BPC430

SAP Business Planning and Consolidation: Reporting and Planning

COURSE OUTLINE

Course Version: 16
Course Duration: 5 Day

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- Business Process Owner/Team Lead/Power User
- Program/Project Manager

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UNIT 1 Overview of SAP Business Planning and Consolidation

Lesson 1: Introducing SAP Business Planning and Consolidation

Lesson Objectives

After completing this lesson, you will be able to:

- Define the key terms of the planning and consolidation application
- Explain the positioning of the planning and consolidation application in the enterprise performance management (EPM) category of solutions
- List the benefits of the planning and consolidation application
- Describe the main components of the planning and consolidation application

Lesson 2: Using the Microsoft Excel Interface of the EPM Add-In

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Microsoft Excel interface
- Explain how to use the EPM pane to build a report

Lesson 3: Connecting and Configuring the Microsoft Excel Interface of the EPM Add-In

Lesson Objectives

After completing this lesson, you will be able to:

- List the main features of the EPM add-in
- Create a connection

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UNIT 2 Basic Report Building in Microsoft Excel

Lesson 1: Creating Reports with the EPM Report Editor

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the options for creating a report
- Create reports with the EPM Report Editor
- Use data analysis options

Lesson 2: Using the Member Selector

Lesson Objectives

After completing this lesson, you will be able to:

- Use hierarchies and attributes to select sort and subtotal

Lesson 3: Sorting, Filtering, and Ranking Data

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the sort, filter, and rank data options

Lesson 4: Using Read Only, Member Names, and Insertion Filtering

Lesson Objectives

After completing this lesson, you will be able to:

- Use read only, member naming, and insertion filtering

Lesson 5: Using Account Types and the Measures Dimension

Lesson Objectives

After completing this lesson, you will be able to:

- Analyze data with account types and measures

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Lesson 6: Using Member Recognition

Lesson Objectives

After completing this lesson, you will be able to:

- Create a report by using the Member Recognition feature

Lesson 7: Using Local Members in a Plan Actual Variance Analysis

Lesson Objectives

After completing this lesson, you will be able to:

- Use local members in a plan actual variance analysis

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UNIT 3 Enhancements to Microsoft Excel Reports

Lesson 1: Linking Reports

Lesson Objectives
After completing this lesson, you will be able to:

- Create different types of links

Lesson 2: Formatting Reports

Lesson Objectives
After completing this lesson, you will be able to:

- Configure a formatting style sheet
- Define formatting for hierarchies
- Define formatting for specific report items
- Apply formatting to a report or to a worksheet

Lesson 3: Reporting on Multiple Sources

Lesson Objectives
After completing this lesson, you will be able to:

- Create reports on different sources in the same worksheet

Lesson 4: Reporting by Using Axis Sharing

Lesson Objectives
After completing this lesson, you will be able to:

- Explain how to meet reporting requirements by sharing a report axis

Lesson 5: Generating Worksheets

Lesson Objectives
After completing this lesson, you will be able to:

- Generate a multiple worksheet report

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Lesson 6: Analyzing Data with Time Dependent Hierarchies

Lesson Objectives

After completing this lesson, you will be able to:

- Analyze data with time dependent hierarchies

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UNIT 4 Report Functions

Lesson 1: Creating Cell-Based Reports with Functions

Lesson Objectives

After completing this lesson, you will be able to:

- Create reports with basic EPM cell functions
- Compare cell functions with Ev functions

Lesson 2: Creating Cell-Based Reports with Advanced Functions

Lesson Objectives

After completing this lesson, you will be able to:

- Use functions to override report items
- Use functions to retrieve dimension and member properties
- Use other advanced functions

Lesson 3: Using the EPMOlapMemberO Function

Lesson Objectives

After completing this lesson, you will be able to:

- Use the EPMOlapMemberO function

Lesson 4: Executing VBA and API Functions

Lesson Objectives

After completing this lesson, you will be able to:

- Create a button to execute functions in VBA

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UNIT 5 Delivered Templates

Lesson 1: Using Delivered Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the delivered templates

Lesson 2: Creating Reports Using Best Practices

Lesson Objectives

After completing this lesson, you will be able to:

- Explain reporting best practices

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UNIT 6

Everest Data Range Exchange (EvDRE) Reports

Lesson 1: Comparing EvDRE to EPM Reports (Optional)

Lesson Objectives

After completing this lesson, you will be able to:

- Compare EvDRE and EPM add-in report features
- Describe EvDRE parameters

Lesson 2: Migrating EvDRE Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the process of EvDRE migration
- Describe how specific EvDRE items are migrated
- Analyze the migration of EvDRE reports

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UNIT 7 Distribution and Collection of Input Schedules

Lesson 1: Configuring Distribution and Collection

Lesson Objectives

After completing this lesson, you will be able to:

- Create a distribution template

Lesson 2: Distributing and Collecting Workbooks

Lesson Objectives

After completing this lesson, you will be able to:

- Distribute workbooks

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UNIT 8 Comments in SAP Business Planning and Consolidation

Lesson 1: Describing the Comment Functionality in SAP Business Planning and Consolidation

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the comment functionality in SAP Business Planning and Consolidation

Lesson 2: Entering Comments with the EPM Ribbon

Lesson Objectives

After completing this lesson, you will be able to:

- Enter comments with the EPM ribbon

Lesson 3: Managing Comment Data

Lesson Objectives

After completing this lesson, you will be able to:

- Manage comment data

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UNIT 9 The EPM Add-in Planning Functions

Lesson 1: Using The Spread, Trend, and Weight Planning Functions

Lesson Objectives

After completing this lesson, you will be able to:

- Use planning functions

Lesson 2: Using Disaggregation

Lesson Objectives

After completing this lesson, you will be able to:

- Disaggregate planning data

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UNIT 10 Business Process Flows (BPFs)

Lesson 1: Positioning Planning Business Process Flows (BPFs)

Lesson Objectives

After completing this lesson, you will be able to:

- Position BPFs using a BPF as a report launch pad

Lesson 2: Using Reporting Business Process Flows (BPFs)

Lesson Objectives

After completing this lesson, you will be able to:

- Use reporting BPFs

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UNIT 11

Web Interface in SAP Business Planning and Consolidation

Lesson 1: Navigating in the Web Interface

Lesson Objectives

After completing this lesson, you will be able to:

- Connect to the Web client
- Describe the main components of the Web interface
- List the Features Available in the Web and Microsoft Excel Clients

Lesson 2: Creating Web Reports, Input Forms, and Workspaces

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Web reports
- Create Web reports, input forms, and workspaces

Lesson 3: Publishing Books

Lesson Objectives

After completing this lesson, you will be able to:

- Configure book publication
- Publish books

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UNIT 12 Drill Through

Lesson 1: Positioning Drill Throughs

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the configuration of drill throughs

Lesson 2: Creating Drill Throughs for Web Sites

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Web site drill through

Lesson 3: Creating Drill Throughs for BW Queries

Lesson Objectives

After completing this lesson, you will be able to:

- Create a drill through to a BW query

Lesson 4: Creating Drill Through for SAP ERP

Lesson Objectives

After completing this lesson, you will be able to:

- Create a drill through for SAP ERP

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UNIT 13

Microsoft Word and Microsoft PowerPoint Reports with Live Data

Lesson 1: Creating Reports with Microsoft Word and Microsoft PowerPoint

Lesson Objectives

After completing this lesson, you will be able to:

- Create Microsoft Word and Microsoft PowerPoint reports

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UNIT 14 Dashboards

Lesson 1: Creating a Dashboard

Lesson Objectives

After completing this lesson, you will be able to:

- Create a dashboard
- Publish a dashboard

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