

# Overview of integrated business planning with SAP Planning and Consolidation

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September 2012



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# Agenda

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## SAP Enterprise Performance Management

- SAP Strategy

## SAP Planning and Consolidation

- Overview

## SAP Planning and Consolidation

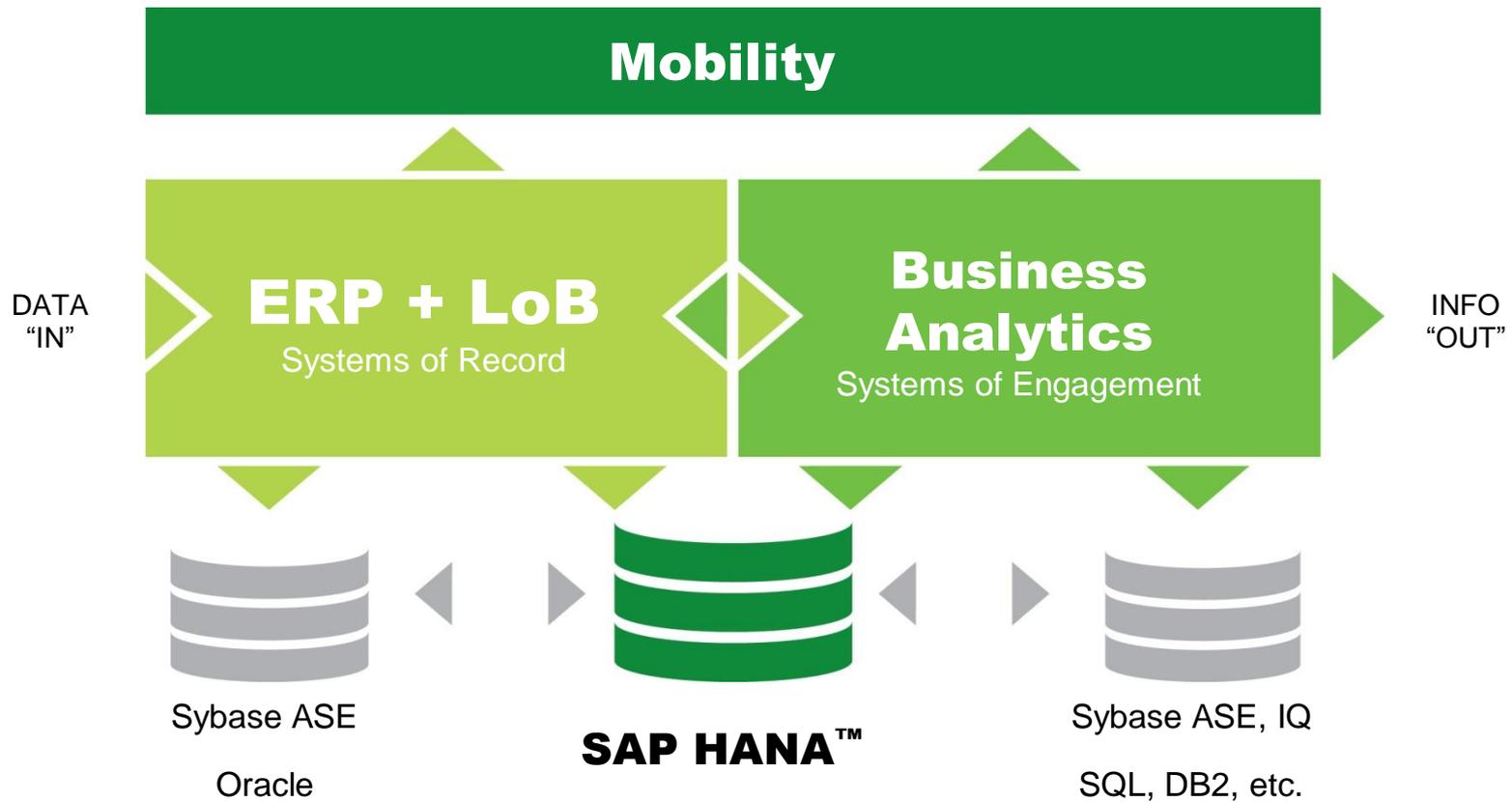
- System Demo



# SAP Enterprise Performance Management - Strategy

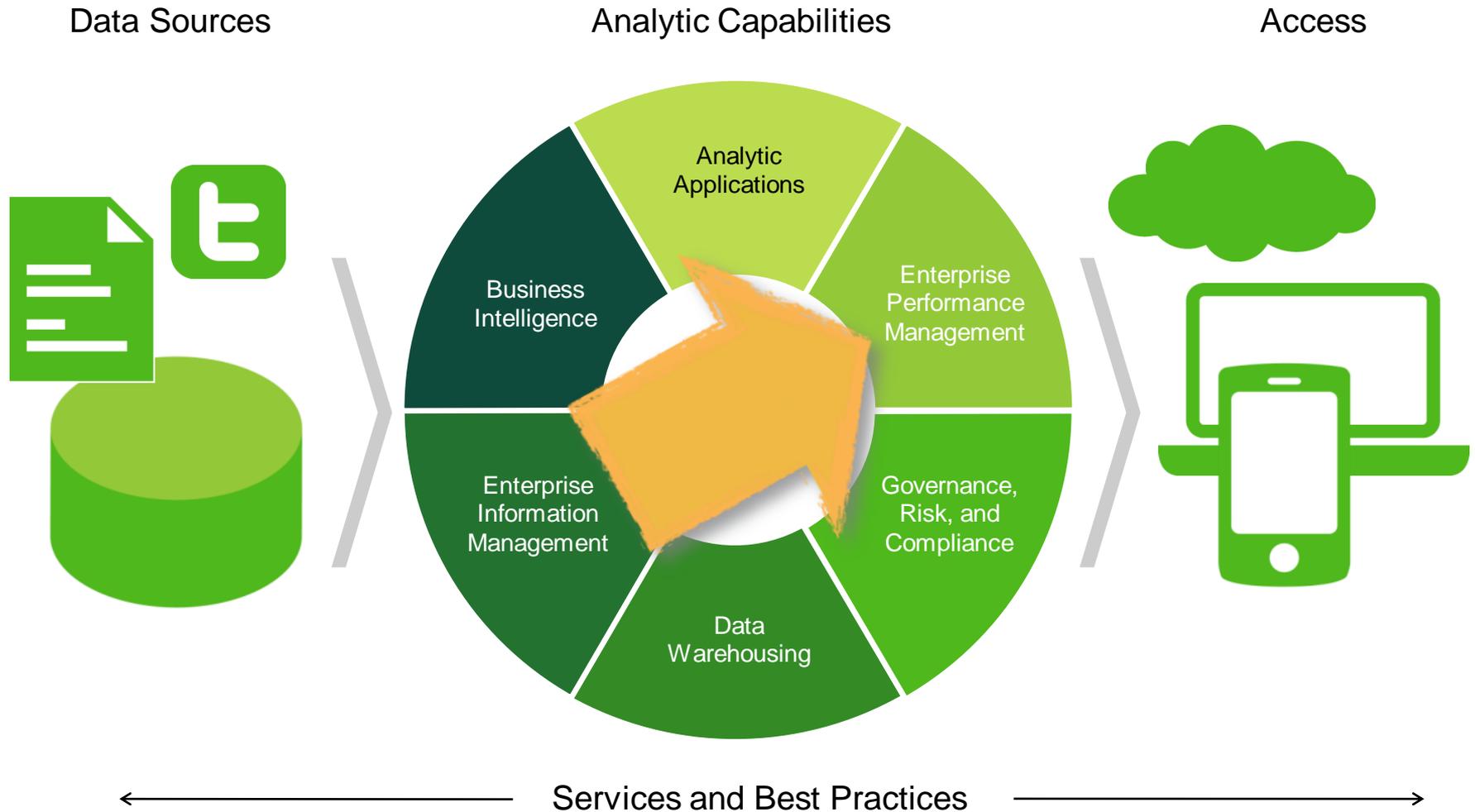
# SAP Strategy

Run Smarter Through Constant Innovation



# Business Analytics Solutions from SAP

## Our Approach



# SAP EPM Office Client 10

harmonized Frontend

Connecting all EPM products with one add-in



SSAS Cube



**SAP FC**  
Financial Consolidation



**SAP SM**  
Strategy Management



**SAP PCM**  
Profitability & Cost Mmt.



**SAP PC**  
Planning & Consolidation



**SAP EPM 10 Suite**



# SAP Planning and Consolidation - Overview

# SAP Planning and Consolidation Platform

## Rely on standards

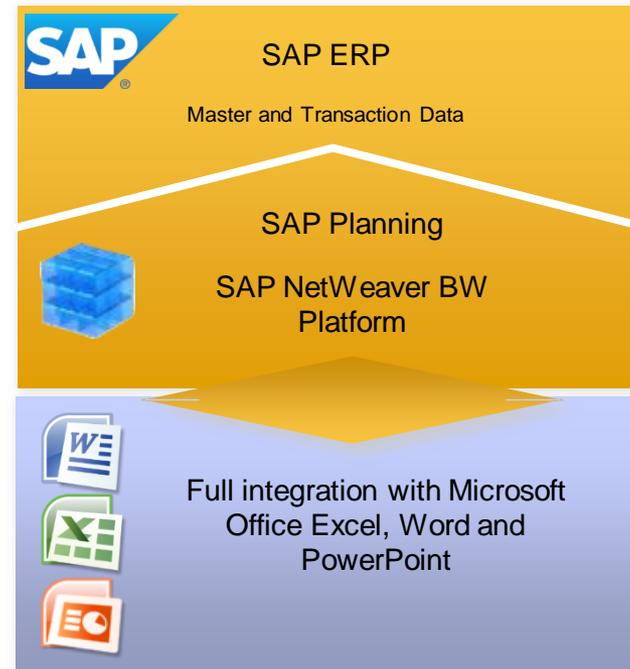
Both versions require no proprietary technologies

for Microsoft



**Frontend and Backend based on Microsoft technology**

for Netweaver



**Frontend based on Microsoft technology, backend SAP NetWeaver**

# What is SAP Planning and Consolidation used for?

✓ **Planning, budgeting, forecasting and financial consolidation in one application**

## **Business planning**

- Budgeting
- Sales/revenue planning
- Capital expenditure planning
- Headcount/staffing
- Expense planning
- Cash flow/liquidity planning

## **Forecasting and consensus building**

- Rolling forecasts
- Continuous planning
- Collaboration

## **Consolidation**

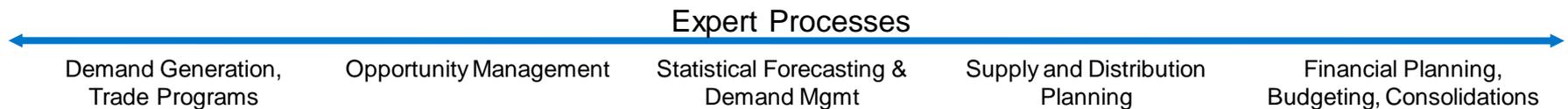
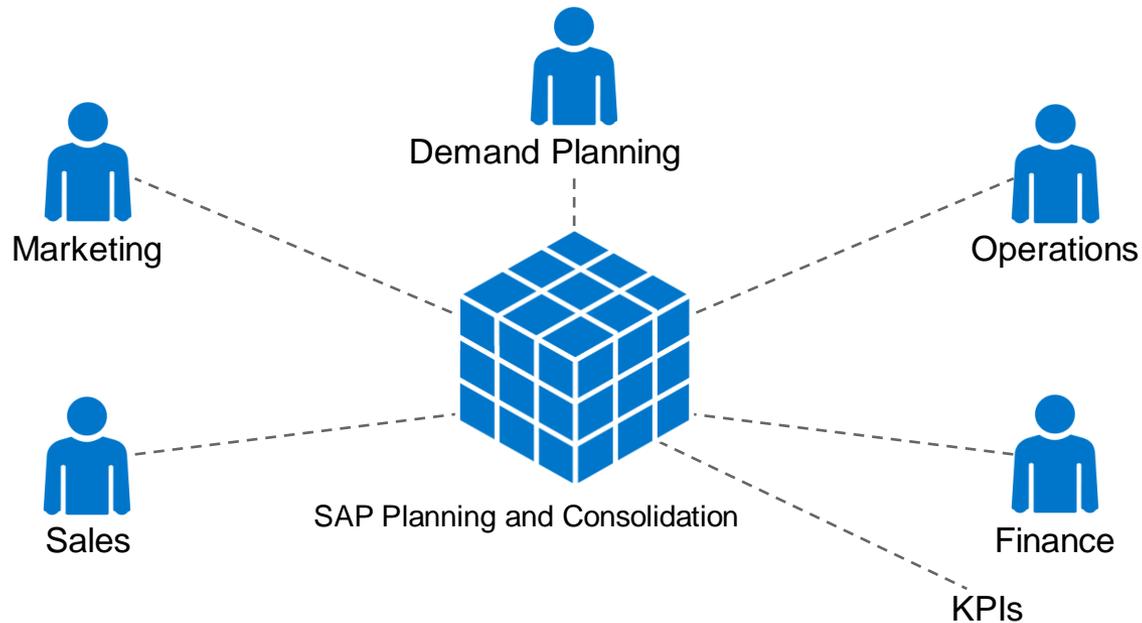
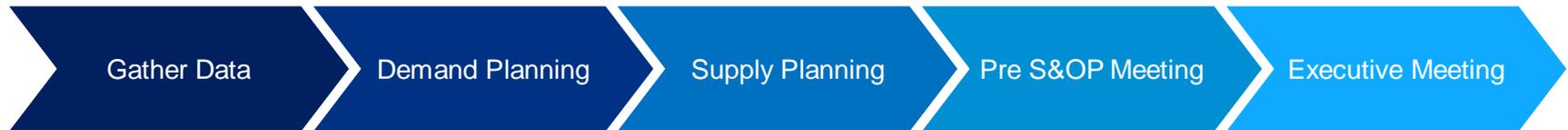
- Intercompany matching/reconciliation
- Intercompany eliminations
- Management roll-ups
- Legal consolidation

## **Financial reporting and analysis**

- Ad hoc
- Variance analysis
- Driver analysis (industry, growth, capacity, etc.)

# Integrated Business Planning

Elevates planning across departments to meet business goals



# SAP Planning and Consolidation\*

Finance view

## ✓ Streamlined planning and a faster, more compliant close

### Familiar and easy to use

- Increase user adoption with a solution that leverages native Microsoft Office tools (e.g., Excel) and Web browsers

### Process-centric

- Guide users and drive process consistency with configurable business process flows

### Unified

- Save time and reduce errors with a single, integrated solution for planning and consolidation

The screenshot displays the SAP Planning and Consolidation interface. At the top, there's a menu bar with options like Home, Insert, Page Layout, Formulas, Data, Review, View, EPM, and Planning and Consolidation Data Manager. Below the menu is a toolbar with icons for various functions. The main workspace is divided into several panes:

- Entity by Period Report:** A table showing financial data for Green electronics corp. for Q4 2010. The table has columns for Periodic, Oct 2010, Nov 2010, Dec 2010, and Q4 2010. The values are: Periodic: Green electronics corp., 82,580, 143,824, 149,000, 375,324.
- Process Monitor: Sales Planning - Budget, 2012:** A dashboard showing activities. It includes a 'Show Grid' button, a 'Grouped by' dropdown set to 'Activity', and a 'Show Activities' dropdown set to 'All'. A progress bar indicates 11 activities completed, 6 in progress, and 5 pending. Below this is a table for 'Enter Budget by Entity' with columns for Activity, Context, Action Required, Status, Performers, and Reviewers. The table lists activities for Argentina, Australia, Brazil, and Canada.
- Targets Summary Report:** A table showing targets for 2012. It has columns for Entity, Product, Total Product, Product Line A, Product Line B, Product Line C, Product Line D, and No Product. The data is summarized by region: Africa, Asia Pacific, Europe, North America, South America, and World Input.
- Bar Chart:** A bar chart showing the 'Periodic' values for each region. The Y-axis ranges from 0 to 280,000. The X-axis lists the regions: Africa, Asia Pacific, Europe, North America, South America, and World Input. The bars are color-coded by product line: Total Product (green), Product Line A (yellow), Product Line B (purple), Product Line C (blue), and Product Line D (orange).

\*available in a version for the Microsoft platform and a version for SAP NetWeaver

# Familiar and easy to use

✓ Setup by IT - owned and managed by business users

## IT Responsibility

### Hardware

### Security and Authentication

- Users
- Roles
- Privileges

### Data and Application Infrastructure

- Database Server
- Application Server
- OLAP Structure

## Business User Responsibility

### Application Security

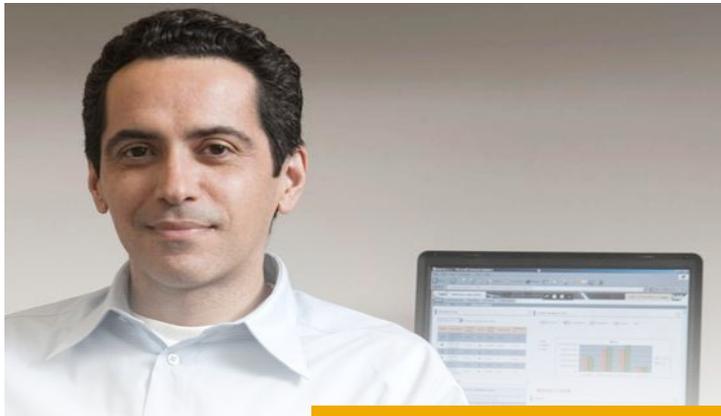
- Users
- Roles
- Privileges

### Hierarchies and Roll Ups

### Report Templates

### Excel, Word, PowerPoint Templates

### Create and Modify Metrics and Measures



Self-service financial reporting ensures any user can create information on the fly  
Wizard-driven interfaces simplify content creation and administration processes

# Advantages of SAP Planning and Consolidation

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## SAP Planning and Consolidation

### **Fast Implementation**

through pre-configured solutions

### **User friendly**

The business user is the focus

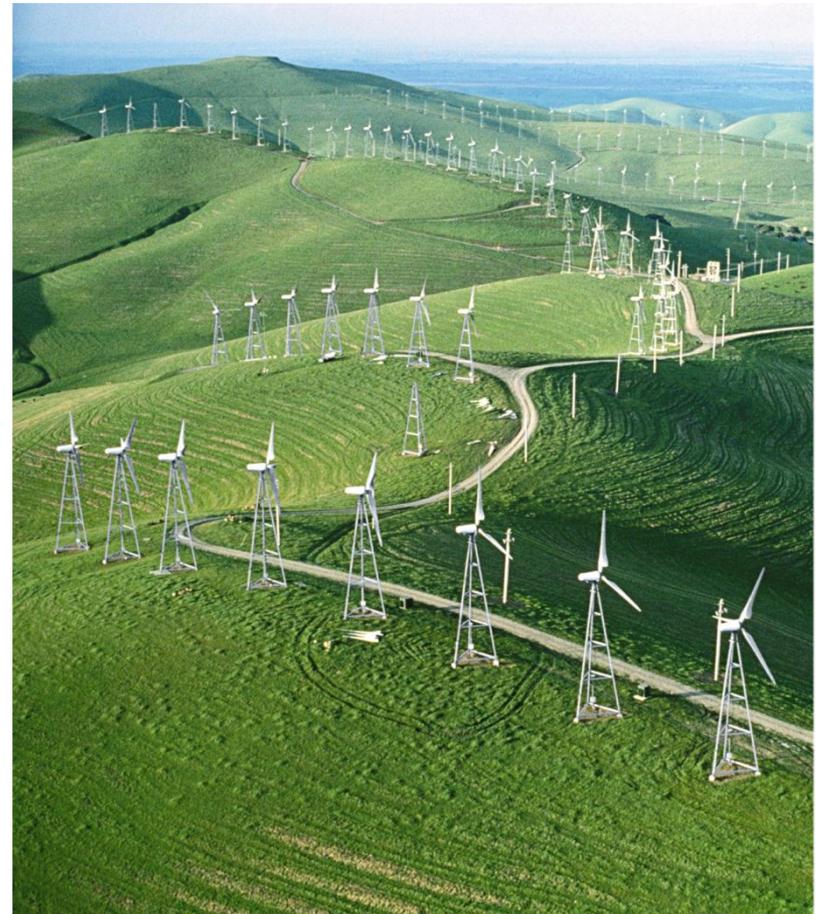
### **Integrated Solution**

Consistency across all aspects of planning to consolidate



# Today in focus: SAP Planning and Consolidation

- ✓ 3000+ customers worldwide, e.g. Toshiba, Marquard & Bahls, Fraport, Siemens PD, Tyco Electronics, Endemol, ... and SAP
- ✓ Certificate with top grades for SAP Planning and Consolidation from EBS
- ✓ Rely on us, as lasting and stable Partner
- ✓ 24/7 Support
- ✓ On of the biggest Partner networks





# SAP Planning and Consolidation – System Demo



# Thank you

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