Mindtree
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# SAP Analytics Cloud (SAC):
Five Key Features for Planning

SAP Analytics Cloud (SAC) warrants you the convenience to Analyse, Plan and Predict using a business user-friendly cloud-based solution. This solution provides you with a single source of truth concept and allows you to promptly turn insights into action across your organization.

This year has witnessed considerable enhancements with the planning capabilities and collaborative features of SAC, and the solution is now setting a new standard for financial planning & analysis by combining analytics and planning together in one user-friendly, collaborative, cloud-based solution which you can easily integrate with your on-premise systems.

This whitepaper outlines the five key planning features that you can utilize to improve the agility in your planning process with this exciting solution from SAP.

Scenario Planning and Variance Analysis

Scenario Planning provides the Business users the ability to plan and forecast on different planning assumptions and see the financial impact instantly. This capability can be achieved using the Version Management functionality in SAP SAC. This feature allows you to plan for all scenarios using public and private version, and enables you to compare and visualise different plans against one another to gain better insights for your business.
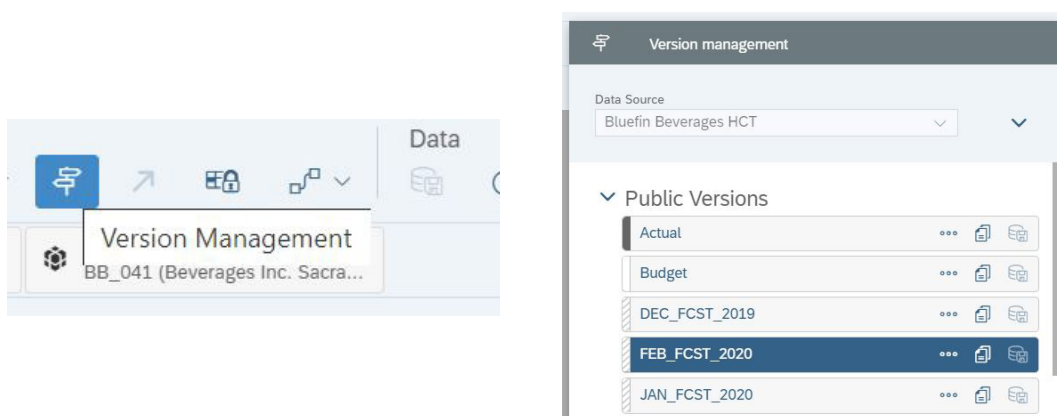

Version Management allows you to track your organization's success using variance analysis to compare the Actual, Budget, Plan, Forecast and Private versions of the data conveniently in your story's charts and tables with out-of-the-box functionality and the ability to create variance calculations on-the-fly.

You can easily create private versions of data by copying existing versions using the version management options. This allows you to perform on-the-fly analysis and ad hoc reporting without compromising the original data.
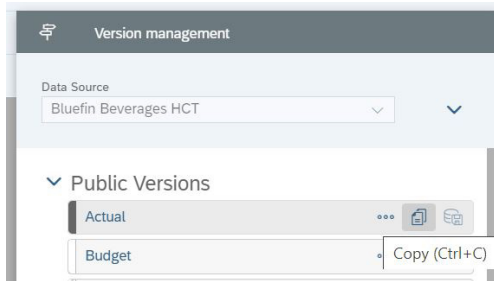
You can share public and private versions with other users and teams to publish the different scenarios without losing sight of the original data.
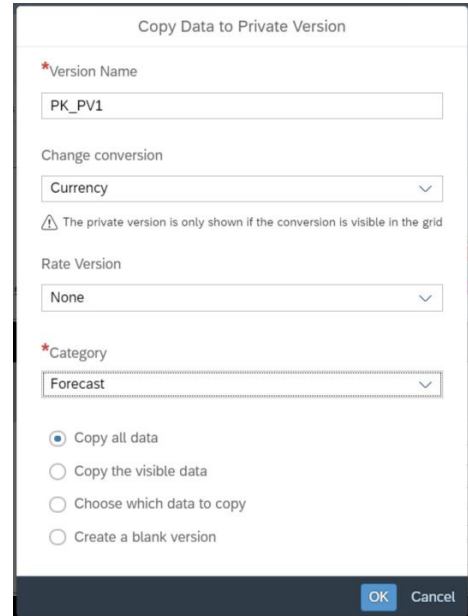
Collaborative Planning (Workflow)

Collaborative Planning has always been a key requirement in any organisation's planning scenario, and SAC has made some significant improvements over the last year to enhance this feature to be fit for the purpose. SAC provides the ability to automate the workflow within the system.

SAP has modified the calendar task to include the option to 'generate task/processes using a driving dimension.' This allows you to define tasks based on the driving dimension's members and attributes.
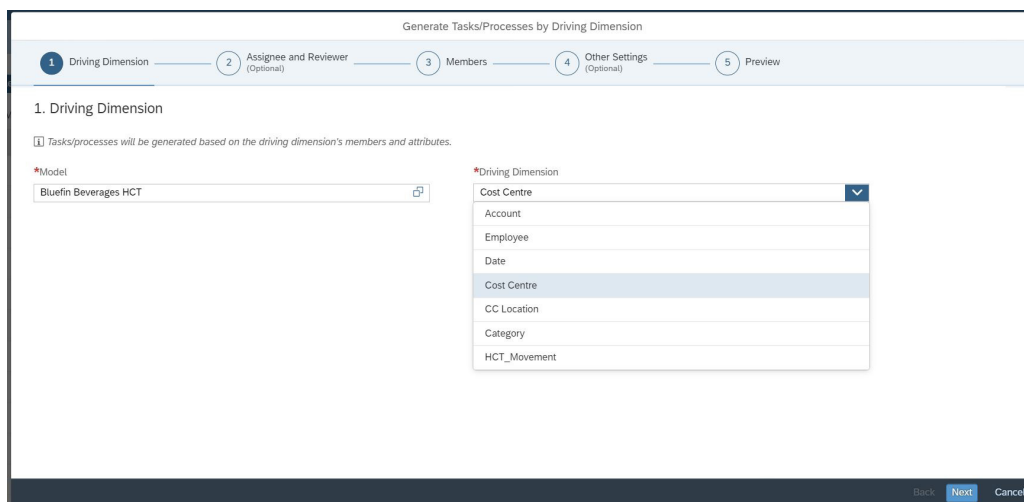
When configuring this type of task, you can also define the attributes that will drive the Assignees and Reviewers. For example, you can set the Person Responsible attribute you've defined in your organisation's dimension as the assignee attribute. This will automatically generate the users' access rights to any work files you have included in your task. You can also define the members that tasks will be generated for; please be aware when you select members within a hierarchy - the leaf members are generated as tasks and other members as processes.

SAC has also introduced the ability to create data locking tasks. Data locking can be used in a planning process, when at different times you may want to enable or prevent users with planning permissions, for instance, making changes to values for certain intersections of dimensions like users involved in FTE salary planning, quarterly product sales planning, etc

You can choose if you want to add a recurrence to your tasks, and can set the pattern to recur every hour, day or week. You can also specify the recurrence frequency – for instance, you can select a specific day for a task that occurs weekly. Additionally, you can specify the start and due date and specific times of the tasks. This can be selected when the recurrence pattern ends, either by end date, number of repetitions or no end to the pattern.

Combining the calendar and generate task/processes using a driving dimension and data locking tasks with SAC's collaborative approach enables you to setup a business process workflow. This gives you a secure platform to turn insights into actions across your organisation quickly and productively and will strengthen your organisations planning agility.

Data Processing using Data Actions and Data Action Trigger

Data action processes is a powerful tool which enable you to perform a series of actions on top of your planning data. Data action processes can be something as simple as a copy and paste action or can perform a more complex series of actions on the account dimension using more advanced calculations to perform different planning functions. For example, if you want to perform salary calculations which include pay increases for specific regions/cost centres for a specific timeframe.

You can define the context and add parameters to your data actions, which can make your data action more manageable. You define the settings for the data action, give your process a name, a description and define the model. Then, you can add the following actions to your Data action process.

- Add Copy Action

- Add Cross-Model Copy Action

- Add Advanced Formulas Action
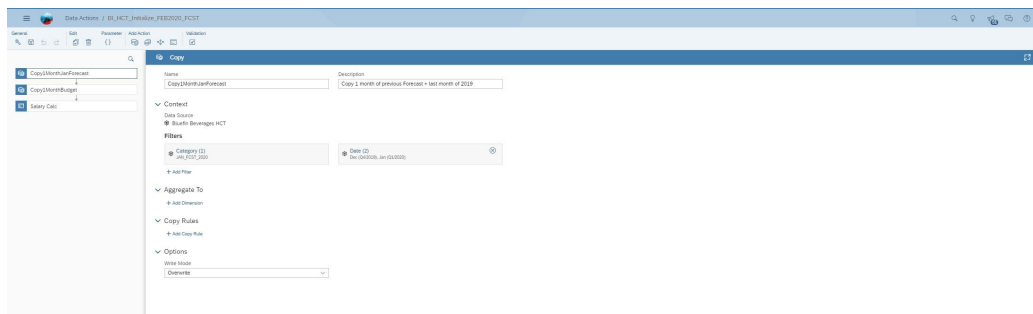
When you create Copy Actions or Advanced Formula Actions, the model you use as the data source and target is defined during the set up. For Cross Model Copy Actions, your model will be the target and you can pick a different source model to copy the data from.

When using the Advanced Formulas Action, you can develop your formulas using either the visual tool or by writing a script.

- The visual tool has been developed with the business users in mind. You don't really need any coding experience to build formulas using this tool. You can easily create the data action process by dragging and dropping graphical elements, and can switch to the script method at

any stage if you desire (please be aware that you cannot switch back from script to visual/ graphical designer once you have modified the script). This is a valuable feature to aid business users with no prior experience in programming and developing formulas using a graphical view rather than writing script. The visual tool is not a replacement for advanced formulas written by script – it is better to use the writing script method to design your data actions for more sophisticated business demands.

- The writing script tool has been developed for professional modelling users such as SAC tenant administrator, SAC consultants or IT specialists. This method requires you to have basic coding knowledge. The action is designed by writing a script. If you use this method, you cannot switch to the visual editor currently (but this may become an option in time). This is advised as your primary method to develop formulas for your more sophisticated business demands.

Data Actions are run using Data Action triggers, which you add to your story canvas or responsive page. You can specify the parameter values for the data action trigger, which can be set to a fixed value or issue a prompt to the user. Prompts enable you to select different members to run the data action against. For example, if you set up a prompt for date you will be able to select any date within the dimensions hierarchy.

Planning Calculations using Advanced Formulas and Calculations

During your model development, you design formulas to perform calculations on constant values or members of your account dimension. This creates new measures that can be utilized in your model and within your stories. These new measures can also be utilized by other team members within your organisation if they create their own stories using your model.

- **The Advanced Formula Editor**

  Formulas can be entered manually in the account dimension formula column, or you can use the advanced formula editor. The advanced formula editor is like the formula bar, but helps you develop the formula to achieve the desired result. The advanced formula editor delivers predefined formula functions, conditions and operators. The system will help you construct the formula as soon as you start

typing. Alternatively, you can press CTRL+SPACE to open the formula menu, which displays an explanation of the formula, the formula syntax, an example, formula remarks and the formulas function
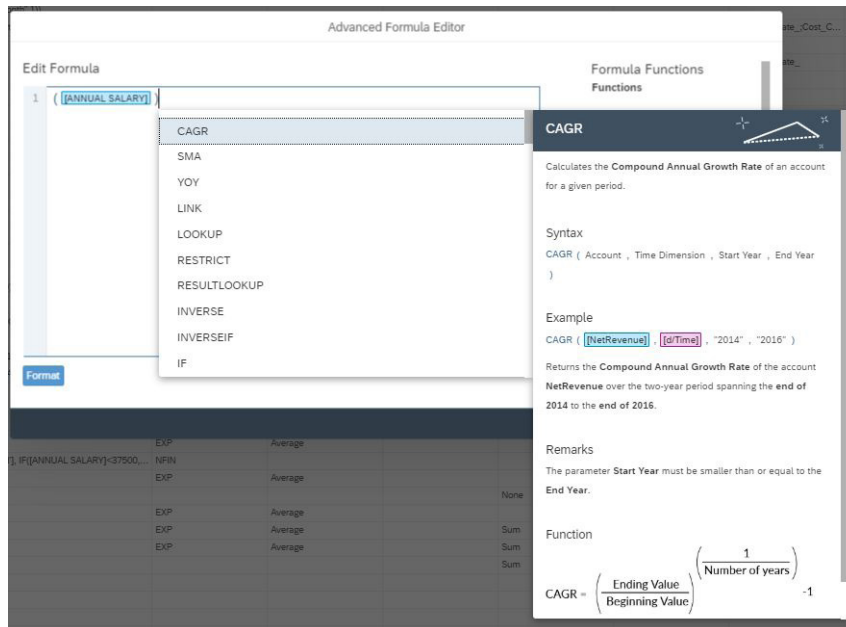
- **Advanced formula Action**

  To utilize this tool, you must first create and save a Data Action Process. After this, you can add one or more Advanced Formula Actions. The advanced formula script writing tool is a dynamic feature which allows you to write formulas that apply transformations and calculations to the source data. You can also define the context, add parameters and any filters for the target model. As with the Advanced Formula Editor, the system will help you develop your advanced formulas. When writing your formula, you can use the CTRL+SPACE option and open the formula menu, after which, the system will help you choose from a list of valid values for the section of the formula you are currently developing. You can also type [d/, which will return a list of dimension and properties that are available. Once you have
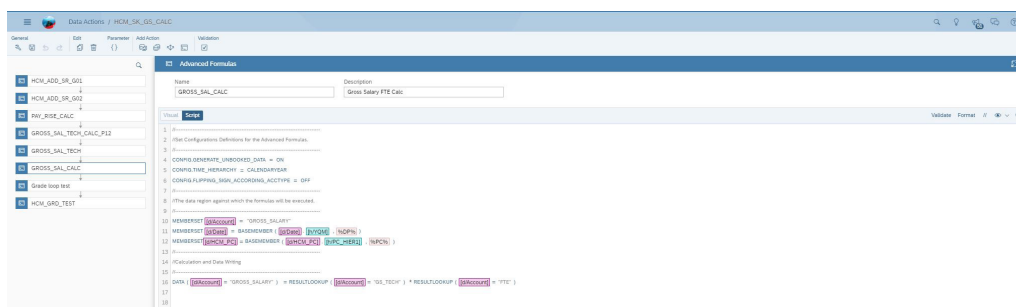
completed the script, you can validate from within the window and the system will highlight any issues, if found.

You can create formulas in your stories charts and tables using the calculation editor. This is a beneficial feature, as it gives you the advantage of creating calculations on-the-fly for immediate analysis of the results within your stories charts and tables.

- **Calculation Editor**
  Like the Advance Formula Editor, the calculation editor delivers predefined formula functions, conditions and operators and helps you formulate your calculation. The system will automatically help once you start typing. You can also use the CTRL+SPACE option to open the formula menu.
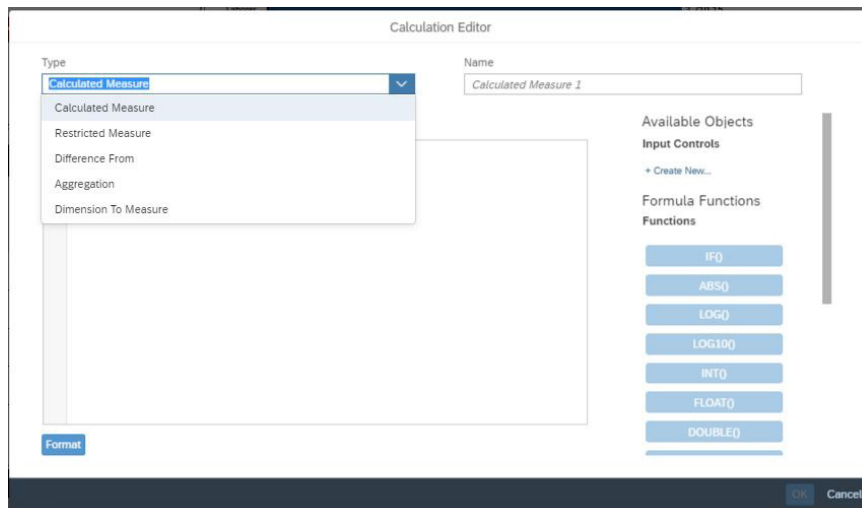
You can create the following calculations using the calculation editor:

- **Calculated Measure** – calculation that uses measures to perform mathematical or Boolean operations on your data

- **Restricted Measure** – calculation that allows you to use only specific values in a measure

- **Difference From** – this aggregation shows the difference in the value of an account between two dates

- **Aggregation** – calculations can be created using operations such as sum, min, count, average as well as others. You can set the conditions for the aggregation that will be applied. This is a very valuable calculation because once created, it produces a new

measure which you can easily utilise in your stories charts and tables. E.g. Average Annual Salary

Configure Rolling Forecasting Capabilities using SAC

A Forecast layout or a Rolling forecast layout lets you configure the rolling forecast functionality without the need for any customisation and this is now available as a standard feature.

This is a beneficial feature, as it enables you to compare two versions of data and turn insights into actions. For example, it helps you compare your actual version to your public or private forecast versions.

In your planning model's tables, you can switch from a standard crosstab layout to a forecast or rolling forecast layout. You need to select the version which displays the historical data (Look back on) and the version to display as the forecast (Look ahead on). You can specify a cutover date, which defines the intersection where your table switches between the historical and forecast versions. You can select either the forecast or rolling forecast option in the Time Frame Type area (depending on your organisation's forecasting practises), set the time granularity and can apply some additional options if needed, including the sum any of the values displayed in

the table or to add additional versions to the layout.

SAC is now a powerful all-in-one planning and analytic cloud-based solution which is user friendly, interactive, collaborative, contemporary, and showcases some state-of-the-art features and exciting capabilities.

About Mindtree

Mindtree is a SAP Gold Partner and has won several quality awards in EPM for Excellence in Delivery. Mindtree is known for expertise in advisory and implementation of SAP EPM solutions.

Get your Cloud for Planning Solution running in as little as 12 weeks.

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