



## SAS® Strategic Performance Management 2.4

Improve performance with a powerful,  
Web-based solution for dashboards, scorecards and strategy maps

### What does SAS® Strategic Performance Management do?

SAS Strategic Performance Management is a Web-based application for designing, building and managing scorecards, dashboards and diagrams, including strategy maps. This solution provides an interactive and collaborative environment to help you communicate organizational goals and strategies, monitor performance against targets and identify opportunities for improvement.

### Why is SAS® Strategic Performance Management important?

SAS Strategic Performance Management allows organizations to align, monitor and measure the execution of key initiatives that serve strategies and performance goals. With this performance visibility, you can ensure alignment with strategic goals and respond proactively to changes in your business environment. Combined with SAS Analytics, SAS Strategic Performance Management enables you to predict the future performance of your organization and use that foresight to identify and model opportunities for improvement.

### For whom is SAS® Strategic Performance Management designed?

SAS Strategic Performance Management is designed for executives and managers who use dashboards, scorecards and strategy maps to align activities with strategic goals on a department, multi-department or organization level..

You need to be able to understand the performance of your organization with one glance. You need to know that employees are all moving in step with organizational strategy. Gaining a firm grip on this information directly affects the success of your organization. Dashboard, scorecard and strategy map tools help you maintain your grip.

Though the marketplace is crowded with vendors offering such tools, there are still some capabilities that elude many organizations. Key performance indicators (KPIs) are necessary for judging performance, but they don't tell the whole story. Standard KPIs won't tell you why things are happening. Are promotions driving sales the way they should? Is a new product release satisfying customer concerns?

Executives need a way to view and interact with KPIs that helps them establish priorities and even select which information they want to see at any given time. Despite the challenges that remain, competitive advantage can be found in the sea of organizational data. There is a solution that helps you focus, align and adapt to strict market demands – SAS Strategic Performance Management.

### Key benefits

- Focus on today's needs and take appropriate action.**  
 Regardless of the amount of data or the number of applications in your organization, SAS Strategic Performance Management lets you spot problems and opportunities quickly through customized filters, alerts and navigation. SAS also uses award-winning data integration technology to provide a single data

repository for your enterprise, so you can be confident that performance information is consistent, regardless of who is viewing it.

- Align the use of resources to maximize profit.**  
 With improved focus, it becomes possible to align the activities of departments and organizations in support of larger corporate goals. SAS Strategic Performance Management lets you establish a hierarchy of dashboards and scorecards, diagram cause-and-effect relationships between metrics and build custom navigation – all facilitating the communication necessary to align your entire organization toward common goals.
- Adapt quickly to market changes.**  
 Focus and alignment give an organization the capacity to be more agile. SAS helps you identify trends and patterns to determine why things happen and which issues happen more than once. The Web interface lets you reach the widest possible audience in the shortest amount of time, so employees can adjust quickly to new strategies. Then you can monitor those new strategies to be sure they achieve enterprise goals.

### Solution overview

SAS Strategic Performance Management helps executives achieve strategic goals by focusing the entire organization on initiatives and indicators that support those goals. It provides both operational dashboards for performance monitoring and strategic scorecards that help align resources and manage performance to achieve strategic goals.



This powerful solution enables collaboration by delivering KPIs through a Web browser and by using built-in filtering and alerts to call employees to action when performance falls behind. Once notified, users can employ predictive analytics from SAS to identify the causal linkages between KPIs, discover why performance is not meeting targets and take corrective action accordingly. Analytics can be further employed to determine which metrics matter, where thresholds should be set, what will likely happen in the future and what is the best possible course of action to take to improve performance.

### Easy-to-use, Web-based navigation

Users access all information in SAS Strategic Performance Management through a Web browser. As a result, definition of scorecards and strategy maps, personalization, monitoring of metrics, reporting, manual data entry, commenting and administration all occur through this interface.

The dashboards and scorecards created in the solution are all easy to navigate, and customizable indicators (including traffic lights, speedometers

and any other graphic) ensure that you can quickly find the information you need to make decisions.

### Dynamic strategy map and diagram editor

The Diagram Editor allows you to visualize strategy maps and process flows. It dynamically reads from, and writes back to, underlying data tables, so any changes made in the diagram are immediately reflected throughout the application.

### Data access and integration

Embedded in SAS Strategic Performance Management is SAS Data Integration Studio, a data management and data integration tool that lets you access performance data wherever it exists in your enterprise. Data can be gathered from virtually any source, including Excel, Oracle or DB2 databases, SAP R/3 and even legacy systems.

SAS Strategic Performance Management also uses a common data store for meta-data and data, which means that it can easily pull data from other SAS solutions, such as SAS Financial Management, SAS Activity-Based Management or SAS Human Capital Management, for

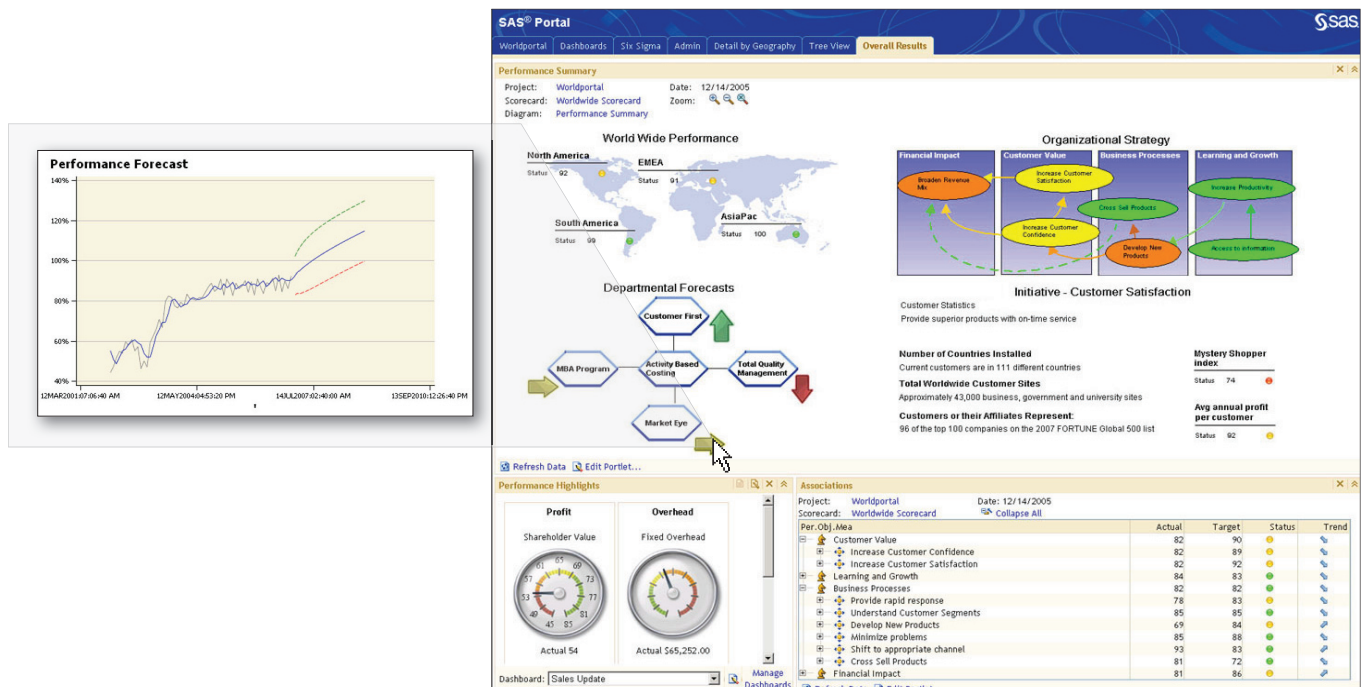
display in a dashboard or as part of a formula connecting elements of your strategy. The integration helps to ensure alignment and successful execution of the organization's strategy.

### Personalized display options

Each user's interface and navigation can be customized to his or her needs and preferences. This means you can choose which metrics you want to track, and you can set personal alert thresholds. For example, suppose your region is aiming for 15 percent revenue growth in the third quarter. Even with a threshold set to alert all sales managers every two weeks if growth dips below 12 percent, you can subscribe to receive an alert based on a personal threshold of 10 percent growth. Such personalization makes it possible to manage by exception, so you have to focus only on the most important items.

### Integration with Microsoft Office

You can also use Microsoft Excel and Word for reporting and analysis from the SAS Strategic Performance Management database. This integration makes it easy to incorporate metrics and reports into documents used for



communicating strategy and progress toward goals.

### **Integration with SAS® Analytics**

Together with SAS Business Intelligence and SAS Analytics, SAS Strategic Performance Management allows organizations to discover the root causes of issues and uncover even the hidden cause-and-effect relationships between key performance indicators. With this insight, organizations can predict what might happen to their KPIs in future periods, enabling managers to focus on the most important measures and identify potential business problems and opportunities.

### **Security and role-based authorization**

Flexible security options give you the ability to control access to any aspect of SAS Strategic Performance Management. Security permissions can be set up for specific elements or rows in data and can also be set for whole scorecards, projects or templates. This capability means you don't have to create separate scorecards for different levels of user.

Additionally, each user may be marked for one or more role within the system. A role determines which actions the user can take.

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### **Software requirements**

SAS Strategic Performance Management includes a rich client and a Microsoft Excel add-in on the client tier, and a Web application on the middle tier. A Web browser may be used on the client tier to view the Web application. SAS 9.1 servers run on the data tier to provide metadata, data and compute services.

By default the middle and consolidation tiers are installed on the same machine. For sites using the planning functionality, we recommend that the middle and consolidation tiers be installed on separate physical servers.

## **Key Features**

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### **User interface and scorecard creation**

- All user interaction is through an easy-to-use, Web-based interface. This includes definition, personalization, monitoring, reporting, data entry, commenting and administration.
- Use speedometers or other customized images to signal KPI status. Associate any image to a certain threshold or range value. Users can create any number of threshold ranges.
- Drill down and through any element in the interface to investigate problems. The solution links to documents as well, such as reports and spreadsheets.
- Alerts can be customized by user. Users themselves can subscribe to receive alerts based on their own personal thresholds.
- Wizards drive the creation and maintenance of scorecards.
- Users can create, modify and maintain many parameters in bulk, such as formulas, ranges and thresholds.
- Parent scorecards indicate underlying problems at the child scorecard level.
- Set the column order, content and format in any table view.
- Display any time period for any metric type (actual, target, status) and choose to display values, colors, range icons or descriptive text.
- Choose from five display views, including simple table view, aggregate table view, dashboard graphs, diagrams and element association tables (which show connections between different element types, such as KPIs, objectives and perspectives).
- Use the Formula Editor to connect elements from various projects, scorecards, time periods, element types and elements. More than 60 industry-standard SAS formulas are included.
- Enter data manually using a Web browser.
- Include hierarchies in user scorecards. Rollups could include geography, function, production system or test system. Copy data between various hierarchies.

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### **Comment Manager**

- Use the Comment Manager to comment on a document.
- Add a comment thread, add attachments to comments and sort comments by author, date or element.

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### **Data and metadata management**

- Access data from virtually any source system, including Excel, Oracle, DB2, SAP and legacy systems.
- Maintain consistent metadata between SAS solutions with a common data store.
- Administer the technology underpinnings of SAS applications (i.e. metadata resources) using a centralized management framework.

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### **Dynamic diagrams**

- Create strategy maps and process flows using a diagram editor that reads from and writes to the underlying database dynamically.

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### **Integration with Microsoft Office**

- Use Microsoft Excel or Word for reporting and analysis from the SAS Strategic Performance Management database.

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### **Security and role-based authorization**

- Establish security permissions for specific elements or rows, as well as templates, projects and scorecards.
- Assign one or more role to each user. Roles determine which actions a user can take.

## WINDOWS (USING WEBLOGIC)

### Client tier

#### Operating systems

- Windows XP Professional
- Windows 2000 Professional
- Windows 2003 Professional

#### Additional software

- Microsoft Internet Explorer 6.0 or later
- Microsoft Excel 2000 or later (for Microsoft Office add-in)
- Microsoft .NET framework 1.1 (for Microsoft Office add-in)
- JRE: 1.4.2\_09 (Sun)

### Middle tier

The following list describes supported platforms for SAS Strategic Performance Management and SAS Information Delivery Portal.

#### Operating systems

- Windows 2000 Server or Advanced Server with Service Pack 3
- Windows 2003 Server or Advanced Server
- Windows 2003 Server, Enterprise Edition

#### Additional software

- J2SDK: 1.4.2\_05 (Sun)
- BEA WebLogic 8.1 with Service Pack 6
- Xythos WebFile Server (WFS) 4.2.35 or Apache HTTP Server 2.0.45

### Data tier

#### Operating systems

- Windows 2000 Server or Advanced Server with Service Pack 3
- Windows 2003 Server or Advanced Server, SE or EE

#### Database server

- MySQL 5.0.22

#### Additional software

- Adobe Reader 6.0.1 or later (for online help)
- J2SDK 1.4.2\_05 (Sun)
- BEA WebLogic 8.1 with Service Pack 6
- Xythos WebFile Server (WFS) 4.2.35 or Apache HTTP Server 2.0.45

## AIX (USING WEBSHERE)

### Client tier

#### Operating systems

- Windows XP Professional
- Windows 2000 Professional
- Windows 2003 Professional

#### Additional software

- Microsoft Internet Explorer 6.0 or later
- Microsoft Excel 2000 or later (for Microsoft Office add-in)
- Microsoft .NET Framework 1.1 (for Microsoft Office add-in)
- JRE: 1.4.2\_09 (Sun)

### Middle tier and data tier

The following list describes supported platforms for SAS Strategic Performance Management and SAS Information Delivery Portal.

#### Operating systems

- AIX 5.2 or 5.3

#### Database server

- MySQL 5.0.22

#### Additional software

- J2SDK 1.4.2\_05 (Sun)
- Adobe Reader 6.0.1 or later (for online help)

- WebSphere Application Server Network Deployment Version 5.1.1.5
- Xythos WebFile Server (WFS) 4.2.35 or Apache HTTP Server 2.0.45

## SUN SOLARIS (USING WEBLOGIC)

### Client tier

#### Operating systems

- Sun Solaris 10

#### Additional software

- Microsoft Internet Explorer 6.0 or later
- Microsoft Excel 2000 or later (for Microsoft Office add-in)
- Microsoft .NET framework 1.1 (for Microsoft Office add-in)
- JRE: 1.4.2\_09 (Sun)

### Middle tier and data tier

The following list describes supported platforms for SAS Strategic Performance Management and SAS Information Delivery Portal.

#### Operating systems

- Sun Solaris 10

#### Database server

- MySQL 5.0.22

#### Additional software

- J2SDK: 1.4.2\_05 (Sun)
- BEA WebLogic 8.1 with Service Pack 6
- Xythos WebFile Server (WFS) 4.2.35 or Apache HTTP Server 2.0.45

The Enterprise Excellence Center at SAS has a sizing and configuration program that provides customer-specific hardware sizing for a qualified software sales opportunity. You can find additional information on the program and how to engage the team at: [http://sww.sas.com/www/eec/size\\_config/](http://sww.sas.com/www/eec/size_config/)



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