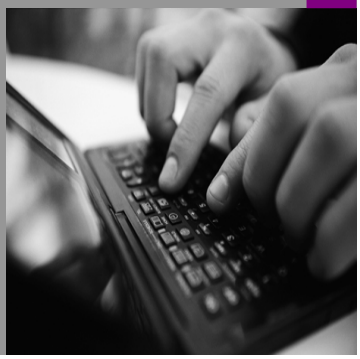

How-to Guide
SAP CPM

How To Build a Custom Menu

Version 1.05 – March 2008

Applicable Releases:
SAP BPC 5.X

THE BEST-RUN BUSINESSES RUN SAP

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1 Scenario

For those BPC 5.X projects where the Business Process Flow is not a requirement or in the design plans, but the Customer still requests a process interface via BPC for Excel, , BPC 5.X has a feature called CUSTOM MENUS. Custom Menus allow the designers to architect interfaces that guide USERS and Administrators through a variety of process tasks, such as opening reports, opening input schedules, and loading data. The menus are built and managed using BPC for Excel and are highly customizable since there are over 100 actions that may be exercised during the design.

2 Introduction

This How -To guide leverages BPC 5.X and the application set called ApShell. ApShell is currently the default application set that is loaded with the BPC software and is often the beginning point for most customer designs. If this application set is not available at your customer, please discuss gaining access to a copy of this application set for development purposes. Each application in ApShell will have the ability to build, store and mange custom menus for the BPC community.

The files that we utilize to build Custom Menus are located in the file server using the following path:

Menus:
[DRIVE]:\BPC\Data\Webfolders\[APPLICATIONSET]\{APPLICATION]\eExcel\Reports\Wizard\ProcessMenu

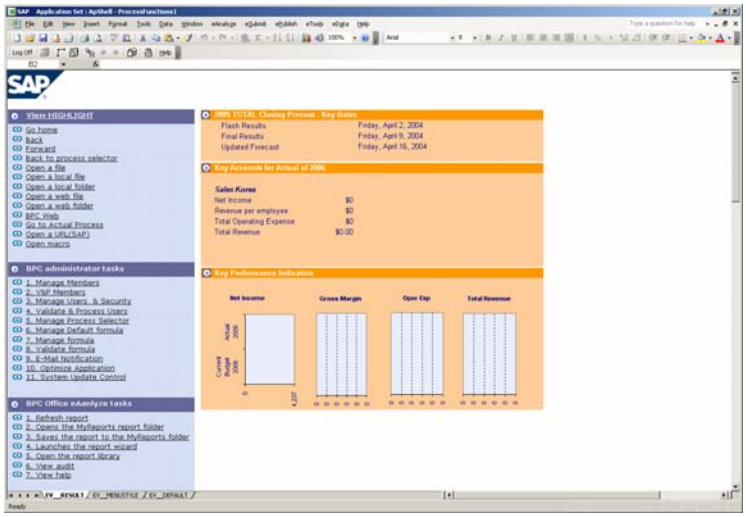
SubMenus:
[DRIVE]:\BPC\Data\Webfolders\[APPLICATIONSET]\{APPLICATION]\eExcel\Reports\Wizard\ProcessMenu\Menus

The default files that are shipped with Apshell are:

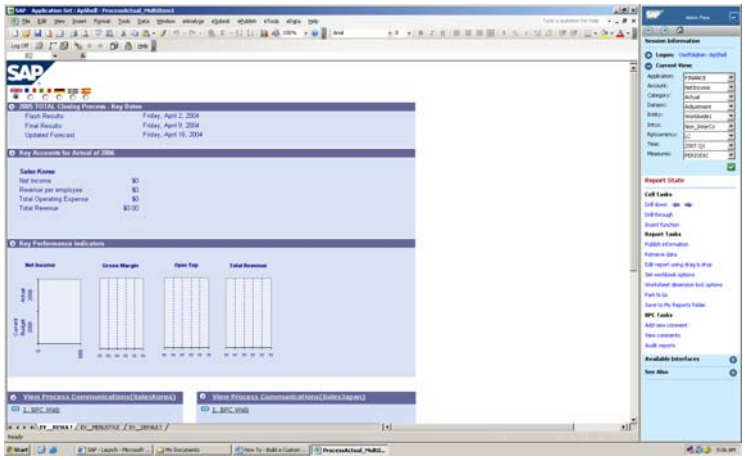
- ProcessActual.xlt
- ProcessActual_MultiItem.xlt
- ProcessFunctions.xlt

The differences between these files is noted below in the grid and examples.

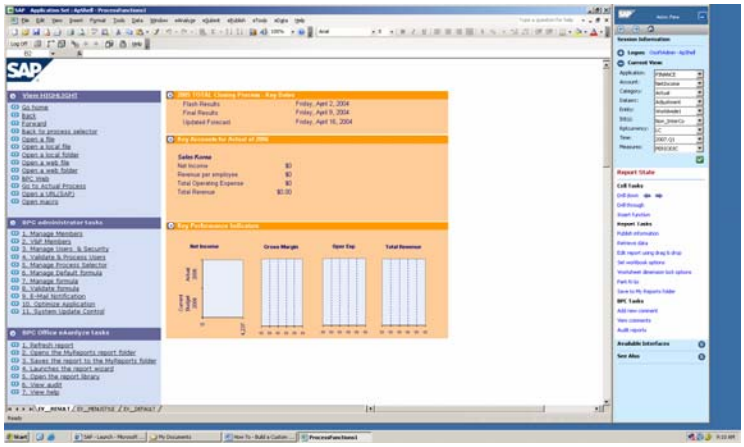
1. ProcessActual.xlt – This is a simple example using the standard 1 column of tasks on the left, and the HIGHLIGHT region (which is also an excel file) on the right.



2. ProcessActual_MultiItem.xlt – This is a complex example using multiple languages, the HIGHLIGHT section at the top of the viewing area, followed by 2 columns for the tasks.



3. ProcessFunctions.xlt – This is a simple example using the standard 1 column of tasks on the left, and the HIGHLIGHT region on the right, and this example has the comprehensive list of tasks.



If the process menu uses a HIGHLTGHT page, the default location for these files is the following:

[DRIVE]:\BPC\Data\Webfolders\[APPLICATIONSET]\{APPLICATION]\eExcel\Reports\Wizard\ProcessMenu\MenuReports

Apshell comes with two default excel files for the HIGHLIGHT section that are named:

- M01Summary.xls

- M01Summary_MultiItem.xls

The Step By Step Solution

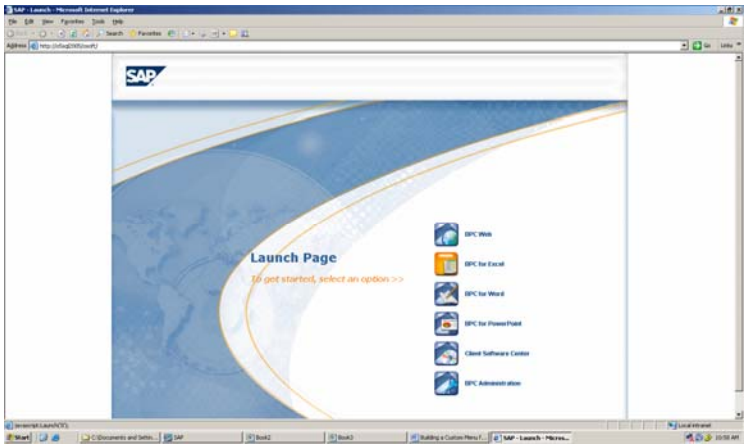
The ability to use custom menus in an application design involves a few key steps:

1. Building the Menu
2. Saving it to the correct file folder
3. Testing the Menu
4. Enabling the Menu via the Administrative Console
5. Leading Users to the Menu

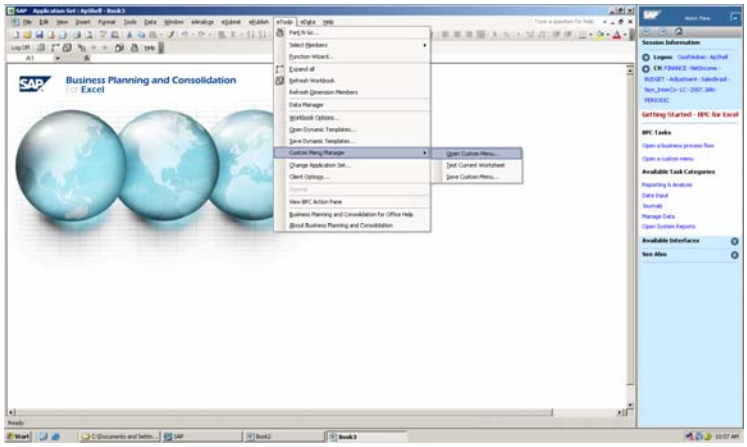
This guide will walk through some of the key steps for this building this key customer interface and process.

2.1 Open and Create a NEW Custom Menu file

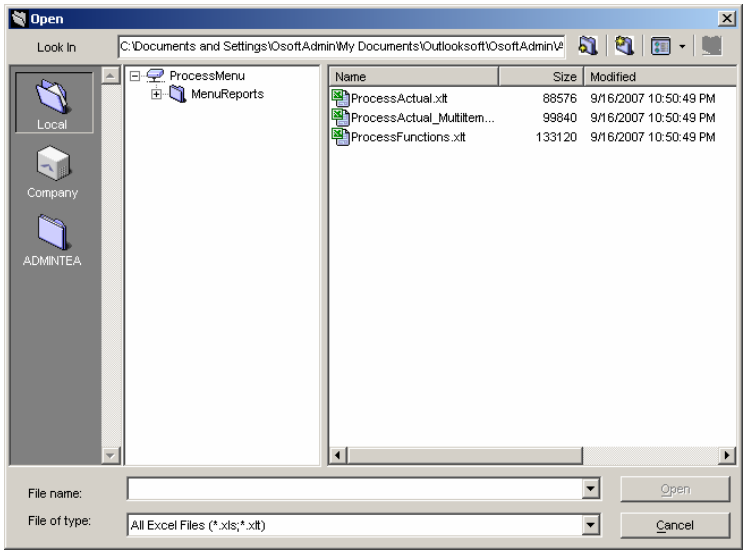
1. Using the FINANCE application in the ApShell Application set, Login and Start in BPC Excel from the BPC launch page.



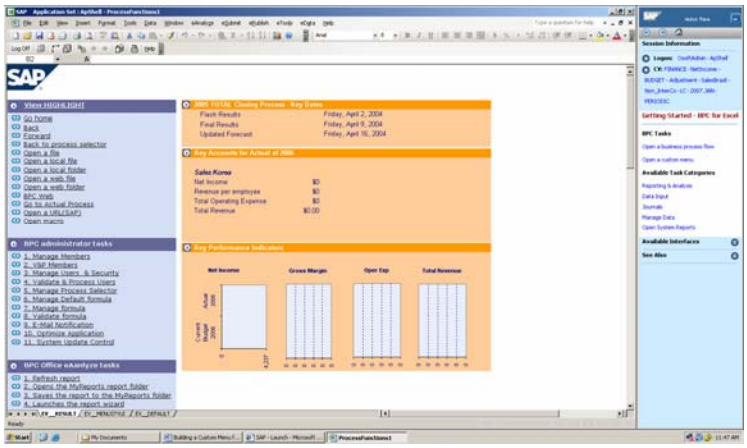
2. To begin a NEW Custom Menu, in BPC Excel, select menu commands, eTools, Custom Menu Manager, Open Custom Menu. These steps facilitate for the creation, saving and testing of all custom menus in BPC Excel.



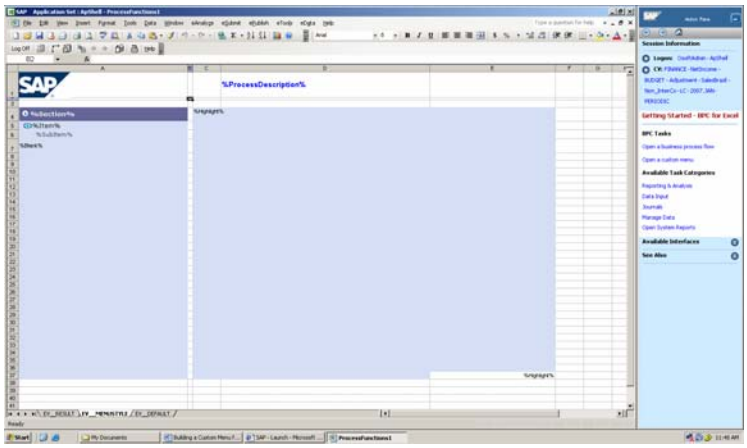
3. Select ProcessFunctions.xlt template from the existing example menus as the foundation for the NEW Menu. Generally, you will find a couple example menus from the ApShell named



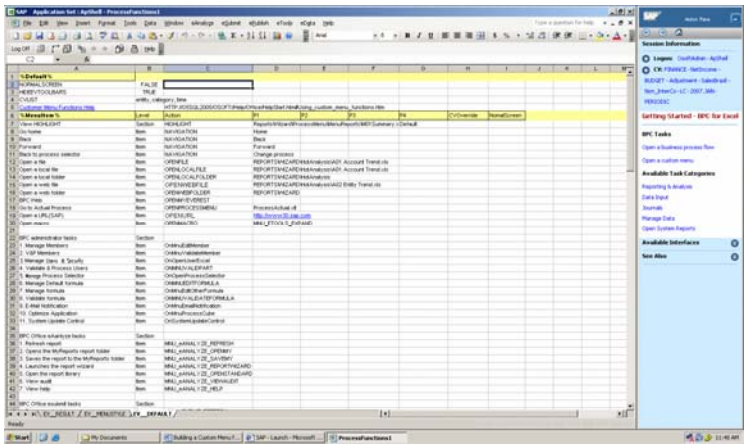
4. There are 3 excel worksheet tabs to this custom menu. The first tab is the view a BPC User will have upon opening the Custom Menu



5. The second tab is the layout tab or framework for the custom menu.



6. The 3rd tab is the instruction tab that defines what information will be shown on tab #1.

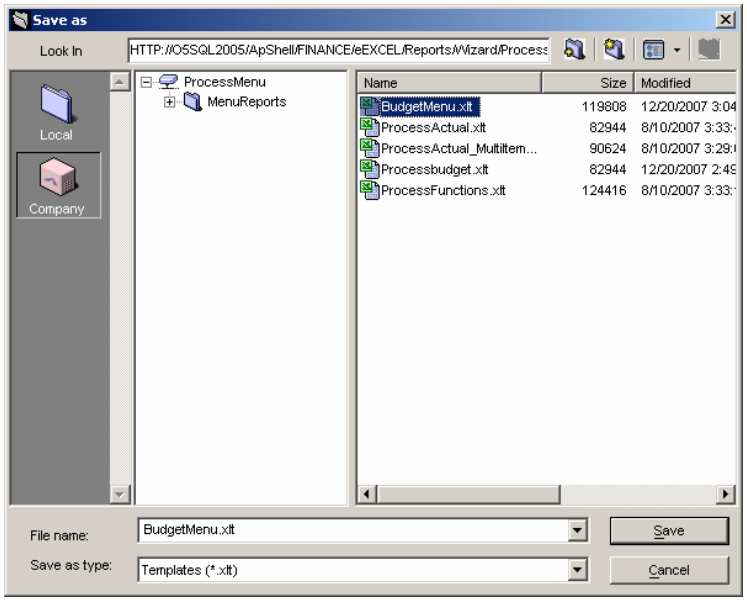


7. The next step is to determine what actions you want to allow the Users to have from this menu. Defining the menu steps is easy, but you need to know what you want the users to accomplish in order to build the best custom menu.

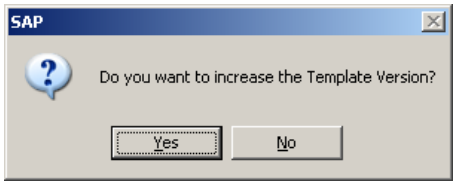
In this example, we will assume the following information is required in the example Custom Menu.

- That we want to open the Report Wizard menu
- That we will open 1 file called M01 Sales Report.xlt
- We will use the Go Home, Back, Forward and Back to Process Selector functions
- That we will OPEN the Data Manager window.

8. In order to build this process, first SAVE the custom menu, as "BudgetMenu" using the Excel menu commands, eTools, Custom Menu Manager, Save Custom Menu.



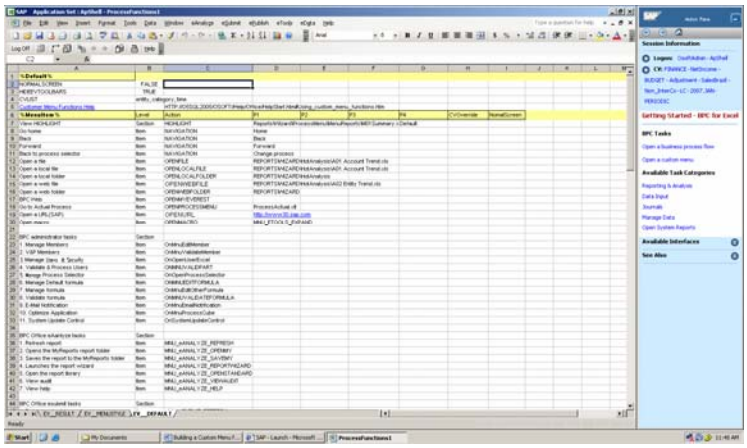
9. Save the file to the Company Folder, and click "No" when prompted to Increase the Template Version. The file must be saved in the Company folder in order to eventually push the files out to BPC "Clients." If the file is saved in a local folder, then ONLY the developer will have access to this menu.



2.2 Building the Custom Menu Commands

Editing the template is a simple process. We will leverage the information and tools provided on this template to add the following content to the Custom Menu we just saved named “BudgetMenu.”

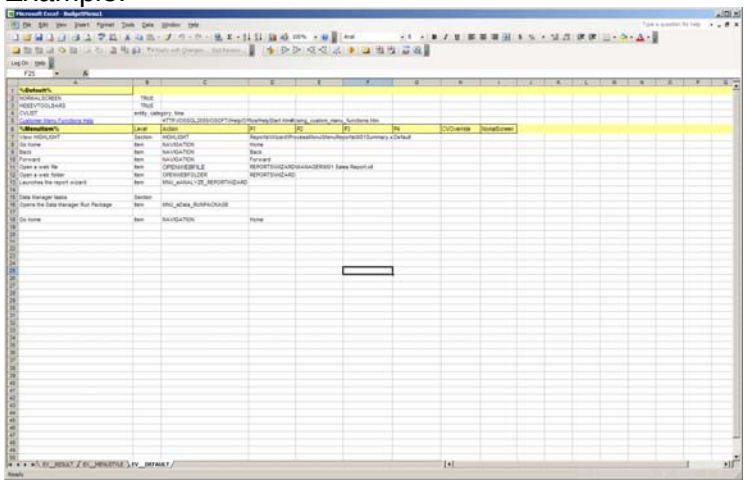
1. In the BudgetMenu Custom Menu file, Click the EV_Default Tab



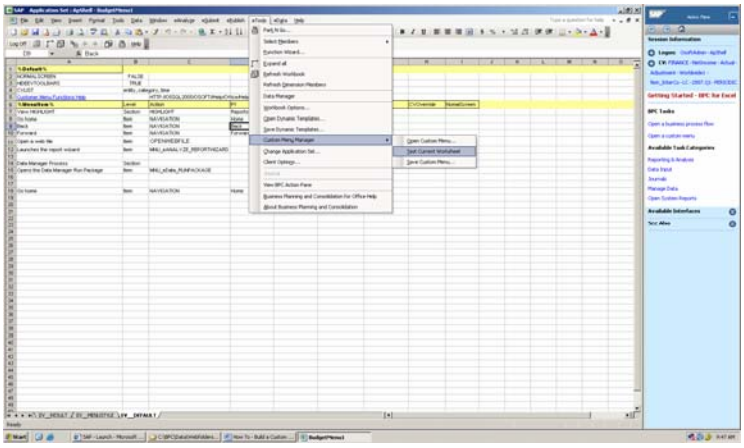
2. Follow the Outlined steps to the Right to build the content for the menu.

- Row 2, change NORMALSCREEN, Column B to TRUE.
- Delete Row 119 to 138
- Delete Rows 40 to 115
- Delete Rows 17 to 38
- Delete Rows 11 to 14
- Copy Row 8 to Row 18
- In row 11, column D, edit the text to read REPORTS\WIZARD\MANAGER\M01 Sales Report.xlt
- Row 13 column A, remove the text “4. “
- Row 16 column A, remove the text “1. “

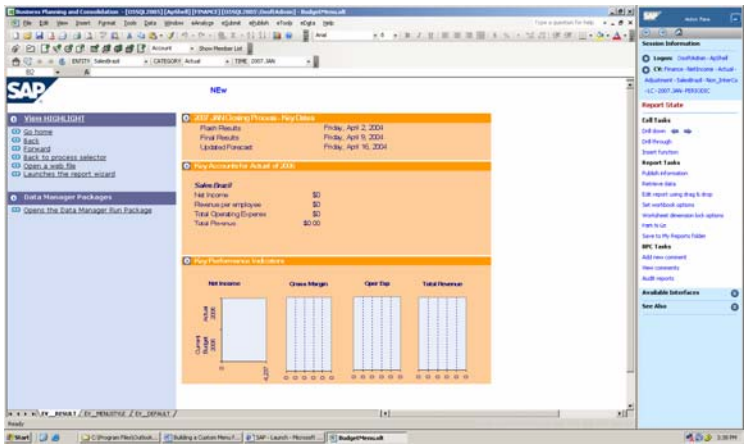
Example:



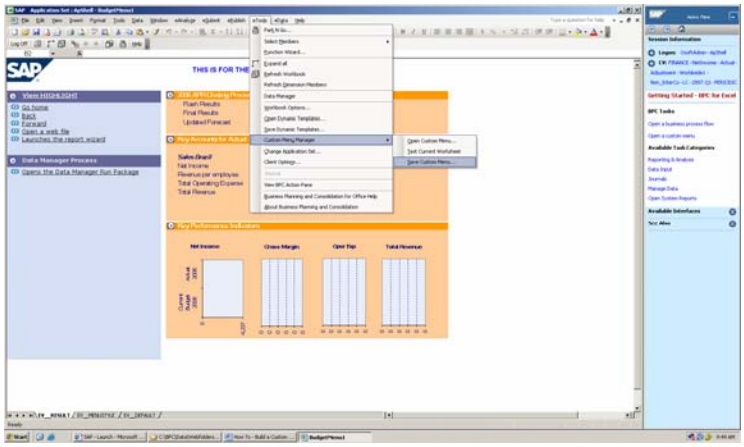
3. In order top now see the new custom menu, we must test the menu by selecting eTools, Custom Menu Manager, Test Current Worksheet. This will then calibrate the menu to our new commands. Sometimes, the last command will not show up in the list and marks the end of the commands. If it does, then delete the command and re-test the worksheet.



4. The new worksheet should look like the following:



5. Once the test is complete, resave the template as “BudgetMenu” using the eTools, Custom Menu Manager, Save Custom Menu function. Save the file to the Company Folder, and click “YES” when prompted to Increase the Template Version. This will push the template out to all users local folders for consumption.

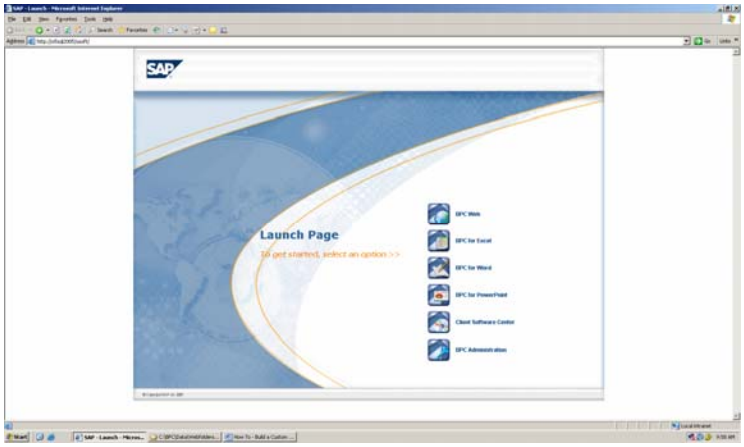


2.3 Enable the NEW Custom Menu in the Admin Console

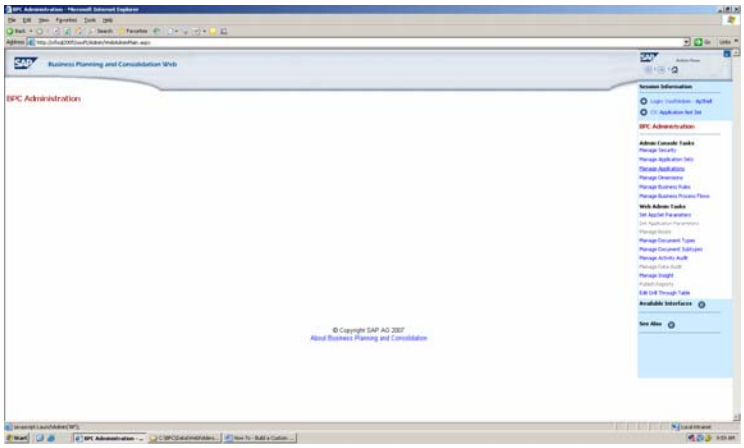
In order for the community to see and use the new BudgetMenu Custom Menu, we need to add the template to the custom menu section of the Finance application via the Admin Console.

From BPC Excel, in the action pane, select BPC Administration form the Available Interfaces section. Select ApShell as the Application set, and choose the Menu option Manage Applications form the Admin Action pane.

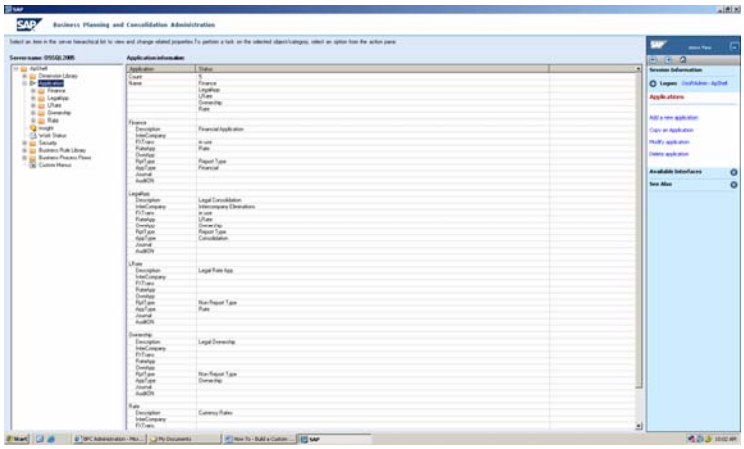
1. Using the BPC launch page or from BPC Excel, Action Pane option, Available Interfaces – BPC for Excel.



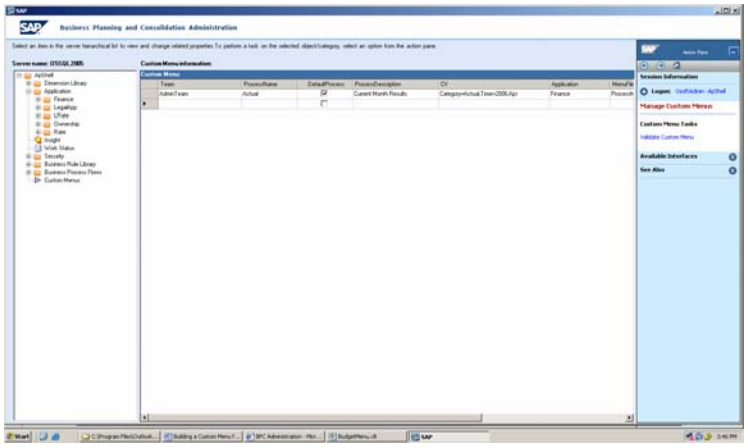
2. Select Manage Applications from the Action Pane, and log onto ApShell.



3. Now that the Admin console is open, at the bottom of the list of items to select on the left is Custom Menus.



4. Open the Custom Menus management page. There should be one example of an existing Custom Menu on the first row.



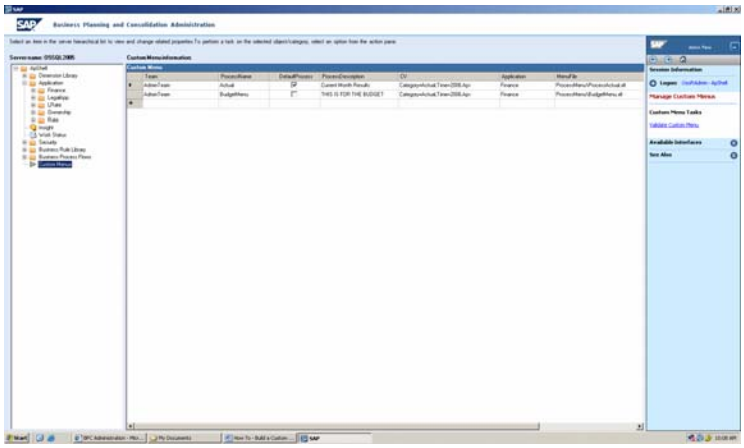
5. We need to fill in the following information fields in this grid in order to Validate the Custom Menu, in the Action Pane tasks.

- TEAM – Defines the Teams who may have access, and link to additional TAB names that hold the same team name.
- ProcessName – Names to Custom Menu when the menu opens
- DefaultProcess – Select the check box if this is the 1 menu that will open upon default of a user not having access
- ProcessDescription – This is a description of the process
- CV – Defines an opening current view for the menu
- Application – Select an available application from the application set
- MenuFile – define the location of the file, typically as ProcessMenu\[nameoffile.xlt]
- Memo – Any text mem

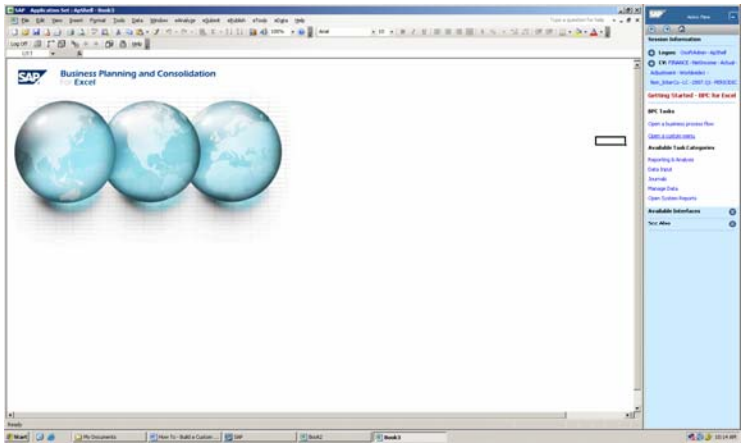
6. In order to add BudgetMenu to the list of available custom menus, use the following information for each field:

- TEAM – ADMINTEAM
- ProcessName – BUDGET MENU
- DefaultProcess – NOT CHECKED
- ProcessDescription – THIS IS FOR THE BUDGET
- CV – COPY the ONE Above from Actua1
- Application – FINANCE
- MenuFile – ProcessMenu\BudgetMenu.xlt
- Memo – TEST MENU

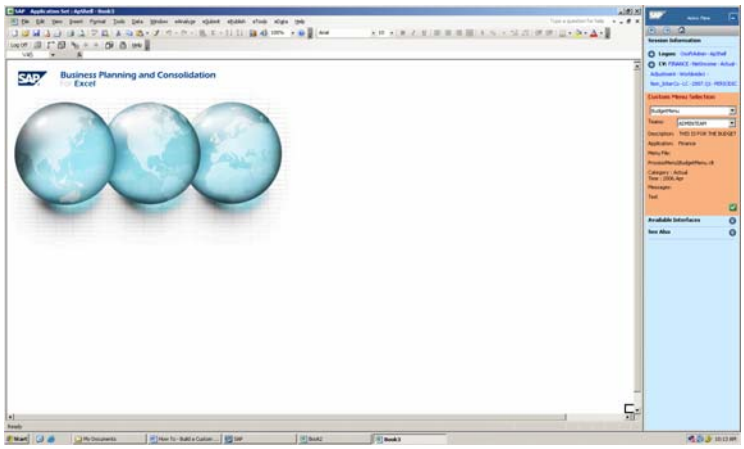
7. Once entered, click the Validate Custom Menu text in the Admin Action pane on the right. Adding the menu is complete



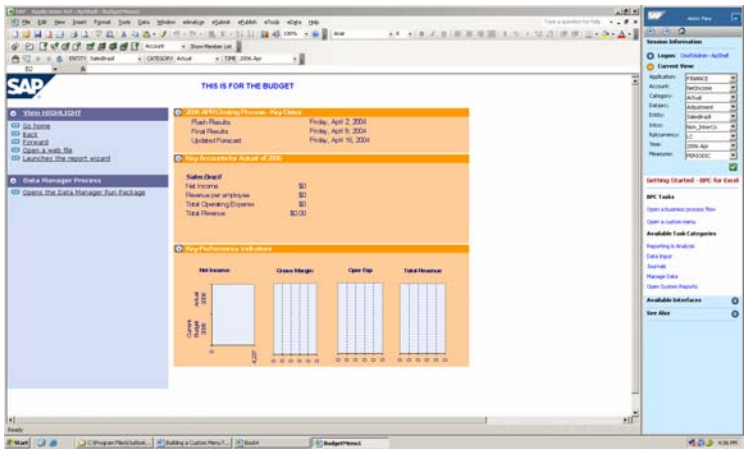
8. To review the menu in BPC for Excel, re-authenticate and log-in to BPC for Excel, under ApShell and the Finance Application. In the Action Pane, click “Open a custom menu”, under BPC Tasks.



9. Now the menu should be available in the drop list for users to open.



10. This is what the final result should resemble. Now you know “How-To” build a Custom Menu in SAP BPC.



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