



SuccessConnect

INTERNAL – SAP AND CUSTOMERS ONLY

Get the Most Out of Embedded Analytics in SAP SuccessFactors Incentive Management

(FKA SAP Commissions)

Learn to easily create interactive analytics dashboards in the SAP SuccessFactors Incentive Management solution to discover insights and visualize information based on sales performance and compensation data.

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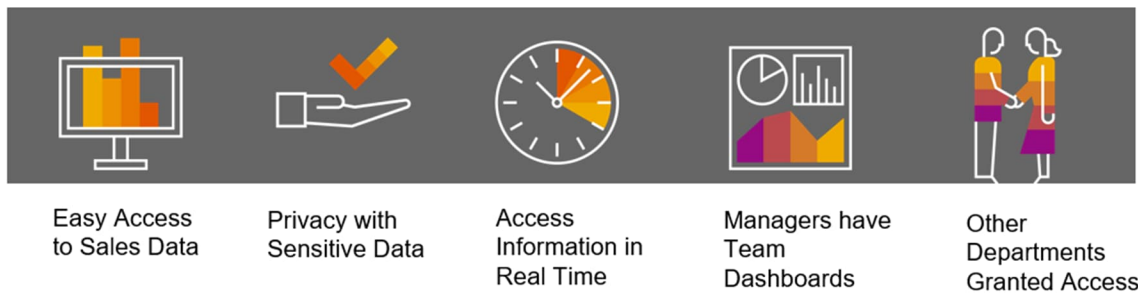
Abstract and outline

In this hands-on lab, you will learn to create interactive analytics dashboards more easily in the SAP SuccessFactors Incentive Management solution (formerly known as SAP Commissions) to discover insights and visualize information based on sales performance and compensation data. This session is for all user levels from beginner to advanced and existing customers only. Participants should bring their own laptop, but scripts will be supplied. Note that registration is required for this hands-on session. Space is limited so that speakers have time to answer attendee questions. If you are five minutes late to the session, we will give your seat to the next person standing in line.

Embedded analytics is an implementation of *SAP Analytics Cloud*. It is used to easily create interactive and dynamic analytics to explore data, find insights, visualize information, and share with colleagues.

- **Overview of embedded analytics**
- **Managing Folders**
- **Creating Stories**
- **Sharing and Teams**

Embedded analytics is an implementation of *SAP Analytics Cloud*. It is used to easily create interactive and dynamic analytics to explore data, find insights, visualize information, and share with colleagues. In this hands-on lab, you will learn how to create interactive analytics dashboards in the SAP SuccessFactors Incentive Management solution to discover insights and visualize information based on sales performance and compensation data.

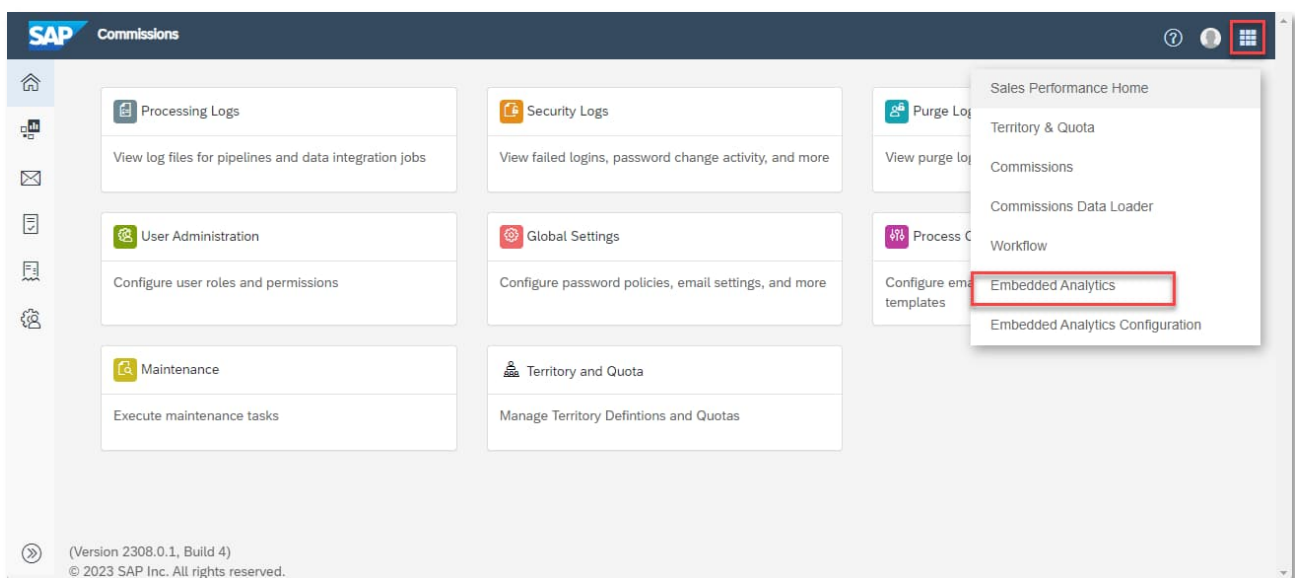


Lab Activity 1: Create a Folder and Save a Story

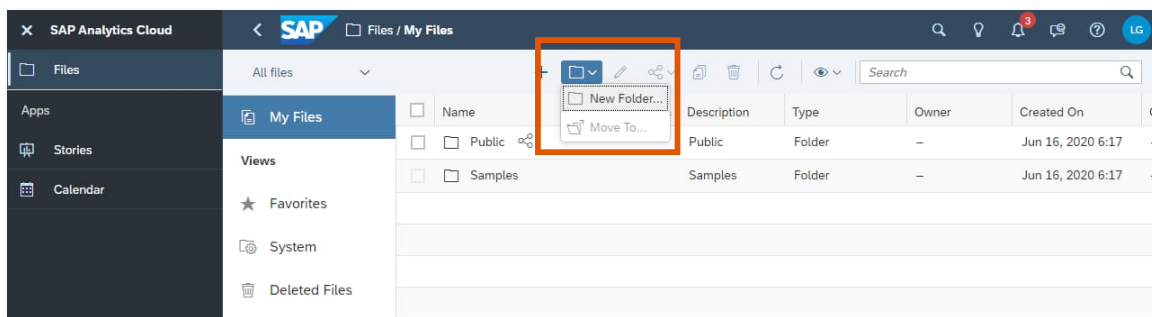
In this lab, you will create a Folder to organize your stories and save a copy of an existing story to this folder.

Exercise 1.1: Log in and create a Folder

1. Log into your system using the credentials provided by your facilitator.
2. Using the Application Picker icon, select **Embedded Analytics**



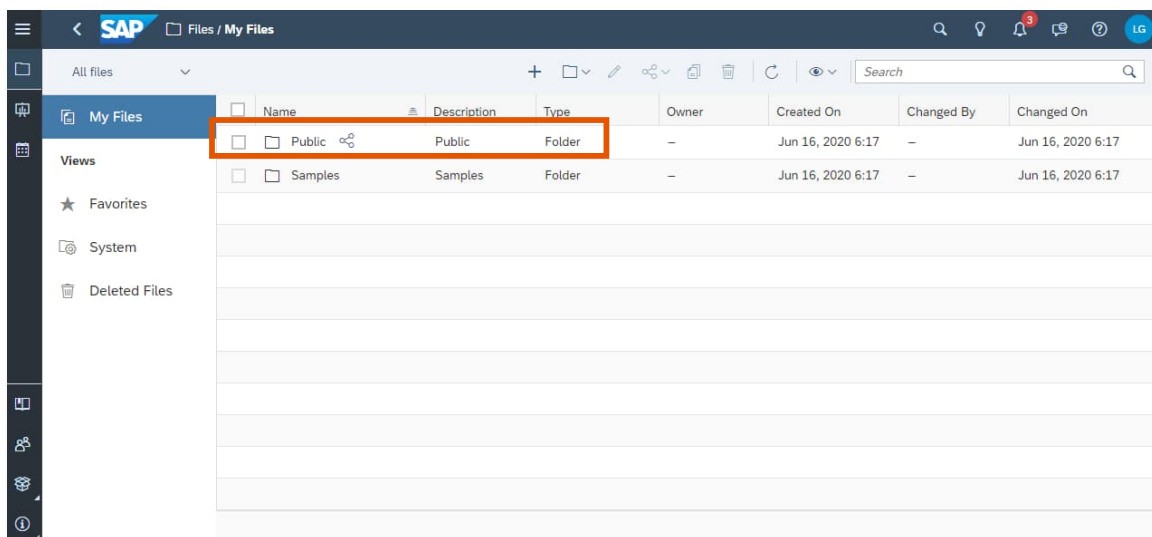
3. Select the **Folder** icon.
4. Select **New Folder...**



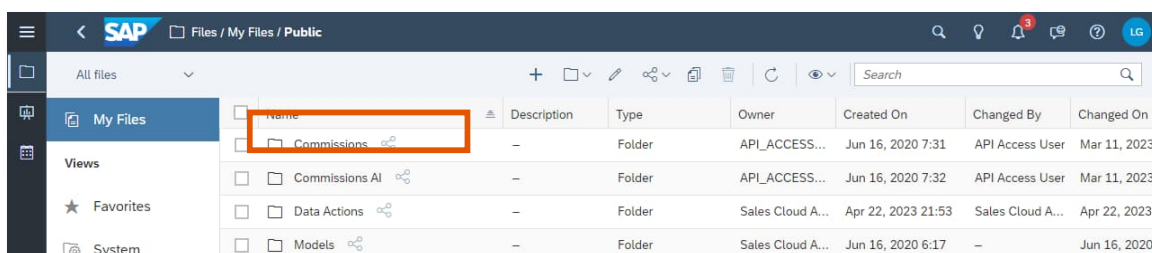
5. Name the folder **My Folder_Your Initials**.
6. Select **OK**.

Exercise 1.2: Open a Story and save it to the Folder

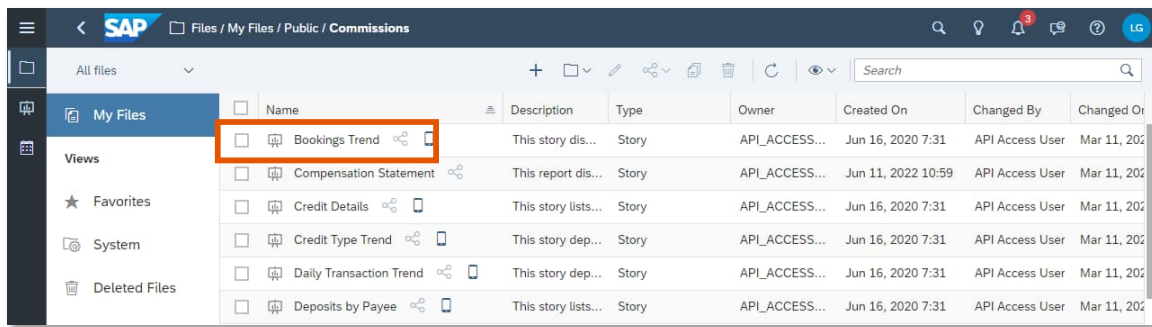
1. Select the *Public* folder.



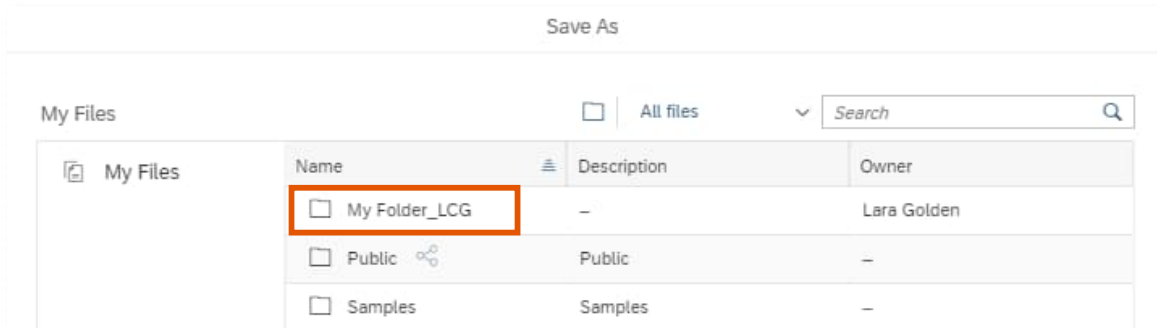
2. Select the *Commissions* folder.



3. Open the *Bookings Trend* story.



4. Save the story to your folder:
 - From the File menu, select **Save As...**
 - Select **My Files**.
5. Select the folder you created in the first exercise.



6. Enter the name **Bookings Trend_Your Initials**.
7. Select **OK**.

Save As

My Files / My Folder_LCG

All files

Search

Name	Description	Owner
There are no files matching the specified filter type(s) in this folder		

*Name

Bookings Trend_LCG

Description

This story displays the trend of bookings by period based on transaction values

OK Cancel

8. Close the story and return to the list of folders.
 - Select the *Bookings Trend_Your Initials* dropdown.
 - Select *My Files*

SAP

Stories

Bookings Trend_LCG

File Edit Tools

Period Name (All)

Bookings Trend_LCG

This story displays the trend of bookings by period based on transaction values

My Files / My Folder_LCG

Sales Cloud Analytics

SAP

Bookings Trend

Transaction Value per Period Name

Subtitle, in USD

9. Set the story as a Favorite.
 - Hover over the story name and select the **star** icon.

SAP

Files / My Files / My Folder_LCG

All files

My Files

Name	Description
Bookings Tre...	This story displays the trend of boo...

Lab Activity 2: Create Stories

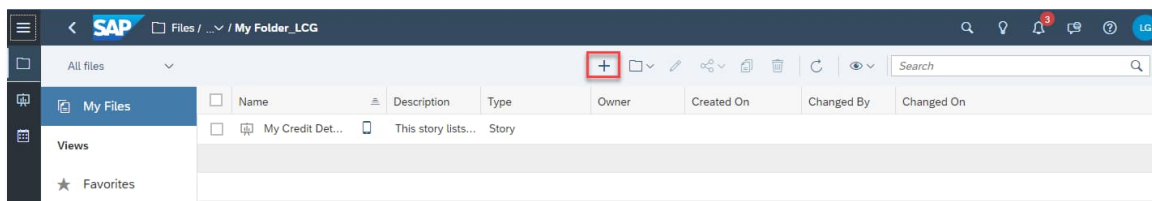
In this lab, you will create two new stories. The first will use the Transactions data model and will display a list of transactions, displaying the Order ID, Compensation Date, Product ID, Product Name, and Transaction Value. The second story will use the Credits data model and will display a list of credits for each payee, displaying the payee's full name and position, Order ID, Period Name, Credit Type, and Credit Value.

Exercise 2.1: Create a Story using the Transactions data model

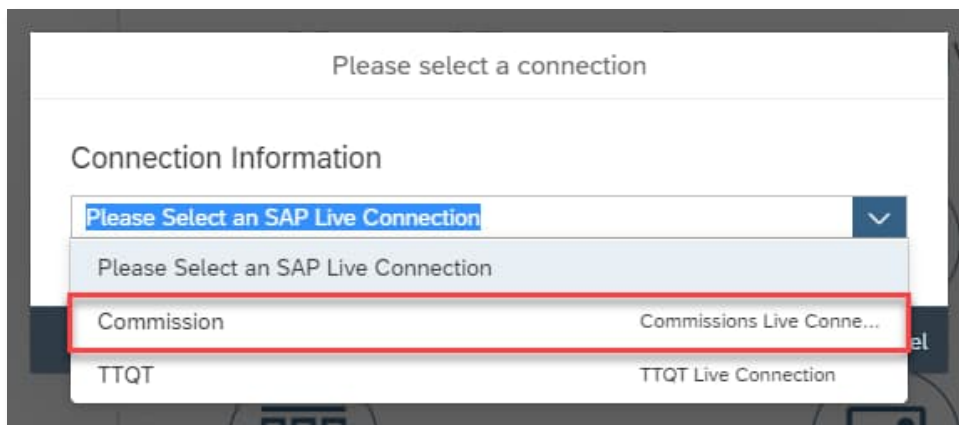
1. Starting from the list of folders, open the folder you created in the previous exercise.

Hint: The folder will be named *My Folder_Your Initials*.

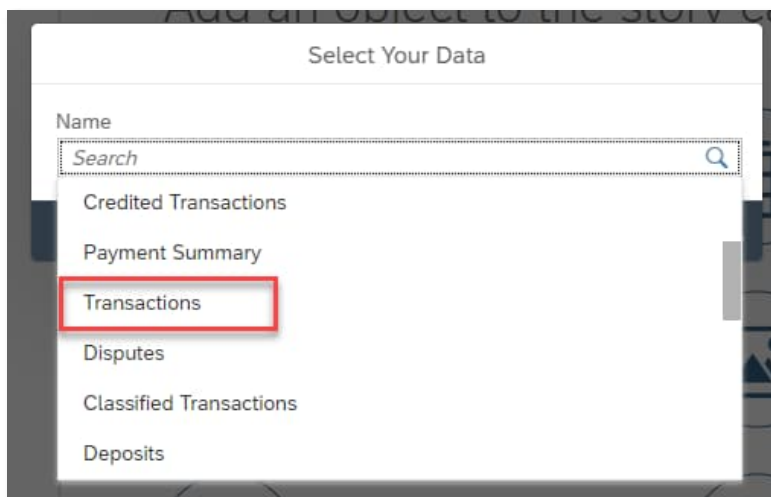
2. Select *Create (+)*.



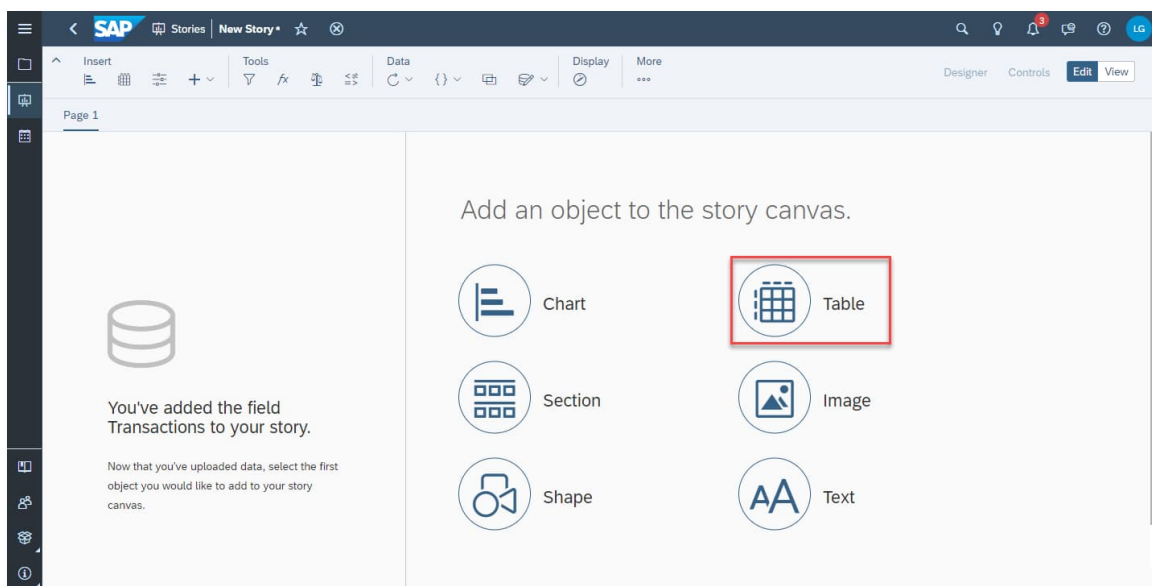
3. When prompted to select a connection, select the dropdown menu, and select **Commission**.



4. Select *OK*.
5. In the Select Your Data dialog box, select *Transactions* from the dropdown menu.

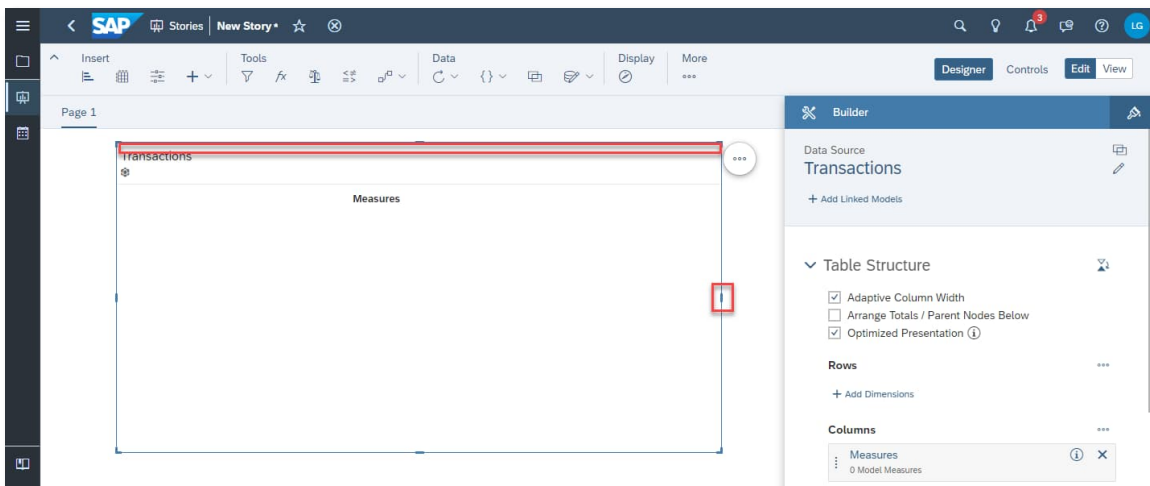


6. Select **OK**.
7. Select **Table**



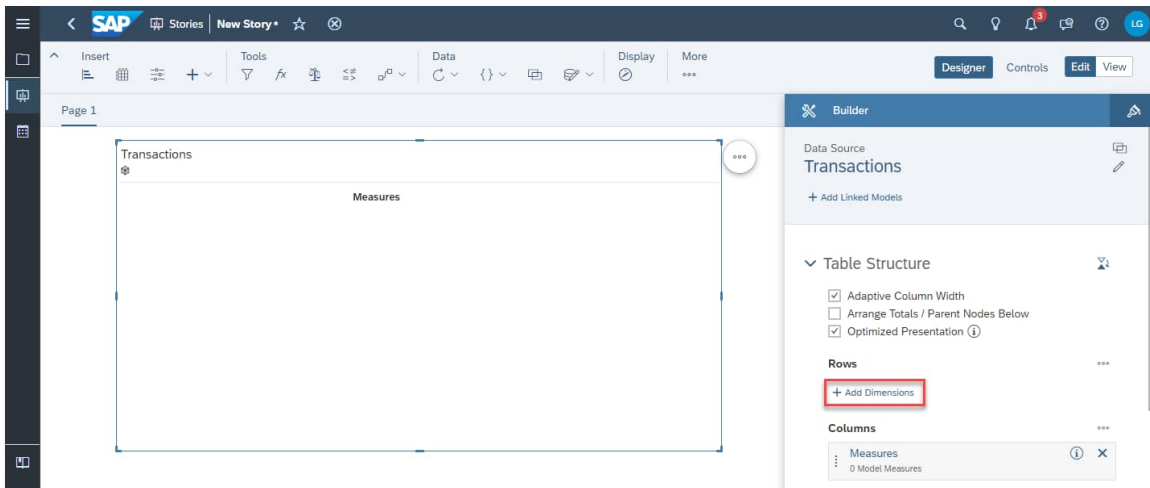
The Transactions table widget appears.

8. Optionally, use the highlighted areas to move and resize the widget so it appears like the image below.

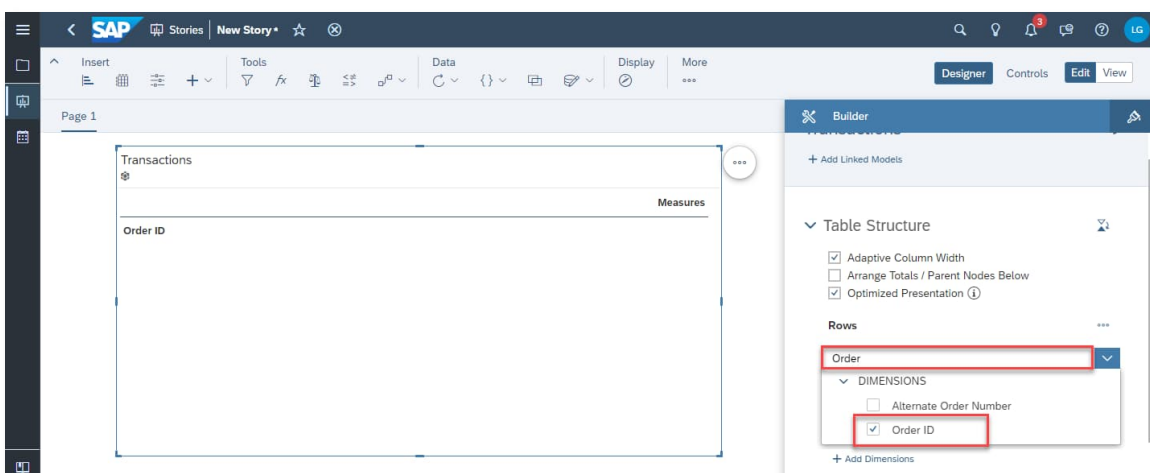


9. Use the following steps to add the columns to the table:

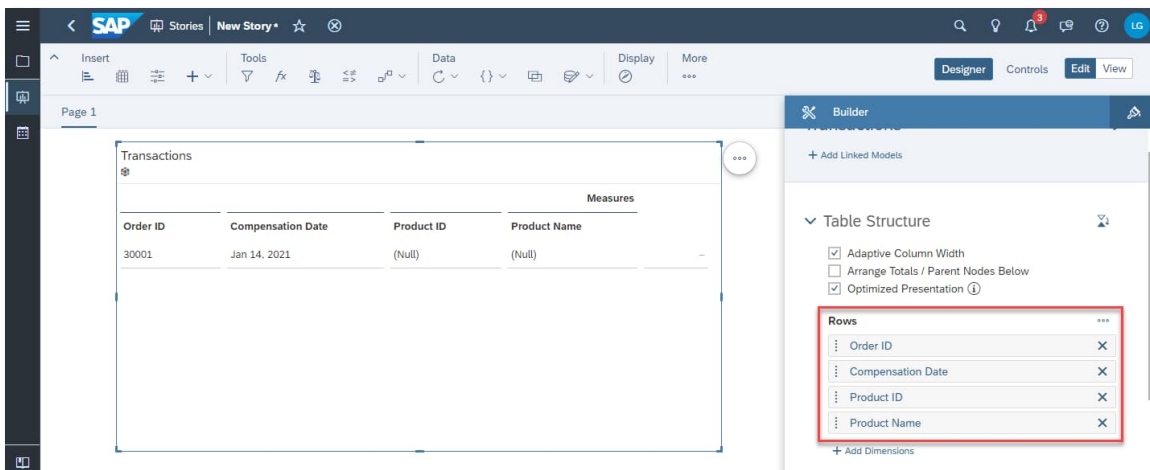
- In the Builder pane, select **Add Dimensions** under the *Rows* section.



- To add the Order ID dimension, type **Order** in the search bar and check the box next to *Order ID*.

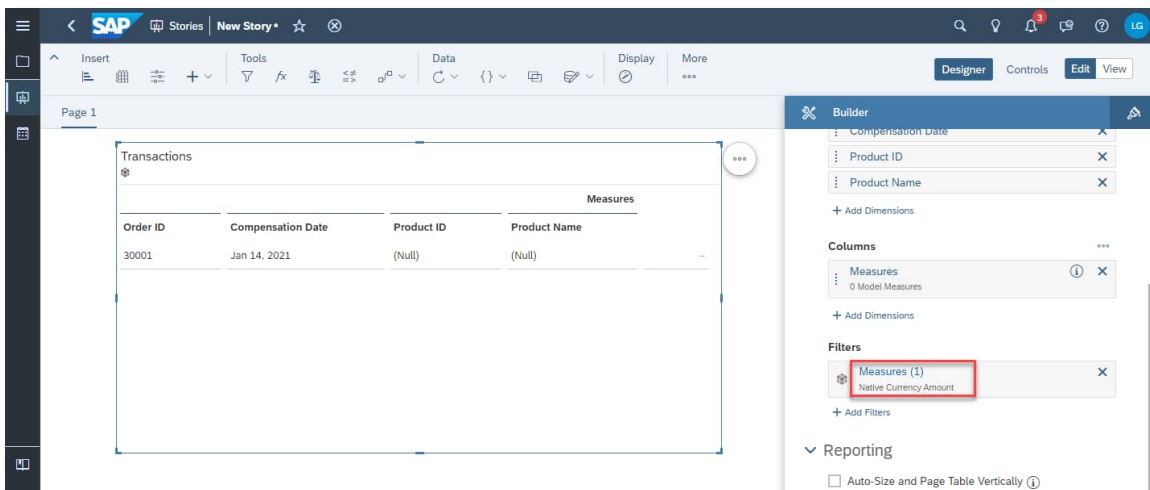


- Repeat these steps to add the **Compensation Date**, **Product ID**, and **Product Name** dimensions:

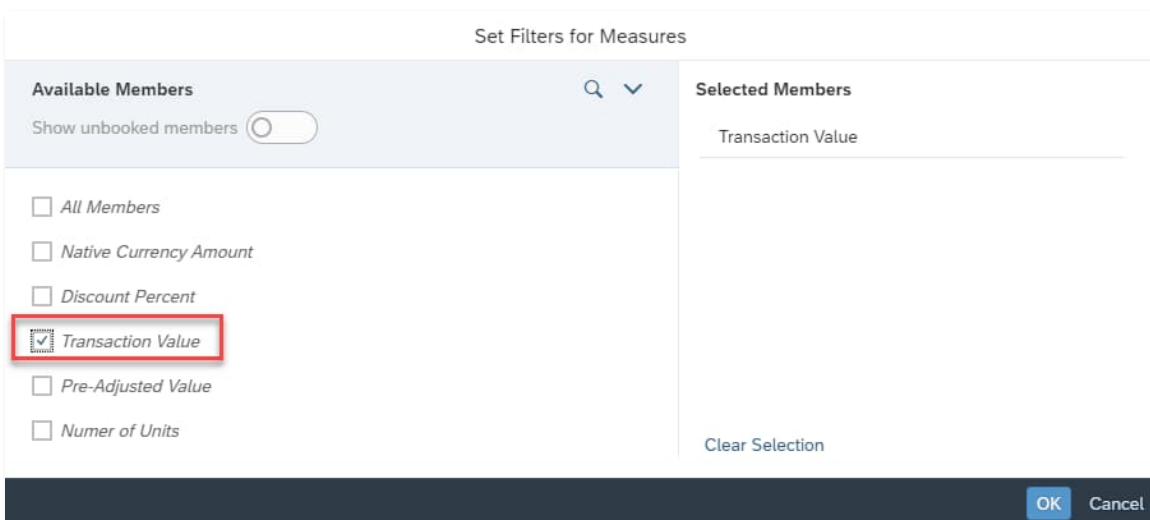


10. Use the following steps to display the Transaction Value in the far-right column:

- In the Builder pane, scroll to the **Filters** section.
- Select the Measures filter. Note the filter is set to *Native Currency Amount*. We want to change this to *Transaction Value*.



- In the dialog box, deselect *Native Currency Amount* and select *Transaction Value*.



- Select **OK**.

The table will now display a list of transactions.

The screenshot shows the SAP Analytics Cloud interface. On the left, a table titled 'Transactions' is displayed with the following data:

Order ID	Compensation Date	Product ID	Product Name	Transaction Value
11001	Apr 11, 2023	BB110	BB 110 Electric Bass	\$18,240.0000000000
11002	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000.0000000000
11003	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000.0000000000
11004	Apr 13, 2023	F1200	Solid Body Electric Guitar 1200	\$121,600.0000000000
11005	Apr 15, 2023	200A	Premier Acoustic Guitar 200A	\$144,000.0000000000
11006	Apr 15, 2023	500X	Premier Acoustic Guitar 500X	\$224,000.0000000000
11007	Apr 15, 2023	BB120	BB 120 Electric Bass	\$35,200.0000000000

On the right, the 'Builder' panel shows the 'Table Structure' section with the following rows:

- Order ID
- Compensation Date
- Product ID
- Product Name

11. Notice that the Transaction Value column has too many trailing zeros. Use the following steps to remove all units after the decimal.

- Select the **Styling** icon on the side panel as shown in the image below.

The screenshot shows the same SAP Analytics Cloud interface as before, but with the 'Styling' icon (a paintbrush) highlighted in the top right corner of the 'Builder' panel. The table of transactions remains the same.

This will display the Styling panel, and the header will turn orange.

- Select any spot in the *Transaction Value* column.

The screenshot shows the SAP Analytics Cloud Designer interface. The main table has the following data:

Order ID	Compensation Date	Product ID	Product Name	Transaction Value
11001	Apr 11, 2023	BB110	BB 110 Electric Bass	\$18,240.0000000000
11002	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000.0000000000
11003	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000.0000000000
11004	Apr 13, 2023	F1200	Solid Body Electric Guitar 1200	\$121,600.0000000000
11005	Apr 15, 2023	200A	Premier Acoustic Guitar 200A	\$144,000.0000000000
11006	Apr 15, 2023	500X	Premier Acoustic Guitar 500X	\$224,000.0000000000
11007	Apr 15, 2023	BB120	BB 120 Electric Bass	\$35,200.0000000000

The Styling panel on the right shows the 'Table Properties' section with the following settings:

- Template: Default
- Color Fill for Editable Cells: [Color Picker]
- Color Fill for Expand Icon: [Color Picker]
- Threshold Style: Symbol (Default)
- Row Height: Default
- Style: [Dropdown]

- In the Styling panel, scroll down to the *Number Format* section.
- Use the dropdown menu to set the Decimal Places to **0**.

The screenshot shows the SAP Analytics Cloud Designer interface with the 'Number Format' section expanded in the Styling panel. The 'Decimal Places' dropdown is set to 0. The table data is the same as in the previous screenshot.

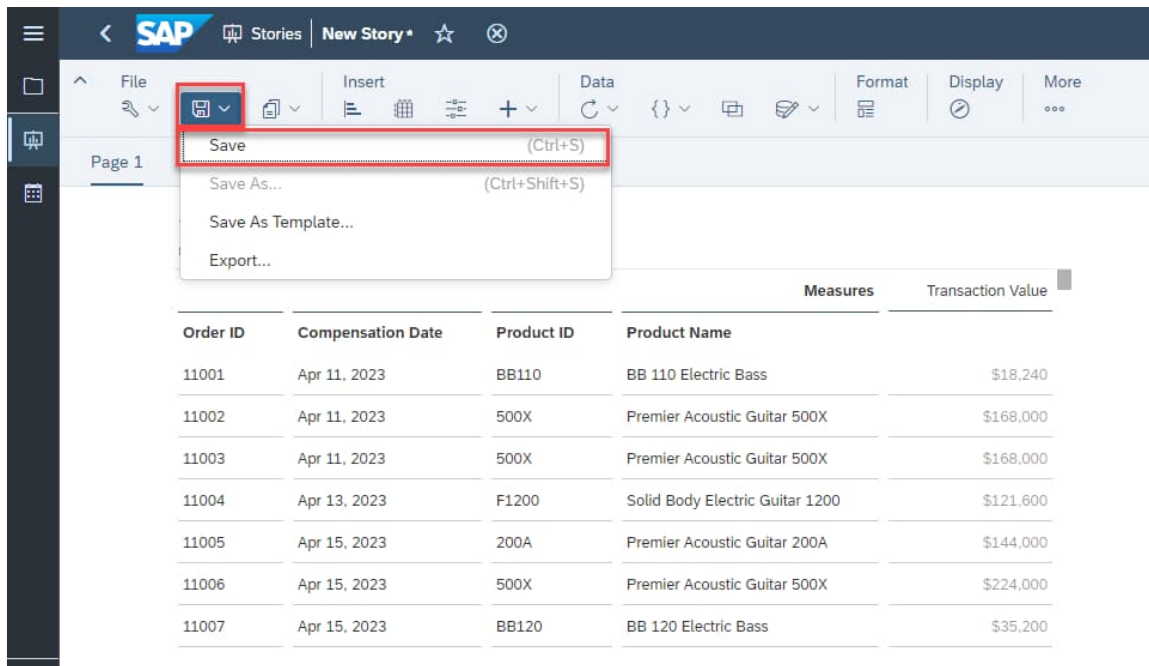
The 'Number Format' section settings are:

- Measure Selection: All
- Scale: Default
- Scale Format: Default
- Display unit / Currencies: Default
- Decimal Places: 0
- Show Sign As: Default

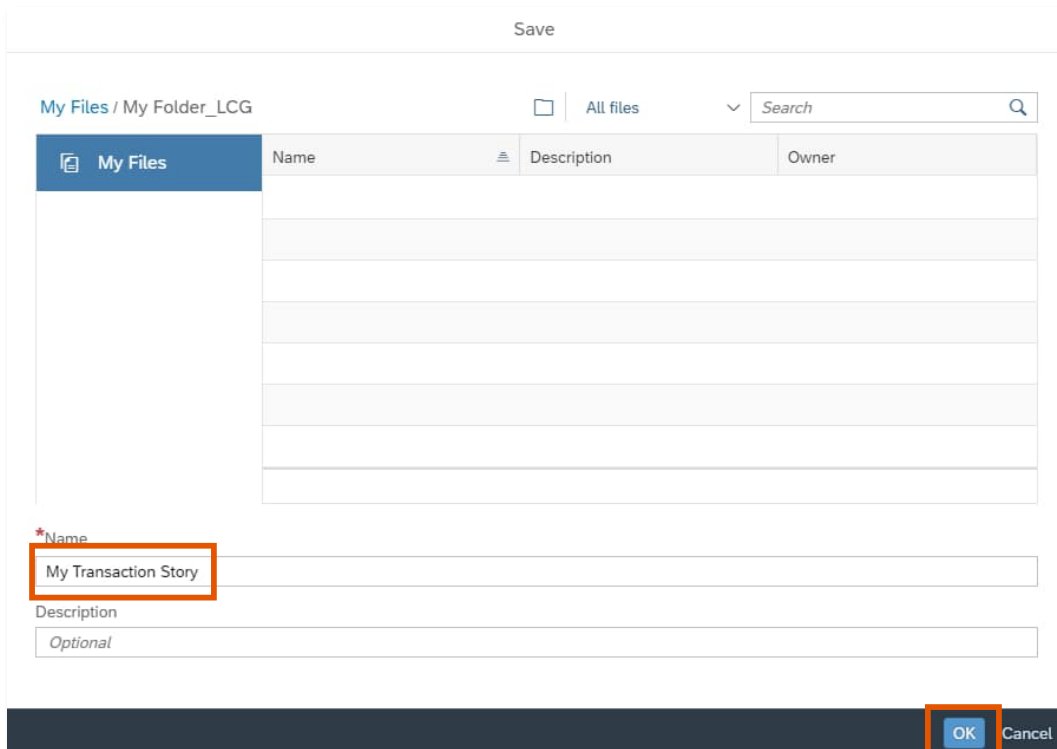
12. To close the Styling panel, select the *Designer* button.

The screenshot shows the SAP Analytics Cloud Designer interface with the 'Designer' button highlighted in the top right corner of the Styling panel. The table data is the same as in the previous screenshots.

13. Save the story to your folder.
 - From the File menu, select Save.



- Select the folder with your initials.
- Name the story “My Transaction Story”.
- Select OK.



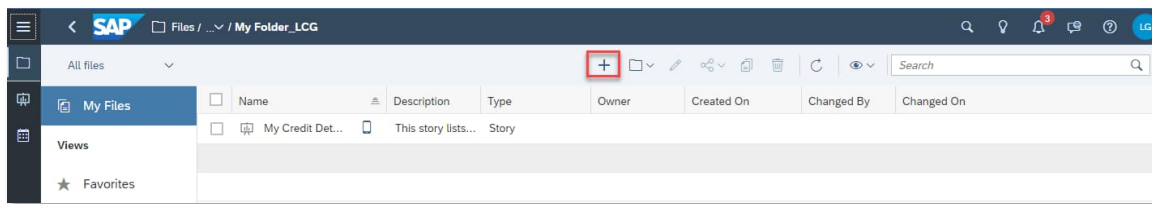
14. To return to the folder, select *My Transaction Story* from the title bar and select *My Folder_My Initials*.

The screenshot shows the SAP Analytics Cloud (SAP SAC) interface. At the top, the title bar displays 'My Transaction Story' with a dropdown arrow. Below the title bar, a menu is open, showing 'My Folder' and 'My Folder_My Initials'. The main content area displays a table titled 'Transactions' with the following data:

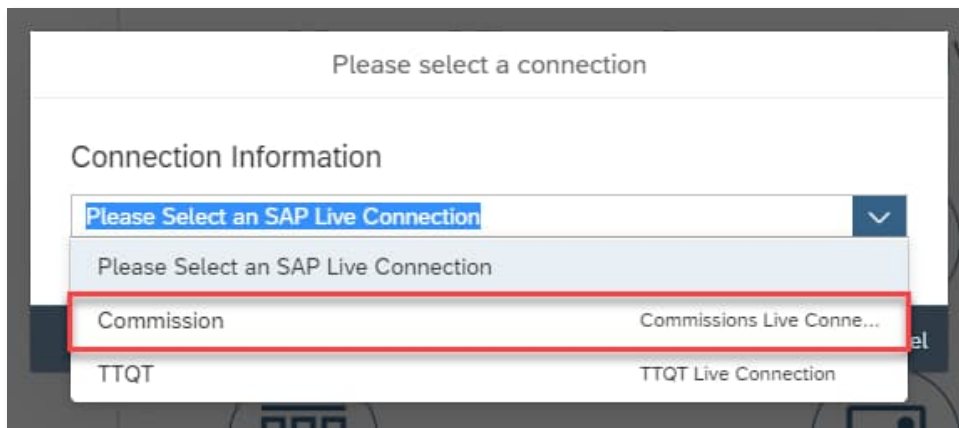
Order ID	Compensation Date	Product ID	Product Name	Transaction Value
11001	Apr 11, 2023	BB110	BB 110 Electric Bass	\$18,240
11002	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000
11003	Apr 11, 2023	500X	Premier Acoustic Guitar 500X	\$168,000
11004	Apr 13, 2023	F1200	Solid Body Electric Guitar 1200	\$121,600
11005	Apr 15, 2023	200A	Premier Acoustic Guitar 200A	\$144,000
11006	Apr 15, 2023	500X	Premier Acoustic Guitar 500X	\$224,000
11007	Apr 15, 2023	BB120	BB 120 Electric Bass	\$35,200

Exercise 2.2: Create a Story using the Credits data model

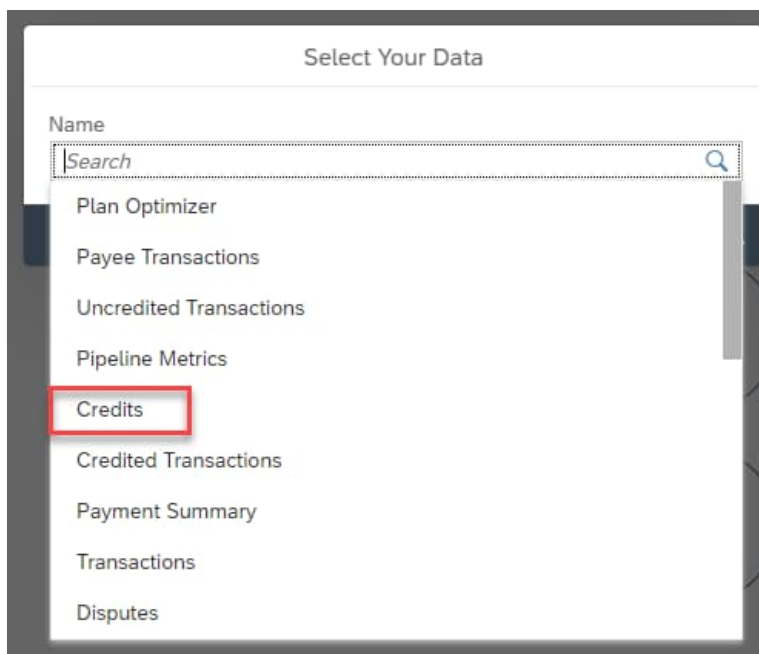
1. Select Create (+).



2. When prompted to select a connection, select the dropdown menu and select *Commission*.

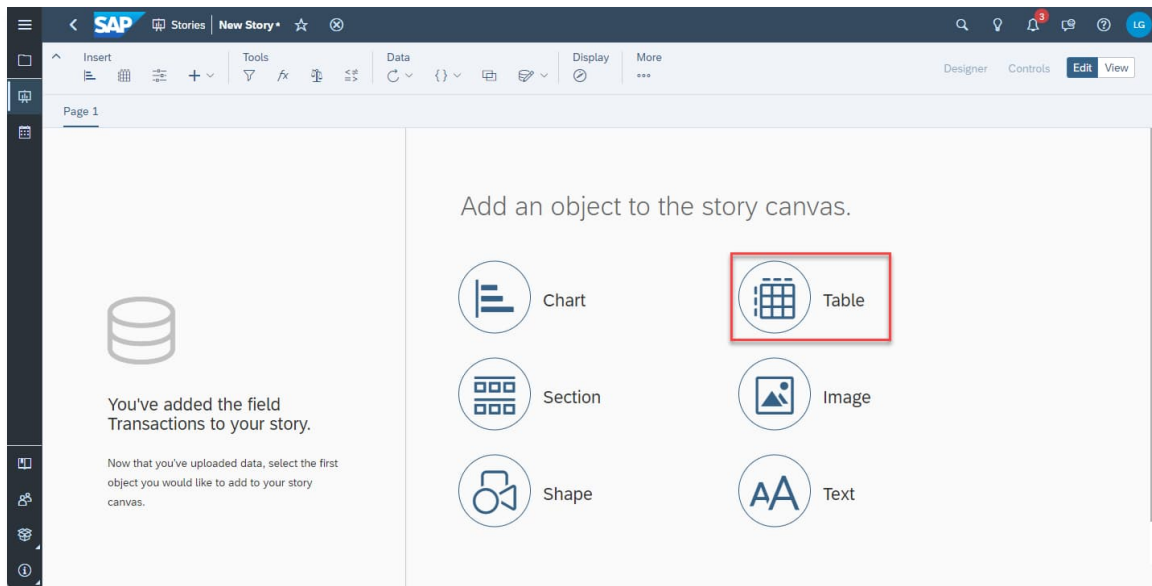


3. Select *OK*.
4. In the Select Your Data dialog box, select *Credits* from the dropdown menu.



5. Select *OK*.

6. Select *Table*.

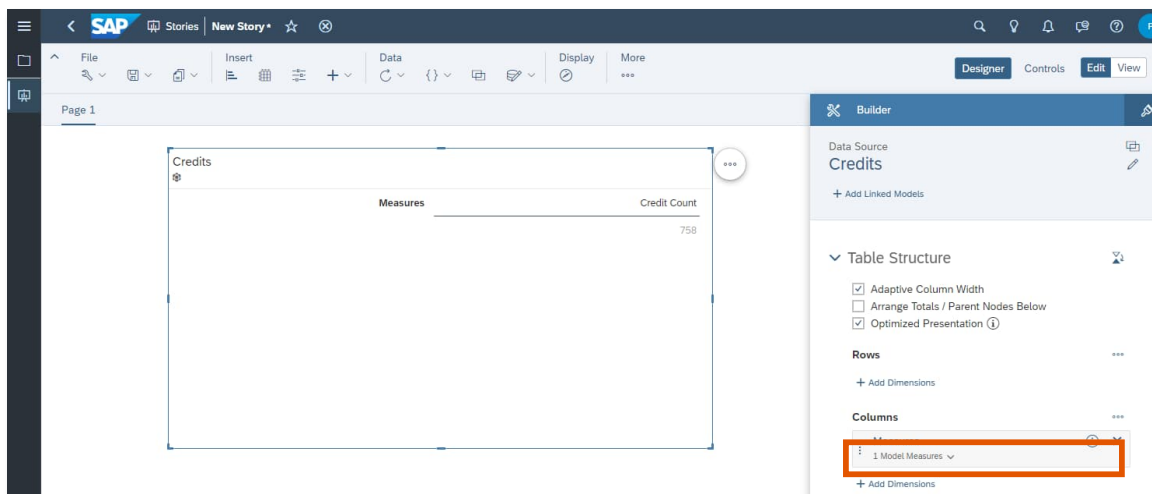


The Credits table widget appears.

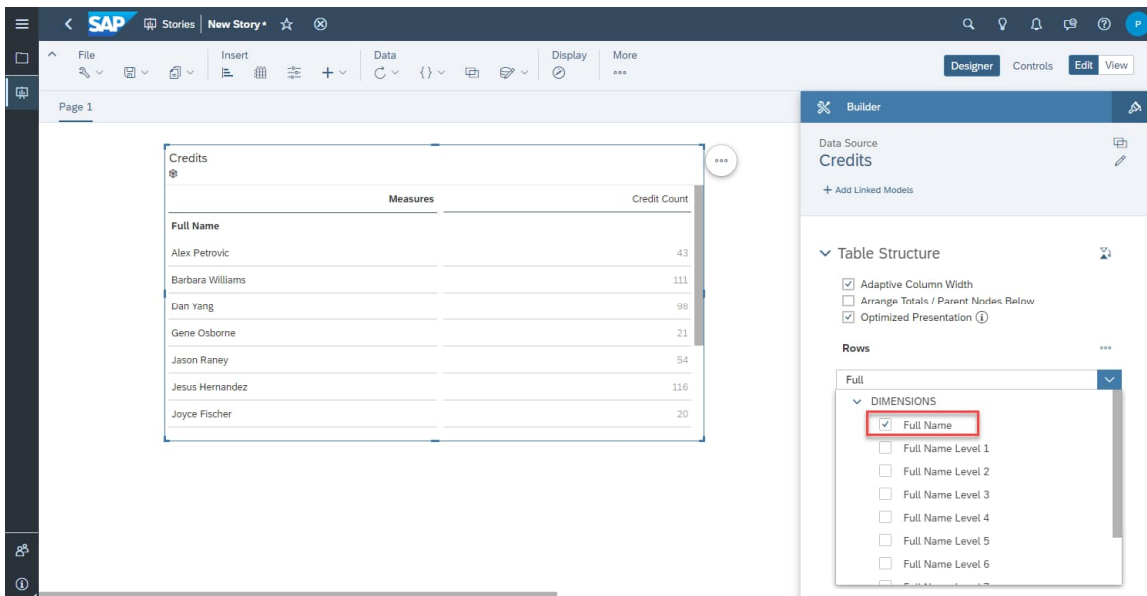
7. Optionally, move the widget to the center of the window.

8. Use the following steps to add the columns to the table:

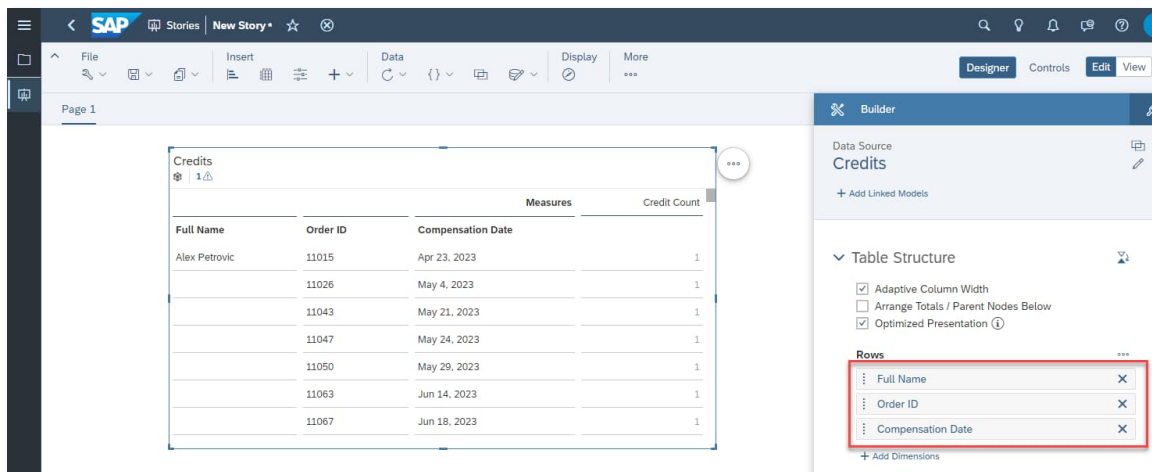
- In the Builder pane, select **Add Dimensions** under the *Rows* section.



- To add the Full Name dimension, type **Full** in the search bar and check the box next to **Full Name**.

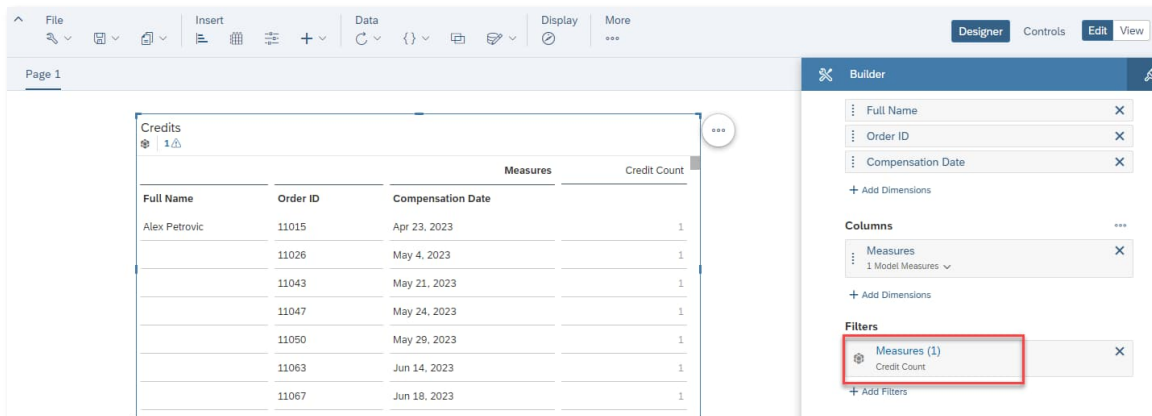


- Repeat these steps to add the *Order ID* and *Compensation Date* dimensions:

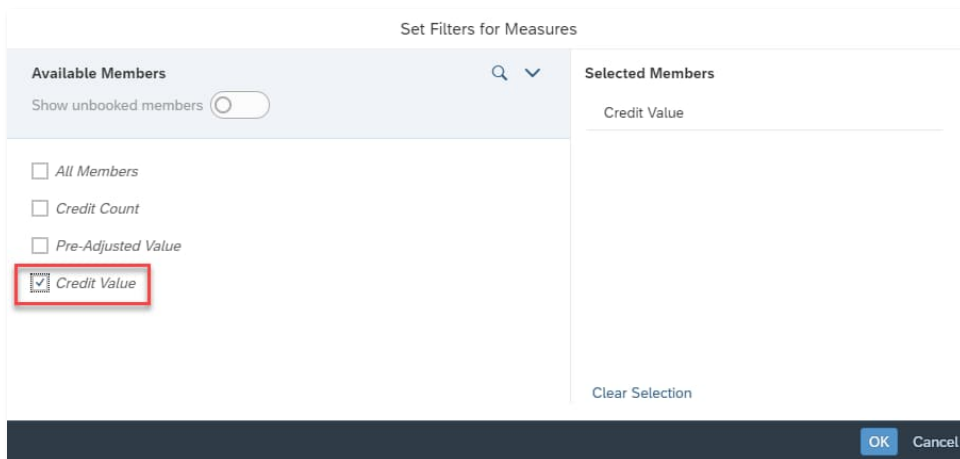


9. Use the following steps to display the Credit Value in the far-right column:

- In the Builder pane, scroll to the *Filters* section.
- Select the *Measures* filter. Note the filter is set to *Credit Count*. We want to change this to *Credit Value*.



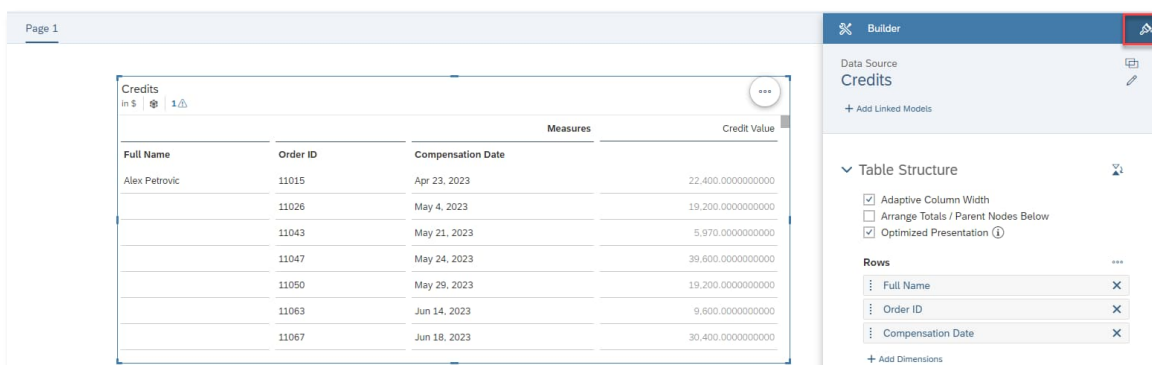
- In the dialog box, deselect *Credit Count* and select *Credit Value*.
- Select **OK**.



- The table will now display a list of credits.

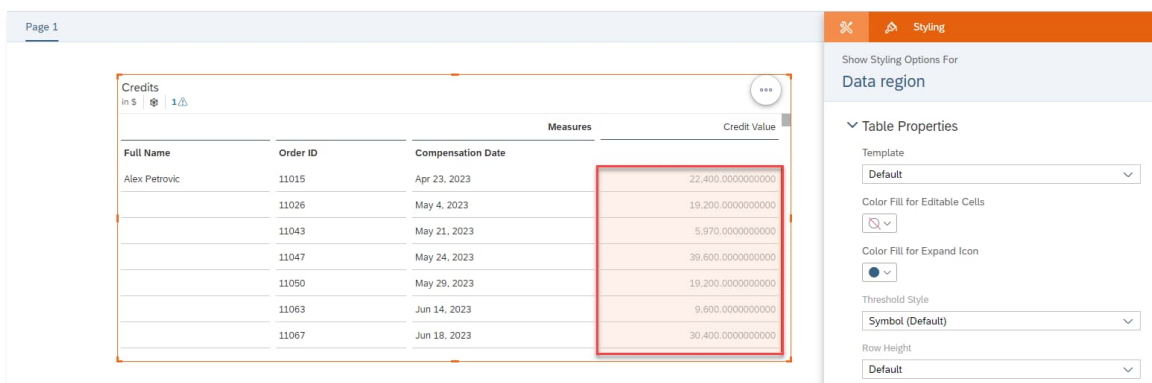
10. As with Transactions, the credit values have too many trailing zeros. Use the following steps to remove them:

- Select the *Styling* icon on the side panel as shown in the image below.

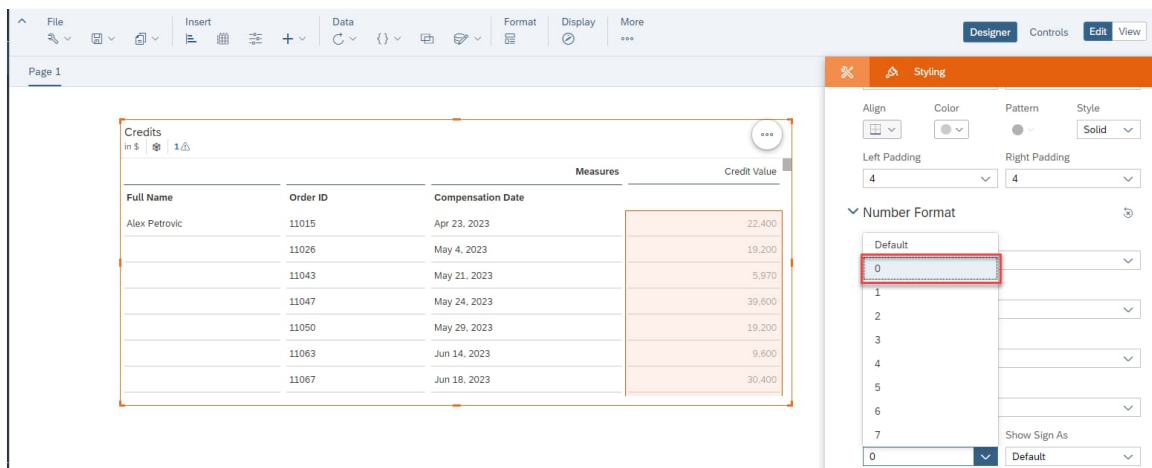


This will display the Styling panel, and the header will turn orange.

- Select any spot in the *Credit Value* column.



- In the Styling panel, scroll down to the *Number Format* section.
- Use the dropdown menu to set the Decimal Places to **0**.

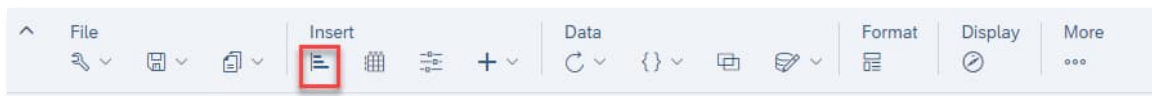


11. To close the Styling panel, select the *Designer* button.

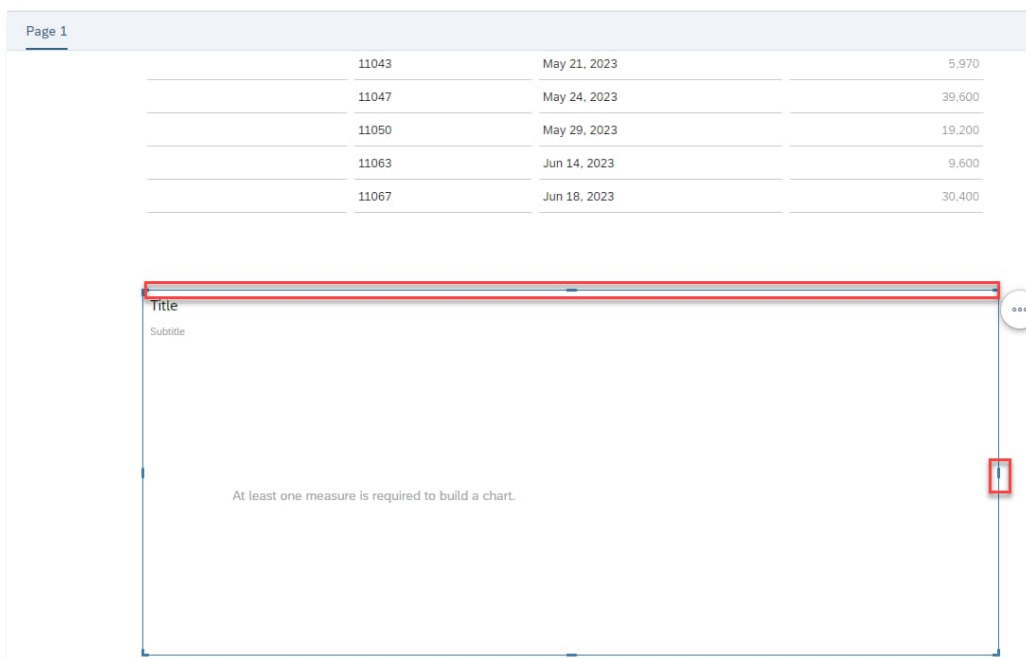
Exercise 2.3: Add a Widget that displays a chart

In this exercise, we will add a second widget to the Credits story to display a chart that shows credits quarter over quarter.

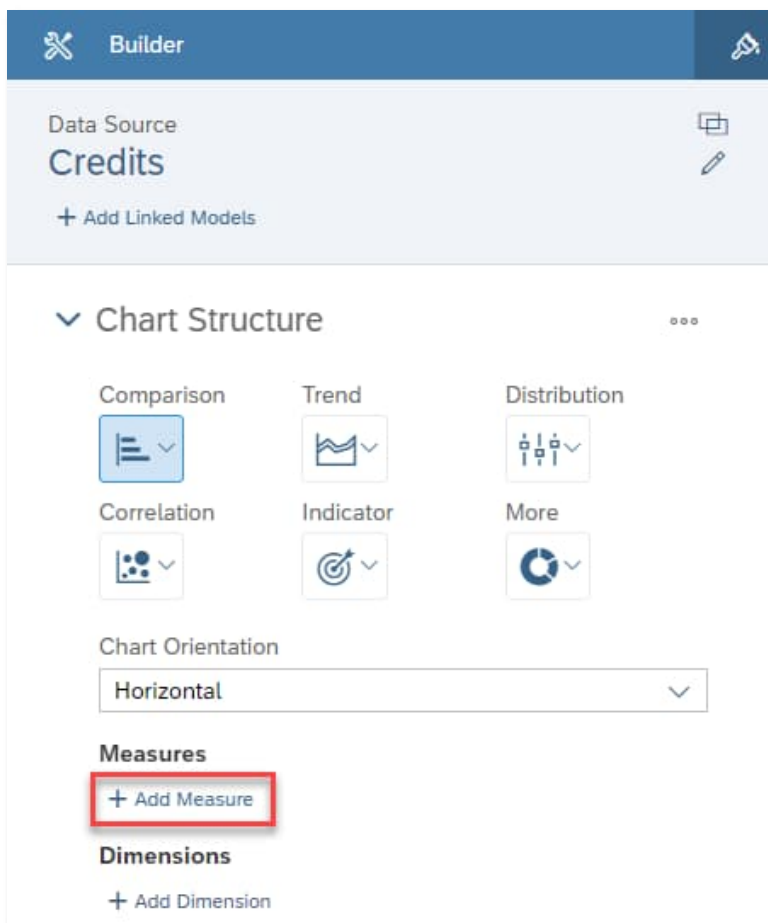
1. On the Insert section of the toolbar, select the *Chart* icon.



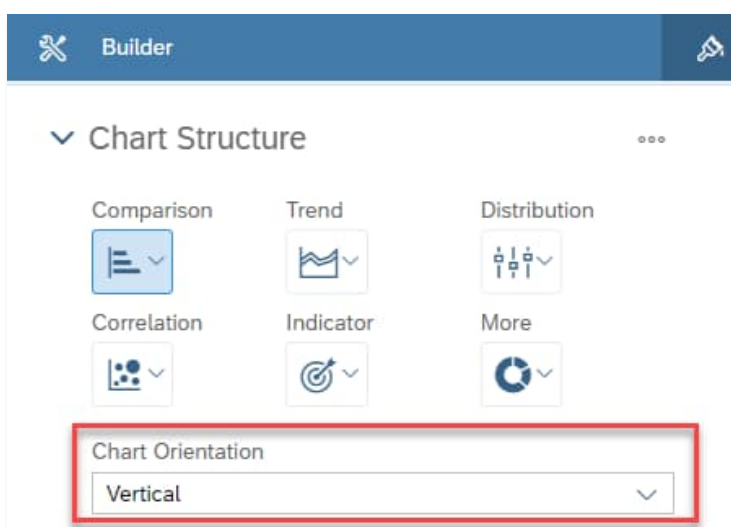
2. Move the widget to the space below the table.
3. Optionally resize the widget so it is about the shape and size shown below.



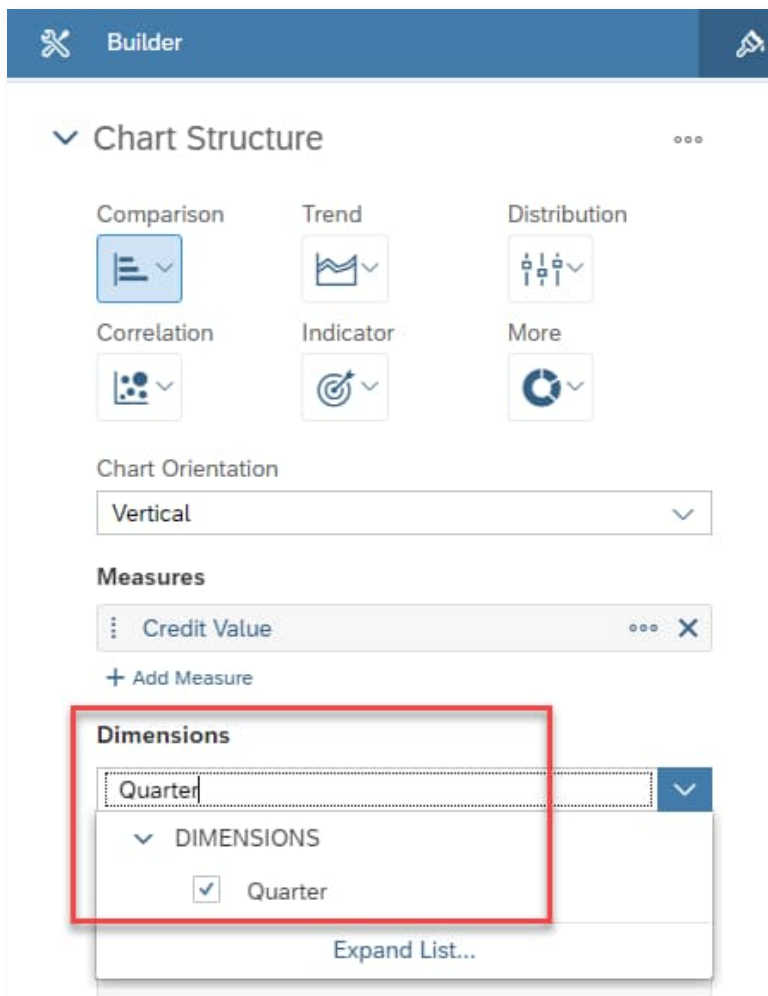
4. Add the Credit Value as the measure for the chart.
 - In the Builder pane, under the Measures section, select *Add Measure*.



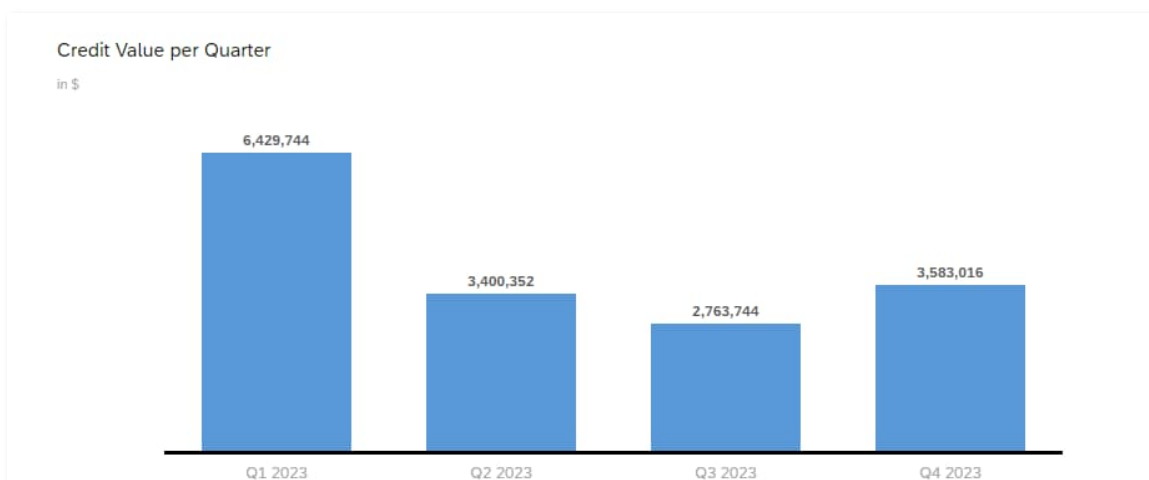
- Select the *Credit Value* checkbox.
5. Change the chart orientation from horizontal to vertical.
 - From the Chart Orientation dropdown, select *Vertical*.



6. Add a dimension to display credits by quarter.
- On the Dimensions menu, enter “Quarter”.
 - Check the *Quarter* box in the list.



7. As an extra challenge, see if you can remember how to remove the trailing zeros from the numbers in the chart.



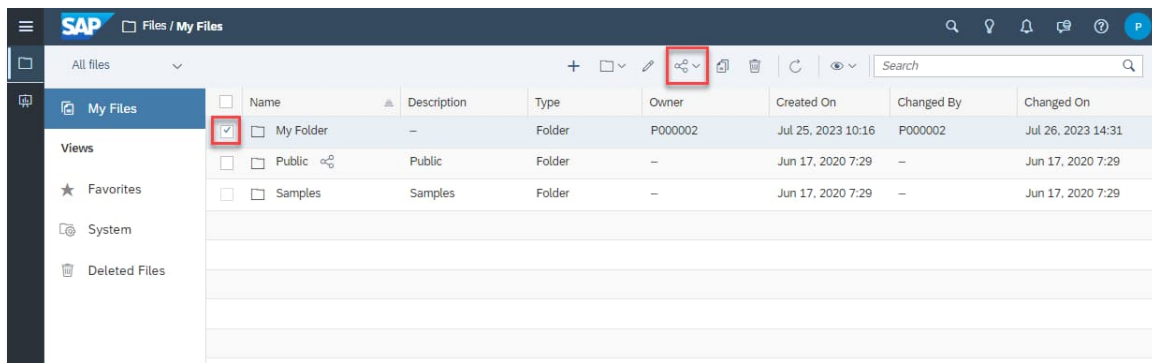
8. Save the Story to your folder.
 - From the File menu, select **Save**.
 - Select the folder with your initials.
 - Name the story “My Credit Story”.
 - Select **OK**.
9. Close the story to return to the list of files.

Lab Activity 3: Share a Folder and Create a Team

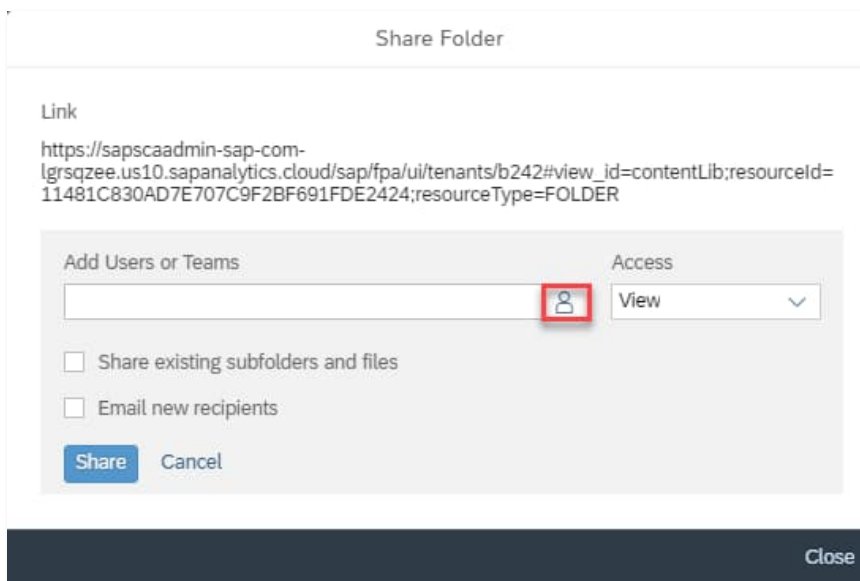
In this activity, you will share a folder manually, then you will create a team and add members to the team.

Exercise 3.1: Manually share a folder

1. Select the folder with your initials using the checkbox.
2. Select the **Share** icon as shown in the image below.

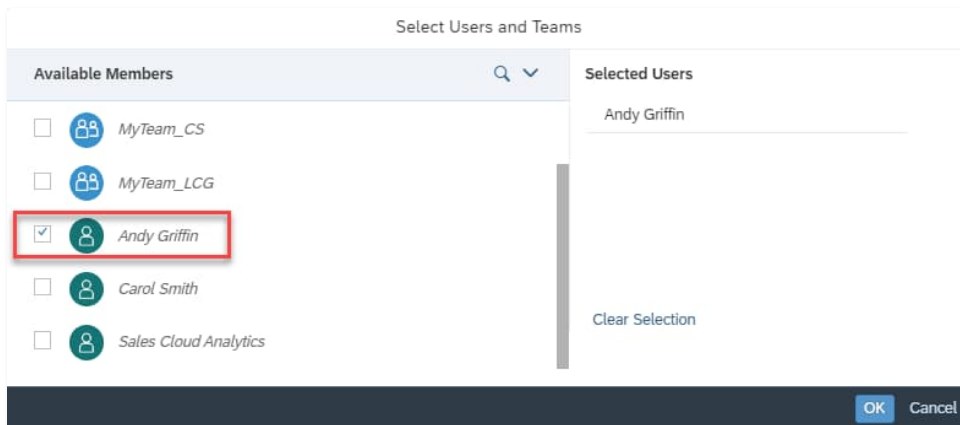


3. From the dropdown menu, select **Share...**
4. In the Share Folder dialog, use the following steps to share your folder with other users.
 - Select the **person** icon in the *Add Users or Teams* field.

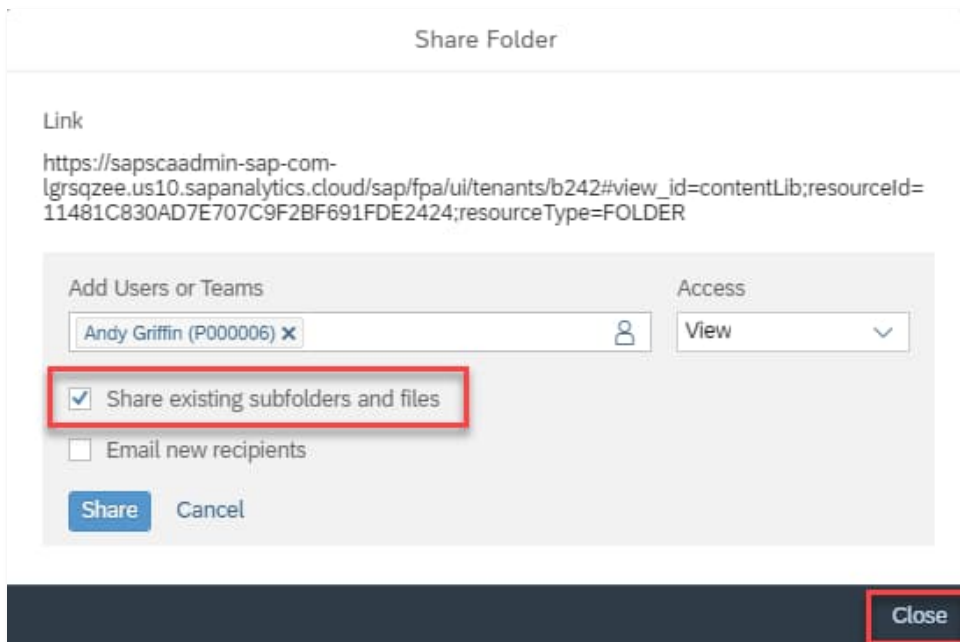


- Select *Andy Griffin*.


- Select **OK**.

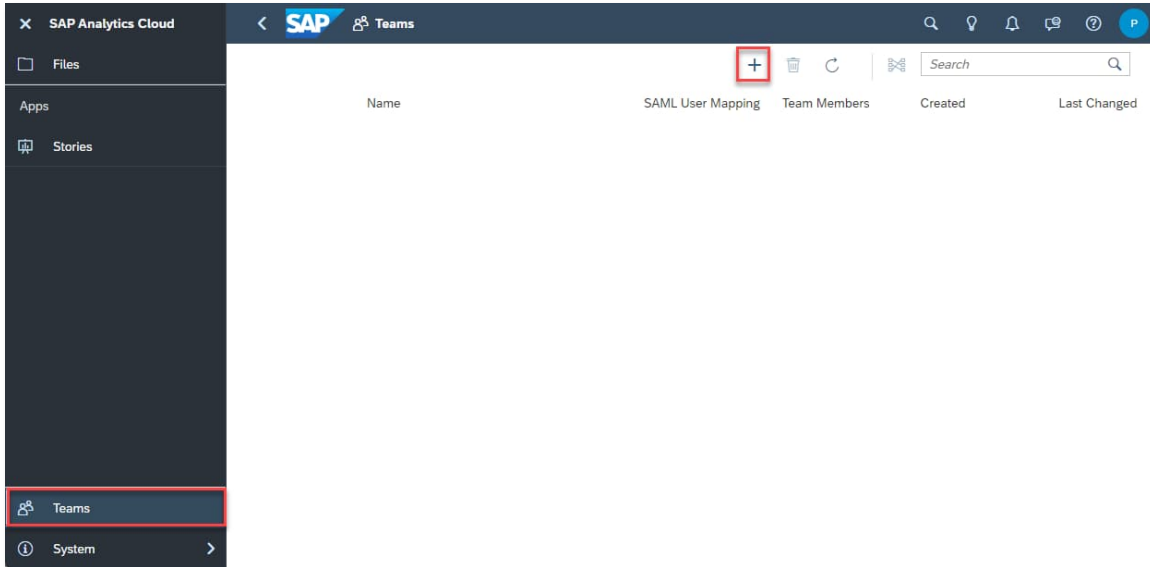


- Select *Share existing subfolders and files*.
- Select **Close**.



Exercise 3.2: Create a Team

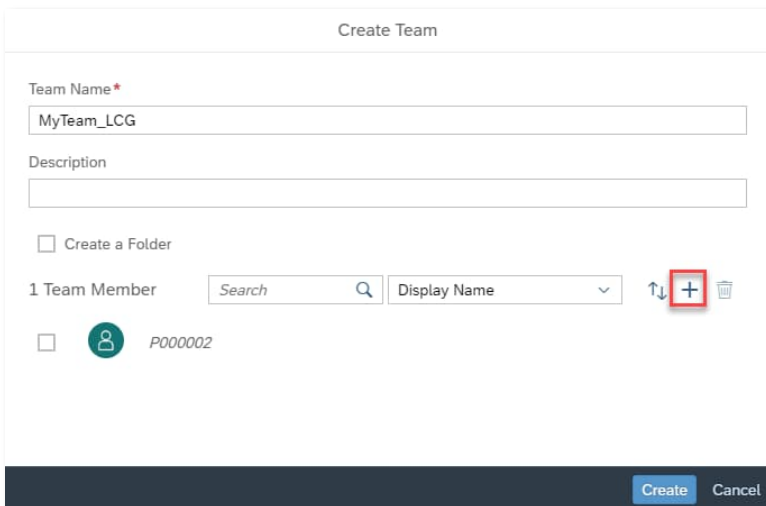
1. From the navigation bar on the left side of the screen, select the hamburger icon  to expand the pane.
2. Select the *Teams* link in the lower left.
3. Select *Create Teams (+)*.



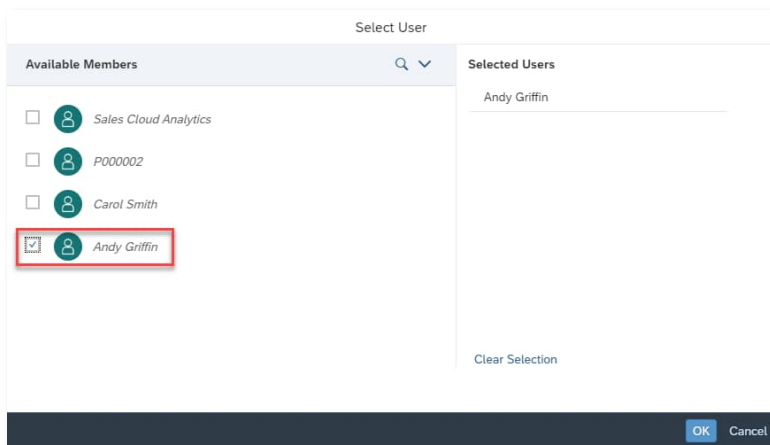
4. In the Create Team dialog box:
 - Name the team *MyTeam_{Your Initials}*.

Note: the team name cannot have spaces.

- To add a team member, select the {+} sign.

The 'Create Team' dialog box is shown. It has a title bar 'Create Team'. Below it, there is a 'Team Name*' field with the text 'MyTeam_LCG' entered. A 'Description' field is empty. There is a checkbox for 'Create a Folder'. Below that, it says '1 Team Member' and shows a search bar with 'Search' and a magnifying glass icon, followed by a 'Display Name' dropdown menu. To the right of the dropdown is a red box around a '+' icon, used to add members. Below this, there is a list of members with a checkbox, a person icon, and the ID 'P000002'. At the bottom right, there are 'Create' and 'Cancel' buttons.

5. Select the checkbox next to *Andy Griffin*.
6. Select *OK*.



7. Select Create.



This concludes the hands-on lab! In this activity, you created a folder in Embedded Analytics for SAP Commissions, saved an existing story, and created, formatted, and shared a new story.

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