

Customer Success Day
SAP Business Technology Platform



Best Practices for SAP Analytics Cloud for Planning

Charlotte Burnier, Solution Expert, SAP



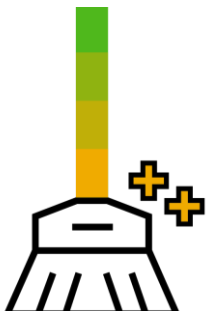
SAC Planning best practices



Integrate the best practices advices during the design phase, don't configure first, then test and find out that end users encounter performances issues.



Create a lean model, define which dimension is relevant for data collection and what can be derived as attributes (like for example geographic area or gender).

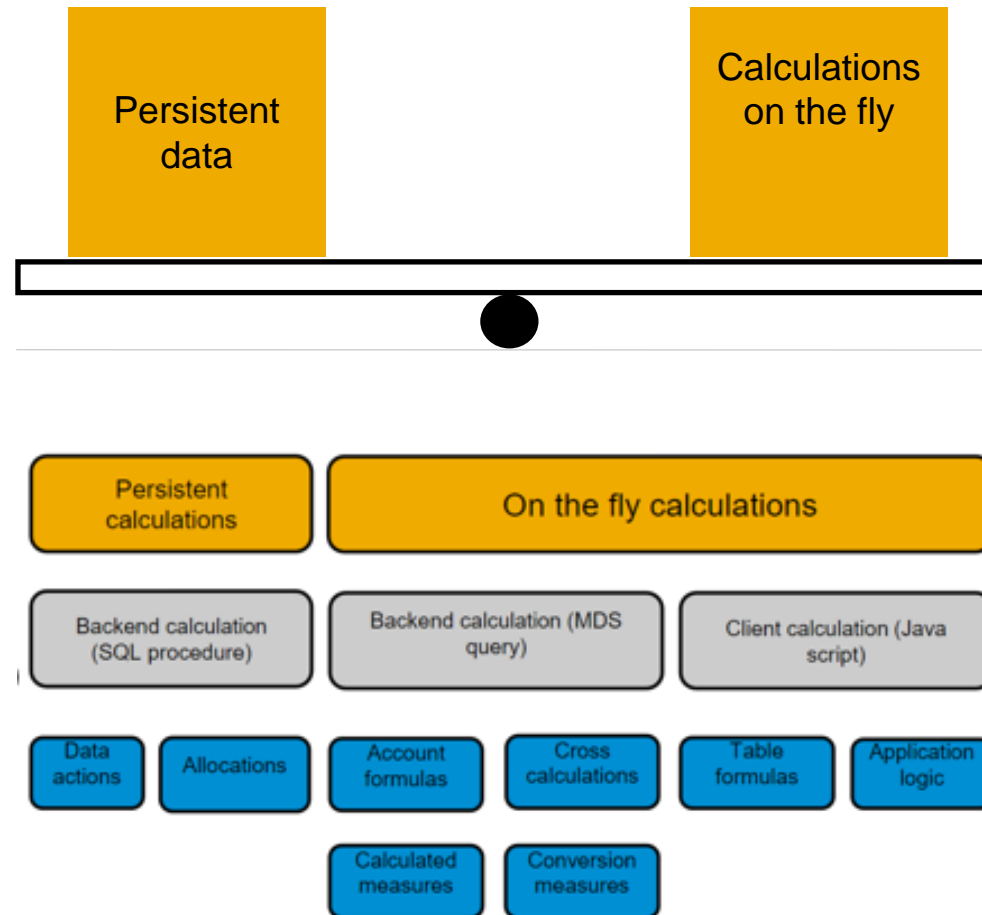


Import only valid dimension members, also consider to split your model in several.

Use the Public dimension feature.

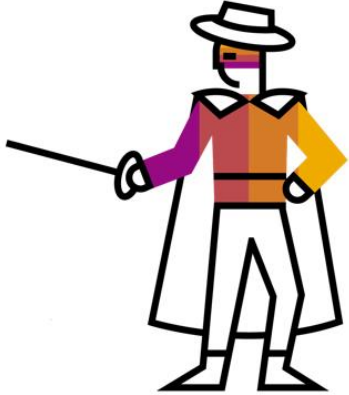
SAC Planning best practices

Calculations: find the right balance



Please note that now data action includes also Currency conversion step

SAC Planning best practices



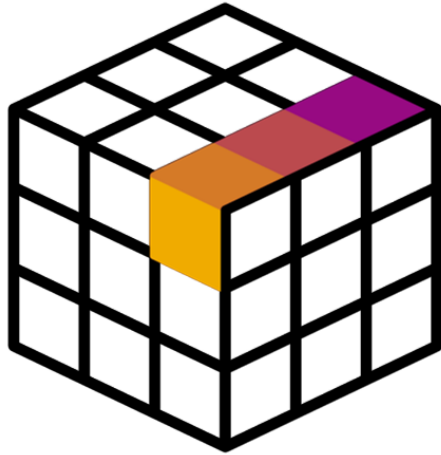
Use Security and Data Access Control and adapt the Write access to the scope of the business user.



Data actions is a very powerful feature but advanced formulas need to be carefully configured, here use variable, attributes of the model for selection purposes, avoid endless IF statements, etc....

This topic has a dedicated Best practices document.

SAC Planning best practices



Lean model challenge

BEFORE
MODEL
11 Dimensions

AFTER	
MODEL 1	MODEL 2
6 Dimensions	5 Dimensions

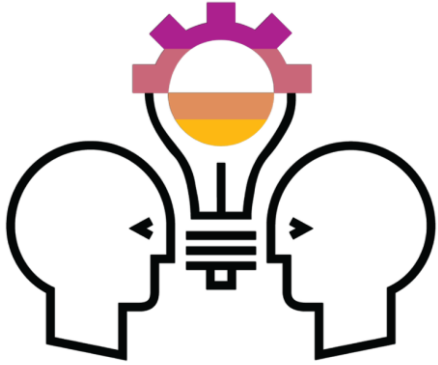
GL ACCOUNT
PROFIT CENTER
CUSTOMER
CONTRACT
COST CENTER
GEOGRAPHIC AREA
CURRENCY
VERSION
SCENARIO
TIME
CAPABILITY

GL ACCOUNT	GL ACCOUNT
PROFIT CENTER	PROFIT CENTER
PROJECT	/
/	/
/	/
/	COST CENTER
/	/
CURRENCY	/
VERSION	VERSION
/	/
TIME	TIME
/	/

Account dimension
Organization dimension
Generic dimension merging CUSTOMER, CONTRACT and CAPABILITY
Merged with PROJECT
Merged with PROJECT
Dedicated dimension for a few accounts
Attribute of the Profit Center
Transactional currency and attribute of the Profit Center
already available in the Version
Merged with PROJECT

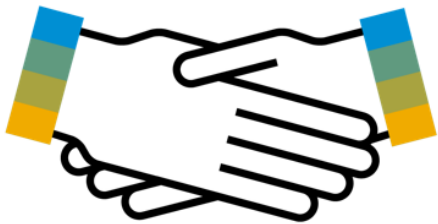
Quick demo of the configuration of the Planning area option and the Data Access Control in the model.

SAC Planning best practices



Before starting the configuration, train or demo to the business users SAC capabilities (including BI visualizations and Predictive) or create a POC.

Invest in Knowledge Transfer and User Acceptance Tests.

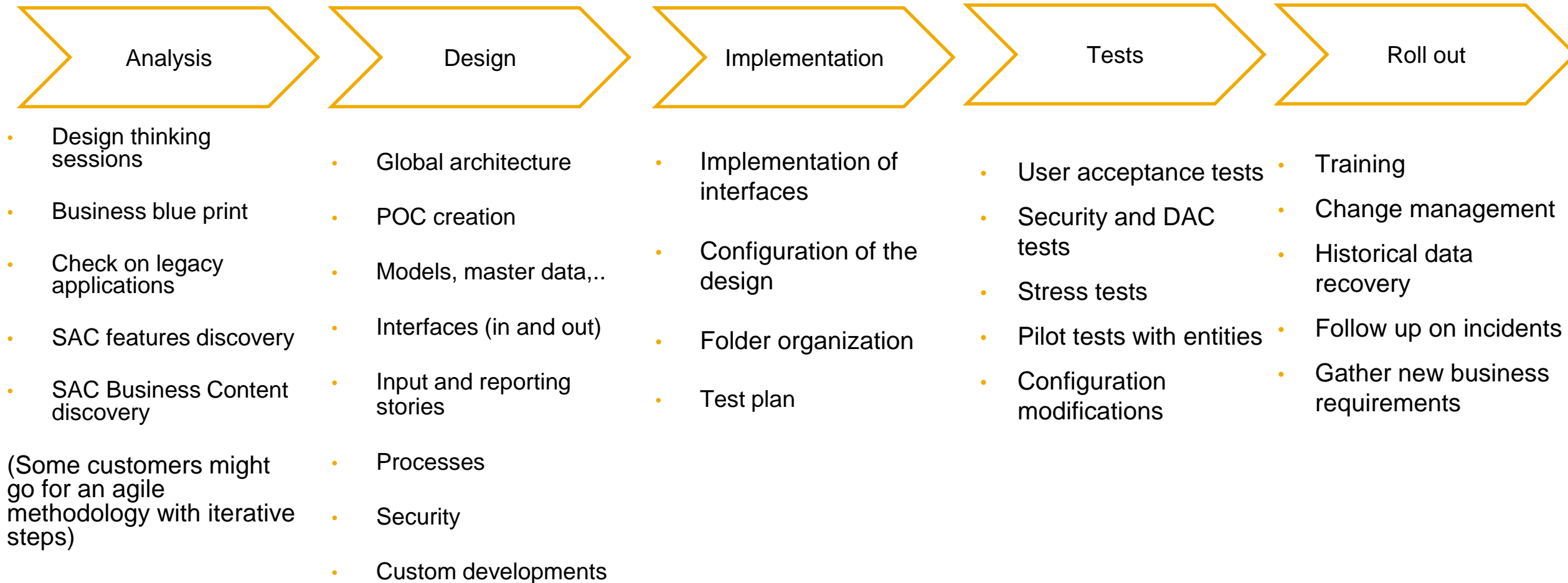


Select a partner with SAC Planning certified consultants.

SAP Analytics Cloud Planning

Implementation methodology

SAC Planning : Project implementation steps



SAP Analytics Cloud Planning

Adoption strategy

SAC Planning adoption strategy hints

- Adopt the new Planning model
- Use story 2.0 and Optimized Design Experience (see current limitations here [Optimized Design Experience limitations](#))
- Use Predictive for SAC Planning

Development processes @SAP

Enhancement requests can be created and voted there [Influence Opportunity Homepage - Customer Influence \(sap.com\)](#)

But before check

- ✓ Roadmap [SAP Road Map Explorer](#)
- ✓ Community and what 's new in the coming release [SAP Analytics Cloud for planning | SAP | SAP Blogs](#)
- ✓ Community for solutions (here an example with blogs [Search the SAP Community](#))

Useful documentation

SAC Planning Best practices blogs



More details can be found here :

[SAP Analytics Cloud Planning : do you encounter performances issues? What can you do before contacting SAP? | SAP Blogs](#) (this blog includes a video of the Optimize Planning Area Option configuration)

[SAP Analytics Cloud Best practices Check list](#)

[SAC Planning Advanced formulas Best practices](#)

[SAP Analytics Cloud Planning : managing data granularity when planning and avoiding performances issues | SAP Blogs](#)

SAC Planning : Workforce Planning scenarios blogs



More details can be found here:

[SAP Analytics Cloud and SAP SuccessFactors \(HXM\): Connection and Automatic User Sync, Detailed Illustration](#)

[SAP Analytics Cloud Planning with SAP SuccessFactors \(HXM\): Step by Step Illustrations of the Best Practices for Workforce Planning](#)

[SAP Analytics Cloud Planning and SuccessFactor – Building a robust Planning Model – Some best practices examples and tips](#)

[SAP Analytics Cloud Planning: HXM Strategic Planning Using Planning/Data Action Trigger](#)

Training and documentation

[SAP Open courses SAP Analytics Cloud Planning](#)

Our BTP library [DAM BTP folder](#)

Connectivity guided path [SAP Analytics Cloud Connectivity playbook](#)

Security [SAP Analytics Cloud - Security Concepts and Best Practice - SAP Analytics Cloud - Support Wiki](#)

Data volumes limitations [System Sizing, Tuning, and Limits | SAP Help Portal](#)

SAP Business Content

Look for the “Best practices” SAP Business Content

<input type="checkbox"/>	Name	Description	Created By	Imported	Changed On
<input type="checkbox"/>	Professional Services for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Professional Services for SAP S/4HANA Cloud	SAP		Apr 21, 2023 13:38
<input type="checkbox"/>	Sales Analytics for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Sales Analytics for SAP S/4HANA cloud	SAP		Apr 21, 2023 14:41
<input type="checkbox"/>	Receivables Management for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP S/4HANA Cloud Receivables Management	SAP	Warning	Apr 21, 2023 14:30
<input type="checkbox"/>	Procurement for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Procurement for SAP S/4HANA Cloud	SAP	Success	Apr 21, 2023 13:07
<input type="checkbox"/>	SAP SuccessFactors Workforce Planning (SAP Best Practices)	Content for SuccessFactors Workforce Planning Best Practices	SAP	Success	Apr 24, 2023 18:02
<input type="checkbox"/>	Liquidity Planning for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Liquidity Planning for SAP S/4HANA Cloud	SAP	Warning	Apr 21, 2023 12:49
<input type="checkbox"/>	Treasury Management for SAP S/4HANA 2022 and SAP S/4HANA Cloud (SAP Be...	Content for SAP Best Practice: Treasury Management for SAP S/4HANA 2022 and SAP S/4HANA Cloud	SAP		Feb 17, 2023 14:13
<input type="checkbox"/>	Treasury Management for SAP S/4HANA 2020 (SAP Best Practices)	Content for SAP Best Practice: Treasury Management for SAP S/4HANA 2020	SAP		Feb 17, 2023 14:15
<input type="checkbox"/>	Rapid Workforce Planning & Analysis for SAP S/4HANA (SAP Best Practices)	Content for Corp FP&A — Rapid Workforce Planning & Analysis for SAP S/4HANA and SAP SuccessFac...	SAP	Success	May 17, 2023 19:34
<input type="checkbox"/>	Rapid Sales Planning & Analysis for SAP S/4HANA (SAP Best Practices)	Content for Corp FP&A — Rapid Sales Planning & Analysis for SAP S/4HANA	SAP		May 17, 2023 19:37
<input type="checkbox"/>	Rapid Financial Planning & Analysis for SAP S/4HANA (SAP Best Practices)	Content for Corp FP&A — Rapid Financial Planning & Analysis for SAP S/4HANA	SAP	Success	May 17, 2023 19:40
<input type="checkbox"/>	Sales Planning for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Sales Planning for SAP S/4HANA Cloud	SAP		May 17, 2023 19:47
<input type="checkbox"/>	Financial Planning & Analysis for SAP S/4HANA Cloud (SAP Best Practices)	Financial Planning & Analysis for SAP S/4HANA	SAP	Success	May 17, 2023 19:49
<input type="checkbox"/>	Workforce Planning for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Workforce Planning for SAP S/4HANA Cloud	SAP	Success	May 17, 2023 19:53
<input type="checkbox"/>	HR Analytics for S4HANA Cloud and SAP SuccessFactors (SAP Best Practices)	Content for SAP Best Practice: HR Analytics for S4HANA Cloud and SAP SuccessFactors Cloud	SAP	Warning	May 17, 2023 19:55
<input type="checkbox"/>	Project Budgeting & Planning for SAP S/4HANA Cloud (SAP Best Practices)	Content for SAP Best Practice: Project Budgeting & Planning for SAP S/4HANA Cloud	SAP	Warning	May 17, 2023 20:00

SAP Analytics Cloud Planning

Monitor options

SAP Analytics Cloud : Monitoring options

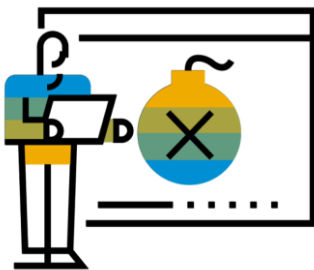
Lots of improvements were made the past 2 years to follow up on the system and during the implementation in



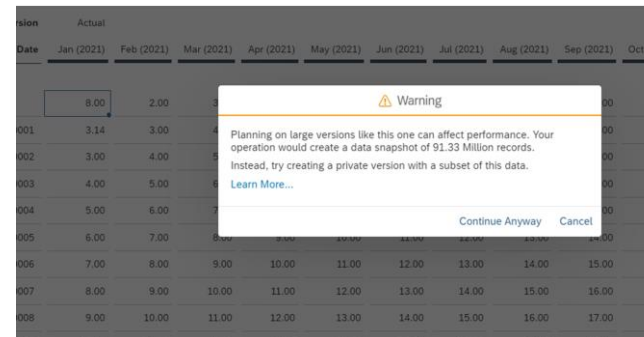
Data actions with the data action monitor, validation status and the tracing of the advanced formulas



Private versions statistics and analysis



Error messages




Monitoring options

Modeler



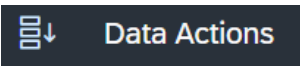
Modeler

Model Preferences

General Settings	 <h3>Data and Performance</h3> <p>Data Performance</p>
Language	
Access and Privacy	
Date Settings	
Planning	<h4>Performance</h4>
Currency	Optimize Story Building Performance: <input type="checkbox"/>
Structure Priority	<p><i>(i)</i> Switch on this option to optimize performance and load on the system. It will stop the automatic update that happens when changes are made in a chart or table.</p>
Data and Performance	Size Limits for Planning Performance:
	<p><i>(i)</i> Planning on large versions can affect performance, so you can recommend a limit on the initial version size for planning. A warning appears if users exceed this limit while creating a private version or starting to edit a public version.</p> <p>Learn More</p> <p><input type="button" value="↩ Use Default Limit (5 Million)"/></p> <p><input type="text" value="5"/> Million Facts</p>
	Optimize Recommended Planning Area: <input type="checkbox"/>
	<p><i>(i)</i> Planning on large versions can affect performance. Use this option to restrict the recommended planning area to the optimal size and to improve performance and resource consumption.</p> <p>Learn More</p>

Monitoring options

Data actions



The screenshot displays the SAP Analytics Cloud interface for monitoring data actions. The left sidebar shows the navigation menu with 'Data Actions' selected. The main area shows a 'Data Action Monitor' table with two failed entries for 'Weekplanning_preparation'. The right panel provides details for the failed job, including a status message, a list of steps, and parameters.

Data Action Monitor Table:

Name	Status	Total Duration	Triggered On	Triggered From	Triggered By	Model	Version
Weekplanning_prepa...	Failed	4 s	Feb 2, 2023, 11:23:23	testnodes capita	SANUGU-	WeekPlanning	(No value set)
Weekplanning_prepa...	Failed	4 s	Feb 2, 2023, 11:19:27	testnodes capita	Charlotte Burnier	WeekPlanning	(No value set)

Job Details: Weekplanning_preparation (Failed)

Pending Time: 2 s | Execution Time: 2 s

Status: The job has failed. Feb 2, 2023, 11:23:26. There are validation errors in the data action "Weekplanning_preparation" when trying to run it without a target version.

Steps:

Name	Database Records Af...	Duration
Pending	-	2 s
Preparing to execute	-	Failed
1 Preparation_ActualRef	-	Not started

Parameters:

- Target Version: public.Actual_Ref

Monitoring options

Tracing information in Data actions [SAP Analytics Cloud Help- Tracing in Advanced formulas](#)

The screenshot displays the 'Advanced Formulas Step' interface. At the top, there is a header bar with the title 'Advanced Formulas Step' and a refresh icon. Below the header, there are two input fields: 'Name' (containing 'Calculate Receivables') and 'Description' (empty). The main area is divided into two tabs: 'Visual' and 'Script'. The 'Script' tab is active, showing a code editor with the following script:

```
7  
8 DATA([d/Flow] = "F_DEC") = RESULTLOOKUP([d/Account] = "33001000", [d/Flow] = "F_CLO", [d/Time] = PREVIOUS(@PaymentTerm  
• 9 DATA([d/Flow] = #Temp) = RESULTLOOKUP([d/Flow] = "F_DEC") / 12  
10  
11 @AverageRevenue = RESULTLOOKUP([d/Account] = "33001000", [d/Flow] = "F_CLO") / 12  
12  
13 IF RESULTLOOKUP([d/Account] = "33001000", [d/Flow] = "F_CLO") > @AverageRevenue THEN  
• 14 DATA([d/Flow] = "F_INC") = RESULTLOOKUP([d/Flow] = "F_INC") * 0.9  
15 ELSE  
16 DATA([d/Flow] = "F_INC") = RESULTLOOKUP([d/Flow] = "F_INC") * 1.1  
17 ENDIF  
18  
19 DATA([d/Flow] = "F_CLO") =  
20 RESULTLOOKUP([d/Flow] = "F_INC")
```

The 'Tracing' panel on the right side of the interface is open, showing the execution details for the selected script. It includes a 'Run' button, a settings icon, and a close icon. The panel is divided into three sections:

- Tracepoints:** Shows two tracepoints for 'Calculate Receivables' at row 9 and row 14.
- Watch Area:** Shows the values of variables at the selected tracepoint: %1_StartDate% : 202001, %2_EndDate% : 202006, %3_PaymentTerm% : 2, and %TargetVersion% : public.Plan01. A 'Show Table' button is also present.
- Variables:** Shows the values of variables: @paymentterm : 2 and @averagerevenue : 624.9999999.
- Calculation Scope:** Shows the scope of the calculation: [d/Account] : 11201000, [d/Flow] : See 6 Rows, and Combined Scope : See 6 Rows.

Monitoring options

System



System

The screenshot displays a software interface with a dark theme. A menu is open, showing the following options:

- Workspace Management
- Content Network
- Translation
- Security >
- Transport >
- Connections
- System >

The 'System' sub-menu is expanded, showing:

- Monitor
- Administration
- abc Synonym Definitions
- Performance >
- About

The 'Performance' sub-menu is further expanded, showing:

- Benchmark Tool
- Analysis Tool
- Statistics and Analysis
- Data Action Statistics and Analysis
- Data Management Jobs Statistics and Analysis
- Private Versions Statistics and Analysis
- Error Statistics and Analysis

Monitoring options

Usage during production time

Files

The screenshot displays the SAP Analytics Cloud interface. The left sidebar contains navigation options: Home, Files, Apps, Stories, Analytic Applications, Data Analyzer, Digital Boardroom, Datasets, Modeler, Data Actions, Allocations, and Value Driver Trees. The main content area shows a file browser view for 'SAP Analytics Cloud Usage Tracking Content'. The breadcrumb path is 'Files / System / Common / Public / SAP Analytics Cloud Usage Tracking Content'. A table lists the following files:

Name	Description	Type
SAC Content Usage	Monitor content usage on your system	Story
SAP__SAC_USAGE_ACTIVITIES	SAC Usage Activities: Information about users' activities within SAP Analytics Cloud (from the System > Activities table).	Model (Analytic)
SAP__SAC_USAGE_FILES	SAC Usage Files: Information about objects from the Files area of SAP Analytics Cloud. Can be linked to the Activities model using the Object ID dimension.	Model (Analytic)
SAP__SAC_USAGE_OTHER_OBJECTS	SAC Usage Other Objects: Additional information about files and other object types, including dependencies. Can be linked to the Activities model using the Object ID dimension.	Model (Analytic)
SAP__SAC_USAGE_SESSIONS	SAC Usage Sessions: Information about sessions in SAP Analytics Cloud.	Model (Analytic)
SAP__SAC_USAGE_USERS	SAC Usage Users: Information about users and teams within SAP Analytics Cloud. Can be linked to the Activities model using the User ID dimension.	Model (Analytic)

THANK YOU

