green
10 to 20	Green
0 to 10	Yellow
-10 to 0	Red
Less than -10	Dark Red

Therefore, the objective status would be Red. However, looking at the colors of the underlying KPIs, the objective color is skewed by the disparate score values of the underlying KPIs. In basic terms, absolute scoring works best when every KPI in the entire database has a score in a narrow range. Even if all of the scores were positive, a single KPI with a very high score can skew the average.

If the same KPIs were averaged with index values, the average score is more reasonable:

Index Values and Colors

Index Value	Color
5	Dark Green
4	Green
3	Yellow
2	Red
1	Dark Red

Average = (3 + 5 + 5 + 2 + 3)/5 = 3.6. The score is rounded to the whole number 4, so the objective status would be Green.

The same premise holds true for weighted average. Indexed scoring is more appropriate unless all the KPIs scores fall in a narrow, known range. If you use least value or greatest value, the color of the scorecard level above KPIs, for example, objectives, is set to the worst performing or best performing KPI color regardless of indexed or absolute scoring. Note that absolute scoring versus indexed scoring is a database-wide setting.

1.8.2 Scorecard Comparison View

Use

Use the *Scorecard Comparison* link to compare similar information across multiple contexts.

For example, a European Sales Manager may be interested in the European scorecard, but may also be interested in the Germany scorecard, France scorecard, and UK scorecard. The *Scorecard Comparison* allows you to compare the scorecards side by side.

The *Scorecard Comparison* may clearly highlight any inconsistencies in performance across your areas of responsibility so that you can investigate further.

Features

The *Scorecard Comparison* has the following features:

- You can specify which contexts you want to compare and the order in which to display them using the *Context* tab from the *Comparison Settings* link.
  All aspects of the first context are shown in the comparison. The other contexts for comparison show only the rows that match the first context. If there is an item in another context that the first context does not have, it is not included in the comparison. For example, if the first context has an Employee perspective but the second context does not, the Employee perspective is shown. If the second context has a Finance perspective but the first context does not, the Finance perspective is not shown in the table.
- You can specify which two periods to compare, or which two to three dimension members to compare.

  > **i Note**
  >
  > Comparing contexts is the default selection.

- You can specify the columns of information you want to compare using the *Date and Format* tab from the *Settings* link.
- You can restore defaults to show just the *Status* column for objectives and just the *Trend* and *Status* columns for KPIs using *the Date and Format* tab from the *Settings* link.
- You can display a *Detail* view of a perspective, objective, KPI, or scored context by clicking that item.
- You can sort on any column that appears as a link. KPIs are sorted within each perspective for the first context.
- You can change the period and end date of the comparison. For more information about these basic filters, see Filters [page 216].
- You can expand or collapse the information using the standard icons.

Activities

To display a *Scorecard Comparison*, click the *Scorecard Comparison* link in the *Scorecard* tab.

To choose whether to compare contexts, two periods, or two or three dimension members, click *Comparison Settings*, then choose the items you want to compare.

1.8.3 Detail Views

Use

You can review details about the objects shown in the scorecard. The *Detail* view typically shows you the associations between the selected item and other aspects of the application.

Features

The *Detail* view has these features:

- You can see the links associated with this item, and click the links to display related materials.
- You can see the user responsible for this item.
- You can see a description of this item.
- You can access comments about this item and add comments if you have been given permission to add comments.
- You can see the associated items that are used to determine the status of this item. For example, if you are viewing the *Perspective Details*, you see the KPI or the objectives, whichever one was used to measure this perspective. You also see the calculation method, if applicable, and score that determined the status.
- You can see the higher level associations. For example, if you are viewing the *Objective Details*, you see the perspective this objective is associated with.
- You can see the subjective assessment status indicator and comment provided by the owner of this item if your strategy management administrator implemented this feature.
- You can add a subjective assessment of a KPI, objective, perspective, or context you own if your strategy management administrator implemented this feature.

1.8.3.1 KPI Details

Use

Use the *KPI Details* view to explore details about a KPI.

A KPI (key performance indicator) is a named aspect of the company strategy that can be measured by quantitative or qualitative data.

Use KPIs to measure the status and progress toward strategic objectives. KPIs can also measure the progress toward initiatives, perspectives, and the entire context. KPIs are also the basis for measuring an indexed KPI.

KPIs appear in all tabs of the strategy management application. The *KPI Details* view in the *Scorecard* tab provides complete information about the selected KPI.

Features

The *KPI Details* view has the following features:

- You can review the measures used to determine the KPI's status indicator color and performance. The five measures from the model referenced in the model connection that make up this KPI are: *Actual*, *Target*, *Score*, *Trend of Actual*, and *Gap Performance*
  The deviation between the actual and target values is used to determine the KPI's score. The score is matched to a point on the colored dial, and that point determines the KPI's status indicator color.

  > **i Note**
  >
  > If you do not see a *Target* value, but you do see a *Forecast* or *Benchmark* column (or something similar), it means your site is set up to use a **Type dimension**. The Type dimension has members that allow you to switch what is being compared to actual, such as target, forecast, or benchmark. The *Dimension Filters* allow you to switch from one Type dimension member to another.

- You can review the *Gap Performance* measure, which is used to determine the KPI's trend indicator. The KPI's *Gap Performance* measure is matched to the *Stable Gap Performance Range*. The symbol is determined by where it fits in that range.
  If a KPI does not have a trend symbol, it means the scorecard administrator did not set these values for the KPI.

Trend Indicator	More Information
Upward arrow	The trend is on the rise. This happens when the KPI's *Gap Performance* value is better than the high number in the *Stable Gap Performance Range* depicted in the *KPI Details* screen.
Downward arrow	The trend is downward. This happens when the KPI's *Gap Performance* value is lower than the low number in the *Stable Gap Performance Range*.
Solid black line	The trend is steady. This happens when the KPI's *Gap Performance* value is between the two numbers in the *Stable Gap Performance Range*.

- The color of the status indicator represents the performance of this KPI. The status indicator color is determined by matching the *Score* value of the KPI to the appropriate *Index Value* specified for the KPI which is matched to a particular color on the color dial.
  The colored dial shows the range of acceptable and unacceptable colors. There may be three or five colors depending on how your strategy management administrator set up the application. The colored dial points to the current status color of the KPI. The red and orange colors represent poor performance, yellow represents average performance, and the green colors represent good performance.
  Depending on how your scorecard administrator set up KPIs to display when there is missing data, a KPI may be displayed without a status indicator, or may not be displayed at all.
- You can review the *Historical Score Status* to see the scores, status indicators, and trend indicators of the KPI in the past three time periods, giving you a historical perspective on the status.
- You can see the description of the KPI, the user responsible for the KPI, and the perspective associated with this KPI. You can also see whether this KPI is leading or lagging, quantitative or qualitative.
  Lagging KPIs are commonly financial in nature and represent outcomes based on historical performance. Leading KPIs are predictors of future performance, and provide direction about which lagging KPIs require more attention.

Quantitative KPIs are considered fact-based measurements. Qualitative KPIs are more subjective and mostly taken from semi-structured sources such as surveys, e-mails, or Excel worksheets. It is a subjective rating of the quality of execution of a KPI.
The display of the leading/lagging information and quantitative/qualitative information is controlled by the selections in the *Select Format* dialog box.

- You can filter the KPIs.
For more information, see Filters [page 216].
- You can display an associated link in a new browser window. The link can display materials that support the index KPI.
- You can see which initiatives, if any, are being measured by this KPI. You can review details about this initiative in the *Initiatives* tab by clicking the initiatives.
- You can see the objectives that are associated with this KPI. You can display details about an objective in the *Objective Details* view by clicking that objective.
For more information, see Objective Details [page 212].
- You can view comments about this KPI or any other item, including unread comments. Comments help you document information that may be important to share that is not covered in the objective description.
For more information, see Reviewing Comments and Replies [page 166].
- You can add comments or replies if your role has permission to do so. If you do not see an *Add* link in the screen, then you do not have the ability to create comments.
For more information, see Adding, Editing, and Removing Comments and Replies [page 165].
- You can analyze actual versus target, drilling, or comparisons reports that provide insight into key performance indicators and highlight areas for deeper analysis. When you switch to a different analysis, the same KPI that is selected in the *KPI Details* view is used in that analysis.
For more information, see Actual vs Target Chart [page 209], Drill Report [page 209], and Comparison [page 210].
- You can add a subjective assessment of a KPI that you own if your strategy management administrator implemented this feature.
- You can see the subjective assessment status indicator and comment provided by the owner of this KPI if this feature has been implemented by the strategy management administrator and the KPI owner.

Activities

To display the *KPI Details* view, select a KPI in any tab.

More Information

Standard Features of the Tabs [page 161]

1.8.3.1.1 Actual vs Target Chart

Use

The *Actual vs Target* chart shows the trend of a KPI's actual and target numbers over time according to the periodicity and time frame specified for the item. The trend chart shows whether the KPI's status is a short-term or long-term problem or success.

Features

The *Actual vs Target* chart has these features:

- You can create a report using *Create Associated Report*.
- If you see a different label on the *Actual vs. Target* link, it means your site is set up to use a *Type* dimension. The *Type* dimension has members that allow you to switch what is being compared to actual, such as target, forecast, or benchmark. When using *Dimension Filters*, you see the members available in the *Type* dimension. The member you select replaces all instances of *Target* with that selection.
- You can specify graph options, such as graph type, the minimum value to chart, the maximum value to chart, and the scale at which to display values. You can also add a label along the Y axis. You can control the display of horizontal grid lines, vertical grid lines, and a chart legend.

Activities

To display the *Actual vs. Target* chart, click *Actual vs. Target* in the *KPI Details* view.

1.8.3.1.2 Drill Report

Use

The *Drill* report explores whether high-level results might be disguising low-level problems. Finding the largest gaps between a result and a target allows you to quickly focus on problematic or successful areas.

Features

The *Drill* report has these features:

- The *Drill* report shows the *Actual*, *Target*, *Score*, status indicator, *Gap Performance*, and trend indicator for the total level of the focus dimension.

- You can drill down on a dimension member into the lower levels of that dimension by clicking on the member.
- You can drill up on a dimension member using *Drill Up*. The report drills up to the next highest level of this dimension.
- You can select the dimension on which to focus. The total member of the dimension is displayed unless you filter on it using *Dimension Filters*.
- You can control whether parent levels of the dimension are displayed when drilling.
- You can create a report using *Create Associated Report*.
- If you see something other than the *Target* column, it means your site is set up to use a *Type* dimension. The Type dimension has members that allow you to switch what is being compared to actual, such as target, forecast, or benchmark. The *Dimension Filters* shows you the members available in the *Type* dimension. The member you select replaces all instances of *Target* with that selection.

Activities

To display the *Drill* report, click *Drill* in the *KPI Details* view.

1.8.3.1.3 Comparison

Use

The *Comparison* chart compares different organizational units such as business units, projects, customer groups, or sales teams. Comparing is also useful for auditing targets. Since targets change over time, this analysis helps set new targets in new areas or new levels in the organization.

Features

The *Comparison* chart has these features:

- The *Comparison* chart displays dimension members over a period of time for a KPI. The *Comparison* chart compares results for the actual values of the KPI across a dimension's members.
  If you uncovered business problems using the *Drill* report, you can further analyze them here to see overall direction relative to other parts of the organization. While the *Drill* report shows a single slice in time across the organization, the *Comparison* chart shows trends for multiple members of the organization.
- You can drill down on a charted member. The chart is updated to display the next lower level series members from the selected member.
- You can drill up on a charted member.
- You can change the focus dimension. The *Total member* of the dimension is displayed by default.
- You can create a report using *Create Associated Report*.
- You can specify graph options, such as graph type, the minimum value to chart, the maximum value to chart, and the scale at which to display values. You can also add a label along the Y axis. You can control the display of horizontal grid lines, vertical grid lines, and a chart legend.

Activities

To display the *Comparison* chart, click the *Comparison* link in the *KPI Details* view.

1.8.3.2 Indexed KPI Details

Use

An indexed KPI is a collection of KPIs. Use the *Indexed KPI Details* view to monitor the progress toward the selected indexed KPI. The *Indexed KPI Details* view shows how an indexed KPI's status color is determined. The progress of an indexed KPI is determined by analyzing the performance of the KPIs associated with the indexed KPI.

Indexed KPIs appear in all tabs of the strategy management application. The *Indexed KPI Details* view in the *Scorecard* tab provides complete information about the selected indexed KPI.

Features

The *Indexed KPI Details* view has these features:

- You can see the description and owner of the indexed KPI.
- You can see the KPIs associated with the indexed KPI. Some KPIs may be weighted more or less than others depending on their importance. If they are not weighted equally, then their weights appear in parentheses. Each KPI is a link to the *KPI Details* view.
  For more information, see KPI Details [page 206].
- You can review the calculation method used on the KPI index values to calculate the index KPI's score.
- The colored dial shows the range of acceptable and unacceptable colors. There may be three or five colors depending on how your strategy management administrator set up the application. The colored dial points to the current status color of the index KPI. This color is also represented numerically as the index KPI's score.
- The color of the status indicator represents the performance of this indexed KPI. A better performance is represented by green, an average score is represented by yellow, and a poor score is represented by red. The indexed KPI's status indicator color is determined as follows. First, the status color of each KPI is matched to the same color in the colored dial. Based on the color match, each KPI is assigned that numeric value. The KPI numeric values are then used in the specified calculation method. The resulting value from the calculation is the indexed KPI's score. This score is matched to the appropriate color in the colored dial, and that color is used for the indexed KPI's status indicator.
- The table shows the KPIs that this index KPI is associated with, the perspectives for those KPIs, and the context. This view has the same format as the *Overviews* view except that it is showing you a filtered view of the associated KPIs rather than all KPIs. This table shows you the status indicator colors of the KPIs that are used to determine the status indicator color of the index KPI.
  For information about the *Overviews* view, see Hierarchy View [page 195].
  For information about the columns that appear in the table, see Format Selections [page 198].
- You can filter the KPIs.

For more information, see Filters [page 216].

- You can display an associated link in a new browser window. The link can display materials that support the indexed KPI.
- You can view comments about this KPI or any other item, including unread comments. Comments help you document information that may be important to share that is not covered in the objective description.
  For more information, see Reviewing Comments and Replies [page 166].
- If you have been given permission to add comments, you can add comments or replies. If you do not see an *Add* link in the screen, or if you do not see a *New* or *Reply* button in the *Comments* dialog box, then you do not have the ability to create comments.
  For more information, see Adding, Editing, and Removing Comments [page 165].
- You can see the subjective assessment status indicator and comment provided by the owner of this indexed KPI if your strategy management administrator implemented this feature.
- You can add a subjective assessment of an indexed KPI you own if your strategy management administrator implemented this feature.

Indexed KPIs do not have trend indicators because they are not measured by a gap performance value.

Activities

To display the *Index KPI Details* view, click an index KPI in any tab that shows indexed KPIs.

More Information

Standard Features of the Tabs [page 161]

1.8.3.3 Objective Details

Use

Use the *Objective Details* view to review details about an objective. The *Objective Details* view shows how an objective's status color is determined.

An objective is an indicator of a perspective that describes a specific, measurable component of the vision and mission of the organization. Objectives represent critical, actionable, and measurable components of a desired state within the context of perspectives.

Objectives appear in all tabs of the strategy management application. The *Objective Details* view in the *Scorecard* tab provides complete information about the selected objective.

Features

The *Objective Details* view has the following features:

- The table shows the underlying KPIs associated with this objective. This table shows the status indicator colors of the KPIs that are used to determine the status indicator color of the objective.
  Some KPIs may be weighted more or less than others depending on their importance. If they are not weighted equally, then their weights appear in parentheses. Each KPI is a link to the *KPI Details* view.
  For more information, see KPI Details [page 206].
  For information about the columns that appear in the table, see Format Selections [page 198].
- You can review the calculation method used on the KPI index values to calculate the objective's score.
- The colored dial shows the range of acceptable and unacceptable colors. There may be three or five colors depending on how your strategy management administrator set up the application. The colored dial points to the current status color of the objective. This color is also represented numerically as the objective's score.
  The color of the status indicator represents the performance of this objective based on the performance of its underlying KPIs. Each associated KPI's score determines the status of the objective. How the KPI statuses are indexed, calculated, and weighted for the objective determines the objective's status.
  When an objective is associated with KPIs but still does not display a status indicator, it means the objective has null or missing data. The scorecard administrator can control whether to display a status indicator in this situation and which color to display.
- The status indicator color is determined by converting the *Score* value of each associated KPI to the appropriate *Index Value* on the objective's colored dial. *Index Values* are processed with the calculation method (for example, they are averaged), and the resulting score of the objective is matched to the relevant color on the color dial.
  For more information, see Indexed Scoring vs. Absolute Scoring [page 203].
- You can see the description and owner of the objective.
- You can filter the objectives.
  For more information, see Filters [page 216].
- You can display an associated link in a new browser window. The link can display materials that support the index KPI.
- You can view comments about this objective or any other item.
  For more information, see Reviewing Comments and Replies [page 166].
- If you have been given permission to add comments, you can add comments or replies. If you do not see an *Add* link in the screen, it means you do not have the ability to create comments. Comments help to facilitate collaboration and the sharing of best practices throughout the organization.
  For more information, see Adding, Editing, and Removing Comments [page 165].
- You can display this objective's initiatives in the *Initiatives* tab by clicking *Associated Initiatives*. Initiatives allow you to keep track of the milestones that are planned to reach a defined target. You can apply initiatives to perspectives or objectives.
- You can see the subjective assessment status indicator and comment provided by the owner of this objective if your strategy management administrator implemented this feature.
- You can add a subjective assessment of an objective you own if your strategy management administrator implemented this feature.
- You can see the cause and effect relationship this objective has on other objectives by clicking the *Related Objectives* tab.

Activities

To display the *Objective Details* view, select the objective in any tab.

More Information

Standard Features of Most Tabs [page 161]

1.8.3.4 Perspective Details

Use

A perspective is an indicator for the various aspects of a business where an organization needs to focus to execute on its strategy. Perspectives are categories of strategic objectives that provide a full view of your company. For example, perspectives such as financial, customer, internal, learning and growth provide a balanced framework for telling the story of the strategy in cause and effect terms.

Use the *Perspective Detail* view to review details about a particular perspective in the context such as how a perspective's status color is determined.

Not all sites implement scored perspectives. If you do not see a status indicator next to a perspective in the *Scorecard* views or the *Scorecard Comparison* view, it means this perspective is not being measured.

Features

The *Perspective Detail* view has these features:

- If the perspective is measured by a KPI, the *Perspective Detail* view shows details about the KPI that is used to measure the perspective. This view is similar to the *KPI Detail* view.
- If the perspective is measured by an index of objectives, the *Perspective Detail* view shows details about the objectives that are used to measure the perspective. This screen is similar to *Objective Detail* view.
- You see all the objects assigned to this perspective in the *Underlying Objectives* tab.
- You see all the objects related to this perspective in the *Related Objectives* tab.
- You can see the subjective assessment status indicator and comment provided by the owner of this perspective if your strategy management administrator implemented this feature.
- You can add a subjective assessment of a perspective you own if your strategy management administrator implemented this feature.

Activities

To display the *Perspective Detail* view, click a perspective in any tab.

More Information

Objective Details [page 212]

KPI Details [page 206]

1.8.3.5 Context Details

Use

Use the *Context Details* view to review details about the context. In this screen, you can learn how the context's status color is determined. The context indicator provides a general target status about the whole scorecard based on the status of one KPI or the status of selected perspectives.

Features

The *Context Details* view has these features:

- If the context is measured by a KPI, the *Context Detail* view shows details about the KPI that is used to measure the context. This screen is similar to a *KPI Detail* view.
- If the context is measured by an index of perspectives, the *Context Detail* view shows details about the perspectives that are used to measure the context. This screen is similar to *Objective Detail* view.
- You see all the objects assigned to this context in the *Underlying Objectives* tab.
- You see all the objects related to this context in the *Related Objects* tab.
- You see the subjective assessment status indicator and comment provided by the owner of this context if your strategy management administrator implemented this feature.
- You can add a subjective assessment of a context you own if your strategy management administrator implemented this feature.

Activities

To display the *Context Details* view, click the context in the current tab.

More Information

Objective Details [page 212]

KPI Details [page 206]

1.8.4 Filters

Use

Use filters to narrow your scorecard view and focus on one or more particular areas. You can select any combination of filters. Use filters to answer questions such as “How are all the objectives and KPIs that I am responsible for performing?” and “Which of the objectives and KPIs that I am responsible for are under performing?”

Filters are available when using the *Scorecard* link.

Features

You can set the following basic filters in the *Scorecard* views, the *Detail* views, and *Scorecard Comparison* view in the *Scorecard* tab:

Field	Description
Period	Specify the period you want to explore in this view. For example, if you choose *Latest Month*, the scorecard view shows you information for the latest month. If you choose *Latest* `<period>`*(to date)*, the scorecard view shows information for the latest period to date, with a weighted average by days. For example, if you set the latest date to be the end of April of the current year, and you display your data for the past three years using the *Latest Year (to date)* period, you see data for those past three years only through April of each year. You can compare the current year's year-to-date data with the previous year's data. Each previous period only has the same amount of aggregation in it so that you can more readily compare previous periods. In certain scenarios, there may not be a difference in data between the latest period and latest to date period, depending on your latest date.
End Date	The *End Date* shows the latest date for which you are viewing information.
Select Date	Click *Select Date* to specify a different end date.

Field	Description
Dimension Filters	Select one member of a dimension to filter the view by that member. For more information, see Filtering by Dimension Members [page 218]. This filter is not available in the *Scorecard Comparison* view. If your administrator set a default dimension filter for this context, you can override the filter with your own filter. For example, if you are displaying the *Scorecard* tab with the *Fashions Enterprise* context, and the context is filtered by *Store: Northeast*, you can change the filter to the total *Store* level, or to a lower level such as *Store: Boston*.

You can set the following advanced filters by clicking *Advanced Filters* in the *Hierarchy* view:

Field	Description
Responsible	Shows only the objects for which the selected user is responsible.
Status	Shows only the objects that have a particular status.
Trend	Shows only the KPIs with a particular trend.
Lead/Lag	Shows only leading KPIs, lagging KPIs, or all KPIs. i Note Your strategy management administrator has the ability to change this text, so your implementation may show the same labels, or different labels, or additional labels.
Quantitative/Qualitative	Shows only quantitative KPIs, qualitative KPIs, or all KPIs. i Note Your strategy management administrator has the ability to change this text, so your implementation may show the same labels, or different labels, or additional labels.
Reset Filters	Resets the filters to their original settings. All changes made in this session are cleared, and the default view is displayed.

Activities

- To select basic filters, specify the filters. The view is automatically filtered.
- To select advanced filters in the *Hierarchy* view of the *Scorecard* link, click *Advanced Filters*, then specify a filter and click *Go*.

1.8.4.1 Filtering by Dimension Members

Procedure

1. In the *Hierarchy* view or *Objectives* view, select the *Dimension Filters* text box to display the *Set Dimension Filters* dialog box.
2. Select the dimension you want to filter. The *Member Selector* appears.

   > **i Note**
   >
   > If you see a *Type* dimension, it means your site is set up to switch what is being compared to actual, such as target, forecast, or benchmark. If you select a member other than *Target*, all instances of *Target* in the *Scorecard* tab change to the selected *Type* dimension member.

3. From the *Display* dropdown list, select whether to view the dimension members by hierarchy or by list. You also specify whether to display dimension members by ID or description or both. Optionally, you can search for a specific member.

   > **i Note**
   >
   > If the dimension contains multiple hierarchies, then you can also select which hierarchy to display. If you do not specify which hierarchy to display, then the default hierarchy is used.

4. Select one member and click *OK*.
5. Optional: Continue selecting dimensions and then selecting one member you want to filter into the view.
6. Click *OK*.

1.9 Initiatives

Use

Initiatives are key projects or programs developed to reach strategic objectives. They are also known as operational programs, projects, actions, and activities. They differ from objectives in that they are more specific, have stated boundaries (a beginning and end date), have a person/team assigned to accomplish them, and have a budget. Several initiatives together may support a specific objective or pathway.

Use the *Initiatives* tab to explore initiatives supporting overall objectives as well as the milestones supporting each initiative, interdependencies between them, and schedule and budget status. This tab helps put ongoing organizational activities in the context of overall goals to ensure that everyone is doing the right work to reach objectives.

Initiatives are integrated into these aspects of the application:

- Initiatives are shown in the *My Performance Summary* panel of the *Home* tab.
- You can subscribe to particular initiatives so you can monitor them and keep of them moving forward using the *Home* tab. You can receive notification when certain aspects of an initiative changes such as the target date or budget status. You can receive notification if a milestone or submilestone changes. You can also be notified immediately if a user comments on an initiative, or if a milestone or submilestone is due within a certain number of calendar days.
- The initiatives for an objective are displayed when you display details about an objective in the *Scorecard* tab.
- The initiatives for an objective are displayed when you click an objective in the *Strategy* > *Goal Diagram* tab.

New, modified, or deleted initiatives are automatically refreshed whenever you restart a new application session, or you switch from this context to another and then back to this context.

If your system administrator has enabled the option that requires all new and modified initiatives within a context be reviewed and approved by colleagues, you see icons beside the names of initiatives in the Initiatives list depending on your role. Different icons appear for end users, authors and owners, and approvers. Also, if you are an approver who has been assigned to approve newly created initiatives and modifications to existing initiatives, you receive email notifications telling you when an initiative needs your review. For more information, see Initiative Approval Workflow [page 245].

Features

The *Initiatives* tab has the following features:

Feature	Description
Initiatives Summary view	The *Initiatives Summary* provides a status of initiatives so you can gain insight into how they impact goals and objectives. Learn where initiatives fit within overall organizational priorities, which require immediate attention, as well as trade-offs between various initiatives and milestones. This helps to ensure the resources are directed to those most critical to reaching organizational goals. For more information, see Initiatives Summary [page 220]. The *Milestones* tab in the *Initiatives Summary* displays milestones and submilestones in the form of a table or Fishbone Diagram. The table shows the milestones and submilestones for an initiative. The diagram assesses critical interdependencies between milestones and submilestones, which increases understanding and helps resolve bottlenecks within an initiative. For more information, see Milestones [page 234] The *Impact Diagram* tab in the *Initiatives Summary* shows the impact of an initiative's actual and forecast changes over a time period for a KPI. For more information, see Impact Diagram [page 241].

Feature	Description
Prioritization Matrix view	The *Prioritization Matrix* provides a view of initiatives' relative importance in relation to its schedule status, budget status, or target status, as well as the dependencies between individual initiatives and milestones. For more information, see Prioritization Matrix [page 242].
Functions that are standard to the tab	You can use the standard features throughout all tabs. For more information, see Standard Features of the Tabs [page 161]

1.9.1 Initiatives Summary

Use

The *Initiatives Summary* provides the status of initiatives to give insight into how they impact goals and objectives.

Features

You can use the *Initiative Summary* to do the following:

- You can create, publish, or unpublish initiatives if your role has permission to create initiatives. You can edit or delete initiatives that you created or that you own.
  For more information, see Initiative Development [page 221].
- You can review information about an initiative. For more information, see Reviewing Initiatives [page 230].
- You can create and review milestones and submilestones using the *Milestones* subtab. For more information, see Milestones [page 234].
- You can view the *Impact Diagram* of initiatives, milestones, and submilestones and the impact from KPIs over time using the *Impact Diagram* subtab. For more information, see Impact Diagram [page 241].
- You can show details about the initiative status by clicking *Details*. You see the detailed information about the initiative, and you can also review the update history, related objectives, related KPI, and any associated links and dashboards.
- You can filter the initiatives on certain features such as schedule status or owner. For more information, see Filter Setting [page 243].
- You can cascade initiatives based on contexts or based on cascaded initiatives. For more information, see Cascaded Initiatives [page 227].
- You can customize the columns using the *Customize Columns* link.
- You can display the dashboard associated with an initiative.

The initiative owner automatically receives notification when the owner becomes associated with the initiative. Each owner is responsible for using the *Home* tab to subscribe to initiatives they own if they wish to be notified of other changes to the initiative.

Activities

To display the *Initiatives Summary*, click *Initiatives Summary* in the *Initiatives* tab.

More Information

Standard Features of the Tabs [page 161]

1.9.1.1 Initiative Development

Prerequisites

To create initiatives, the system administrator has given this permission to your role. If you can access the *Add Initiative*, *Edit*, and *Delete* links in the *Initiative Summary*, it means you can create initiatives. With these permissions, you can also edit and delete initiatives that you own that were created by someone else.

Context

You create initiatives for strategic objectives. You can create an initiative by starting with empty values or by basing it on the values of another initiative.

Procedure

1. Display the *Initiatives Summary*.
2. Perform the appropriate function as follows:

Function	Navigation	More Information
Create an initiative	Click *Add Initiative*	When adding an initiative, you link it to strategic objectives. This creates an association between the initiative and its objectives. The association provides immediate views on how the initiative affects performance at the strategic level. Wherever an objective appears in the application, you see a list of its associated initiatives. For more information, see Creating an Initiative [page 223].
Create an initiative like an existing initiative	Click *Copy an Existing Initiative* when creating or editing an initiative.	For more information, see Creating an Initiative [page 223].
Create an initiative using actual and budget data from SAP Business Planning and Consolidation, if applicable	Create the initiative, then click *Edit*. Select the *Use the Value from Planning and Consolidation* checkboxes and the *Load Data* link.	If you do not see the *Use the Value from Planning and Consolidation* checkboxes, it means your system is not integrated with SAP Business Planning and Consolidation. For more information, see Creating Initiatives Using Planning and Consolidation Data [page 226].
Add milestones and submilestones to the initiative	In the *Milestones* subtab, click *New*	For more information, see Creating a Milestone or Submilestone for an Initiative [page 237]
Publish an initiative	Select the *Publish Initiative* option when creating or editing an initiative	None
Unpublish an initiative	Deselect the *Publish Initiative* option when editing an initiative	Unpublished initiatives appear in the *Initiatives Summary* and the *Prioritization Matrix* only if you include a filter option to include unpublished initiatives. You can return to this dialog box to publish the initiative at any time.

Function	Navigation	More Information
Edit an initiative	Select the initiative and click *Edit*.	You may want to update the progress over time or add an actual end date once the initiative has completed. While editing an initiative, you can notify team members at once that you have edited the initiative using *Notify Team Members Now*. Depending on how the team members subscribe to notifications, the team members may receive an e-mail and an entry in the *Inbox* in the *Home* tab. Users do not have to subscribe to that particular initiative to receive these notifications. The subject of the e-mails appears as *Strategy Management Initiatives Notification*.
Delete an initiative	Select the initiative and click *Delete*	You can only delete initiatives that you created or that you own. When you delete an initiative, you also delete all of its milestones and submilestones. Whenever you make a change, it might be useful to add a comment about the change.

1.9.1.1.1 Creating an Initiative

Procedure

Creating an Initiative

1. Click *Add Initiative* to display the *Initiatives* dialog box.
2. Enter the values as shown in the tables below and click *Next* after you complete each section.

Creating an Initiative by Copying an Existing Initiative

1. Click *Add Initiative* to display the *Initiatives* dialog box.
2. Click *Copy an Existing Initiative*.
3. In the *New Initiative* text box, type the name of the new initiative.
4. From the *Copy From* dropdown list, select the existing initiative whose values you want to use for the new initiative.
5. Optional. To copy all the milestones and submilestones of the initiative too, click *Copy Milestones and Submilestones*. Otherwise, the initiative is created with no milestones or submilestones.
6. Click *OK*.

7. To modify some values of the new initiative, make sure the initiative is selected in the *Initiatives Summary*, and then click *Edit*. Then enter the values as shown in the table below.

Fields and Descriptions

General Information Fields	Description
Name	Specifies the name of the initiative.
Type	Specifies the categorization of the initiative. For example, you can create a *corrective action* initiative or a *strategic* initiative.
Description	Specifies information about this initiative.
Owner	Specifies the owner of this initiative. The owner is the user who is responsible for managing the initiative activities. An owner is the person responsible for ensuring that the stakeholders follow through on their tasks and updates the initiatives regularly.
Select Multiple Owners	Allows you to select more than one owner. In the *Multiple Owners* dialog box, select owners and drag them to the *Owner Name* box. Owners are allowed to edit and delete initiatives that they own.
Author	The *Author* box is read-only. It shows your user name as you are the user creating the initiative.
Roles	Specifies the roles who you want to view this initiative.
Notify Team Members Now	Alerts initiative team members when any aspect of this initiative has changed. Users will receive a notification immediately, just this one time. In order for this functionality to work, team members must have a *Display Notification* option selected using the *Manage Subscriptions* link in the *Home* tab *Inbox*.
Display Role Members	Shows the users in the selected role.

Budget and Schedule Fields	Description
Actual	Specifies the actual value for this initiative. If there is no actual value, leave this box empty.
Budget	Specifies the budgeted value for this initiative. If there is no budget value, leave this box empty.
Start	Specifies the month, day, and year on which to start this initiative. Select a date and click *OK*.
Target End	Specifies the target end date for this initiative.

Budget and Schedule Fields	Description
Actual End	Specifies 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	Specifies the expiration date for this initiative.
Initiative Does Not Expire	Specifies that you do not want this initiative to expire
Progress	Specifies the progress of this initiative. You need to update the progress when it changes.
Publish Initiative	Specifies that you want to publish the initiative. The initiative does not appear in the *Initiatives* tab 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 in review or unapproved. You change an initiative's status between published and unpublished by editing the initiative.

Measurement Fields	Description
Omit Initiative Status	Shows an empty space in the *Status* column instead of a status indicator for this initiative
Set Initiative Status	Shows a status indicator of your choice for the initiative. The initiative status is a subjective value that you enter to communicate how well the initiative is progressing. From the dropdown 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.
Measure Initiative on a KPI	Shows a status indicator that is based on the status of a selected KPI. From the dropdown list, select the KPI whose status indicator you want to use for this initiative.
Importance	Specifies the level of importance to give to this initiative.

Scorecard Fields	Description
Perspectives/Objectives	Specifies the perspectives and objectives to associate with this initiative. Add or remove perspectives and objectives by dragging them to or from the *Selected* list.

Associated Links Fields	Description
Associated Links	Specifies a URL to associate with this initiative. In the *Title* box, type the text for this URL. The URL represents a Web location that supports the initiative. These links appear in the *Details* box when you click the *Details* link in the *Initiatives Summary*.

1.9.1.1.2 Creating Initiatives Using Planning and Consolidation Data

Prerequisites

The system administrator has configured the application for a Planning and Consolidation integration. For more information, see the SAP Library at *http://help.sap.com* > *Analytics* > *All Products*. Then filter on *Financial Information Management*. Choose *SAP BusinessObjects Financial Information Management 10.0: Supplement for SAP BusinessObjects Strategy Management 10.0*.

You are the strategy management administrator or an initiatives administrator (a user in a role with permission to create initiatives). If the *Add Initiative* link is unavailable to you, it means you do not have the correct permissions.

Context

You can create initiatives whose actual and budget values are based on SAP BusinessObjects Planning and Consolidation data, if that application is implemented on your system.

Procedure

1. Create the basic initiative and save it. For information about creating an initiative, see Creating an Initiative [page 223].
2. Select the initiative and click *Edit*.
3. Go to *Budget and Schedule*.
4. Select *Use the Value from Planning and Consolidation* next to one or both the *Actual* and *Budget* fields, and then click *Load Data*.
5. The Financial Information Management (FIM) application is started in a second browser to acquire the appropriate data for the fields. Log into FIM.

6. To create a new job, click *New*.
7. Enter the job name and description and click *Next*.
8. Add users to the job and click *Next*.
9. Select the data store and model for the source and click *Next*.
10. Select the data store for the target. Then select the *Initiatives* radio button, and select the context and initiative to load, and click *Next*.
11. Map the source with target initiative and click *Finish*.
12. Run the job in FIM, and then exit from FIM.
13. Save your changes in the *Initiatives* tab.

1.9.1.2 Cascaded Initiatives

Use

Large organizations are commonly required to create initiatives that link and span across contexts. For example, an initiative at the corporate level may have multiple underlying related initiatives at the divisional level. Cascaded initiatives tie very closely to the concept of cascaded scorecards and enable true cascading of strategy across the organization.

Features

You can do the following with cascaded initiatives:

- If your role has permission to create initiatives, you can create cascaded initiatives.
  You can create a group of initiatives that are linked together by virtue of the fact that they are linked to a hierarchy of cascaded objectives
  You can also create initiatives that are linked across contexts. This is a quick way of copying an initiative to many contexts at the same time.
  For more information, see Cascaded Initiatives Development [page 228].
- If your role does not have permission to create initiatives, you can view cascaded initiatives in the *Initiatives* tab.
  You can select individual contexts from the *Context* dropdown list to see the cascaded initiative. You can also select *Show All Initiatives (Across Contexts)* from the *Show* dropdown list to see the cascaded initiative in the designated contexts.
  You can display just the linked initiatives by choosing *Linked Initiatives* from the *Show* dropdown list.

1.9.1.2.1 Cascaded Initiatives Development

Use

You can create cascaded initiatives across contexts, or across objectives.

Prerequisites

A cascaded scorecard exists.

Features

You can do the following:

- Cascade an initiative from one context to other contexts in the same hierarchy, creating a link between the initiatives. This is a quick way of copying an initiative that is the same or similar among many contexts. In each context that contains a cascaded initiative, you can change the initiative name, owner, and actual and budget numbers. For more information, see Cascading an Initiative by Contexts [page 228].
- Create a group of initiatives that are linked together by virtue of the fact that they are linked to a hierarchy of cascaded objectives. For more information, see Cascading an Initiative by Cascaded Objectives [page 229].

1.9.1.2.1.1 Cascading an Initiative by Contexts

Prerequisites

- The system administrator has given your role permission to create initiatives. If you can access the *Add Initiative* link in the *Initiative Summary*, it means you can create initiatives.
- The strategy management administrator has set an option to display the *Show All Initiatives (Across Contexts)* option in the *Show* dropdown list to be able to display all initiatives across all contexts. If you see this option, it means your administrator has set up this feature.
- A scorecard administrator has created cascading scorecards based on a dimension hierarchy or has created individual scorecards and ordered them hierarchically. For more information, see Cascaded Scorecards Based on a Dimension Hierarchy [page 66] and Ordering Contexts and Applying a Hierarchy [page 60].

Context

This is a way of copying an initiative to multiple contexts. You can keep the copied initiative exactly the same as the original, or you can modify the name, owner, actual and budget values, and specify how you want to copy the data.

Procedure

1. In the *Initiatives* tab, select the initiative you want to cascade, and click *Cascade*.
2. Select *Cascade Based on Contexts*.
3. Select the contexts in which to copy this initiative.
4. To rename an initiative in a particular context, click the *Initiative* box on the appropriate line, and enter the new initiative name.
5. To change an actual or budget number for a copied initiative in a particular context, click the *Actual* or *Budget* text box and enter a new number.
6. To specify a new owner for the initiative in a particular context, click the *Owner* box on the appropriate line, and enter a different name.
7. To include the initiative's milestones and submilestones in the selected contexts, select *Include Milestones and Submilestones*.
8. Specify whether you want to copy budget information from the parent budget, or enter your own budget information.

1.9.1.2.1.2 Cascading an Initiative by Cascaded Objectives

Prerequisites

- The system administrator has given your role permission to create initiatives. If you can access the *Add Initiative* link in the *Initiative Summary*, it means you can create initiatives.
- The strategy management administrator has set an option to display the *Show All Initiatives (Across Contexts)* option in the *Show* dropdown list to be able to display all initiatives across all contexts. If you see this option, it means your administrator has set up this feature.
- A scorecard administrator has created cascaded objectives.

Context

You can associate an initiative with cascaded objectives. You can keep the associated initiative exactly the same as the original, or you can modify the name, owner, actual and budget values, and specify how you want to copy the data.

Procedure

1. In the *Initiatives* tab, select the initiative you want to cascade, and click *Cascade*.
2. Select *Cascade Based on Cascaded Objectives*.
3. Select a cascaded objective from the *Select a Cascaded Objective* dropdown list. This is a parent objective upon which to base the cascade.
4. Select the contexts upon which to base the cascade.
5. To rename an initiative in a particular context, click the *Initiative* box on the appropriate line, and enter the new initiative name.
6. To specify a new owner for the initiative in a particular context, click the *Owner* box on the appropriate line, and enter a different name.
7. To include the initiative's milestones and submilestones in the selected contexts, select *Include Milestones and Submilestones*.
8. To change an actual or budget number for a copied initiative in a particular context, click the *Actual* or *Budget* text box and enter a new number.
9. Specify whether you want to copy budget information from the parent budget, or enter your own budget information.

1.9.1.3 Reviewing Initiatives

Use

You can control how you want to view initiatives and learn about the status of initiatives by reviewing the *Initiatives Summary*.

Prerequisites

The strategy management administrator has set an option to display the *Show All Initiatives (Across Contexts)* feature to be able to display all initiatives across all contexts. If you see this listed in the *Show* dropdown list, it means your administrator has set up this feature.

Procedure

You can do the following to review initiatives in the *Initiatives Summary*:

Function	Navigation	More Information
Filter the list of initiatives	Select *Show Filters,* specify filter settings, and click *OK*.	For more information, see Filter Setting [page 243].
Clear all filters	Click *Reset Filters*.	None
Review an initiative	Select the initiative.	None
Review details about a selected initiative	Select the initiative and click *Details*.	You can see all the data about this initiative, the items related to this initiative, the date it was last updated, and associated links. If the initiative or any of its milestones or submilestones has been updated since the items were created, you can display an additional information box with the update history by clicking *Show Update History*.
Display an initiative's milestones and submilestones in a table	Select the *Milestones* subtab and then select ▦.	For more information, see Milestones [page 234].
Display an initiative's milestones and submilestones in the form of a *Fishbone Diagram*	Select the *Milestones* subtab and then select *Fishbone*.	For more information, see Milestones [page 234].
Display the initiative's impact on a KPI's status over time	Select the *Impact Diagram* subtab.	For more information, see Impact Diagram [page 241]
Add and remove columns in the *Initiatives Summary*	Click *Customize Columns*.	None
Display initiatives from the current context, or from all contexts available to your role, or all linked initiatives	From the *Show* dropdown list, select the appropriate item.	The strategy management administrator controls which roles have the ability to view initiatives across all contexts. If your role is not set up with this feature, this option is not displayed in the dropdown list.
Display initiatives across specific contexts	Select *Show Filters*, choose multiple contexts, and click *OK*.	None

Function	Navigation	More Information
Review the status indicator if one is set up	Display the *Status* column.	The initiative status is a subjective value that communicates how well the initiative is progressing. You can set this up when creating or editing an initiative. You can measure an initiative's performance by the status of a KPI or by a status that you choose.
Review the budget status	Display the *Budget Status* column.	The initiative's budget status shows whether the initiative is under budget (green), on budget (yellow), or over budget (red). If there is no status indicator, it means that there is no budget value associated with this initiative. For information about how the budget status is determined, see Budget Status Determination [page 233].
Review the schedule status	Display the *Schedule Status* column.	The initiative's schedule status shows whether the initiative is on schedule. In the *Prioritization Matrix*, that same schedule status is plotted on the *Urgency* (X) axis in the quadrant that represents behind schedule (far-left quadrants), on time (middle quadrants), or ahead of schedule (far-right quadrants). An initiative's schedule status is determined differently based on whether it is active (has no actual end date) or completed (has an actual end date). For information about how the schedule status is determined, see Initiative Schedule Status [page 232].
Sort a column	Select a column heading.	None

1.9.1.3.1 Initiative Schedule Status

Use

The initiative's schedule status in the *Schedule* column of the *Initiative Summary* shows whether the initiative is on schedule. In the *Prioritization Matrix*, that same schedule status is plotted on the *Schedule* (X) axis in the quadrant that represents behind schedule (far-left quadrants), on time (middle quadrants), or ahead of schedule (far-right quadrants).

An initiative's schedule status is determined as follows based on whether it is active (has no actual end date) or completed (has an actual end date):

- If an initiative is active, it derives its schedule status from the milestone that is the most behind schedule. If any of its milestones are behind schedule (red), the initiative is considered behind schedule. The initiative is colored red in the *Initiative Summary* and is plotted in the *Behind* quadrant in the *Prioritization Matrix*. If any of its milestones are either on time (yellow) or ahead of schedule (green), the initiative is considered ahead of schedule. The initiative is colored green in the *Initiative Summary* and is plotted in the *Ahead* quadrant in the *Prioritization Matrix*. If all milestones are on time (yellow), the initiative is considered on time. The initiative is colored yellow in the *Initiative Summary* and is plotted in the *On Time* quadrant in the *Prioritization Matrix*.
- If an initiative is active and does not have any milestones assigned, the initiative does not show any schedule status.
- If an initiative is completed, it derives its schedule status by whether its target end date was before or after the actual end date. If its actual end date is before the target end date, the initiative has an *Ahead* (green) schedule status. If its actual end date is after the target end date, the initiative has a *Behind* (red) schedule status. If its actual end date is the same as the target end date, the initiative has an *On Time* (yellow) schedule status.

If you edit or delete a milestone that is most behind schedule, then the schedule status of the initiative is updated to reflect the next milestone that is most behind schedule. Editing or deleting a milestone whose initiative is active has no effect on the initiative's schedule status.

More Information

Milestone and Submilestone Schedule Status [page 240]

1.9.1.3.2 Budget Status Determination

Use

The initiative's budget status in the *Budget* column of the *Initiative Summary* shows whether the initiative is under budget, on budget, or over budget. The colors of the status indicators in the *Budget* column are determined as follows:

- If *Actual* is greater than *Budget*, then the *Budget* status indicator for this initiative is red because the initiative is over budget.
- If *Actual* is less than *Budget*, then the Budget status indicator for this initiative is green because the initiative is under budget.
- If *Actual* is equal to *Budget*, then the *Budget* status indicator for the initiative is yellow because the initiative is on budget.
- If *Actual* and *Budget* both have 0 values (that is, there is no cost associated with this initiative), or if either *Actual* or *Budget* is empty, then no *Budget* status indicator is displayed for the initiative.

1.9.1.4 Milestones

Use

You can review the milestones and submilestones for the selected initiative as either a *Milestones and Submilestones* table or as a *Fishbone Diagram*.

Prerequisites

To create milestones and submilestones, you are assigned to a role that has permission to create them. If you can access the *New* link in the *Milestones* subtab, it means you can create milestones. With these permissions, you can also edit and delete initiatives and milestones for which you are the owner or author.

Features

You can do the following:

- You can review milestones and submilestones for an initiative.
- You can create milestones or submilestones and maintain them if you have the appropriate permission.

Activities

To review milestones and submilestones, click the *Milestones* subtab in the *Initiatives Summary*. Then do one of the following:

- To view milestones and submilestones in a table, select .
- To view milestones and submilestones in a *Fishbone Diagram*, select .

More Information

Milestone and Submilestone Development [page 235]

Creating a Milestone or Submilestone for an Initiative [page 237]

Reviewing Milestones and Submilestones [page 238]

Initiatives Summary [page 220]

1.9.1.4.1 Milestone and Submilestone Development

Use

Milestones are tasks that support an initiative. They are the individual work items that must be executed to complete an initiative. You can assign any number of milestones to an initiative. If a milestone is complex, it may have submilestones that break out the milestone into separate subtasks.

You add milestones to an initiative and add submilestones to a milestone. You can have an unlimited number of levels of submilestones for a milestone.

Prerequisites

To create milestones and submilestones, the system administrator has given this permission to your role. If you can access the *New* link in the *Milestones* subtab, it means you can create milestones and submilestones. With these permissions, you can also edit and delete milestones and submilestones that you own that were created by someone else. If you do not have the correct permissions, selecting the milestone or submilestone displays information about it instead.

You selected the *Milestones* subtab in the *Initiative Summary*.

Procedure

You can do the following to create milestones and submilestones in the *Initiatives Summary*:

Field	Navigation	More Information
Create a milestone for the selected initiative	In the *Milestones* subtab, click *New*.	Most items you define for a milestone appear in the *Milestones and Submilestones* table and *Fishbone Diagram*. Milestones also appear in the *Prioritization Matrix*. The schedule status of the milestones and submilestones is plotted in relation to the importance. For more information, see Creating a Milestone or Submilestone [page 237].
Create a submilestone	In the *Milestones* subtab, select the milestone and click *New*.	For more information, see Creating a Milestone or Submilestone [page 237].

Field	Navigation	More Information
Edit a milestone or submilestone	In the *Milestones* subtab, select ▦. Then select the item to edit, and click *Edit*.	Editing a milestone's schedule status may cause its initiative's schedule status to change if this milestone is a key factor for the initiative's status. Changing a milestone's schedule status changes where the plot of the milestone or submilestone appears in the *Prioritization Matrix* and may also change where its initiative is plotted. Changing a milestone's importance changes the color and thickness of the line in the *Fishbone Diagram*, and also changes location of the milestone or submilestone in the *Prioritization Matrix*. When a milestone is completed, the milestone author or owner must edit it to specify the actual end date.
Delete a milestone or submilestone	In the *Milestones* subtab, select ▦. Then click *Delete*.	Deleting a milestone's schedule status may cause its initiative's schedule status to change if this milestone is a key factor of the initiative's status.
Change a submilestone to a milestone or change a milestone to a submilestone	In the *Milestones* subtab, select ▦. Select the item to edit, and then click *Edit* Then select or deselect *Change This Milestone to a Submilestone of*.	None

More Information

Standard Features of the Tabs [page 161]

1.9.1.4.1.1 Creating a Milestone or Submilestone for an Initiative

Prerequisites

You have specified a start date and target end date for the initiative associated with the new milestone or submilestone.

Procedure

1. In the *Initiatives Summary*, select the initiative.
2. If necessary, filter the list to find the appropriate initiative.
3. Click the *Milestones* subtab.
4. Click *New* to display the *New Milestone or Submilestone* dialog box.
5. Enter the required data to create the milestone or submilestone as follows, and click *Next* after you complete each section:

General Information Field	Description
Name	Specifies the name of the milestone or submilestone.
Description	Specifies information about this milestone or submilestone.
Owner	Select the owner of the milestone or submilestone and drag it to the text box. The owner is the user who is responsible for managing the milestone activities. An owner ensures that the stakeholders follow through on their tasks and updates the initiatives regularly.
Team	Select users from the list and drag them to the list of team members. If necessary, add members using the *Add* pushbutton.
Author	The *Author* box is read-only. It shows your user name as you are the user creating the milestone or submilestone.
Importance	Select the level of importance of this milestone or submilestone to meet the initiative.

General Information Field	Description
Change This Milestone to a Submilestone of	By default, this is created as a milestone. To create it as a submilestone instead, select *Change This Milestone to a Submilestone of* and then select the milestone that is the parent of this submilestone from the dropdown list.

Schedule and Status Fields	Description
Start	Click the *Calendar* button to display a calendar where you specify the month, day, and year on which to start this milestone or submilestone. The start date must be on or after the start date of the initiative.
Target End	Click the *Calendar* button and specify the target end date for this milestone or submilestone similar to the way you selected the start date. The target end date must be on or before the target date of the initiative.
Actual End	Click the *Calendar* button and specify the actual end date similar to the way you selected the start date. When you first create the milestone or submilestone, this information is unknown.
Completion	Type a number that represents the percentage that this milestone or submilestone is complete. If there is no progress on this milestone or submilestone yet, enter 0. You cannot leave this field blank.
Rule-Based status *Override status*	Specify how the milestone's schedule status indicator is colored: ◦ To color the milestone by comparing the actual end date and target end date according to certain rules, select *Rule Based Status*. For more information, see Milestone and Submilestone Schedule Status [page 240]. ◦ To specify a status of your choice and override the rule-based status for milestones, select *Override Status* and then select a status from the dropdown list.

1.9.1.4.2 Reviewing Milestones and Submilestones

Use

You can review milestones and submilestones as a *Milestones and Submilestones* table, an *Impact Diagram*, a *Fishbone Diagram* or a *Gantt Chart*. The color-coded status is based on a comparison of the actual end date and target end date.

Prerequisites

You are displaying the *Milestones* tab in the *Initiatives Summary*.

Procedure

You can do the following to review milestones and submilestones in the *Initiatives Summary*:

Task	Navigation	More Information
Review an initiative's milestones and submilestones	Select the initiative.	None
Display the *Milestone and Submilestones* table	Select the *Milestones* tab.	None
Display an impact diagram to see how an initiative impacts the performance of a KPI over the initiative's time period.	Select the *Impact Diagram* tab.	See Impact Diagram [page 241].
Display milestones in a *Fishbone Diagram*	Select the *Fishbone* tab.	The *Fishbone Diagram* shows you the milestones and submilestone details in a diagram that helps you understand relationships. The milestones are displayed by their target end date. The left-most milestone has the target end date furthest away from the initiative's target end date. The right-most milestone has the closest target end date to the initiative's target end date.
Display submilestones in the *Fishbone Diagram*	Click the *Submilestones=* `<number>` link on the milestone node in the *Fishbone Diagram* .	If a milestone has submilestones, a *Submilestones=* `<number>` link appears under the milestone node. The number identified in the link shows the number of submilestones for the milestone. The left-most submilestone has the target end date furthest away from the milestone's target end date. The right-most submilestone has the closest target end date to the milestone's target end date.

Task	Navigation	More Information
Display milestones in a *Gantt Chart*	Select the *Gantt Chart* tab.	Display dates and values by resting the cursor over a bar. You can see the start date, target date, and completed date, if available.
Sort the milestones and submilestones	Click a column heading in the table.	None
Review the schedule status	See the *Status* column.	The schedule status shows whether the milestone or submilestone is on schedule. In the *Prioritization Matrix*, a plot for the schedule status appears on the *schedule* (X) axis in the quadrant that represents behind schedule (far-left quadrants), on time (middle quadrants), or ahead of schedule (far-right quadrants). A milestone's schedule status is determined differently based on whether using a rule-based status or overriding the status. For information about how the schedule status is determined, see Milestone and Submilestone Schedule Status [page 240].

1.9.1.4.2.1 Milestone and Submilestone Schedule Status

Use

The milestone's schedule status shows whether the milestone is behind schedule, on schedule, or ahead of schedule, and also controls the status of the initiative. The schedule status appears as a colored figure in the *Milestone and Submilestone* table and as a colored clock in the *Fishbone Diagram*. The schedule status is also plotted in the *Prioritization Matrix*.

A milestone's schedule status is determined differently based on whether using a rule-based status or overriding the status. If a milestone is defined with a rule-based status, its schedule status is determined based on these rules:

- If the milestone is completed (has an actual end date), the actual end date is compared to the target date. If the actual end date is after the target date, the status is behind schedule (red). If the actual end date is before the target date, the status is ahead of schedule (green). If the actual end date is the same as the target date, the status is on time (yellow).

- If the milestone is active (has no actual end date), the target date is compared to today's date. If the target date is later than today's date, the status is on time (yellow). If the target date is today or later, then the status is behind schedule (red).

If you override the rule-based status, you can specify your own subjective status for this milestone or submilestone. For example, if you have a milestone with a target date that is a week away, but you know you are behind schedule, you can override the status to whatever status you choose.

More Information

Initiative Schedule Status [page 232]

1.9.1.5 Impact Diagram

Use

The *Impact Diagram* shows how an initiative impacts the performance of a KPI by showing the performance of a KPI over the initiative's time period. It also shows a Gantt chart of the initiative and its milestones and submilestones so that you can see the timeline visually. By looking at milestones over time, you can identify if they are impacting the performance of KPIs.

Features

You can do the following with the *Impact Diagram*:

- You can slide the time bar from the left and right to narrow or increase the range of information and time periods.
- Select a different KPI to view the impact the initiative has on it.
- Select a different initiative in the *Initiatives Summary* to see the impact of the current KPI on the initiative.
- Display values for the KPI at a point in time by resting the cursor over a data point in the chart. You can see the actual or target value and the period in which this value is reported.
- Display dates and values for the initiative, milestones, or submilestones in the Gantt chart by resting the cursor over a bar. You can see the start date, target date, and completed date, if available.

Activities

To display the *Impact Diagram*, select the *Impact Diagram* tab in the *Initiative Summary*.

1.9.2 Prioritization Matrix

Use

The *Prioritization Matrix* provides a view of initiatives' relative importance in relation to its schedule status, budget status, or target status, as well as the dependencies between individual initiatives and/or milestones.

Prerequisites

To display completed initiatives, milestones, and submilestones, the *Include Completed* filter option is selected.

Features

The *Prioritization Matrix* has the following features:

- You can review the matrix, which consists of circles plotted on the X- and Y-axis.
  The Y-axis represents importance (low, medium, high) assigned to the item. The top-right quadrant is an alert zone. The initiative, milestone, or submilestone appears in the bottom (low importance) quadrant, middle (medium importance) quadrant, or top (high importance) quadrant based on the assigned importance. Any initiatives, milestones, or submilestones that exist in that quadrant should be reviewed immediately because those plots have high importance.
  Each plot is a circle indicating whether it is an initiative, a milestone, or a submilestone. Gray circles represent initiatives, milestones, or submilestones that are completed if you have the *Include Completed* filter set.
  The X-axis displays information based on the view you set, either *Importance vs Schedule*, *Importance vs Budget*, or *Importance vs Status*.
- You can review the schedule status of an initiative, milestone or sub-milestone with its importance to the strategic goals of the company. Knowing both the schedule and importance allows you to prioritize on initiatives that require immediate attention as a schedule risk. The top right quadrant is the one to focus on because it represents items that are behind schedule and important. This matrix is available using the *Importance vs Schedule* view.
  The X-axis represents urgency (ahead of schedule, on time, behind schedule). The initiative's start, target, and actual dates affect its schedule status. For information about the schedule status determination, see Schedule Status Determination.
  For information about the schedule status determination, see Initiative Schedule Status [page 232] and Milestone and Submilestone Schedule Status [page 240].
- You can review the budget status of an initiative, milestone or submilestone with its importance to the strategic goals of the company. Knowing both the budget status and importance allows you to prioritize on initiatives that require immediate attention as a budget risk. The top right quadrant is the one to focus on because it represents items that are over budget and important. This matrix is available using the *Importance vs Budget* view.
  The X-axis represents budget status (under budget, on budget, over budget). The difference between an initiative's actual and budget values affect its budget status.
  For information about the budget status determination, see Budget Status Determination [page 233].

- You can review the scorecard status of an initiative, milestone or submilestone with its importance to the strategic goals of the company. Focus on the top right quadrant to see items that are below target and important. This matrix is available using the *Importance vs Status* view.
  The X-axis represents scorecard status (above target, on target, below target). The status of an initiative's associated KPI determines its scorecard status.
- You can display active initiatives, milestones, and submilestones in the matrix by clicking *Active Projects*.
- You can display the name of the plotted item by resting your cursor on the plot.
- You can review a plotted item by clicking on a plot. All related items are highlighted with a yellow background. If the plot is an initiative, the related plots are the milestones and submilestone linked to this initiative. If the plot is a milestone, the related plots are the submilestones and the initiative related to this milestone. If the plot is a submilestone, the related plots are the milestone and the initiative related to this submilestone.
- You can filter the initiatives on certain features such as schedule status or owner. For more information, see Filter Setting [page 243].

Activities

To display the *Prioritization Matrix*, click *Prioritization Matrix* in the *Initiatives* tab.

More Information

Standard Features of the Tabs [page 161]

1.9.3 Filter Setting

Use

You can filter the list of initiatives displayed in the *Initiatives Summary* and *Prioritization Matrix*.

Features

You can filter the initiatives list in the following ways:

- By context
- By an associated perspective or objective selected in the *Perspectives and Objectives* dropdown list
  If you choose `<context>` , then the *Initiatives* list shows all initiatives for the scored context if one is defined for this scorecard.
- By an initiative owner selected in the *Owner* dropdown list
- By a participant selected in the *Participant* dropdown list

You can filter on individual participants, or participants from a particular role, or search for a participant by name. Searching by name is useful when you are looking for a person who is not a strategy management user.
To search by name, enter the first and last name exactly as it is defined in the system. This field is case-sensitive. You cannot use wildcards.
Participants are any users who are initiative owners, milestone owners, or initiative participants.
- By the schedule status selected in the *Schedule* dropdown list
- By the budget status selected in the *Budget* dropdown list
- By a particular target end date selected in the *Target End Date* dropdown list
- By the initiatives whose statuses are determined by an associated KPI selected in the *Status KPIs* dropdown list.
- By an initiative type selected in the *Type* dropdown list
- By including initiatives that are completed (ones that have met their actual end date) in addition to the active ones.
  In the *Initiative Summary* view, the selected initiative's milestones and submilestones are always displayed regardless of whether the milestones or submilestones are completed or not completed.
  In the *Prioritization Matrix*, milestones and submilestones are affected by this filter. If you include completed initiatives, then all milestones and submilestones for the initiatives are displayed. If you do not include completed initiatives, any initiatives, milestones, and submilestones that have not been completed are not displayed in the matrix. If an active initiative has a completed milestone, then that milestone is not displayed, but the initiative is displayed.
- By including initiatives that are unpublished in addition to the published ones
- By including expired initiatives in addition to the current ones.
- Display initiatives from the current context, or from all contexts available to your role, or all linked initiatives using the *Show* dropdown list.
  To be able to display all initiatives across all contexts, the strategy management administrator must have set up this feature. For more information, see Reviewing Initiatives [page 230].

You can show or hide the filters. Even if some filter options may be hidden, their filter criteria still remains in effect.

You can reset filters to original settings.

Activities

- To set filters, select *Show Filters*. Specify a filter and click *Go*.
- To reset filters, click *Reset Filters*.
- To hide the filter settings, click *Hide Filters*.

1.9.4 Initiative Approval Workflow

System administrators can enable an option that requires all new and modified workflows within a context be reviewed and approved prior to being put into use.

If your administrator has configured your system to require initiative approvals in certain contexts, icons appear beside the names of initiatives in the Initiatives list to indicate their status. The icons you may see are the following:

Icon	Description
Lock	*Not submitted yet* The initiative is new or is an existing initiative that has been modified, and it has not yet been submitted for approval by its owner or author.
Blue exclamation point	*Pending approval* The new or modified initiative has been submitted for approval by its owner or author. Up to three people may have to approve the initiative before it becomes available for general use.
Red exclamation point	*Requires your attention* You are an assigned approver of this initiative, and you should have received an email indicating that you need to take action on this initiative.
Check mark	*Completed* The initiative has received all of the approvals it needs and is in general use.

> **i Note**
>
> When a milestone for an initiative is added or updated, the initiative is considered to have been modified and therefore needs review if your system requires approval of new and modified initiatives in that context.

Related Information

Submitting an Initiative for Approval [page 246]
Reviewing New and Modified Initiatives [page 247]

1.9.4.1 Submitting an Initiative for Approval

Authors and owners of initiatives can modify their initiatives and can create new initiatives. Your system may be configured to require that new and modified initiatives in certain contexts be reviewed by up to three approvers.

Context

When you create an initiative and modify an existing initiative, and when the initiative is pending approval, the initiative is visible to users, and its current status appears as an icon beside the name of the initiative. However, your administrator has the option to hide such initiatives in the system. In this case, new and modified initiatives become visible to users only when they have received all necessary approvals. For more information about the status icons, see Initiative Approval Workflow [page 245].

Up to three people may be required to review and approve new and modified initiatives. Approvers are assigned to an initiative by default based on its context. Different contexts can have different sets of default approvers and a different number of approvers. In addition, if your system is set up to allow this, you can change the approvers assigned by default to review your initiative.

You can save an initiative when you are in the process of creating or modifying it prior to sending it for approval.

When creating and modifying an initiative, you can enter a note that the first approver sees. Each approver can add a note to the next approver.

Users of the system who have been designated as approvers of new and modified initiatives within a context receive an email that provides a link to where they can review the workflow, read any notes entered by the person before them in the approval process, and then approve the initiative.

Procedure

1. Open and modify the initiative as needed.
2. In the *Workflow* section of the initiative, the names of up to three approvers appear. If your system administrator allows you to change the default approvers for this context, select the names of other approvers.

   Email notifications and the actual approvals occur in the order in which the names appear here.
3. Click *Submit for Approval*.
4. Add a note to the first approver of this initiative, if necessary, then click *Submit*.

Results

The first approver receives an email that states the initiative requires review. The email contains a link to the initiative and your note.

Related Information

[Initiative Approval Workflow [page 245]]
[Reviewing New and Modified Initiatives [page 247]]

1.9.4.2 Reviewing New and Modified Initiatives

Initiative authors and owners assign colleagues to review and either approve or reject new initiatives and changes to existing initiatives when a system administrator enables this requirement.

Context

When an initiative is submitted for approval, the first assigned approver receives an email. The email states that an initiative requires review and contains a link to the initiative. The email also contains any notes that the owner or author wrote to the first approver when submitting the initiative for approval. If you are the second or third approver in line, you see any notes entered by the approver before you.

Procedure

1. Open the initiative by clicking the link in the email or by navigating to the initiative on the Initiative tab within Strategy Management.

   Notes from the owner or author appear.
2. Choose *Review* to close the notes and proceed with your review of the initiative.
3. Examine the information provided about the initiative. Milestones display if they exist.
   - When you select *Show all items*, all available information for the initiative appears along with any fields that have been modified.
   - When you select *Show only changed items*, only the modified fields appear.
   - When you select *Details*, a chronological display of all changes to the initiative appear.
4. Select *Approve* or *Reject* after your review.
5. Optional - Enter a note if you want to capture information about your review of the initiative or to provide information to the next approver.
6. Depending on your selection in step 4, choose *Approve* or *Reject* in the *Add a Note* dialog box or choose *Cancel* to continue reviewing the initiative.

   When you choose *Approve* and you are the only approver assigned to the initiative or the last approver of the initiative, its status changes to *Completed* and the initative becomes available for general use in the system. If there are additional assigned approvers, the initiative stays in *Pending approval* status and the system sends an email to the next approver in line.

   When you reject an initiative, the person before you in the approval process - either the submitter or the previous approver - receives an email noting your rejection.

Related Information

Initiative Approval Workflow [page 245]
Submitting an Initiative for Approval [page 246]

1.10 Dashboards

A dashboard is a collection of objects, for example, reports arranged on a single screen to provide the business user with a comprehensive overview.

A dashboard enables the user to display high-level information, as well as to perform in-depth analysis through linking to detailed analytics. The display of the dashboard is individually configurable.

You can create your own dashboard, or you can use an existing dashboard and modify it as needed. You can select a preferred layout for the dashboard. The layout cannot be modified once it has been initially created and saved.

You can save dashboards in the folder structure.

Related Information

Creating a dashboard [page 248]
Modifying a dashboard [page 249]

1.10.1 Creating a dashboard

Creating a dashboard involves selecting a layout and a saved report for each dashboard panel.

Procedure

1. Go to the dashboard tab
2. Select the *New* button.
3. Select a layout for the dashboard.
4. For the KPI View layout, do the following:
    1. Choose the *Select KPIs* link.
    2. In the *Select KPIs* dialog box, select the context in the dropdown box.
    3. For each panel on the right, select the KPIs you want to view.
    4. Optionally, enter a title for each panel of KPIs.

    5. Select *OK*.
5. For all other layouts, select a saved report for each dashboard panel by choosing the *Select Report* link. This displays a dialog box showing all saved reports.
6. Select the *Save* button.

1.10.2 Modifying a dashboard

Modifying a dashboard involves either replacing a report in a standard dashboard panel or replacing selected KPIs in the KPI View dashboard.

Procedure

1. Go to the *Dashboard* tab.
2. Select the *Browse* button, then open a saved dashboard.
3. To replace a report in one of the dashboard panels, do the following:
    1. Choose *X* to remove the existing report.
    2. Choose the *Select Report* link. This displays a list of all saved reports.
    3. Select a new report to add to the dashboard panel.
4. To replace a KPI in a KPI View dashboard, choose the *Select KPIs* link, then choose one or more KPIs to display.
5. Select the *Save* button.

1.10.3 Restricting dashboard access

Restrict access to dashboards in the Public folder to specific users based on their roles.

Context

By default, dashboards in the Public folder are available to all users.

Procedure

1. If you are the author of the dashboard, select *Manage Access* when browsing, creating, or saving your dashboard.
2. Choose the roles that can access the dashboard.

1.11 Briefing Books

A briefing book is a collection Scorecard, Initiatives, Strategy, Home, Reports, and Dashboard screens that show live data.

You determine the information that appears in a briefing book, and whether you need to create a new briefing book or modify an existing one based on your needs.

A briefing book shows live data. You can also publish briefing books as a way to record and present information over time. Publishing a briefing book retains the data at the time you publish it and makes it available in PDF format on the Briefng Books tab. For example, you might have a briefing book called *Monthly Summary* that you publish on the last day of each month. Over time, you would then have monthly summaries for January, Febraury, March, and so on available on the Briefing Books tab, maintaining a historic record of information after the system has been refreshed with the latest data in the live briefing book. This is a useful way to track data over time and to create templates for regular reviews.

Related Information

Creating a briefing book [page 250]
Adding content to a briefing book [page 251]
Viewing a briefing book [page 251]
Modifying a briefing book [page 252]
Printing a briefing book [page 252]
Publishing a briefing book [page 252]
Restricting briefing book access [page 253]

1.11.1 Creating a briefing book

You create a briefing book, then add content to it.

Procedure

1. Go to the *Briefing Book* tab.
2. Select the *New* button.
3. Enter a briefing book name.
4. Select the folder where you want to save the briefing book

1.11.2 Adding content to a briefing book

After creating a briefing book, you can add content from Scorecard, Initiatives, Strategy, Home, Reports, and Dashboards to it.

Procedure

1. Go to any tab and navigate to the view you want to capture.
2. Select the *Briefing Book* button.
3. Select the briefing book to which you want to add the content.
4. Enter a name for the captured screen.

1.11.3 Viewing a briefing book

Once you create a briefing book and add content, you can view it. You can also view previously published versions of briefing books.

Procedure

1. Go to the *Briefing Book* tab.
2. Select the *Browse* button.
3. Select a briefing book from the dialog box.
   To view a specific version of a briefing book that has been published, make a selection in the *Version* field.
4. Navigate through the briefing book.
   - Click on a link in the table of contents to view that page.
   - Select the *Next* and *Back* buttons to move among the pages of the briefing book.
   - Click *Jump to Page* to display a specific page.

1.11.4 Modifying a briefing book

Organize captured screens in your briefing book.

Procedure

While viewing a briefing book you can modify it by selecting the *Organize* button. You can rename or delete captured screens or the entire briefing book.

1.11.5 Printing a briefing book

Generate a PDF to print or save.

Procedure

1. While viewing a briefing book you can print it by selecting the *Print* button.
   The system generates and displays a PDF of the briefing book.
2. Print or save the PDF.

1.11.6 Publishing a briefing book

Build a list of briefing books in PDF format that contain snapshots of your data from the time of publishing.

Context

Procedure

1. While viewing a briefing book, choose *Publish*.
2. Set the publishing options, then choose *OK*.
   A PDF of the briefing book displays.

1.11.7 Restricting briefing book access

Restrict access to briefing books in the Public folder to specific users based on their roles.

Context

By default, briefing books in the Public folder are available to all users.

Procedure

1. If you are the author of the briefing book, select *Manage Access* when browsing, creating, or saving your briefing book.
2. Choose the roles that can access the briefing book.

1.12 Reports

The Reports component of SAP Strategy Management allows you to measure ongoing progress toward objectives. You can compare business measures with different time frames and view information at different levels of granularity. Reporting on performance versus previous periods enables you to examine progress versus historical performance.

You can do the following in the Reports component:

- You can create a report to explore your business data in a different way, to give you different perspectives on your data.
- You can personalize an existing report to better fit your needs.
- You can rename or delete a report you created.
- You can save a report.
- You can review private or public reports.

If there are filters applied to the report, the filter information is displayed on the line below the report title. The report title also shows the latest date that is being analyzed.

Reports in the Private folder are available only to the user who created them. Reports in the Public folder are available to all users for viewing. However, you can restrict access to reports in the Public folder to specific users based on their roles.

Related Information

[Restricting report access [page 264]]

1.12.1 About creating reports

Provides information about what you do when creating a report.

You can create a report that is temporary for the current session, or you can save it to a name in a folder for future reference.

When creating a report, you must do the following:

- You select a dimensional model whose data you want to view in a report.
- You can add or remove a graph at a using Display Graph in the Graph section.
- The report is created with default settings. Each dimensional model also has a default measure that is used in the initial view.

Related Information

[Creating Reports [page 254]]

1.12.1.1 Creating Reports

Provides the steps to create a report.

Procedure

Click *New*.

1.12.2 About saving reports

Provides information about what you do when saving a report.

You can save a report to a private or public set. A private report is viewable only be you while a public report is viewable by all users.

You can do the following when saving a report:

- You can save the report to a new name using *Save As*. Or, you can save the report to an existing report name and overwrite that report with your changes using *Save changes to current report*.
  The name can be alphanumeric. You cannot use special characters in a report name, such as an asterisk (*), slash (/), exclamation point (!) or pipe (|).

- You can specify whether to save the report to a private folder or to a public folder.
- If you save a private report, only you can display, edit, rename, or delete this report or set. If you save a public report, the report is available to all users.
- You cannot use the asterisk (*), slash (/), or exclamation point (!) in a set name.

Related Information

Saving reports [page 255]

1.12.2.1 Saving reports

Provides the steps to save a report.

Procedure

Click *Save*.

1.12.3 About working with reports

Provides information about what you do when working in a report.

Select measures

You can select measure for the report by selecting the *Measures* link. This will bring up a dialog box allowing you to select measures.

Select dimension members

You can select dimension members for the report by selecting the *Rows* link. This will bring up a dialog box allowing you to select members.

Select dimension filters

You can select dimension filters for the report by selecting the *Filters* link. This will bring up a dialog box allowing you to select members.

Set the time frame

You can examine progress versus historical performance by changing time frames. See About setting time frames in reports [page 257].

Set the presentation

You can specify the presentation of the report by laying out the dimensions, measures, and time periods across or down the report, setting row limits, controlling the display of row and column totals. For information, see About presentation setting [page 258] and About report layout options [page 259].

Display a trend graph

You can control the display of the chart, specify which items are charted, and set charting features. See About graph settings [page 260].

Sort a column

Select a column heading and then select *Sort Ascending* or *Sort Descending* to sort the data based on the selected column.

Drill up and down on dimensions

Select a label in the first column to drill down on a dimension. Select the drill up button at the top left of the grid to drill back up.

Update View

Whenever a report setting is changed, you must select *Update View* to see the changes reflected in the data.

Related Information

Working with reports [page 256]

1.12.3.1 Working with reports

Describes the tasks you can perform when working in reports.

Procedure

- To edit the measures that are used in the report, click *Measures* in the *Adjust Data* section.
- To edit the dimension members that are used in the rows, click *Rows* in the *Adjust Data* section.
- To filter the dimensions not used in the report, click *Filters* in the *Adjust Data* section.
- To set the time frame, use the settings in the *Time* section.
- To lay out the dimensions, time, and measures in the table, click *Layout* in the *Presentation* section.
- To set limits and to control the display of row and column totals, use the settings in the *Presentation* section.
- To display a chart, click *Display Graph* in the *Graph* section.
- To change chart settings, click *Graph items* in the *Graph* section.
- To sort a column, click the column heading.
- To drill down on data, click any item in the left-most column that contains a blue link.
- To drill up on data, click the *Up* arrow.

- To update the view with new time settings, click *Update View*.

1.12.4 About setting time frames in reports

Provides information about specifying the time frame in a report.

If your report has a *Show time by* drop-down list, you can specify the time frame as specific dates, relative dates, or as a period comparison.

You can set the following types of time frames in reports:

- You can set a time frame using specific start and end dates.
- You can set a date range and periodicity using relative dates.
  The periodicity can be the same frequency or more frequent than the date range. For example, if you select the Latest Week date range, you can select a time period of daily or weekly, but you cannot select a monthly time period. Any saved report using relative dates always displays the selected date range and the latest date for which there is data.
- You can set a time frame that compares two time periods. Optionally, you can include a percent change column in the report that shows the differences between the two time periods as a percentage.
  You can choose to always use the latest date for which there is data, or you can select a static end date for the report.

You must refresh the view with any new time frame settings you make.

Related Information

Setting time frames in reports [page 257]

1.12.4.1 Setting time frames in reports

Describes how to set time frames in reports.

Procedure

- To set a time frame, select an item from the *Show time by* drop-down list, specify the appropriate settings, and click *Update View* to refresh the view.
- To set a time frame using specific dates, select *Specific Dates* from the *Show time by* drop-down list. Then select the start date, end date, and the periodicity.
- To set a date range and periodicity using relative dates, select *Relative Dates*. Then select the date range to analyze from the *Date Range* drop-down list and the periodicity from the *Time Period* drop-down list.
- To set a time frame that compares two time periods, select *Period Comparison*. Then select the two periods you want to analyze from the *Period* drop-down list. Optionally, you can include a percent change

column in the report that shows the differences between the two time periods as a percentage by clicking *Show % Change*.

- To make sure you always use the latest date for which there is data, deselect *Override Latest Date*. You can also select a static end date for the report by selecting *Override Latest Date* and selecting an end date for the report. The *Override Latest Date* option is temporary for the current session. If the report was saved using *Always display latest date*, it has the ultimate control over whether the report is saved with an end date or the latest date.

1.12.5 About presentation setting

Provides information about what you can do to set the layout of a report.

You can do the following to set the presentation of the report:

- You can specify which dimensions will appear in the report, and the location of dimensions, measures, and time in the report.
  The initial view displays time across the table and measures displayed down the table. Time and measures are always displayed in the table, although you can switch their places so that measures are displayed across and time is displayed down. For more information, see About report layout options [page 259]
- You can limit the information in a report based on criteria of data in a particular column.

  > **Example**
  >
  > If you limit column one to display all values greater than 5,000,000, any rows with values less than 5,000,000 in that column are not displayed.

- You can order dimensions and members by a specific column, alphabetically, or hierarchically.
  When *Show Parents* is selected, each level of the dimension is indented when you drill up or down. The indentation is removed if you sort on a column or if you order the dimension alphabetically.
- You can control whether all higher levels of a dimension are displayed when drilling down.
- You can display a *Grand Total* row that represents the sum of all the numbers in each column for each page in the report. If the column is a percentage, such as *% Variance*, then the total number in that column represents the total percent variance rather than the sum. One page is considered one combination of members when there are two or more dimension members down the page. A table can have a single page down, or it may have multiple pages down the table.
- You can include a *% Total* row at the bottom of the report that represents the percentage of contribution of that column's members to the total for each page of the report.
- You can display a *Total* column across the report that sums the values across each row. If there are more than two dimensions across the table, then a column of subtotals is also shown for each page across the table. If the row is a percentage, then the total number in that row represents the total percent variance rather than the sum.
- You can include a *% Total* row across the report that represents the percentage of contribution of row members to the total for each page across the report. You can use this feature only if you have one dimension or metric displayed across the report.

Related Information

[Presentation setting [page 259]]

1.12.5.1 Presentation setting

Describes how to set the layout of a report.

Procedure

- To set the layout, click *Layout*.
- To set the high and low limits for data, click *Limit*. From the *Limit* column drop-down list, select the name of the column whose values you want to limit. From the *to values* drop-down list, select the function by which to limit values. Then type the value to set the limit. You can also suppress the display of missing values in a report by clicking *Suppress Missing*. If you apply a limit to any column, the *Suppress Missing* option is automatically selected.
- To order dimensions and members by a specific column, click the column heading.
- To order dimensions and members alphabetically, select *Order dimensions alphabetically* from the *Order* drop-down list.
- To order dimensions and members hierarchically, select *Order dimensions hierarchically* from the *Order* drop-down list.
- To control whether all higher levels of a dimension are displayed when drilling down, click *Show Parents*.
- To display a *Grand Total* row, click *Column totals*. To include a *% Total* row at the bottom of the report, click *Show %* next to *Column totals*.
- To display a *Total* column across the report, select *Row totals*. To include a *% Total* row across the report, click *Show %* next to *Row totals*.

1.12.6 About report layout options

Provides information about setting the layout of the dimensions, measures, and time in a report.

You can do the following to lay out the dimensions, measures, and time in the report:

- Add dimensions to the report.
  The order that items appear in the list represent the order they will appear in the report. If you add a dimension to the table, its Total member is added. You can either drill down on the Total member to go to a lower level, or you can use the *Rows* link in the *Adjust Data* section to select members.
- Remove a dimension from the report.
  Metrics and time are always displayed in the report. You cannot remove them.
- Swap the items in the *Across* list and *Down* list.
- Change the location of items in the *Across* list and *Down* list.

These items always remain on the table. The *Down* list and *Across* list cannot be empty. If the list contains only time or measures, you must temporarily add a dimension to the list, then move the Time or Measures item to the desired location, and then you can remove the dimension.

- Reorder dimensions, measures, and time in the list.
- Clear the *Across* and *Down* lists so only Time is in the *Across* list and measures are in the *Down* list.

Related Information

Selecting layout options [page 260]

1.12.6.1 Selecting layout options

Describes how to set layout options in a report.

Prerequisites

The *Change Layout* dialog box is displayed.

Procedure

- To work with the layout, click *Layout* in the *Presentation* section to display the *Change Layout* dialog box.
- To add dimensions to the report, select each one in the *Dimensions* list and click *To Across* or *To Down* depending on whether you want to display this item across or down the table.
- To remove a dimension from the report, select it in the *Across* or *Down* list and click *Remove*.
- To swap the items in the *Across* list and *Down* list, click *Swap Across/Down*.
- To reorder dimensions, measures, and time in the list, select the item you want to reorder and use *Move Up* and *Move Down*.
- To clear the *Across* and *Down* lists so only Time is in the *Across* list and measures are in the *Down* list, click *Reset*.

1.12.7 About graph settings

Provides information about displaying charts and changing the items that are charted

You can use graph settings in the following ways:

- You can display or hide the chart.

- You can add and remove items to be charted.
- You can change chart settings.
- You can create a dual axis trend chart when charting disparate items.
- Initially, the report's latest date and the time frame determine the length of the trend. Each point on the X-axis represents one period until the latest date. You can click a time frame link above the chart to change from the current time frame to the selected time frame. The chart is refreshed. The current time frame is highlighted in bold. You can also click *Graph items* to change the time frame in the *Graph Items* dialog box. You can change the periodicity and the number of periods to chart using the *Graph Items* dialog box.
- You can reset a chart's properties.

Related Information

Implementing graph settings [page 261]

1.12.7.1 Implementing graph settings

Describes how to implement graph settings.

Procedure

- To display the chart, select *Display Graph*.
- To hide the chart, deselect *Display Graph*.
- To add or remove items in a chart, click *Graph items*.
- To change chart settings, click *Graph items*. If a trend chart is displayed, you can click *Options* above the chart.
- To reset a chart's properties, click *Reset Graph Defaults*.

1.12.8 About chart settings

Provides information about changing the appearance of a chart.

You can modify the following **chart settings**:

- Change the chart type by clicking an icon that represents the type.

> i Note
>
> If you are selecting more than two series, you cannot select *Bar & Line*. If you are selecting more than three series, you cannot select *2 Bars & 1 Line* or *1 Line & 2 Bars* or *2 Stacked & Line*. When creating a pie chart, you can only select one series.

- Select items to graph. The series are charted in the order they appear in the *Selected items* list. You can change the order that items appear using *Move Up* and *Move Down*.
- Remove items from the chart.
- If the dimension or metric names are so long that you cannot see the full name, you can resize the dialog box.
- It is possible to have dimension member labels as long as 128 characters. If you have long member names, they may not appear in the chart. If you are changing the chart settings of a report in the *Reports* component, you can select a smaller number in the *Display label characters* drop-down list of the *Presentation* section to display a portion of the labels.
- If you are creating a chart that compares trends between disparate items, you can chart two or three series on the same chart, using dual Y-axis scales and different chart types to differentiate the series for each axis. A dual axis allows you to more accurately represent the comparison of disparate items.
- Select the periodicity for the chart. The time periods appear along the X-axis. By default, all periods for which there is data are charted according to the selected periodicity.

You can modify the following **chart options**:

- Type a title for the chart.
- Specify minimum and maximum values to chart along the Y-axis. By default, all values are displayed. The chart will adjust to show all points starting at the minimum number. If any points are lower than that number, they are shown starting from the minimum number. The chart will adjust to show all points up to the maximum number. If any points exceed that number, they are cut off at that number.
- Add a label that will appear along the Y-axis of the chart.
- Add horizontal and/or vertical grid lines.
- Display the chart legend.
- Scale the numbers.

  > Example
  >
  > If you have numbers in the millions, you might want to scale it by 1,000,000 to show all numbers as single digits. Then you can identify the scale being used in the label.

- Change the color of a series. The current designations are show in the *Colors* list.

Related Information

Modifying chart settings [page 263]

1.12.8.1 Modifying chart settings

Describes how to modify the settings of a chart.

Procedure

- To change the chart settings in the Reports component, click *Graph items* in the *Graph* section of the *Settings* panel.
- To change the chart settings in a *KPI Details* screen of the *Scorecard* component, click *Graph Options*.
- To select items to graph, select items from the *Select items to graph* section and click *Add to graph*.
- To use a dual Y-axis to chart disparate items, select either *Bar & Line*, *2 Bars & 1 Line*, *1 Bar & 2 Lines*, or *2 Stacked & Line* as the graph type. Then you can select *Dual Y Axis*.
- To select the periodicity for the chart, select a period from the *Select dates* drop-down list. Then select whether you want to chart all the data, or just the last x periods.
- To change the color of a series, select the series and then select the color from the *Change Colors* drop-down list.

1.12.9 About dual-axis trend charts

Provides information about creating charts that compare trends between disparate items.

If you are creating a chart that compares trends between disparate items, you can chart two or three series on the same chart, using two different Y axis scales and different chart types to differentiate the series for each axis. A dual-axis chart allows you to more accurately represent the comparison of disparate items.

You can do the following in the *Settings* tab specific to creating a dual-axis trend chart:

- If you are charting two disparate series, use *Bar & Line*. The first chart type and series follows the numbers on the left Y-Axis. The next chart type and series follows the numbers on the right Y-Axis.
- If you are charting two similar series and one nonsimilar series, choose *2 Bars & 1 Line* or *2 Stacked & Line*.
- If you are charting one separate series and two similar series, use *1 Bar & 2 Lines*.
- You can see which series will use which chart type by viewing the *Type* list next to the *Selected items* list. If necessary, you can move the items in the list to match the appropriate chart types.
- You can specify minimum and maximum values to chart along the Y-axes.
- You can add one label to the left Y-axis of the chart and another label to the right Y-axis.

Related Information

Creating dual-axis trend charts [page 264]

1.12.9.1 Creating dual-axis trend charts

Describes how to create a dual-axis trend chart.

Prerequisites

The *Graph Items* dialog box is displayed.

Procedure

- To change the chart settings, click *Graph items* in the *Graph* section of the *Settings* panel.
- To create a dual Y-axis, select *Dual Y Axis* option in the *Settings* tab of the *Graph Items* dialog box. Then specify a chart type and select the items to graph.

1.12.10 Restricting report access

Restrict access to reports in the Public folder to specific users based on their roles.

Context

By default, reports in the Public folder are available to all users.

Procedure

1. If you are the author of the report, select *Manage Access* when browsing, creating, or saving your report.
2. Choose the roles that can access the report.

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