

How To... Execute Planning Functions and Sequences from MS Office Ribbon

Applicable Releases:

SAP Business Object Analysis 1.1, Edition for Microsoft (“Analysis Office”)

Topic Area:

Business Intelligence

Version 1.0

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Document History

Document Version **Description**

| | |
|------|--------------------------------------|
| 1.00 | First official release of this guide |
|------|--------------------------------------|

Typographic Conventions

| Type Style | Description |
|-----------------------------|--|
| <i>Example Text</i> | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation |
| Example text | Emphasized words or phrases in body text, graphic titles, and table titles |
| Example text | File and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example text | User entry texts. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example text> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE TEXT | Keys on the keyboard, for example, F2 or ENTER. |

Icons





| Icon | Description |
|---|-----------------------|
|  | Caution |
|  | Note or Important |
|  | Example |
|  | Recommendation or Tip |

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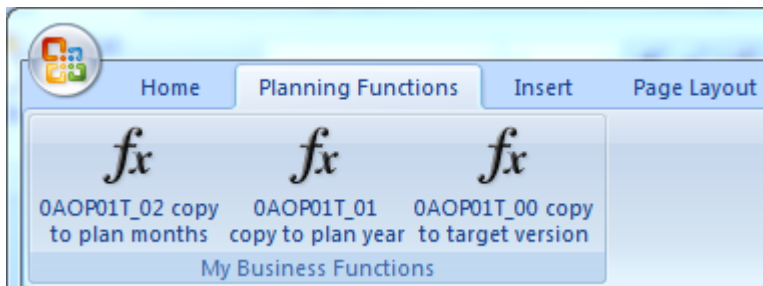
| | |
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1. Introduction

Aside of the input ready query the execution of planning functions and sequences is a central building block of each planning application. Easy and intuitive access to them is key to improve the usability and to gain acceptance. Giving this to your projects and users is the aim of this how to paper. It offers simple execution from the MS Ribbon with freely configurable labels, screentips/tooltips and icons.

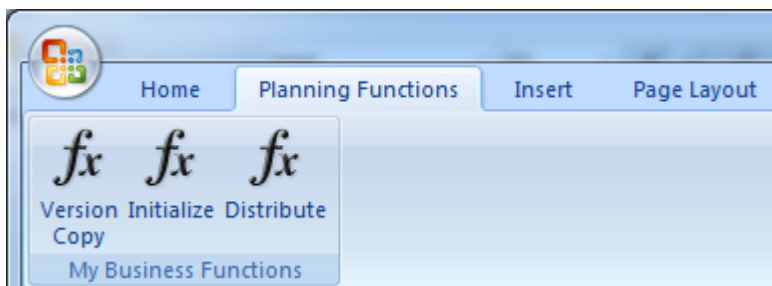
The screenshots below provide you a first impression, the configuration is demonstrated in the video *HowToExecutePFPSFromRibbon.mp4*.

Once this how to is implemented you can execute planning function and sequences from the office ribbon. There is a new tab *Planning Functions* containing a list of buttons to execute the planning function and sequences.

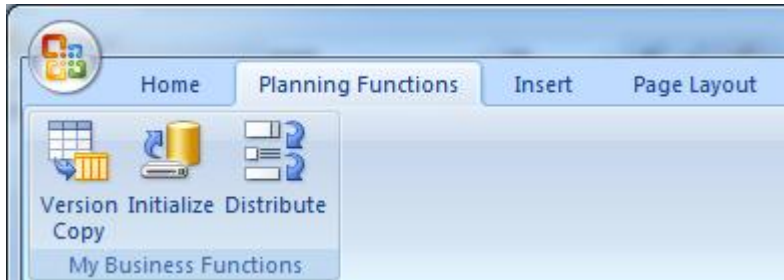


Moreover, this default view can be configured in several ways:

Set the button labels ...

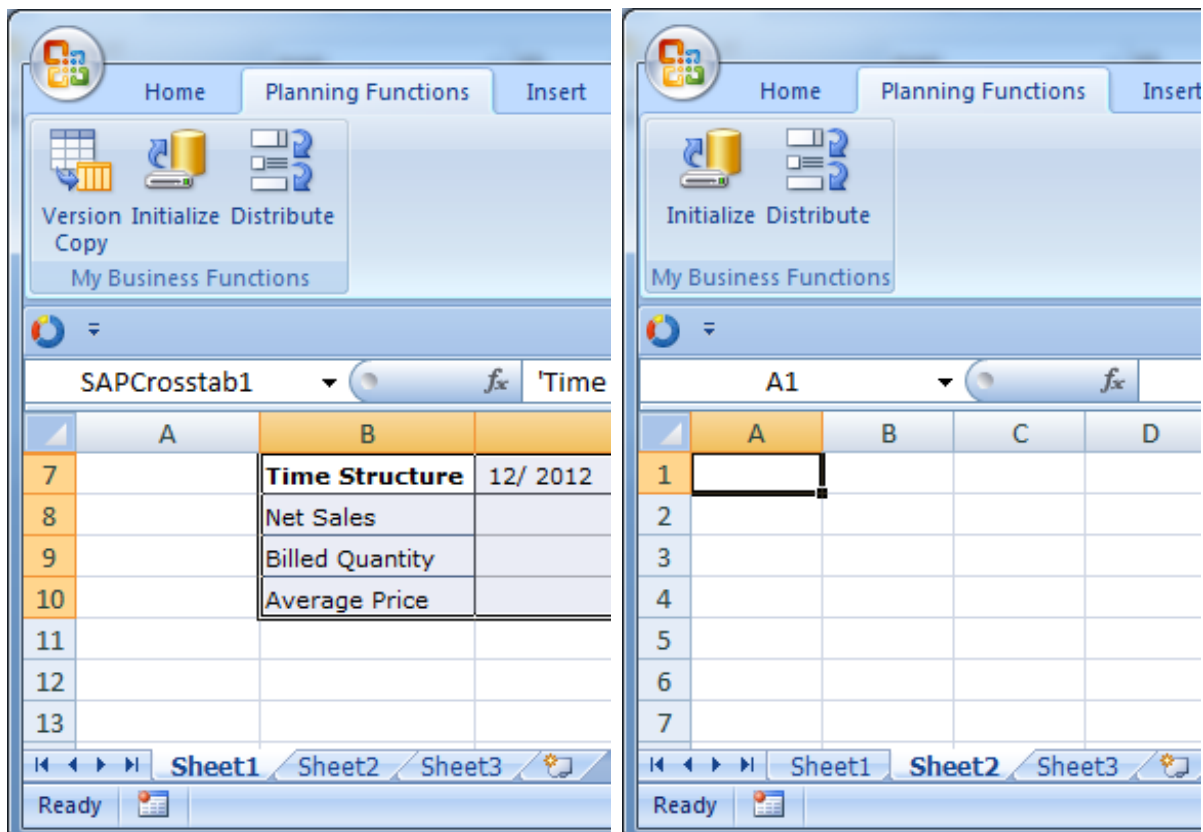


Choose alternative icons (delivered with MS Office) ...



Link the visibility of the button to a crosstab/query.

In this example the version copy is bound to CrossTab1 and only visible if the cross tab is visible ...



2. Implementation Steps

Before starting with the step-by-step implementation, please consider your current use case: when you plan to create a blank workbook first – and then want to add the planning objects and data

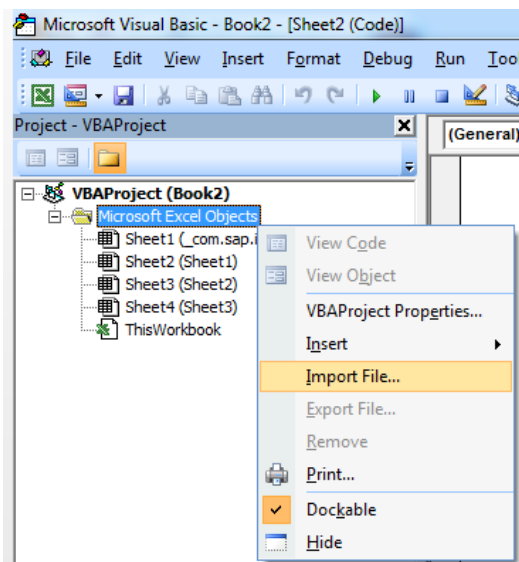
sources - just open the workbook “HowToPFPS_Blank.xlsm” from the appendix of this document and skip this chapter.

If you like to add the implementation to an existing workbook – or like to learn more about the details of this implementation then just follow the step-by-step instructions.

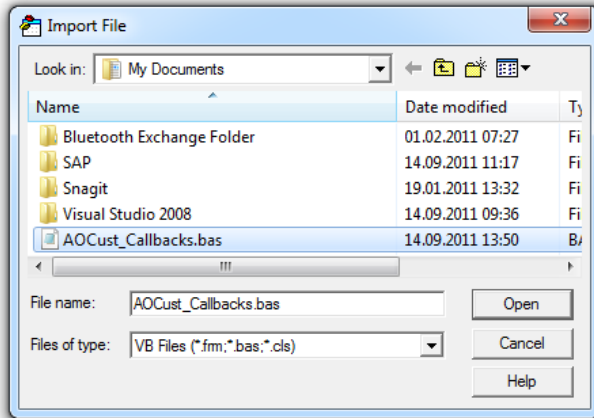
The implementation described consists of three parts: a VBA coding module, a registration to the sheet change event of the Excel workbook and a ribbon configuration. The following instructions guide you through the required steps:

2.1 Inserting the VBA module

1. Navigate to the VBA editor, invoke the context menu as shown and select the option *Import File*.



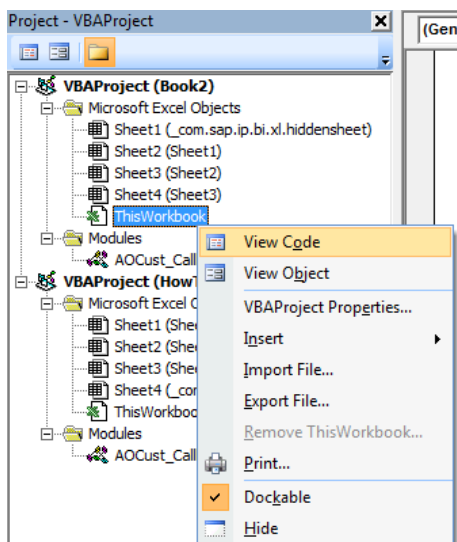
2. Select the file AOCust_Callbacks.bas which is part of the attachment of this file containing this how-to and press *Open*.



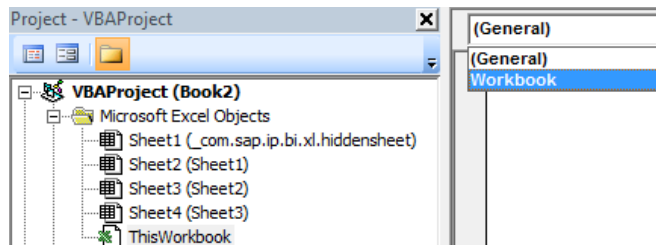
3. Save the workbook.
4. The import of the module is finished.

2.2 Inserting the Event Handler

1. Navigate to the VBA editor, invoke the context menu as shown and select the option *View Code*.



2. From the drop-down on top of the editor select the entry *Workbook*.



3. Insert the following source code snippet:

```
Private Sub Workbook_SheetActivate(ByVal Sh As Object)
    Call AOCust_Callbacks.AOCust_Invalidateribbon
End Sub
```

4. Save the workbook.
5. The definition of the event handler is done.

2.3 Inserting the Ribbon Configuration

What is the ribbon configuration? Starting from Office 2007 on Microsoft is using a new concept for the Office menus – the so called ribbon UI. For us it is important to understand that the configuration is an XML-file that needs to be added to the Office document.

Technical and background information can be found on Microsoft Blogs like *Customizing the 2007 Office Fluent Ribbon for Developers (Part 1 of 3)* (search for this in your search provider like google).

Inserting a ribbon configuration (the xml-file) is unfortunately not supported from the VBA editor. Hence a helper tool offered by Microsoft is required – the so-called CustomUIEditor.

Download Location: You might try

<http://openxmldeveloper.org/blog/b/openxmldeveloper/archive/2010/08/10/23248.aspx> or enter *CustomUIEditor Download* in your search provider like google.

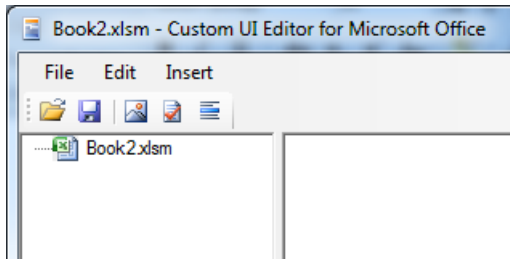
Introduction to the CustomUIEditor: The blog *Customizing the Word 2007 Fluent Ribbon Is As Easy As 1-2-3 (Part 2 of 2)* provide several usage samples. (search for this in your search provider like google).

For our how to paper there are just a few simple steps to go ...

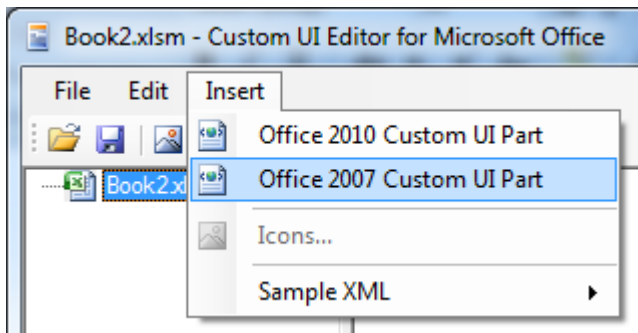
1. Save and close your workbook. This is required to release the lock and allow the CustomUIEditor to perform changes to the document.


www.sdn.sap.com/irj/sdn/howtoguides

2. Launch the CustomUIEditor, select the folder icon and open the workbook

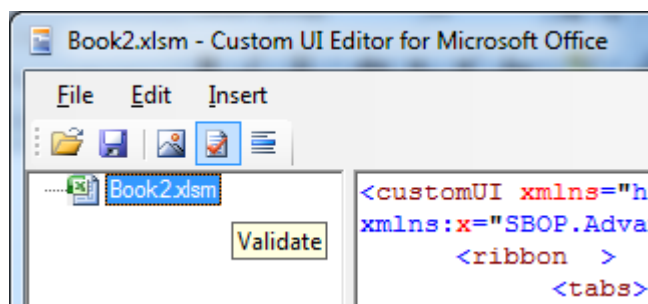


3. Select *Insert* from the menu and choose Office 2007 or 2010, depending on your Office version (the 2007 definition is supported by 2010 as well).



4. Paste file content of the file AOCust_RibbonXml.xml to the editor. The file is part of the attachment of this file.
5. Validate the XML entered by pressing the validate button . You must not continue until you receive the message that everything is well defined. A stumble stone sometimes is the correct namespace definition

(`xmlns="http://schemas.microsoft.com/office/2009/07/customui"`).



6. Save the changes and close the editor.
7. The ribbon configuration is finished. Continue now with the next chapter and prepare the planning functions and sequences.

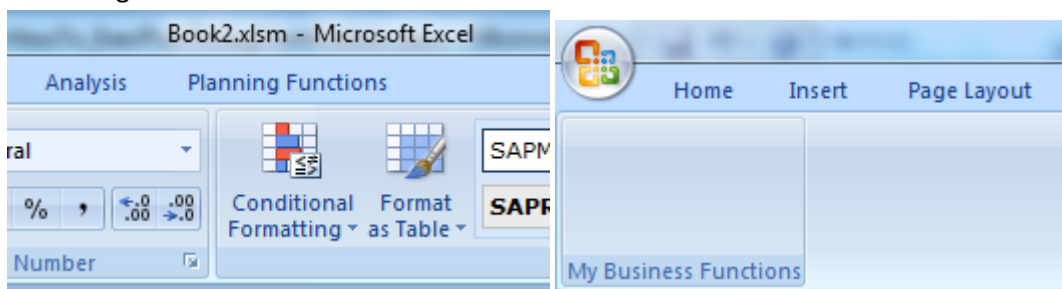
3. Configuration Steps

To an overview about configuration you might want to check out the video

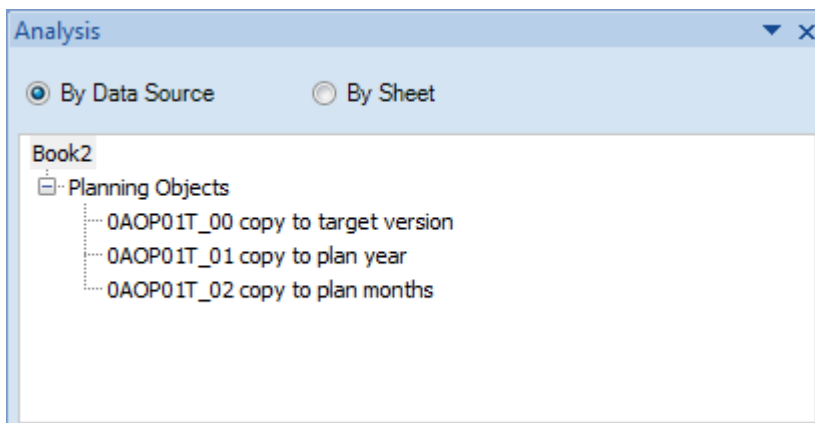
www.sdn.sap.com/irj/sdn/howtoguides

HowToExecutePFPSFromRibbon.mp4. When starting with the template file *HowToPFPS_Blank.xlsm* you can follow the instruction with your own functions immediately.

- Let us start with a first check: as an immediate result of the previous steps we should see a new ribbon with the name *Planning Functions* aside of the *Analysis* tab – with an empty group *My Business Functions* below. If this is not the case, please revisit the first steps before continuing.



- We presume that some functions or sequences have been assigned to the workbook already. The functions below in the screen shot are just dummy names. In your scenario you should see your functions and sequences.



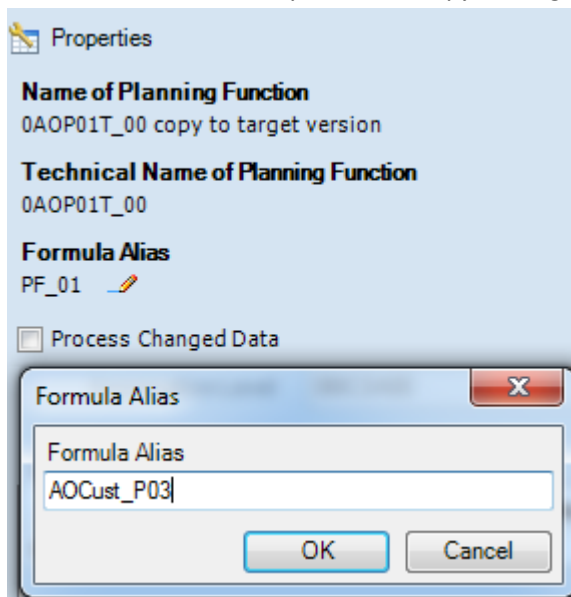
- Now decide which functions or sequences should be added to the ribbon and in which order. The order is defined implicitly by the alias name: AOCust_P01 is the first one, then AOCst_P02 ... until AOCust_P09. In our sample we like to add all in the order as shown in the table:

| Position | Planning Object | Alias (old -> new) |
|----------|---------------------|--------------------|
| 1 | Copy to plan year | PF_2 -> AOCust_P01 |
| 2 | Copy to plan months | PS_1 -> AOCust_P02 |

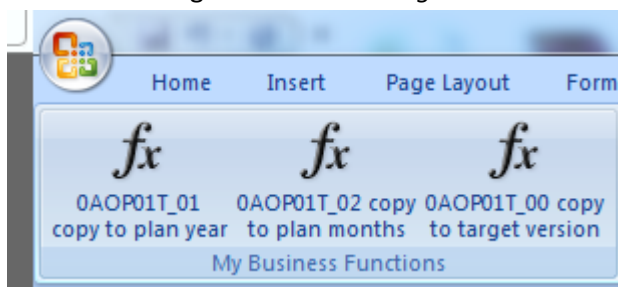
www.sdn.sap.com/irj/sdn/howtoguides

| | | |
|---|------------------------|--------------------|
| 3 | Copy to target version | PF_1 -> AOCust_P03 |
|---|------------------------|--------------------|

4. Navigate to each planning function or sequence and adjust the alias according to the naming convention. Here is sample for the *copy to target version*.



5. To update the ribbon configuration you just need to switch to another sheet in the workbook. Navigate to the *Planning Functions* tab – and you will see a list of buttons like this.



6. Congratulations, you can now already start and execute the planning functions and sequences by pressing the buttons.

Fortunately there is even more functionality offered by this how to paper implementation:

- a. Provide an alternative text for a planning object: Per default the text displayed is the name of planning object as defined at the backend, there is an easy way to replace it with a workbook specific text
- b. Provide a comprehensive screentip/tooltip giving details and background information for this function.

www.sdn.sap.com/irj/sdn/howtoguides

- c. Provide an alternative icon – take one from the huge gallery of pre-delivered MS Office icons.
An overview of icons can be found here (<http://www.microsoft.com/download/en/confirmation.aspx?id=11675>) or search for *Office2007IconsGallery*.
 - d. Control the visibility of a button based on the visibility of a related crosstab: the button just disappears once the related crosstab is not located on the active sheet.
7. This additional functionality requires a configuration – which for simplicity reasons is stored in a named Excel range, where the name is equal to the alias of the planning object. To define a name range to be used in this how to paper select four cells as shown – and enter the name into the field above the sheet. As we like to add the configuration to our first function, we use the alias AOCust_P01 as name for the range.

| AOCust_P01 | | fx MyLabel | | | | |
|------------|---|-----------------------------------|-------------|---------------|---------------|---|
| | A | B | C | D | E | F |
| 1 | | | | | | |
| 2 | | Named Range for AOCust_P01 | | | | |
| 3 | | Label | ScreenTip | MsoImage name | CrossTab name | |
| 4 | | MyLabel | MyScreenTip | Bold | SAPCrossTab1 | |
| 5 | | | | | | |

4. Appendix

4.1 Source Code for the Visual Basic Part:

This file contains the required source code. Please copy to your computer and upload to the Visual Basic Project as described in the How To Paper:



AOCust_Callbacks.bas

This file is included in the SDN zip file “SAP BusinessObjects Analysis, Edition for Microsoft Office - How to Easy Execution of Planning Objects – ZIP”.

4.2 Ribbon Definition

This file contains the XML declaration for the ribbon UI. Please copy to your computer and add it to the workbook as described in the How To Paper:



AOCust_RibbonXml.xml

This file is included in the SDN zip file “SAP BusinessObjects Analysis, Edition for Microsoft Office - How to Easy Execution of Planning Objects – ZIP”.

4.3 Excel Workbook

This Excel Workbook contains the complete How To already and can be used as a jump start. Please copy to your computer and start it. Then follow the instruction of chapter 3 or check out the video.



HowToPFPS_Blank.xl
sm

This file is included in the SDN zip file “SAP BusinessObjects Analysis, Edition for Microsoft Office - How to Easy Execution of Planning Objects – ZIP”.

4.4 Tech Smith Coding

Viewing the video requires the Tech Smith Coding, which can be downloaded here:

<http://www.techsmith.com/codecs.asp>