How to utilize Home Page & Dashboards to drive adoption in SAP Cloud for Customer

Sushant Potdar, SAP
Sep 25, 2018
PUBLIC
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Home Page
Homepage Overview
Homepage is usually the landing page which acts like a snapshot of all the important KPI as well as a launchpad to start my day.

SAP delivered Tools – Deal Finder, Pipeline Influencers, News, My Upcoming Activities
Home Page – Custom Tile Demo
Demo

Important KPI Tile
My Org Win Ratio
QTD
1%

Custom Tiles
Travel & Expense
Concur
Guided Activity
Ticket
Digital Board Room
Sales Performance

Planned in 1811
Revenue Won Q3 | in M USD
5.26

Floor plan
Launch URL
Launch
URL Mashup
Display – HTML Mashup
Launch – URL, Floor plan, HTML Mashup

What’s on my mind
Accounts: My Accounts
8
Leads: Qualified
259
Opportunities: My Opportunities
66
Employees: My Team
19
My Tasks
428
Overdue
Deal Finder
10081
Leads
Pipeline Influencers
80%
50%
20%
Total Value USD

Sales Operations and Admin followup
Thu, 20 Sep 2018
How to Improve Your Digital Journey
With the Right Partners
No single technology or company can solve busi…
SAP News Center

My Upcoming Activities
You have no upcoming activities
Simplify expense, travel, and invoice for greater visibility

Find the right solutions for your business.

<table>
<thead>
<tr>
<th>Small Business</th>
<th>Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense</td>
<td></td>
</tr>
<tr>
<td>Simple and accurate expense management</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>Invoice</td>
</tr>
<tr>
<td>Travel solutions right-sized for your business</td>
<td>Reduce costs with an automated invoice solution</td>
</tr>
</tbody>
</table>

Automate expenses from receipt to reimbursement

Automating the expense management process – and eliminating the errors, paper and procedures that go with it – frees up your employees and gives you more control over compliance and costs. Users can quickly take a picture of receipts, submit expense reports from any mobile device, and keep productivity on track. It’s the expense management software that your company needs to streamline business travel expense report processing and business expense reports.
Create Custom Tile

**Type**: Floorplan

**Title**: Guided Activity Ticket

**Path**: /BYD_COD/ServiceOnDemand/AgentQueue/SEOG_TICKET

**Icon**: ![extended-ticket]

**Description**: create ticket
Main contact is Initial. Delete it or enter an ID. Activity Planner Routing Rules were re-executed. Task Tasks was added successfully. Task Task 1 was added successfully.

### Involved Parties (3)

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Address</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
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<tr>
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<td></td>
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<tr>
<td>Service and ...</td>
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</table>
Planned for 1811 release
Subject to change
<table>
<thead>
<tr>
<th>Status</th>
<th>API Keys</th>
<th>Mashup ID</th>
<th>Mashup Name</th>
<th>Mashup Category</th>
<th>Mashup Type</th>
<th>Created By</th>
<th>Changed On</th>
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</thead>
<tbody>
<tr>
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<td></td>
<td>CM00276</td>
<td>BO Report Sample for Benchmark</td>
<td>Productivity &amp; Tools</td>
<td>HTML Mashup</td>
<td>Eddie Smoke</td>
<td>2018/08/30 3:35 AM</td>
</tr>
<tr>
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<td>CM00275</td>
<td>Mashup SSO</td>
<td>Productivity &amp; Tools</td>
<td>HTML Mashup</td>
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<td>2018/08/22 7:50 AM</td>
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<td>SM00050</td>
<td>Embedded Route Planner (Rand.com)</td>
<td>Location &amp; Travel</td>
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<td>SCP_APP</td>
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<td>HTML Mashup</td>
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<td>Test020</td>
<td>Productivity &amp; Tools</td>
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<td>external app</td>
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<td>HTML Mashup</td>
<td>Janet Liu</td>
<td>2018/06/21 8:25 AM</td>
</tr>
<tr>
<td>Active</td>
<td></td>
<td>SM00039</td>
<td>S4 HANA 360 Object Page</td>
<td>Business &amp; Finance</td>
<td>HTML Mashup</td>
<td></td>
<td>2018/05/18 7:54 PM</td>
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<td>Active</td>
<td></td>
<td>CM00286</td>
<td>zaAccount Details</td>
<td>Business &amp; Finance</td>
<td>HTML Mashup</td>
<td>Michael Johnes</td>
<td>2018/05/04 7:41 PM</td>
</tr>
</tbody>
</table>

Details: Insurance

**General Information**
- Port Binding: URL Navigation
- Mashup Type: HTML Mashup
- Mashup ID: SM00103
- Description: Insurance Industry Solution is deprecated. DO NOT ACTIVATE THIS MASHUP

**Administrative Information**
- Created By: "
- Created On: 2014/03/12 11:16 AM
- Changed By: "
- Changed On: 2018/09/04 10:58 AM
### URL Mashup

<table>
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<tr>
<th>Status</th>
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<th>Port Binding</th>
<th>Mashup ID: CM00277</th>
<th>Mashup Name</th>
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</table>

**General Information**

- **Mashup Category**: 
- **Port Binding**: 
- **Mashup ID**: CM00277
- **Mashup Name**: 
- **Description**: 
  - **Status**: Inactive

**URL Information**

- **URL**: 
- **HTTP Method**: GET
- **Window Features**: 
- **Extract Parameter**: 

**Request Parameter**

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<tr>
<th>Parameter</th>
<th>Constant</th>
<th>Mandatory</th>
<th>Parameter Binding</th>
</tr>
</thead>
</table>

No records found
URL Mashup: Digital Boardroom - Sales Performance

### General Information
- **Mashup Category:** Productivity & Tools
- **Mashup ID:** CM0077
- **Mashup Name:** Digital Boardroom - Sales Performance
- **Description:**
  SAP Analytics Digital Boardroom for Sales Performance - Sales Revenue, Product Portfolio, Customers
- **Status:** Active

### URL Information
- **HTTP Method:** Get
- **Window Features:**

### Request Parameter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Constant</th>
<th>Mandatory</th>
<th>Parameter Binding</th>
</tr>
</thead>
</table>

No records found.
Create Custom Tile

*Type:
- URL Mashup

*Title:
- Digital Board Room

*URL Mashup:

Icon:
- insert icon name

Description:

Save Cancel

Planned for 1811 release
Subject to change
<table>
<thead>
<tr>
<th>Icon</th>
<th>Type</th>
<th>Name</th>
<th>Category</th>
<th>ID</th>
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</thead>
<tbody>
<tr>
<td><img src="image" alt="Url Mashup" /></td>
<td>Url Mashup</td>
<td>AIN</td>
<td>BusinessFinance</td>
<td>CM00116</td>
</tr>
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<td><img src="image" alt="Url Mashup" /></td>
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<td>Digital Boardroom - Sales Performance</td>
<td>Productivity/Tools</td>
<td>CM00277</td>
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<tr>
<td><img src="image" alt="Url Mashup" /></td>
<td>Url Mashup</td>
<td>ERP Account Cockpit</td>
<td>Productivity/Tools</td>
<td>SM00105</td>
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<td>Productivity/Tools</td>
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Planned for 1811 release
Subject to change
Planned for 1811 release
Subject to change
Create Custom Tile

Type:
URL Mashup

Title:
Digital Board Room

URL Mashup:
Digital Boardroom - Sales Performance

Icon:
performance

Description:
Sales Performance

Save Cancel

Planned for 1811 release
Subject to change
### Sales Revenue

#### Revenue Won

**Current Year vs Previous Year** in Thousand USD

<table>
<thead>
<tr>
<th>Target 2018</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
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<tbody>
<tr>
<td></td>
<td>-2,020.53</td>
<td>-1,611.45</td>
<td>-1,561.82</td>
<td>-589.93</td>
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<td>-851.13</td>
<td>+314.79</td>
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<td>-13.21</td>
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</table>

#### Year to Previous Q (Target)

**2018**

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
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<tr>
<td>1,584.70</td>
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<td>+491.60</td>
<td>+1,152.31</td>
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</tbody>
</table>

#### Current Quarter (Target)

**5.26 (-1.25%) (-9.80%)**

### Breakdown of Revenue Won

#### Dimensions

- Sales Unit
- Territory
- Industry
- Country

#### Trend in Million USD

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Revenue Growth</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale trade</td>
<td>4.67</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>2.61</td>
<td>1.87</td>
</tr>
</tbody>
</table>

### Product Portfolio

#### Current Year (vs Previous Year) in Million USD

- **Revenue Existing Products**: 4.72 (4.44)
- **Revenue New Products**: 26

#### Product Count

- **Top 20**
  - **5S Designer Advanced Edition**: 1,020.90
- **New Product Revenue Distribution**
  - **Top 5**
    - **5S Designer Professional Edition**: 241.36
      - Computer X5 Series 256GB 90.11
### Mashup Authoring: All Mashups (205)

<table>
<thead>
<tr>
<th>Status</th>
<th>URL</th>
<th>Mashup ID</th>
<th>Mashup Name</th>
<th>Mashup Category</th>
<th>Mashup Type</th>
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<th>Changed On</th>
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</thead>
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<td>SCP_APP</td>
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<td>Michael Johnes</td>
<td>2018/05/04 17:41 PM</td>
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</tbody>
</table>

#### Details: Insurance

**General Information**

- Port Binding: URL Navigation
- Mashup Type: HTML Mashup
- Mashup ID: SM00103
- Description: Insurance Industry Solution is descoped. DO NOT ACTIVATE THIS MASHUP

**Administrative Information**

- Created By: 
- Created On: 2014/03/12 11:16 AM
- Changed By: 
- Changed On: 2018/08/04 10:58 AM
### Mashup Authoring: HTML Mashups (119)

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<thead>
<tr>
<th>Status</th>
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<th>Mashup Category</th>
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<th>Changed On</th>
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</thead>
<tbody>
<tr>
<td>Active</td>
<td></td>
<td>CM00208</td>
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<td>Productivity &amp; Tools</td>
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<td>2018/08/30 4:11 AM</td>
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<td>2018/05/04 7:38 PM</td>
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<td>HTML Mashup</td>
<td>Eddie Smoke</td>
<td>2018/04/27 6:18 PM</td>
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</table>

**Details: Growth Tile**

**General Information**

- **Port Binding**: HTML Mashup
- **Mashup ID**: CM00208
- **Description**:

**Administrative Information**

- **Created By**: Sushant Poddar
- **Created On**: 2018/06/25 12:04 PM
- **Changed By**: Sushant Poddar
- **Changed On**: 2018/06/25 12:04 PM
### HTML Mashup: Sales Performance

**Status:** Inactive  
**Mashup Category:** Productivity & Tools  
**Mashup ID:** CM00281  
**Mashup Name:** Sales Performance

#### General Information

- **Mashup Category:** Productivity & Tools  
- **Port Binding:**  
- **Mashup Name:** Sales Performance  
- **Mashup Model ID:** CM00281  
- **Description:**

#### Configuration Information

- **Type:** URL  
- **URL:** https://customexperience.eu1.sapanalytics.cloud/sapfpj/tenant/024/app.html?view_id=storyId=DOE3D

#### Request Parameter

<table>
<thead>
<tr>
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<th>Mandatory</th>
<th>Parameter Binding</th>
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No records found
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<tr>
<th>Icon</th>
<th>Type</th>
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<th>Category</th>
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</table>

Planned for 1811 release
Subject to change
Growth

Revenue Won

Current Quarter (\(\Delta\)Target) (\(\Delta\)Weighted Revenue) in Million USD

5.26 (-1.25%) (-9.80%)

Revenue Trend in Million USD

Pipepline

Leads Generated

Current Year (YoY)

In USD

606 (+52)

Opportunities by Close Date

Current Year (YoY)

Subtitle

7,198 (+4,076)

Average Sales Cycle Time

Current Year (YoY) | in Days

In USD

81.86 (-1.17)

Pipeline Funnel

Next 12 Months | in Million USD

Subtitle

Weighted Revenue Pipeline

Identify opportunity

1.99

Qualify opportunity

1.67

Develop value proposition

0.34

Quotiation

0.42

Sales Team

Revenue Won by Sales Person

YTD | in Thousand USD

Eduard Becker

142.73

Sandra Mohr

630.86

Peter Grün

1,806.90

Peter Fischer

426.18

John Kim

375.70

Revenue Pipeline by Sales Person

YTG | in Thousand USD

Diane Lassy

1,489.37

Eduard Becker

1,604.69

Peter Grün

854.50

Sandra Mohr

286.47

Mike Summers

315.25

Evelin Chalmers

0.00

Quota

1,489.37

1,604.69

854.50

286.47

0.00
Home Page – Filter Tile Demo
Home Page – Filter Tile Setup
Home Page – KPI Tile Demo
Demo

Important KPI Tile

My Org Win Ratio QTD

KPI 1%

Custom Tiles

Travel & Expense concur

Guided Activity Ticket

Digital Board Room Sales Performance

Revenue Won Q3 in M USD

5.26

What's on my mind

Accounts: My Accounts

Leads: Qualified

Opportunities: My Opportunities

Employees: My Team

My Tasks

Deal Finder

Pipeline Influencers

Sales Operations and Admin followup

Thu, 20 Sep 2018

How to Improve Your Digital Journey With the Right Partners

No single technology or company can solve busi...

SAP News Center

My Upcoming Activities

You have no upcoming activities
Analytics in Cloud for Customer: Overview

Real-Time Analysis at no additional cost

No need to rebuild Authorization

Once Click to add Extension field in Data Source.

Advanced Integration

Standard content delivered every release

Personalize Home Page Tile, Views, Selection

Customize - Data Source, Reports, Key figures, KPIs, Dashboards

Mobile & Offline

Exception Based Reporting

Plug-in for Excel

Custom Fiscal year, Quantity & Currency conversions

i18n

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Insight to Action: Overview

Homepage

Homepage is usually the landing page which acts like a snapshot of all the important info in form of KPI and Report Tiles

KPIs - Insight

KPI tile indicates the actual value along with the color and arrow indicator to show the achievement vs target.

Dashboard

Dashboards constitute of multiple reports in one place. The dashboards in C4C are interactive in nature.

Contextual Reports

KPI typically drills down to a contextual report or dashboard (as configured by the key user).

Reports

Reports are the heart of Analytics. Eventually all KPI’s or Dashboards are nothing but some or all parts of a report.

Transactions - Actions

Reports are made up of data source. There can be multiple visualizations of the same report.
Dashboard Designer
How to build a Dashboard with Global filter and connections?

Homepage

Homepage is usually the landing page which acts like a snapshot of all the important info in form of KPI and Report Tiles.

KPIs - Insight

KPI tile indicates the actual value along with the color and arrow indicator to show the achievement vs target.

Dashboard

Dashboards constitutes of multiple reports in one place. The dashboards in C4C are interactive in nature.

Contextual Reports

KPI typically drills down to a contextual report or dashboard (as configured by the key user).
Dashboards Designer

- View data from different reports together.
- **Global filters** in dashboard allows users to filter across reports views.
- Building connections help **Pass filters** from one report to the other.
- **In-place drill down** can be used to add or remove additional characteristics and measures to slice and dice data for further analysis.
- **Quick-view** of transactions helps users to glance at the transactions while still working on dashboard. For further insights user can directly jump onto transactions directly from dashboard.
Old Dashboard Designer – Six Step Creation Process (Admin/Key User)

Step 1: Name dashboard
Step 2: Assign report views
Step 3: Select the report view variant required
Step 4: Build up the layout required – up to 9 views
Step 5: Build up the required interactivity
  - Step 5.a: Select the Dashboard Source report view for interactivity
  - Step 5.b: Select the Dashboard Target report view for interactivity
  - Step 5.c: Automatic mapping Data set to drive interactivity or manually select from Tables
  - Step 5.d: Shows list of data sets selected for dashboard interactivity
Step 6: Preview The dashboard before saving
Fiori Based Dashboard Designer – New in 1805

The new Fiori based dashboard designer lets you visualize your data in design mode.

It also provides additional personalization capabilities like changing view name, chart type etc.

Enable in following fine tuning activity:

Administrator Analytics – Settings

Switch to Fiori Designer
Old Approach

New Approach

Visualize dashboard at design time

Adjust visualization within dashboard

Clear connection flow
<table>
<thead>
<tr>
<th>Dashboard Name</th>
<th>Description</th>
<th>Created On</th>
<th>Created By</th>
<th>Changed On</th>
<th>Changed By</th>
<th>Origin Type</th>
<th>Published</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfecto_Dashboard</td>
<td>this dashboard is for test purpose</td>
<td>2017/07/18 12:40 PM INDIA</td>
<td>TRL, ANA</td>
<td>2017/07/18 12:40 PM INDIA</td>
<td>TRL, ANA</td>
<td>Administrator</td>
<td>No</td>
</tr>
<tr>
<td>cycid</td>
<td>undefined</td>
<td>2017/06/14 2:40 PM INDIA</td>
<td>TRL, ANA</td>
<td>2017/06/14 2:40 PM INDIA</td>
<td>TRL, ANA</td>
<td>Administrator</td>
<td>No</td>
</tr>
<tr>
<td>TestDashboardFilters</td>
<td></td>
<td>2018/09/03 1:05 PM INDIA</td>
<td>Smoke, Eddie</td>
<td>2018/09/03 1:05 PM INDIA</td>
<td>Smoke, Eddie</td>
<td>Administrator</td>
<td>No</td>
</tr>
<tr>
<td><strong>SAP (10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forecast revenue</td>
<td>Forecast revenue</td>
<td>2015/09/07 12:04 AM INDIA</td>
<td>KPR</td>
<td>2015/09/07 12:04 AM INDIA</td>
<td>KPR</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Forecasts by Employees</td>
<td>Forecasts by Employees</td>
<td>2015/09/24 4:57 AM INDIA</td>
<td>HEXIA</td>
<td>2015/09/24 4:57 AM INDIA</td>
<td>HEXIA</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Forecast Revenue for User</td>
<td>Forecast Revenue for User</td>
<td>2015/09/24 4:54 AM INDIA</td>
<td>HEXIA</td>
<td>2015/09/24 4:54 AM INDIA</td>
<td>HEXIA</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Overview</td>
<td>Service Overview</td>
<td>2015/07/20 3:0 AM INDIA</td>
<td>GANAPATI</td>
<td>2015/08/03 10:25 PM INDIA</td>
<td>GANAPATI</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Forecast</td>
<td>Forecast</td>
<td>2015/07/08 0:02 AM INDIA</td>
<td>HEYING</td>
<td>2015/07/08 0:02 AM INDIA</td>
<td>HEYING</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Pipeline Scouting (Sales Leads)</td>
<td>Pipeline Scouting (Sales Leads)</td>
<td>2013/07/01 11:30 PM INDIA</td>
<td>SAP</td>
<td>2013/07/01 11:30 PM INDIA</td>
<td>SAP</td>
<td>SAP</td>
<td>No</td>
</tr>
<tr>
<td>Pipeline Scouting (Leads)</td>
<td>Pipeline Scouting (Leads)</td>
<td>2015/08/18 9:54 AM INDIA</td>
<td>HEYING</td>
<td>2015/08/25 8:50 AM INDIA</td>
<td>HEYING</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Pipeline</td>
<td>Pipeline</td>
<td>2013/06/28 2:55 AM INDIA</td>
<td>SAP</td>
<td>2013/06/28 2:55 AM INDIA</td>
<td>SAP</td>
<td>SAP</td>
<td>Yes</td>
</tr>
<tr>
<td>Sales Performance</td>
<td>Sales Performance</td>
<td>2013/06/29 4:56 AM INDIA</td>
<td>SAP</td>
<td>2013/06/29 4:56 AM INDIA</td>
<td>SAP</td>
<td>SAP</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Design Dashboards: All (1)

<table>
<thead>
<tr>
<th>Dashboard Name</th>
<th>Description</th>
<th>Created On</th>
<th>Created By</th>
<th>Changed On</th>
<th>Changed By</th>
<th>Origin Type</th>
<th>Published</th>
</tr>
</thead>
</table>
Creating a KPI
How to build a KPI to launch Dashboard or Contextual Reports

Homepage

Homepage is usually the landing page which acts like a snapshot of all the important info in form of KPI and Report Tiles

KPIs - Insight

Dashboard

KPI tile indicates the actual value along with the color and arrow indicator to show the achievement vs target.

Contextual Reports

Dashboards constitutes of multiple reports in one place. The dashboards in C4C are interactive in nature.

KPI typically drills down to a contextual report or dashboard (as configured by the key user).
### Design KPIS: Customer Created KPIS (61)

<table>
<thead>
<tr>
<th>KPI Name</th>
<th>Category</th>
<th>Description</th>
<th>Report for Current Value</th>
<th>Created By</th>
<th>Created On</th>
<th>Changed On</th>
<th>Changed By</th>
<th>LC Status</th>
<th>LC Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfecto_kpi</td>
<td>Sales Performance</td>
<td>The KPI provides an overview of Sales by Product Category</td>
<td>Sales by Product Category</td>
<td>ANA TRL</td>
<td>2017/07/18</td>
<td>2017/09/15</td>
<td>Eddie Smoke</td>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>Perfecto_KPI</td>
<td>Perfecto Reports</td>
<td>Created vs. Solved Inside</td>
<td>ANA TRL</td>
<td>2017/07/18</td>
<td>2017/09/29</td>
<td>Eddie Smith</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERFECTO KPI - CONT</td>
<td>Sales Performance</td>
<td>DO NOT DELETE. This is...</td>
<td>Sales by Product Category</td>
<td>ANA TRL</td>
<td>2017/08/01</td>
<td>2017/09/15</td>
<td>Eddie Smith</td>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>PERFECTO KPI - CONT</td>
<td>Sales Performance</td>
<td>DO NOT DELETE. This is...</td>
<td>Sales by Product Category</td>
<td>ANA TRL</td>
<td>2017/08/01</td>
<td>2017/09/15</td>
<td>Eddie Smith</td>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>Test 1711</td>
<td>Test 1711</td>
<td>Opportunity Revenue Analysis</td>
<td>I033001 I033001</td>
<td>2017/09/19</td>
<td>2017/09/19</td>
<td>I033001 I033001</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chk9Oct</td>
<td>Open Incidents</td>
<td></td>
<td>Eddie Smith</td>
<td>2017/10/09</td>
<td>2017/10/09</td>
<td>Eddie Smith</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test 123</td>
<td>Opportunity Analysis</td>
<td></td>
<td>Pooja Bhalla</td>
<td>2017/12/04</td>
<td>2017/12/04</td>
<td>Pooja Bhalla</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KPI for UNITS Test</td>
<td></td>
<td></td>
<td>Z FOR KPI UNITS</td>
<td>2017/12/14</td>
<td>2017/12/14</td>
<td>Eddie Smith</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Details:**

**Sales Forecast**

- **Changed On:** 2016/10/08
- **Changed By:** Eddie Smith

- **Created On:** 2014/01/16
- **Created By:** Eddie Smith
New Key Performance Indicator My Org Win

**Information**
- **Name**: My Org Win
- **Description**: 
- **Responsible**: 
- **Interpretation**: 

**Current Value**
- **Report Name**: Customer Insight: Win Ratio
- **Key Figure**: QTD
- **Selection**: Initial

**Value Setting**
- **Decimal Places**: 0
- **Sign Presentation**: Minus Sign Before Value
- **Reverse Sign**: 

**Context Dashboard**
- **Dashboard**: Win-loss dashboard
Define the Threshold and Reference values
### New Key Performance Indicator My Org Win

#### General

<table>
<thead>
<tr>
<th>Tab</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Values and Thresholds

<table>
<thead>
<tr>
<th>Section</th>
<th>Value Source</th>
<th>Direction of Improvement</th>
<th>Tolerance</th>
<th>Tolerance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Value</td>
<td>Fixed Value Provided</td>
<td>Maximize</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference Value</td>
<td>Not Used</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
New Key Performance Indicator My Org Win

**Target Value**
- **Value Source**: Fixed Value is Provided
- **Value**: 60

**Reference Value**
- **Value Source**: Not Used

**Thresholds**
- **Direction of Improvement**: Maximize
- **Value Source**: Fixed Value is Provided

1. **Alert Point**
   - **Value**: 20

2. **Warning Point**
   - **Value**: 40

**My Org Win QTD**
- **Actual**: 1%
- **Target**: 60%
- **Comparison**
  - Actual vs Target: -59%
  - Value vs Target: 20%
Pass filter to dashboard
New Key Performance Indicator My Org Win

You can add explicit filter fields, which can be filled from outside - e.g. from a KPI Variant. This step makes your KPI filterable.
In order to transfer these filters to context reports within KPI Details you need to map these fields. Please use the check button to verify the mapping.

Filter Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>![check]</td>
<td>![Not Mapped]</td>
</tr>
</tbody>
</table>

Filter Mapping:

<table>
<thead>
<tr>
<th>Target Type</th>
<th>Report Name</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context Dashboard</td>
<td>Win-loss dashboard</td>
<td></td>
</tr>
</tbody>
</table>
New Key Performance Indicator My Org Win

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Filter Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Organization</td>
<td>Multiple Values</td>
<td>Partially Mapped</td>
</tr>
</tbody>
</table>

Filter Mapping: Sales Organization

<table>
<thead>
<tr>
<th>Target Type</th>
<th>Report Name</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context Dashboard</td>
<td>Win-loss dashboard</td>
<td></td>
</tr>
</tbody>
</table>
New Key Performance Indicator My Org Win

Select Characteristic

Unit/Currency conversion is handled centrally and cannot be overwritten by filters.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Selection Type</th>
<th>Type</th>
<th>Result Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Filter (2)</td>
<td>Multiple Values</td>
<td>Dashboard Filter</td>
<td>Characteristic Selection</td>
</tr>
<tr>
<td>Sales Organization</td>
<td>Multiple Values</td>
<td>Dashboard Filter</td>
<td>Characteristic Selection</td>
</tr>
</tbody>
</table>
Maintain Default value that needs to pass from KPI Tile to Dashboard Global Filter
New Key Performance Indicator My Org Win

You can add explicit filter fields, which can be filled from outside - e.g. from a KPI Variant. This step makes your KPI filterable.

In order to transfer those filters to Content reports within KPI CICD, you can export the following content:

**Select Values Sales Organization**

<table>
<thead>
<tr>
<th>Sales Organization</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>Almika</td>
</tr>
<tr>
<td>1111</td>
<td>Sales Swati</td>
</tr>
<tr>
<td>1234</td>
<td>Swati Go</td>
</tr>
<tr>
<td>5678</td>
<td>Swati Sales</td>
</tr>
<tr>
<td>8000</td>
<td>Omega Systems</td>
</tr>
<tr>
<td>8111</td>
<td>Omega Sales Offic</td>
</tr>
<tr>
<td>8222</td>
<td>Omega Sales Group</td>
</tr>
<tr>
<td>10001</td>
<td>GW DUMMY TEST</td>
</tr>
<tr>
<td>20000</td>
<td>GW Dummy Test 2</td>
</tr>
<tr>
<td>21000</td>
<td>Public Sector Service</td>
</tr>
</tbody>
</table>

**Planned for 1902 release**
New Key Performance Indicator My Org Win

You can add explicit filter fields, which can be filled from outside - e.g. from a KPI variant. This step makes your KPI filterable.

In order to transfer these filters to context reports within KPI Explorer, you must also select the context as a filter in main report configuration. Once you've added a filter, you can remove it or maintain default values.

Filter Definitions
- Remove
- Add Row
- Maintain Default Values

Field
Sales Organization

Filter Mapping: Sales Organization

Target Type

Context Dashboard

Maintain Default Values

Sales Organization

My Assigned Sales Organizations

OK Cancel
New Key Performance Indicator My Org Win

You can add explicit filter fields, which can be filled from outside - e.g. from a KPI Variant. This step makes your KPI filterable.
In order to transfer these filters to context reports within KPI Details you need to map those fields. Please use the check button to verify the mapping.

Filter Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Organization</td>
<td>Multiple Values</td>
<td>Fully Mapped</td>
</tr>
</tbody>
</table>

Filter Mapping: Sales Organization

<table>
<thead>
<tr>
<th>Target Type</th>
<th>Report Name</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context Dashboard</td>
<td>Win-loss dashboard</td>
<td>Sales Organization</td>
</tr>
</tbody>
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Filter Definitions

<table>
<thead>
<tr>
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<th>Selection Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Organization</td>
<td>Multiple Values</td>
<td>Fully Mapped</td>
</tr>
</tbody>
</table>

Filter Mapping: Sales Organization

<table>
<thead>
<tr>
<th>Target Type</th>
<th>Report Name</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context Dashboard</td>
<td>Win-loss dashboard</td>
<td>Sales Organization</td>
</tr>
</tbody>
</table>
### Design KPI: Customer Created KPIs (1)

<table>
<thead>
<tr>
<th>KPI Name</th>
<th>Category</th>
<th>Description</th>
<th>Report for Current Value</th>
<th>Created By</th>
<th>Created On</th>
<th>Changed On</th>
<th>Changed By</th>
<th>LC Status</th>
<th>LC Message</th>
</tr>
</thead>
</table>

**Details: My Org Win**

- **General**
  - Changed On: 2018/09/25
  - Changed By: Sushant Poddar
  - Created On: 2018/09/25
  - Created By: Sushant Poddar
### Design KPIs: Customer Created KPIs (1)

<table>
<thead>
<tr>
<th>KPI Name</th>
<th>Category</th>
<th>Description</th>
<th>Report for Current Value</th>
<th>Created By</th>
<th>Created On</th>
<th>Changed On</th>
<th>Changed By</th>
<th>LC Status</th>
<th>LC Message</th>
</tr>
</thead>
</table>

**Details: My Org Win**

- **General**
  - Created On: 2018/09/25
  - Changed On: 2018/09/25
  - Created By: Sushant Potdar
  - Changed By: Sushant Potdar
KPI Filter – passed to dashboard

Planned for 1902 release
Gestures on tablets
Gestures on Tablets

- Show Values
- Sort in Charts
- Filter out
- Compare Discrete Points
- Zoom with Carousel.

Highlight legend for Pie Charts.
While analyzing the data in charts one may want to look at the actual values. This is particularly useful when the difference between two data points is close.

In this release we have enabled gestures in tablets to see values. You can simply side on the chart to look at the values. For charts like combination or stacked chart where there are multiple values per bar the box shows all the values.
Sort in Charts

Sorting in charts has become much easier and fun to use. You can simply slide on the axis to sort the chart.

This works for both x and y axis.
Report Name: Pipeline Funnel

View: Pipeline by Country (modified)

Selection: Initial
Filter – Out

Though we provide a way to apply filters and look at specific value there is no way in which one can remove a value from chart.

Filter out gesture helps you quickly remove a data value. This is very useful in scenarios where one large value is making it difficult to compare the rest of values. You can simply remove the bar/pie by sliding it out.

The floating filter icon helps you to have a quick view on filters.

Note: Filter-out can only be used while working on charts. You cannot save this filter.
Compare Discrete Points

If you want to compare two values you would have to manually do it today. After 1805 this task will become very simple. You just need to select two data points to look at a comparison. The system would show you delta, average and aggregation of the two values.

E.g. If you want to know what opportunities will help you meet your targets, you can simply look at your opportunities in chart and select different opportunities to look at total.
Zoom with Carousel

When there are many values in chart it gets difficult to analyze the data. Normal zoom only lets you zoom a chart which is not very useful.

We are providing you a way to zoom your chart and scan through with the help of Carousel. The Carousel gives you a view of where you are and let’s you move across the chart in a zoomed mode.
Dashboard

Report Name: Pipeline Funnel

View: Pipeline by City
Selection: Initial
Highlight legend for Pie Charts

When there are many values in a pie chart it gets difficult to identify what value belongs to which characteristic. Sometimes when there are many data points the color for two values might be same making it all the more confusing.

Now you can simply click on the pie to highlight the legend and identify the data point.
Embedded Reports
Report Embedded into Account Object “Chart” Facet

Change Chart Type

Analyze Report
Create Embedded Reports (Admin / Key User)

- Search and select view
- Embed collapsed view
- Define mapping
- Use report default selections
- System generated mapping error
Embedded Reports: Adapt using Key User Tool

Configure Column Span
Broadcasting
Modern businesses need to be proactive in collaboration, analysis and distribution of data.

Whether distribution is required for regular meeting preparation or for ad-hoc analysis, organizations need to enable report distribution and analysis collaboration.

C4C Analytic Broadcasting does just that. This key capability delivers the ability to collaborate by scheduling report and dashboard analysis distribution via email prior to meetings or ad-hoc discussions when necessary.

C4C Broadcasting enables users to share data on a regular cadence or on an as need basis where the data will be sent to the listed email recipients.

This enables executives across the business to be involved and plan the next best business action.

Broadcasting also promotes alignment across the enterprise with colleagues as collaboration improves relationship with key executives as the everyone is on the same page.
Broadcasting in C4C

Select Object type (Report or Dashboard) and object instance that needs to be broadcasted

Build Email message

Add broadcast email recipients

Select Broadcast format: URL Link, CSV, HTML Embedded view

Select & Set the Broadcast Schedule

Resulting Broadcast email
Further Information
Further Information - I


C4C Analytics Guide – Central Analytics / BW integration: https://help.sap.com/viewer/66e9a9081a7b40e38c8604d6617d0311/latest/en-US/07b35518bc2c4cd7b3c74ea6fb9a790c.html

C4C Integration with BusinessObjects Cloud (since 1611): https://help.sap.com/viewer/66e9a9081a7b40e38c8604d6617d0311/latest/en-US/102e7c7143c641f9ba037e99d36a1f97.html


Transfer sample Account KPIs from BW to C4C / SAP Note: https://launchpad.support.sap.com/#/notes/0001724752

C4C OData API Reference: https://help.sap.com/viewer/26fdb8fadd5b4becb5c858d92146d0e0/latest/en-US

Analytics ODATA: https://help.sap.com/viewer/66e9a9081a7b40e38c8604d6617d0311/latest/en-US/a3befde33fa6472c9f7ad2686bd41c31.html

Further Information - I

C4C OData API GitHub Project- https://github.com/SAP/C4CODATAAPIDEVGUIDE

Create Date type Key Fig in PDI- https://blogs.sap.com/2016/04/22/use-date-data-type-field-as-key-figure-in-analytics/

Performance - http://scn.sap.com/community/cloud-for-customer/blog/2016/05/27/sap-cloud-for-customer-how-to-identify-sub-optimal-reports
Derive Business Insights using C4C Analytics http://scn.sap.com/community/cloud-for-customer/blog/2016/05/20/derive-business-insights-using-c4c-analytics

Reporting in C4C - https://blogs.sap.com/2016/05/27/reporting-c4c/
Interactive Dashboards - http://scn.sap.com/community/cloud-for-customer/blog/2016/06/03/interactive-dashboards

C4C Home page reporting http://scn.sap.com/community/cloud-for-customer/blog/2016/06/12/c4c-homepage-reporting--never-miss-a-kpi
Homepage Video - https://www.youtube.com/watch?v=JFj4aUkWAtI

Use date as Key Fig - https://blogs.sap.com/2016/04/22/use-date-data-type-field-as-key-figure-in-analytics/

SAC Integration- https://uacp2.hana.ondemand.com/viewer/66e9a9081a7b40e38c8604d6617d0311/latest/en-US/102e7c7143c641f9ba037e99d36a1f97.html
Thank you.

Contact information:

Sushant Potdar
Senior Director – Product Management
Sushant.potdar@sap.com
End users can now share the view between themselves. E.g. If you like the chart your colleague is sharing you can simply ask him/her to share it with you.

As a receiver you get an option to accept or reject the shared view.

Note: Any fields added through ‘Add-Fields’ will not be supported.
<table>
<thead>
<tr>
<th>Sales Phase</th>
<th>Identify opportunity</th>
<th>Qualify opportunity</th>
<th>Develop value proposition</th>
<th>Quotation</th>
<th>Decision</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>438,383.64 USD</td>
<td>289,434.24 USD</td>
<td>344,012.55 USD</td>
<td>248,568.61 USD</td>
<td>267,721.51 USD</td>
<td>489,582.66 USD</td>
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<tr>
<td>Educational services</td>
<td>0.00 USD</td>
<td>0.00 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information</td>
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<td>0.00 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>6,074,189.00 USD</td>
<td>436,331.67 USD</td>
<td>394,376.40 USD</td>
<td>351,920.91 USD</td>
<td>267,787.79 USD</td>
<td>240,185.23 USD</td>
</tr>
<tr>
<td>Professional, scientific...</td>
<td>727,561.04 USD</td>
<td>1,650,920.04 USD</td>
<td>1,164,681.60 USD</td>
<td>1,194,588.96 USD</td>
<td>526,761.35 USD</td>
<td>722,988.67 USD</td>
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<tr>
<td>Retail trade</td>
<td>803,392.00 USD</td>
<td>13,168,176.00 USD</td>
<td>1,992,700.00 USD</td>
<td>1,645,025.00 USD</td>
<td>28,440.00 USD</td>
<td>48,108.60 USD</td>
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<tr>
<td>Utilities</td>
<td>500,000.00 USD</td>
<td>0.00 USD</td>
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</tr>
<tr>
<td>Competitors</td>
<td>3,271,661.10 USD</td>
<td>1,051,177.15 USD</td>
<td>780,593.90 USD</td>
<td>754,383.55 USD</td>
<td>1,145,711.46 USD</td>
<td>566,173.35 USD</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>5,595,462.02 USD</td>
<td>2,565,000.01 USD</td>
<td>1,464,050.02 USD</td>
<td>1,960,580.01 USD</td>
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<td></td>
</tr>
<tr>
<td>Not assigned</td>
<td>0.00 USD</td>
<td>0.00 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Analytics: Defining Conditions to restrict report results in Fiori Client

When you work with reports, you can create conditions to restrict results:
- Ranked Conditions: Top 5, bottom 5.
- Simple Conditions: based on threshold like net value greater than a certain threshold value

Key Business Benefits
- When you activate conditions you are just hiding the values that are not relevant, hence they have no effect on the values displayed in result rows

Set-up Details
- You create, edit, and delete conditions using the Manage Conditions dialog box
Analytics: Defining exception for key figures in Fiori Client

When you work with reports, you can create exceptions for key figures:

- An exception is a deviation from defined threshold values
- Indicated using symbols (Arrow, Traffic Light) or are highlighted in color

Key Business Benefits

- Using exceptions, the system emphasizes key figure values that deviate from or adhere to threshold values or intervals

Set-up Details

- You create, edit, and delete exceptions using the Manage Exceptions dialog box
Analytics: Defining exception for key figures in Fiori Client

When you work with reports, you can create exceptions for key figures:

- An exception is a deviation from defined threshold values
- Indicated using symbols (Arrow, Traffic Light) or are highlighted in color

Key Business Benefits:

- Using exceptions, the system emphasizes key figure values that deviate from or adhere to threshold values or intervals

Set-up Details:

- You create, edit, and delete exceptions using the Manage Exceptions dialog box