

PUBLIC

Unbox and Implement Workforce Planning

ANA360

Exercises / Solutions
Product Management / SAP SE

TABLE OF CONTENTS

OVERVIEW	ERROR! BOOKMARK NOT DEFINED.
EXERCISES	3
Exercise 1 – Import from the Analytics Content Network	3
Exercise 2 – Configure Planning Parameters	9
Exercise 3 – Aggregated External HC Plan	14
Exercise 4 – Aggregated Internal HC Plan	19
Exercise 5 – Detailed Internal HC Plan	22
Exercise 6 – Reporting	27
Exercise 7 – Integration to Financial Planning	28
Exercise 8 – Add additional cost type	34

www.sap.com/contactsap

© 2020 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

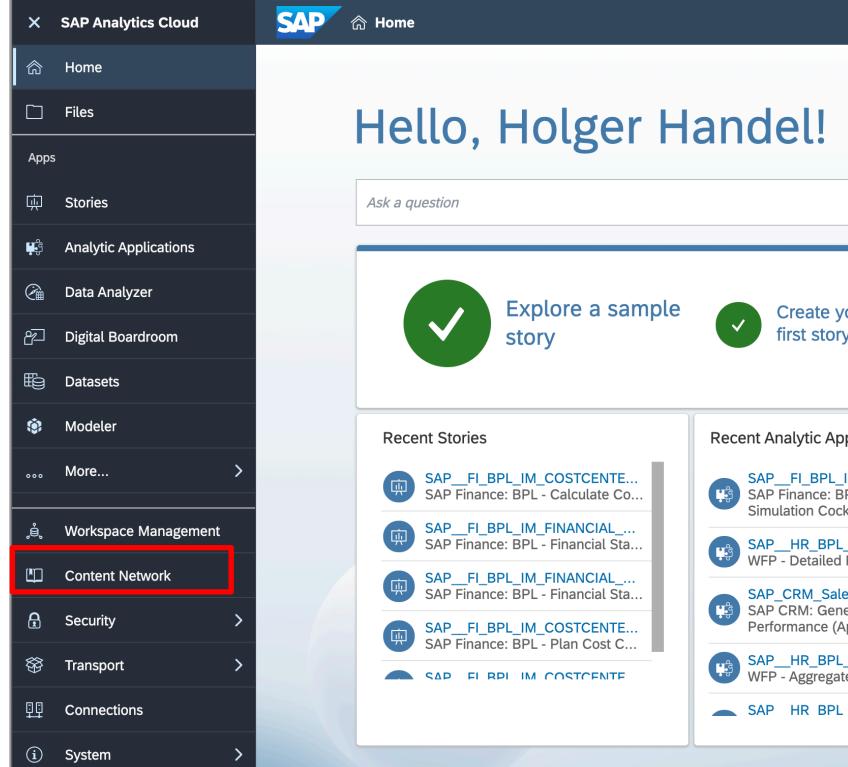
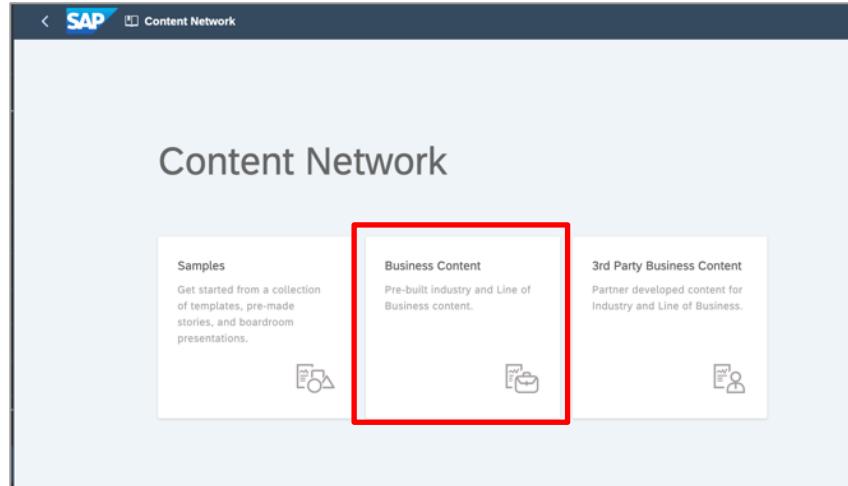
These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies. See www.sap.com/copyright for additional trademark information and notices.

EXERCISES

Exercise 1 – Import from the Analytics Content Network

Explanation	Screenshot
<p>1. In the main menu, navigate to Content Network.</p>	 <p>The screenshot shows the SAP Analytics Cloud main menu on the left. The 'Content Network' option is highlighted with a red box. The main area displays a welcome message 'Hello, Holger Handel!' and a 'Recent Stories' section with several items listed.</p>
<p>2. Click on Business Content to browse through the available business content offered by SAP.</p>	 <p>The screenshot shows the SAP Content Network page. The 'Business Content' section is highlighted with a red box. It contains a description of pre-built industry and line of business content, along with icons for documents and a briefcase.</p>

3. The business content for Workforce Planning is delivered as two packages:
- **SAP Human Experience Management (HXM) Workforce Planning:** Contains the main part of the workforce planning content
 - **SAP Human Experience Management (HXM) Workforce Planning Add-On:** Optional artefacts for integration with financial content
4. Click on the entry for **SAP Human Experience Management (HXM) Workforce Planning** which can be quickly found by searching for HXM in the search field.

Name	Description	Created By
SAP Integrated Business Planning	Content for Line-of-Busin...	SAP
SAP Integration Suite	Content for SAP Integrati...	SAP
Add-on for Integrated Financial Planning for SAP S/4HANA	Content for Add-on for In...	SAP
SAP Cloud Platform Integration Reporting Dashboard	Content for SAP Cloud PL...	SAP
Group Reporting Planning for SAP S/4HANA	Content for Group Report...	SAP
SAP Retail: Replenishment Planning and Unified Demand Forecast Dashboard	Content for SAP Retail: R...	SAP
SAP Retail Unified Demand Forecast	Content for SAP Retail U...	SAP
SAP Retail Replenishment Planning	Content for SAP Retail R...	SAP
SAP Real Estate	Content for Industry Real...	SAP
Integrated Financial Planning for SAP S/4HANA	Content for Integrated Fi...	SAP
Outcome-Based Business Insights	Outcome-Based Business...	SAP
SAP Procurement: Contract Management	Contract Management for...	SAP
SAP Human Experience Management(HXM) Workforce Planning	SAP Human Experience ...	SAP
SAP Human Experience Management(HXM) Workforce Planning: Add-On	SAP Human Experience ...	SAP
SAP Sports One Analytics Version 2	Content for Industry Spor...	SAP
SAP SuccessFactors Workforce Planning (SAP Best Practices)	Content for SuccessFacto...	SAP
SAP Field Service Management	Content for Line of Busin...	SAP
SAP Ariba: Enterprise Analytics for Procurement	Content for SAP Ariba: E...	SAP

5. On the **Overview** tab you see some basic information about the content package and links to further documentation.
6. Click on **Import Options** to switch the tab.

Import Overview

Overwrite Preferences: Don't overwrite objects or data Impacted Content: 0

Description
SAP Human Experience Management(HXM) Workforce Planning

Details
Description:
SAP Human Experience Management(HXM) Workforce Planning.

Operative Head Count Planning

- This package enables top-down as well as bottom-up planning of headcount or full-time equivalents and calculates the resulting costs using the central assumptions as basis.
- Preparation of planning process: Setup parameters for cost calculation including mid-point salaries and other cost drivers. Seed plan data with existing data if desired. Create versions for chart comparisons, including budgets from Strategic Financial Planning.
- Top-down aggregated planning: planning of target headcount, required new hires and contingent workers. Costs for workforce are re-calculated based on centrally maintained parameters
- Bottom-Up detailed planning: Planning individual actions on employee level (e.g. maintain absence, adjust employment level, plan cost center change) and get an updated costs overview based on current plan. Plan detailed new positions for a team to increase workforce and assess resulting costs.
- Additional reports and analysis of current and planned total workforce to give insights during and after the planning cycle. Insights include ratio of external to internal workforce, and gender

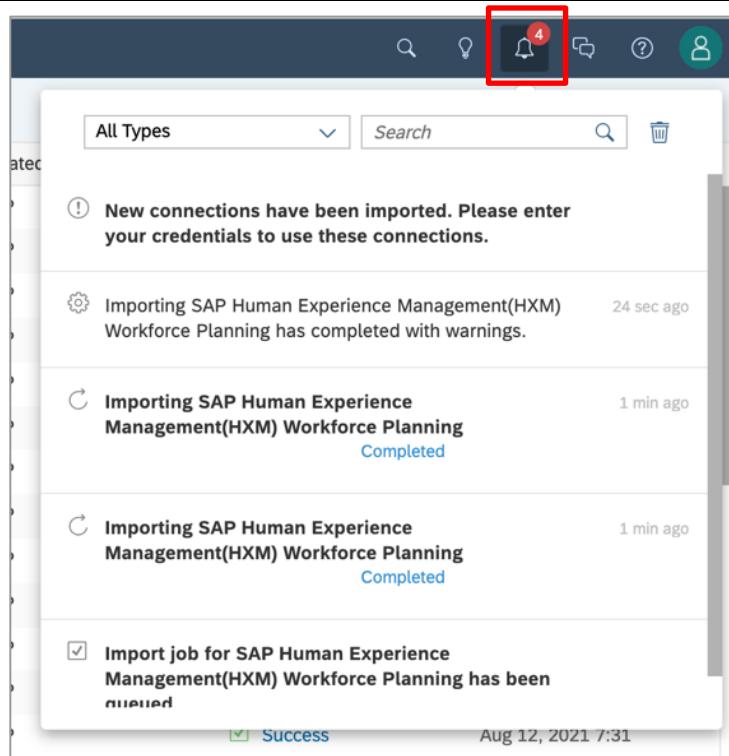
Import Close

7. In the **Import Options** tab, you can see which objects are part of the package.
8. Make sure that you have selected **Overwrite objects and data**.
9. Click on **Import** to start the import of the content package.

Object Type	Object Name	Status	Location
Analytical Application	SAP_HR_BPL_IM_WFP_AGGREGAT...	WFP - Aggregated External Plan	My Files/Public/SAP_Content/SAP_HX...
Analytical Application	SAP_HR_BPL_IM_WFP_AGGREGAT...	WFP - Aggregated Internal Plan	My Files/Public/SAP_Content/SAP_HX...
Analytical Application	SAP_HR_BPL_IM_WFP_CENTRAL...	WFP - Central Assumptions	My Files/Public/SAP_Content/SAP_HX...
Analytical Application	SAP_HR_BPL_IM_WFP_DETAILED...	WFP - Detailed FTE Plan	My Files/Public/SAP_Content/SAP_HX...
Analytical Application	SAP_HR_BPL_IM_WFP_OVERVIEW...	WFP - Overview page	My Files/Public/SAP_Content/SAP_HX...
Stories	SAP_HR_BPL_IM_WFP_REPORTING	WFP - Reporting	My Files/Public/SAP_Content/SAP_HX...
Models	SAP_HR_BPL_IM_WORKFORCE	HXM (Human Experience Management) In...	My Files/Public/Models
Dimensions	Audit	Audit	
Date	Date	Date	

Import Close

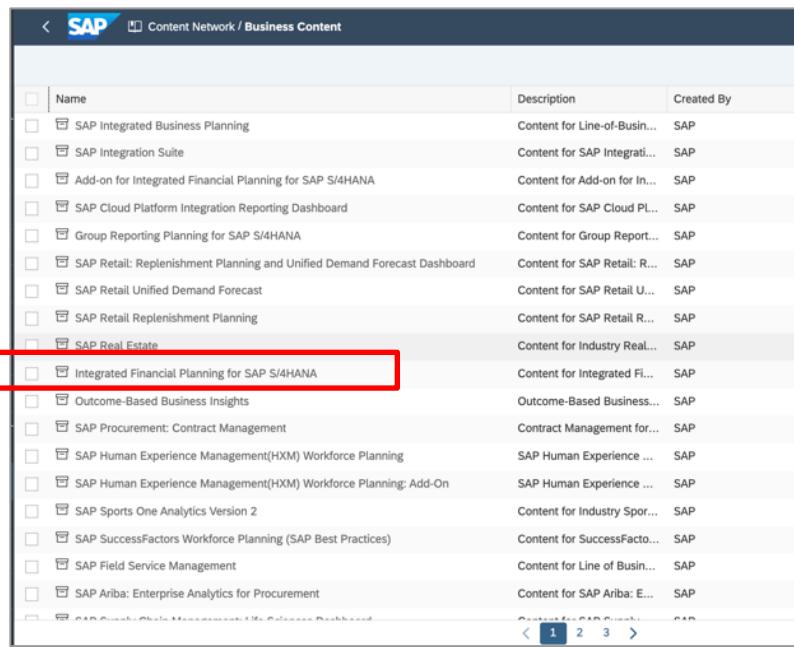
10. When the import is done, you will get a notification. If there were any issues you will also see additional information about errors or warnings.
11. There is no need to maintain credentials for shipped connections in this exercise.



The screenshot shows the SAP Fiori home screen with a red box highlighting the notification icon in the top right corner, which has a red circle with the number '4' indicating unread notifications. Below the notifications, a message states: "New connections have been imported. Please enter your credentials to use these connections." A list of recent events includes:

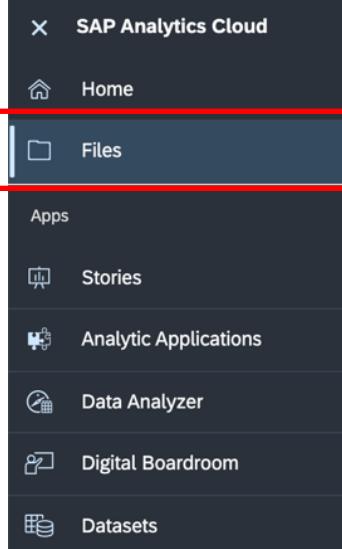
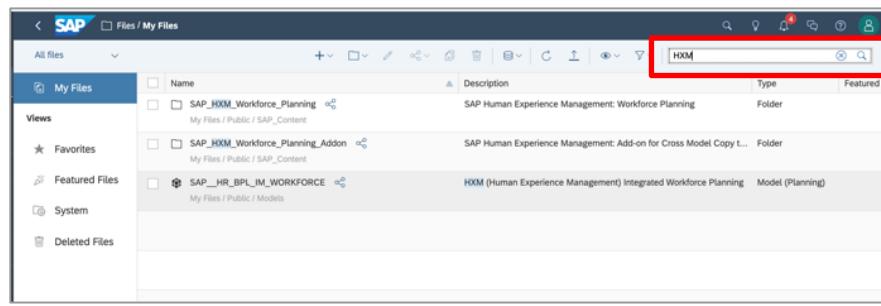
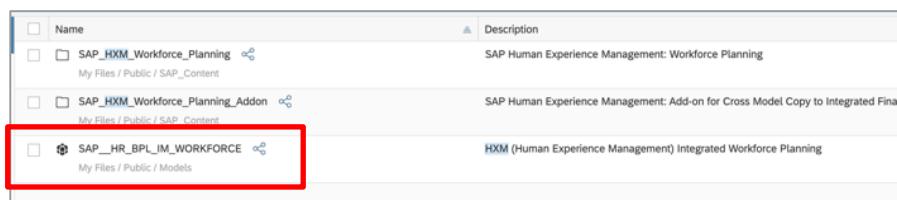
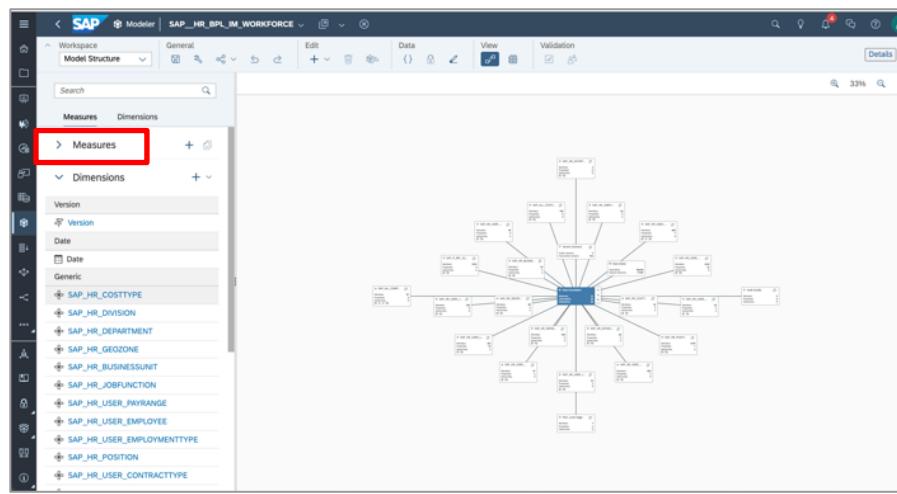
- Importing SAP Human Experience Management(HXM) Workforce Planning has completed with warnings. (24 sec ago)
- Importing SAP Human Experience Management(HXM) Workforce Planning Completed. (1 min ago)
- Importing SAP Human Experience Management(HXM) Workforce Planning Completed. (1 min ago)
- Import job for SAP Human Experience Management(HXM) Workforce Planning has been triggered. (Success, Aug 12, 2021 7:31)

12. If you want to integrate Workforce Planning with financial planning (transfer the results of your workforce plan into cost center planning) you can import the content package **Integrated Financial Planning for SAP S/4HANA**.



The screenshot shows the SAP Content Network / Business Content page. A red box highlights the row for "Integrated Financial Planning for SAP S/4HANA". The table lists various content packages with their descriptions and creators:

Name	Description	Created By
SAP Integrated Business Planning	Content for Line-of-Busin...	SAP
SAP Integration Suite	Content for SAP Integrati...	SAP
Add-on for Integrated Financial Planning for SAP S/4HANA	Content for Add-on for In...	SAP
SAP Cloud Platform Integration Reporting Dashboard	Content for SAP Cloud Pl...	SAP
Group Reporting Planning for SAP S/4HANA	Content for Group Report...	SAP
SAP Retail: Replenishment Planning and Unified Demand Forecast Dashboard	Content for SAP Retail: R...	SAP
SAP Retail Unified Demand Forecast	Content for SAP Retail U...	SAP
SAP Retail Replenishment Planning	Content for SAP Retail R...	SAP
SAP Real Estate	Content for Industry Real...	SAP
Integrated Financial Planning for SAP S/4HANA	Content for Integrated Fi...	SAP
Outcome-Based Business Insights	Outcome-Based Business...	SAP
SAP Procurement: Contract Management	Contract Management for...	SAP
SAP Human Experience Management(HXM) Workforce Planning	SAP Human Experience ...	SAP
SAP Human Experience Management(HXM) Workforce Planning: Add-On	SAP Human Experience ...	SAP
SAP Sports One Analytics Version 2	Content for Industry Spor...	SAP
SAP SuccessFactors Workforce Planning (SAP Best Practices)	Content for SuccessFacto...	SAP
SAP Field Service Management	Content for Line of Busin...	SAP
SAP Ariba: Enterprise Analytics for Procurement	Content for SAP Ariba: E...	SAP

<p>13. To investigate the imported objects of the workforce planning content, navigate to Files in the main menu.</p>	
<p>14. Type in HXM in the search bar to see the related objects in the file repository.</p>	
<p>15. You can see two folders and the model. Click on the model.</p>	
<p>16. The modeling environment is opened, and you can make yourself familiar with the model structure. Click on Measures.</p>	

17. In the **Measures** section, you can see the existing measures of the model.

The screenshot shows a list of measures in a software interface. The title 'Measures' is at the top, followed by a '+' icon and a clipboard icon. Below the title is a list of measures, each preceded by a small icon:

- AMOUNT
- FTE_Change
- HC_Change
- HC_EoP
- HC_BoP
- FTE_BoP
- FTE_EoP
- Rate_Percentage
- Change_Percentage
- Rate_Absolute
- Manual_Adjustment

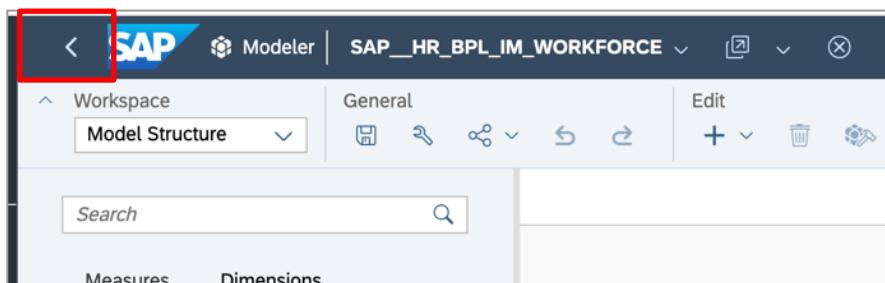
18. In the **Dimensions** section, you can see the available dimensions of the model.

The screenshot shows a list of dimensions in a software interface. The title 'Dimensions' is at the top, followed by a '+' icon and a dropdown arrow icon. Below the title are three categories: 'Version', 'Date', and 'Generic'. Under 'Generic', there is a list of dimensions, each preceded by a small icon:

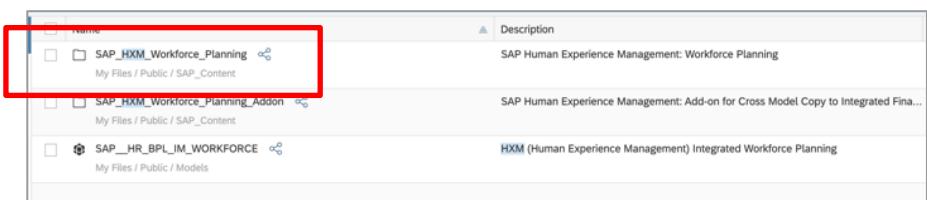
- SAP_HR_COSTTYPE
- SAP_HR_DIVISION
- SAP_HR_DEPARTMENT
- SAP_HR_GEOZONE
- SAP_HR_BUSINESSUNIT
- SAP_HR_JOBFUNCTION
- SAP_HR_USER_PAYRANGE
- SAP_HR_USER_EMPLOYEE
- SAP_HR_USER_EMPLOYMENTTYPE
- SAP_HR_POSITION
- SAP_HR_USER_CONTRACTTYPE
- SAP_HR_USER_JOBLEVEL
- SAP_HR_USER_EVENT

ANA360

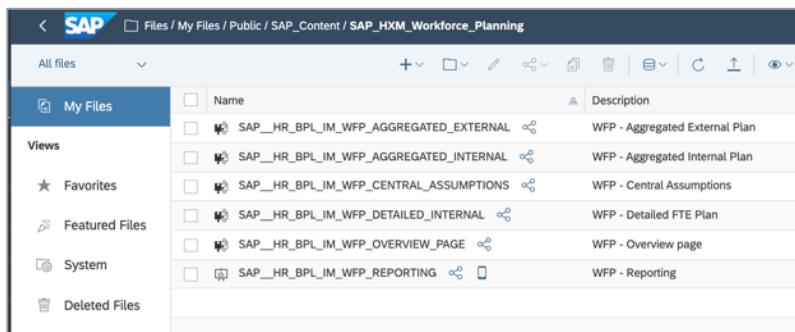
19. Click on the back icon to navigate back to the file repository.



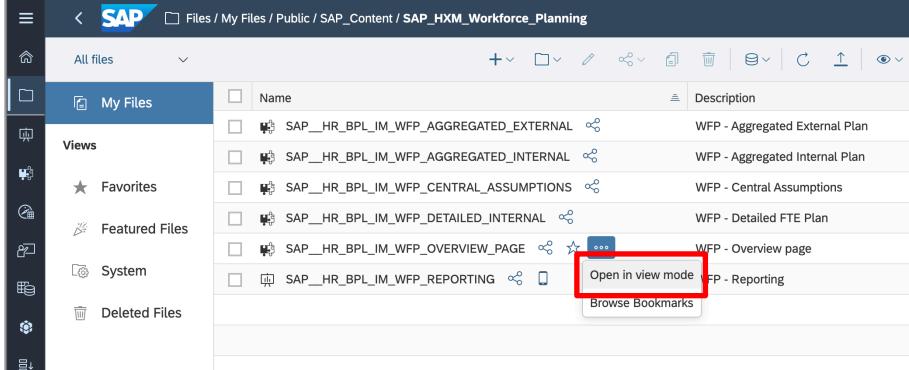
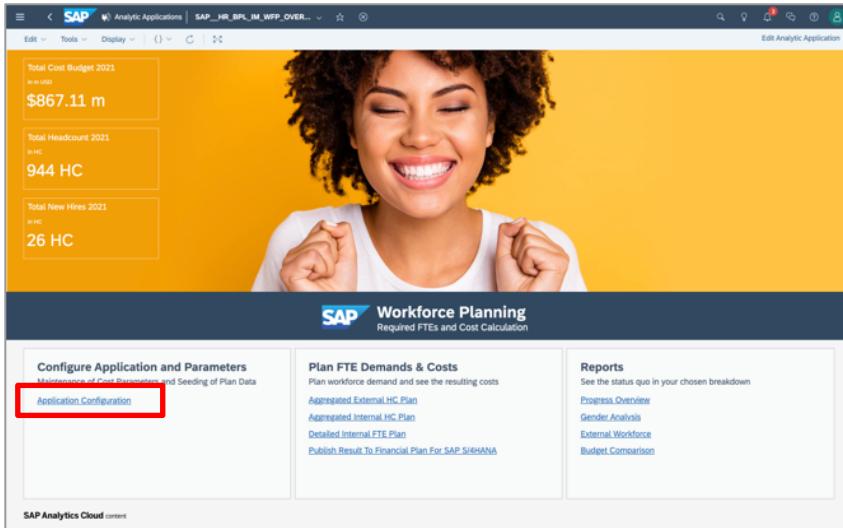
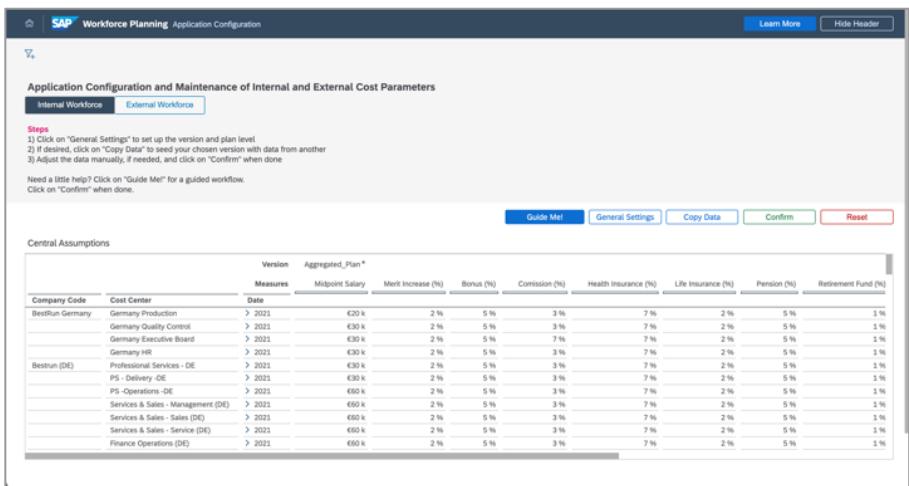
20. Open the HXM Workforce Planning folder.



21. The folder contains several planning applications and a story which is used for reporting.



Exercise 2 – Configure Planning Parameters

Explanation	Screenshot
<p>1. Open the application WFP – Overview Page.</p>	
<p>2. The Overview Page contains some KPI's and allows to navigate to other applications:</p> <ul style="list-style-type: none"> - Configuration - FTE & Cost Planning - Reports <p>3. Click on Application Configuration to open the configuration</p>	
<p>4. In the main screen of the Application Configuration, you can adjust the values of the central planning parameters, e.g., midpoint salaries, merit increase or life insurance contributions. You can enter the values directly into the table.</p>	
<p>5. At the top, you can click on Learn More to get more information.</p>	

6. You will be re-directed to the **SAP Community** pages for Enterprise Planning Content. There you can find more detailed information about the content Operational Workforce Planning.

Enterprise Planning Content

Here you will find helpful links and resources for your SAP Enterprise Planning Content.

Human Experience Management (HXM) Operational Workforce Planning

Area	Details
General Introduction	This package enables top-down as well as bottom-up planning of headcount or full-time equivalents and calculates the resulting costs using the central assumptions as basis. Help Portal .
App: Overview	Video
Entry page with navigation to all included apps.	
App: Configuration	Video
Preparation of planning process: Setup parameters for cost calculation including mid-point salaries and other cost drivers. Seed plan data with existing data if desired. Create versions for chart comparisons, including budgets from Strategic Financial Planning.	
App: Aggregated Internal Planning	Video
App: Aggregated External Planning	Video

7. In the Application Configuration, click on **Guide Me!** This will start a wizard which helps you setting up the planning parameters.

Application Configuration and Maintenance of Internal and External Cost Parameters

Internal Workforce External Workforce

Steps

- Click on "General Settings" to set up the version and plan level
- If desired, click on "Copy Data" to seed your chosen version with data from another
- Adjust the data manually, if needed, and click on "Confirm" when done

Need a little help? Click on "Guide Me" for a guided workflow. Click on "Confirm" when done.

Company Code	Cost Center	Version	Aggregated_Plan *							
			Measures	Midpoint Salary	Merit Increase (%)	Bonus (%)	Commission (%)	Health Insurance (%)	Life Insurance (%)	Pension (%)
BestRun Germany	Germany Production	> 2021	€30 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun Germany	Germany Quality Control	> 2021	€30 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun Germany	Germany Executive Board	> 2021	€30 k	2 %	5 %	7 %	7 %	2 %	5 %	2 %
BestRun (DE)	Germany HR	> 2021	€30 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	Professional Services - DE	> 2021	€30 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	PS - Delivery - DE	> 2021	€30 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	PS - Operations - DE	> 2021	€60 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	Services & Sales - Management (DE)	> 2021	€60 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	Services & Sales - Sales (DE)	> 2021	€60 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %
BestRun (DE)	Finance Operations (DE)	> 2021	€60 k	2 %	5 %	3 %	7 %	2 %	5 %	2 %

8. The central parameters which you can maintain are always related to a specific **version** and a **planning level**. The Planning Level defines the organizational granularity for which the planning parameters are stored and at which level you will plan.

Configure Application

Step 1: General Settings **Step 2: Data Input**

Please select the version and the level you wish to plan on.

Version: Aggregated_Plan

Planning Level: CompanyCode/CostCenter

Done **Cancel**

9. In the drop-down box Version select **Aggregated_Plan** and for Planning Level select **Company Code / Business Unit**.

The screenshot shows the 'Configure Application' interface. At the top, it says 'Step 1: General Settings' and 'Step 2: Data Input'. Below that, a message says 'Please select the version and the level you wish to plan on.' A dropdown menu for 'Version' has 'Aggregated_Plan' selected. Another dropdown for 'Planning Level' has 'CompanyCode/BusinessUnit' selected, which is highlighted with a red box.

10. In the second step, **Data Input**, of the wizard, you can define how the parameter values are initialized:

- a. **Manual**: Parameter values are manually initialized
- b. **Copy Data From**: Parameter values are copied from an existing version

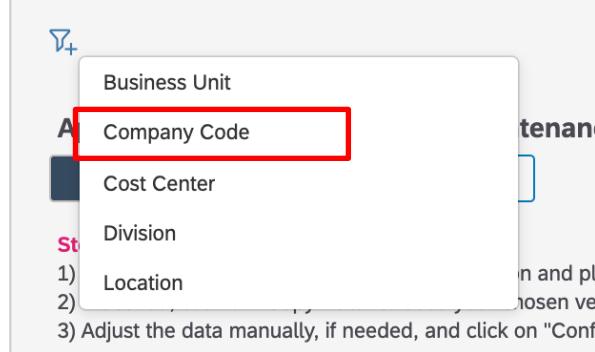
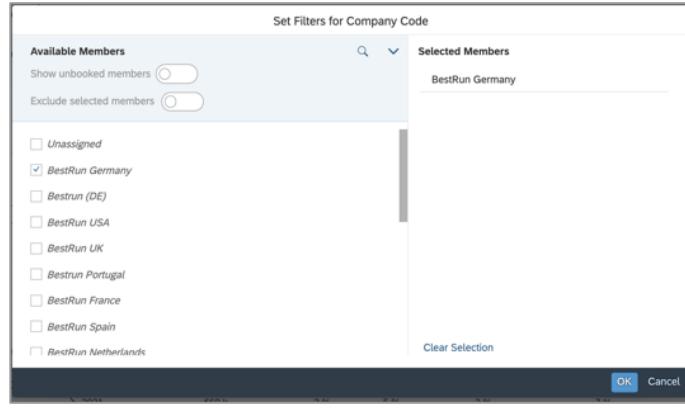
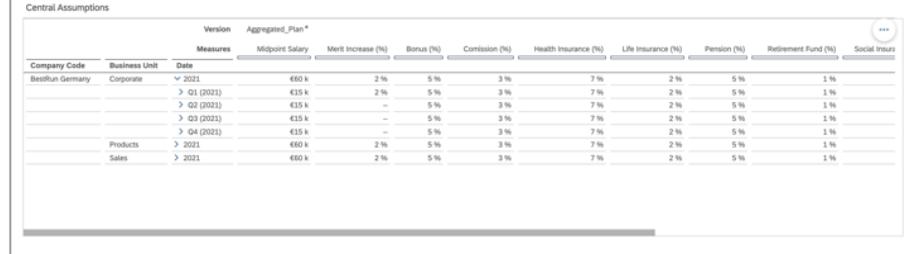
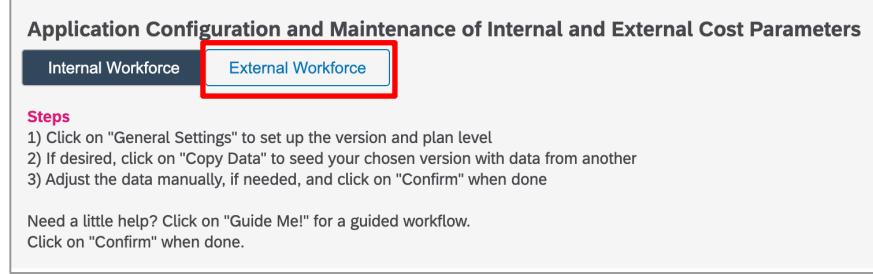
11. Click **Done**. The central assumptions data will be copied into your chosen plan level/version combination.

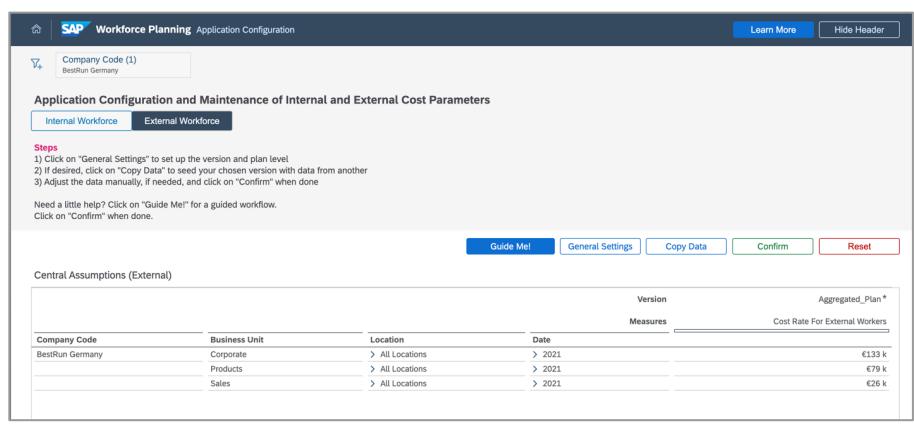
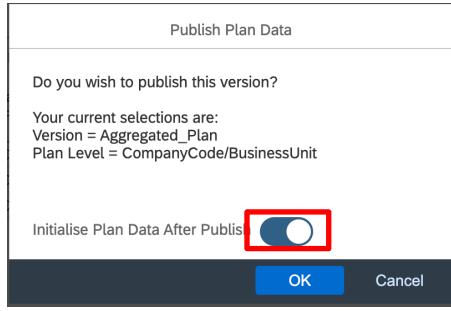
The screenshot shows the 'Configure Application' interface at 'Step 2: Data Input'. It has two radio button options: 'Manual' (selected) and 'Copy Data From'. A dropdown for 'Version' has 'Aggregated_Plan' selected. Below that, a dropdown for 'Prepare input table to maintain parameters for' has 'Internal Workforce' selected. At the bottom right, there are 'Done' and 'Cancel' buttons, with 'Done' highlighted with a red box.

12. The input table for the parameters will be adjusted according to the settings.

13. Click on the filter icon to apply filters to the table

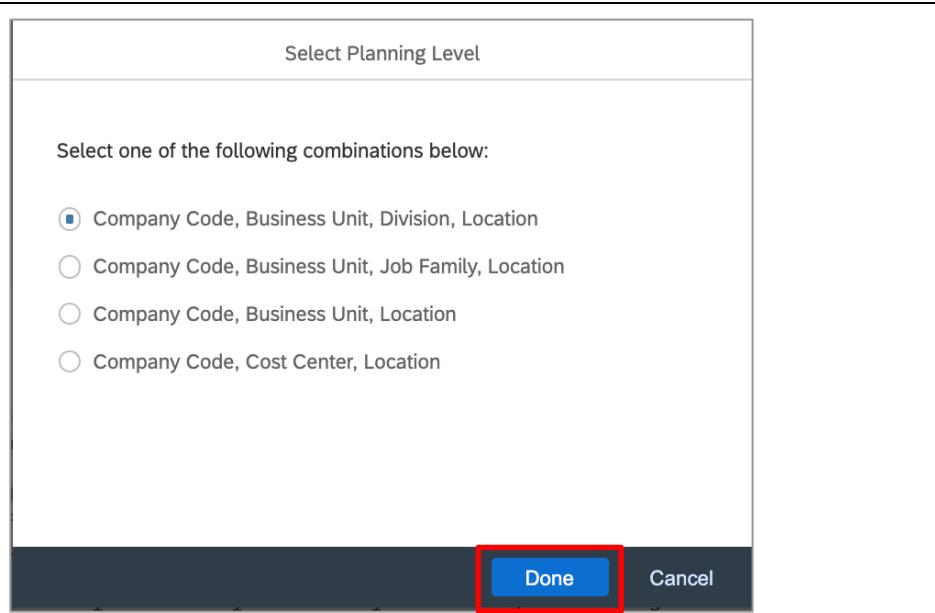
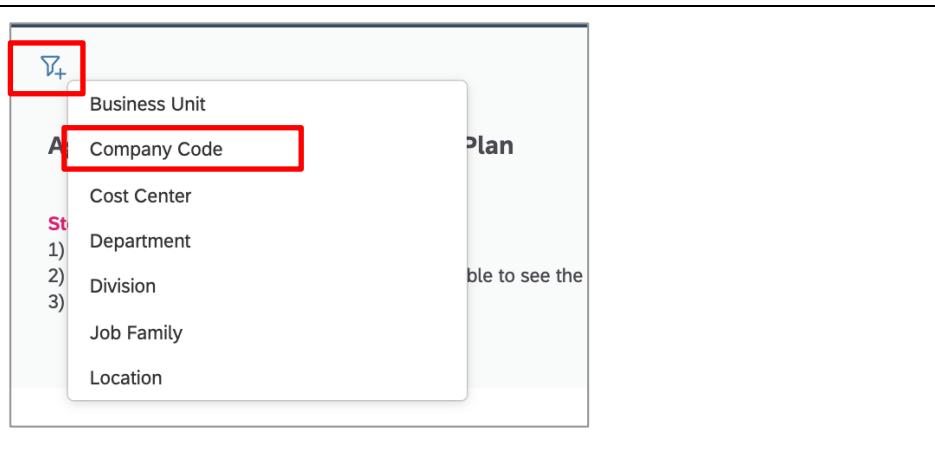
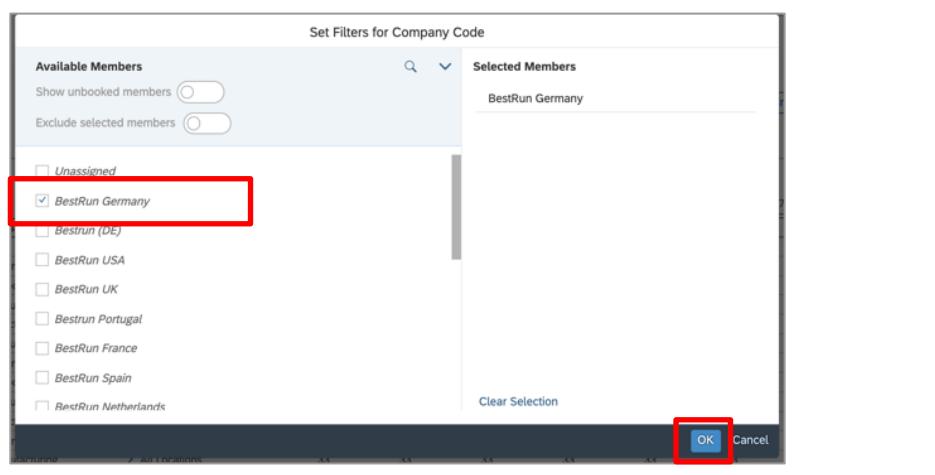
The screenshot shows the 'SAP Workforce Planning Application Configuration' interface. It displays a table titled 'Central Assumptions' under the 'Internal Workforce' tab. The table has columns for Company Code, Business Unit, Date, Measures, Midpoint Salary, Merit Increase (%), Bonus (%), Commission (%), Health Insurance (%), Life Insurance (%), Pension (%), Retirement Fund (%), Social Insurance (%), Travel Costs Absolute Rate, and Car Costs. A red box highlights the filter icon (magnifying glass) at the top left of the table area.

<p>14. Select Company Code from the list of available dimensions.</p>	 <p>Business Unit</p> <p>Company Code</p> <p>Cost Center</p> <p>Division</p> <p>1) Location</p> <p>2)</p> <p>3) Adjust the data manually, if needed, and click on "Confirm".</p>																																																																																																																
<p>15. From the member selector, pick BestRun Germany. Click on OK to confirm your selection.</p>	 <p>Set Filters for Company Code</p> <p>Available Members</p> <p>Show unbooked members <input type="checkbox"/></p> <p>Exclude selected members <input type="checkbox"/></p> <p>Selected Members</p> <p>BestRun Germany</p> <p>Clear Selection</p> <p>OK Cancel</p>																																																																																																																
<p>16. The table is filtered according to the filter settings. You can expand the hierarchy node for the Date dimension and drill down to the quarters or periods.</p>	 <p>Central Assumptions</p> <table border="1"> <thead> <tr> <th>Company Code</th> <th>Business Unit</th> <th>Date</th> <th>Measures</th> <th>Aggregated_Plan*</th> <th>Midpoint Salary</th> <th>Merit Increase (%)</th> <th>Bonus (%)</th> <th>Commission (%)</th> <th>Health Insurance (%)</th> <th>Life Insurance (%)</th> <th>Pension (%)</th> <th>Retirement Fund (%)</th> <th>Social Insur.</th> </tr> </thead> <tbody> <tr> <td>BestRun Germany</td> <td>Corporate</td> <td>> 2021</td> <td></td> <td></td> <td>€60 k</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td></td> <td></td> <td>> Q1 (2021)</td> <td></td> <td></td> <td>€15 k</td> <td>—</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td></td> <td></td> <td>> Q2 (2021)</td> <td></td> <td></td> <td>€15 k</td> <td>—</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td></td> <td></td> <td>> Q3 (2021)</td> <td></td> <td></td> <td>€15 k</td> <td>—</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td></td> <td></td> <td>> Q4 (2021)</td> <td></td> <td></td> <td>€15 k</td> <td>—</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td>Products</td> <td></td> <td>> 2021</td> <td></td> <td></td> <td>€60 k</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> <tr> <td>Sales</td> <td></td> <td>> 2021</td> <td></td> <td></td> <td>€60 k</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td>7 %</td> <td>2 %</td> <td>5 %</td> <td>3 %</td> <td></td> </tr> </tbody> </table>	Company Code	Business Unit	Date	Measures	Aggregated_Plan*	Midpoint Salary	Merit Increase (%)	Bonus (%)	Commission (%)	Health Insurance (%)	Life Insurance (%)	Pension (%)	Retirement Fund (%)	Social Insur.	BestRun Germany	Corporate	> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %				> Q1 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %				> Q2 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %				> Q3 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %				> Q4 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %		Products		> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %		Sales		> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %	
Company Code	Business Unit	Date	Measures	Aggregated_Plan*	Midpoint Salary	Merit Increase (%)	Bonus (%)	Commission (%)	Health Insurance (%)	Life Insurance (%)	Pension (%)	Retirement Fund (%)	Social Insur.																																																																																																				
BestRun Germany	Corporate	> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
		> Q1 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
		> Q2 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
		> Q3 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
		> Q4 (2021)			€15 k	—	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
Products		> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
Sales		> 2021			€60 k	2 %	5 %	3 %	7 %	2 %	5 %	3 %																																																																																																					
<p>17. Click on External Workforce to switch the view and maintain cost drivers for external workforce.</p>	 <p>Application Configuration and Maintenance of Internal and External Cost Parameters</p> <p>Internal Workforce External Workforce</p> <p>Steps</p> <ol style="list-style-type: none"> 1) Click on "General Settings" to set up the version and plan level 2) If desired, click on "Copy Data" to seed your chosen version with data from another 3) Adjust the data manually, if needed, and click on "Confirm" when done <p>Need a little help? Click on "Guide Me!" for a guided workflow. Click on "Confirm" when done.</p>																																																																																																																

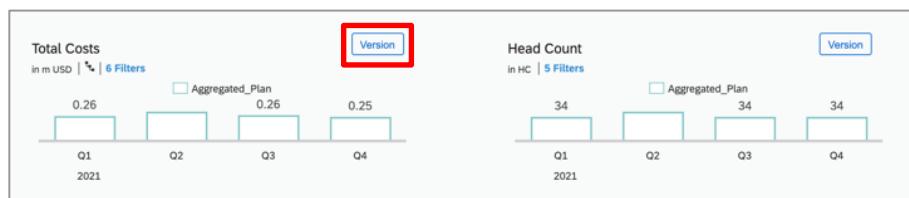
<p>18. The layout of the table is adjusted to include the dimension Location and only one measure for the total cost rate for external workers.</p> <p>19. Change some values in the table.</p>	 <table border="1"> <thead> <tr> <th>Company Code</th> <th>Business Unit</th> <th>Location</th> <th>Date</th> <th>Version</th> <th>Measures</th> <th>Aggregated_Plan *</th> </tr> </thead> <tbody> <tr> <td>BestRun Germany</td> <td>Corporate</td> <td>> All Locations</td> <td>> 2021</td> <td></td> <td></td> <td>€133 k</td> </tr> <tr> <td></td> <td>Products</td> <td>> All Locations</td> <td>> 2021</td> <td></td> <td></td> <td>€79 k</td> </tr> <tr> <td></td> <td>Sales</td> <td>> All Locations</td> <td>> 2021</td> <td></td> <td></td> <td>€26 k</td> </tr> </tbody> </table>	Company Code	Business Unit	Location	Date	Version	Measures	Aggregated_Plan *	BestRun Germany	Corporate	> All Locations	> 2021			€133 k		Products	> All Locations	> 2021			€79 k		Sales	> All Locations	> 2021			€26 k
Company Code	Business Unit	Location	Date	Version	Measures	Aggregated_Plan *																							
BestRun Germany	Corporate	> All Locations	> 2021			€133 k																							
	Products	> All Locations	> 2021			€79 k																							
	Sales	> All Locations	> 2021			€26 k																							
<p>20. Once you are done with your changes, you can click the Confirm button to publish your changes.</p>	<div style="border: 1px solid green; padding: 5px; text-align: center;">Confirm</div>																												
<p>21. You will see a confirmation dialog which summarizes the main settings. Toggle-on Initialise Plan Data After Publish to populate the plan version with initial data.</p> <p>22. Click OK to publish the version.</p>	 <p>Publish Plan Data</p> <p>Do you wish to publish this version?</p> <p>Your current selections are: Version = Aggregated_Plan Plan Level = CompanyCode/BusinessUnit</p> <p>Initialise Plan Data After Publish <input checked="" type="checkbox"/></p> <p>OK Cancel</p>																												
<p>23. Click on the Home icon at the top left of the screen to return to the overview page.</p>																													

Exercise 3 – Aggregated External HC Plan

Explanation	Screenshot
<p>1. On the overview page, click on Aggregated External HC Plan to open the planning application.</p>	
<p>2. On the main screen, you can see the planning table for entering planned headcount for external workers. The values represent the headcount at the end of the period.</p> <p>3. The values are shown for a certain planning level, meaning for a certain combination of dimensions of the planning model.</p>	
<p>4. Click on General Settings to adjust the planning level.</p>	<p>General Settings Confirm Reset</p>

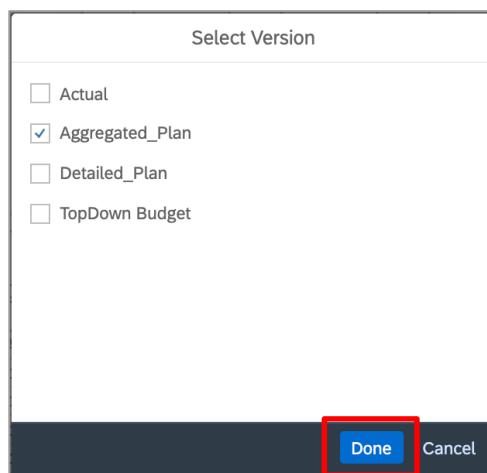
<p>5. You can select from the list of available planning levels. You will enter headcount values at the level of these dimension combinations. The costs are calculated from the central planning parameters which also need to be maintained at the selected planning level.</p> <p>6. Leave the given selection and click OK.</p>	
<p>7. Click on the filter icon at the top left of the page.</p> <p>8. Select Company Code from the list of available dimensions.</p>	
<p>9. Select BestRun Germany from the list of available members.</p> <p>10. Click on OK to confirm your selection.</p>	

11. At the page header you see two charting widgets which you can use to compare different versions. One chart shows cost information the other one headcount.
12. Click on the **Version** to open the version selector.



13. Select the versions you want to compare. Typically, you compare your current plan version against your target, e.g., budget, or strategic plan.
14. Leave the selection and click on **Done**.

Note: Selecting a second version only makes sense if the two versions are comparable, e.g., having a second version representing a strategic plan.



15. Click on **Hide Header** to hide the header section and save some screen space for the plan input table.



16. Navigate to the planning table and expand the node for **Location**.
17. Select a cell for Europe and P04 (2021).

Version	Aggregated_Plan *						
	Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)
Location	34	34	34	38	38		
> All Locations	1	1	1	5	5		
▽ All Locations	1	1	1	1	1	1	
▽ Europe	1	1	1	1	1	1	
Berlin	1	1	1	1	1	1	
> All Locations	31	31	31	31	31	31	
> All Locations	1	1	1	1	1	1	

18. Type in a new value to the cell.

Version	Aggregated_Plan *				
Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)
Location	34	34	34	41	38
> All Locations	1	1	1	5	5
▽ All Locations	1	1	1	4	1
▽ Europe	1	1	1	4	1
Berlin	1	1	1	4	1
> All Locations	31	31	31	4	31
> All Locations	1	1	1	1	1

19. Drag this cell across the table row until P08 (2021)

Version	Aggregated_Plan *									
Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)	P07 (2021)	P08 (2021)	P09 (2021)	P10 (2)
Location	34	34	34	41	38	38	34	34	34	***
> All Locations	1	1	1	5	5	5	1	1	1	
▽ All Locations	1	1	1	4	1	1	1	1	1	
▽ Europe	1	1	1	4	1	1	1	1	1	
Berlin	1	1	1	4	1	1	1	1	1	
> All Locations	31	31	31	31	31	31	31	31	31	
> All Locations	1	1	1	1	1	1	1	1	1	

20. The value will be copied into the cells.

Version	Aggregated_Plan *									
Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)	P07 (2021)	P08 (2021)	P09 (2021)	P10 (2)
Location	34	34	34	41	41	41	37	37	34	***
> All Locations	1	1	1	5	5	5	1	1	1	
▽ All Locations	1	1	1	4	4	4	4	4	4	
▽ Europe	1	1	1	4	4	4	4	4	4	
Berlin	1	1	1	4	4	4	4	4	4	
> All Locations	31	31	31	31	31	31	31	31	31	
> All Locations	1	1	1	1	1	1	1	1	1	

21. Click on the **Calculate Costs** button to recalculate the costs based on the changed headcount values.

Calculate Costs

22. Expand the lower table to show the costs.

 Overview Costs (Reference only - except for adjustments)

23. You can see the new total amount for the planning year.

Overview Costs (Reference only - except for adjustments)				Show Adjustment <input checked="" type="checkbox"/>	Calculate Costs <input type="button" value="Calculate Costs"/>	
Company Code		Business Unit	Division	Location	Date	> 2021
Totals					Measures	Total Amount
BestRun Germany		Corporate	Information Technology	> All Locations	967.00	967.00
		Corporate Services	Corporate Services	> All Locations	62.80	62.80
	Products	Manufacturing	Manufacturing	> All Locations	59.40	59.40
	Sales	Direct Sales	Sales	> All Locations	818.40	818.40
					26.40	26.40

24. Expand into the periods for the year.

Overview Costs (Reference only - except for adjustments)				Date	> 2021	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)	P07 (2021)	P08 (2021)	...
Company Code		Business Unit	Division	Location	Measures	Total Amount								
Totals					967.00	967.00								
BestRun Germany		Corporate	Information Technology	> All Locations	62.80	12.20	2.20	2.20	11.00	11.00	11.00	2.20	2.20	81.40
		Corporate Services	Corporate Services	> All Locations	59.40	2.20	2.20	2.20	8.80	8.80	8.80	2.20	2.20	8.80
	Products	Manufacturing	Manufacturing	> All Locations	818.40	68.20	68.20	68.20	68.20	68.20	68.20	68.20	68.20	68.20
	Sales	Direct Sales	Sales	> All Locations	26.40	2.20	2.20	2.20	2.20	2.20	2.20	2.20	2.20	2.20

25. You can manually adjust the calculated costs.
Toggle-on **Show Adjustment**.

Show Adjustment

26. In the table, you can see additional columns with header **Adjustment** which can be used to manually add an adjustment value which is added to the automatically calculated costs.

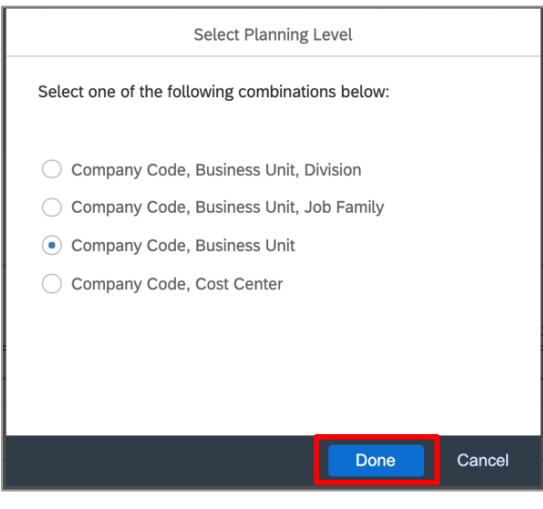
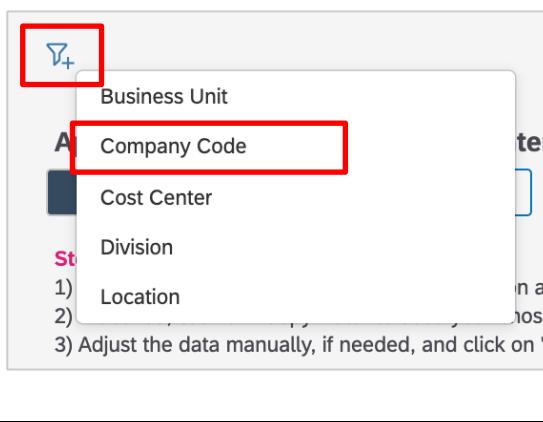
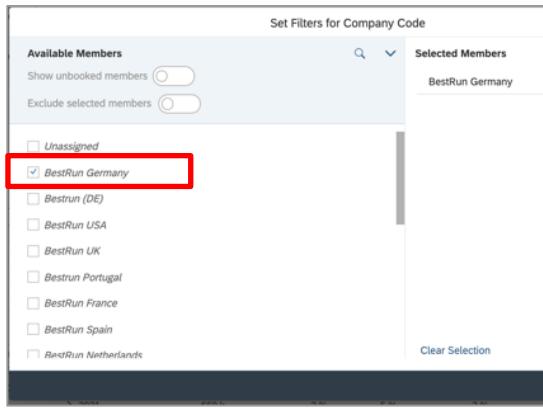
Overview Costs (Reference only - except for adjustments)				Show Adjustment <input checked="" type="checkbox"/>	Calculate Costs <input type="button" value="Calculate Costs"/>									
Company Code		Business Unit	Division	Location	Date	> 2021	P01 (2021)	P02 (2021)	P03 (2021)					
Totals					Measures	Amount	Adjustment	Total Amount	Amount	Adjustment	Total Amount	Amount	Adjustment	Total Amount
BestRun Germany		Corporate	Information Technology	> All Locations	967.00	10.00	997.00	74.00	10.00	64.80	74.80	2.20	2.20	74.80
		Corporate Services	Corporate Services	> All Locations	62.80	10.00	62.80	2.20	10.00	12.00	2.20	2.20	2.20	2.20
	Products	Manufacturing	Manufacturing	> All Locations	59.40	-	59.40	2.20	-	2.20	2.20	-	2.20	2.20
	Sales	Direct Sales	Sales	> All Locations	818.40	-	818.40	68.20	-	68.20	68.20	-	68.20	68.20
					26.40	-	26.40	2.20	-	2.20	2.20	-	2.20	2.20

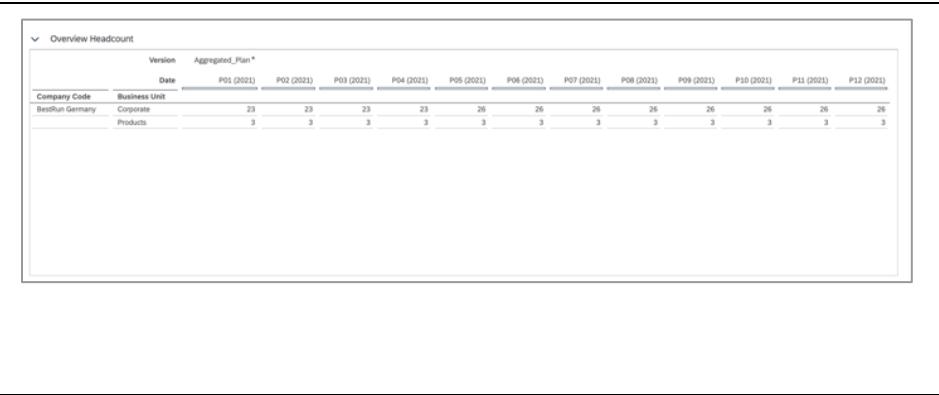
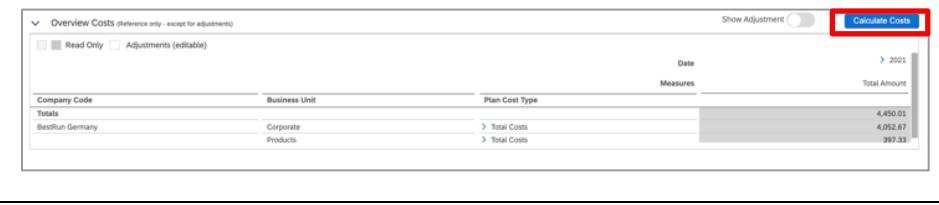
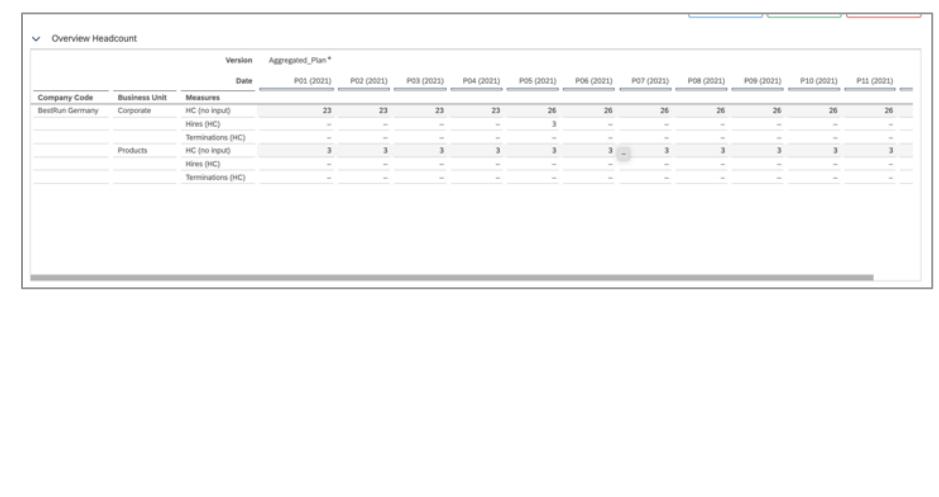
27. Navigate back to the overview page.



Exercise 4 – Aggregated Internal HC Plan

Explanation	Screenshot
<p>1. On the overview page, click on Aggregated Internal HC Plan to open the planning application.</p>	
<p>2. On the main screen, you can see the planning table for entering planned headcount for internal workers. The values represent the headcount at the end of the period.</p> <p>3. The values are shown for a certain planning level, meaning for a certain combination of dimensions of the planning model.</p>	
<p>4. At the page header you see two charting widgets which you can use to compare different versions. One chart shows cost information the other one headcount.</p> <p>5. Click on General Settings to select a planning level.</p>	

<p>6. Select Company Code, Business Unit. As a result, headcount and costs will be planned for combinations of company code and business unit.</p> <p>7. Click on Done to confirm your selection.</p>	
<p>8. Add a filter by clicking on the filter icon at the top left corner of the page.</p> <p>9. Select Company Code from the list of available dimensions.</p>	
<p>10. From the member selector, pick BestRun Germany. Click on OK to confirm your selection.</p>	

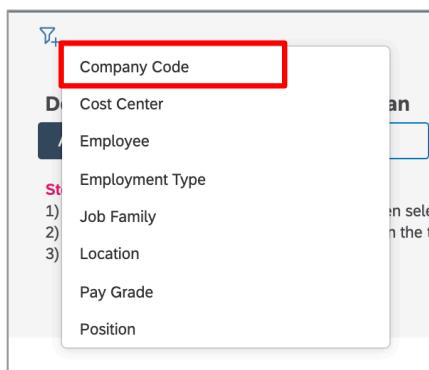
<p>11. Check that the planning grid is filtered to the correct company and see how the planning level was adjusted to show company code and business unit.</p> <p>12. Similar to the application for external workforce planning you can adjust some headcount numbers.</p>	
<p>13. Click on Calculate Costs to re-calculate personnel costs based on your planned headcount and the central parameters.</p>	
<p>14. Expand the cost table to explore the cost structure.</p> <p>15. You can drill-down into the Cost Type dimension to see the break-down of the overall costs.</p>	
<p>16. Besides planning total headcount numbers at the end of each period you can also enter new hires. Click on Plan New Hires Demand.</p>	<p>Aggregated Internal Employee HC Plan</p> <p>Plan Total Demand Plan New Hires Demand </p> <p>Steps</p> <ol style="list-style-type: none"> 1) Enter total headcount demand in the first table 2) Click "Calculate Costs" and check the results in the second table 3) Click "Confirm" when done
<p>17. The table layout changes, and you can see three lines for each combination of company code and business unit:</p> <ul style="list-style-type: none"> a. HC: Planned end-of-period headcount b. Hires: Planned number of hires for the period c. Terminations: Planned number of terminations for the period <p>18. When you recalculate the costs, the system will also recalculate the correct number of end-of-period HC for the full year.</p>	

19. Navigate back to the overview page.	
---	--

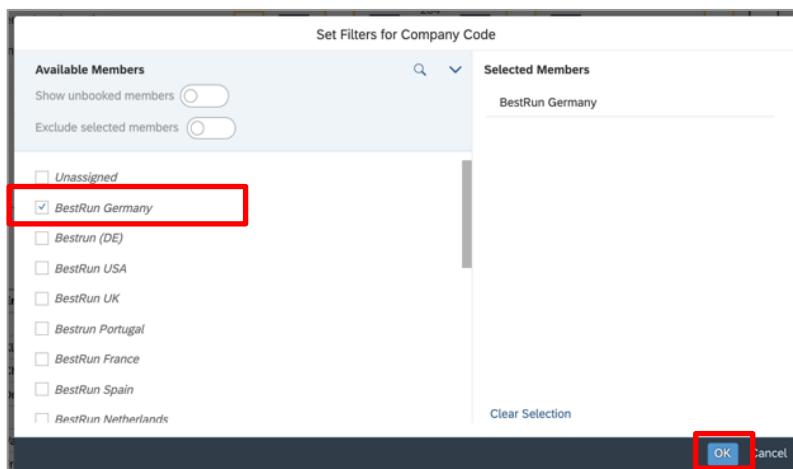
Exercise 5 – Detailed Internal HC Plan

Explanation	Screenshot
<p>1. On the overview page, click on Detailed Internal FTE Plan to open the planning application.</p>	
<p>2. The planning grid in the main view shows the FTE values for each individual employee. For the employees, additional information like Job Family, Location and Pay Grade are also shown.</p> <p>3. At the bottom there is a second table showing cost information.</p>	

4. Add a filter by clicking on the **filter** icon at the top left corner of the page.
5. Select **Company Code** from the list of available dimensions.



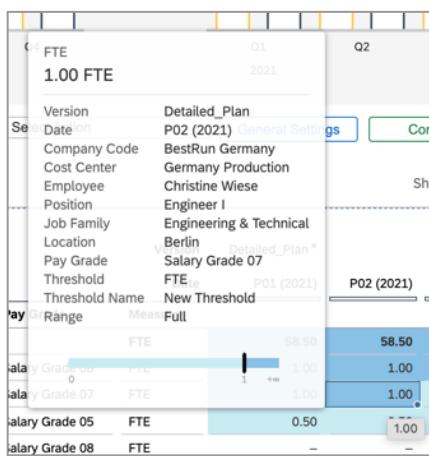
6. From the member selector, pick **BestRun Germany**. Click on **OK** to confirm your selection.



7. Click on a cell in the table.

Overview FTE (reference Only)										Detailed_Plan*									
Company Code	Cost Center	Employee	Position	Job Family	Location	Pay Grade	Measures	Version Detailed_Plan*											
								Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)	P07 (2021)	P08 (2021)	P09 (2021)	P10 (2021)	P11 (2021)
BestRun Germany	Germany Production	Klaus Frommherz	QA Engineer	Engineering & Technical	Frankfurt	Salary Grade 08	FTE	32.50	32.50	30.30	33.30	29.30	29.80	29.10	—	—	—	—	—
		Christine Wiese	Engineer I	Engineering & Technical	Berlin	Salary Grade 07	FTE	1.00	1.00	0.00	0.00	0.00	0.00	0.00	—	—	—	—	—
		Dmitri Kupfer	Engineering Intern	Engineering & Technical	Berlin	Salary Grade 05	FTE	0.50	0.50	0.50	0.50	0.50	0.50	0.50	—	—	—	—	—
		Vinzenz Wagner	VP Operations	Executives	Berlin	Salary Grade 10	FTE	—	—	—	—	—	—	—	—	—	—	—	—
		Fredrik Bergq	Controller	Salaried Craft Worker	Munich	Hourly Grade 03	FTE	1.00	1.00	—	—	—	—	—	—	—	—	—	—
		Stefan Feindler	Custodian	Salaried Craft Worker	Berlin	Hourly Grade 03	FTE	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		Peter Eckard	Engineering Manager	Managers - Business Ops	Berlin	Salary Grade 10	FTE	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
		Kathrin Denecken	Program Management Office	Managers - Business Ops	Frankfurt	Salary Grade 08	FTE	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	—

8. If you keep the mouse pointer over the cell you will see additional information for that employee.
9. You will also see the selected employee in a text field above the table.



10. From the drop-down box, you can select an activity which you want to apply to the selected employee.
11. Click on **Adjust Employment Level**.

Location	Pay Grade	Measures
Frankfurt	Salary Grade 08	FTE
Berlin	Salary Grade 07	FTE

12. In the popup window you can adjust the employment level (**FTE**) and select a time range for which this change is applied (**Valid From / Valid To**).
13. Click on **Done** to apply the change.

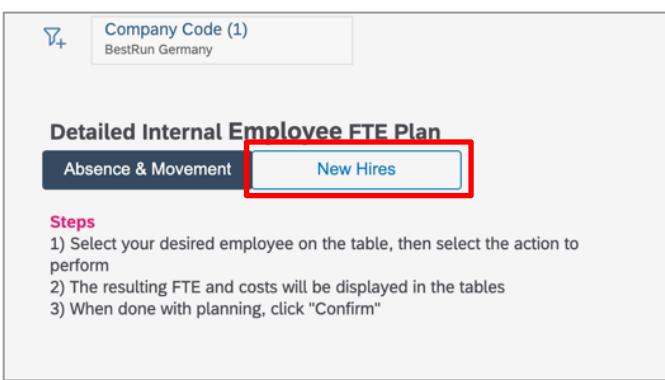
14. You can see the impact of the change in the planning table.
15. The costs are automatically re-calculated based on those changes.

		Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)	P06 (2021)	P07 (2021)	P08 (2021)	P09 (2021)	P10 (2021)	P11 (2021)	P12 (2021)
Location	Pay Grade	Measures	FTE	58.50	58.50	57.30	58.30	56.30	56.60	56.60	57.80	57.80	57.80	57.80
al. Frankfurt	Salary Grade 08	FTE		1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
al. Berlin	Salary Grade 07	FTE		1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
al. Berlin	Salary Grade 05	FTE		0.50	0.50	0.50	0.50	0.50	0.80	0.80	0.80	0.80	0.80	0.80
	Salary Grade 08	FTE		—	—	—	—	—	—	—	—	—	—	—
	Berlin	Salary Grade 12	FTE		1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

16. Expand the section **Overview FTE Costs** to analyze the costs for each individual employee.
17. The costs are calculated from the FTE values and the central parameters which can be maintained in the Configuration Application.

Overview FTE (Reference Only)														
Overview FTE Costs (reference only - except for adjustments)														
Company Code			Cost Center		Employee		Position		Job Family		Location		Pay Grade	
Totals	BestRun Germany	Germany Production	Klaus Frommherz	QA Engineer	Engineering & Technical	Frankfurt	Salary Grade 08							
			Christine Wieser	Engineer I	Engineering & Technical	Berlin	Salary Grade 07							
			Dmitri Kupler	Engineering Intern	Engineering & Technical	Berlin	Salary Grade 05							
			Vanessa Wagner	VP Operations	Executives	Berlin	Salary Grade 12							
			Frederic Berbig	Custodian	Skilled Craft Workers	Munich	Hourly Grade 03							
			Stefan Freilinger	Custodian	Skilled Craft Workers	Berlin	Hourly Grade 03							
			Peter Eckardt	Engineering Manager	Managers - Business Ops	Berlin	Salary Grade 10							
			Kathrin Deneckert	Program Management Office	Managers - Business Ops	Frankfurt	Salary Grade 08							
					Salary Grade 09									

18. Besides changes for existing employees, you can also plan new positions.
 19. Click on **New Hires**.



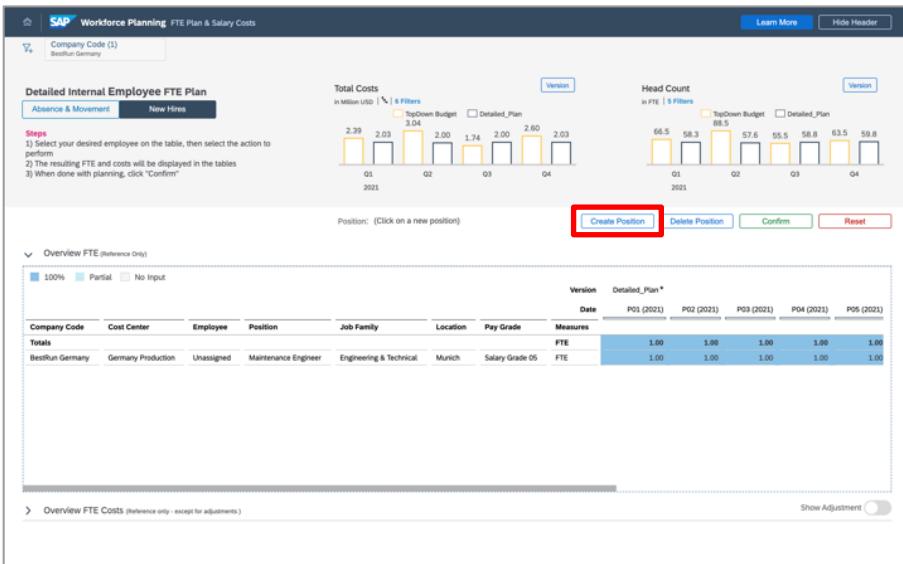
Detailed Internal Employee FTE Plan

Absence & Movement **New Hires** (highlighted with a red box)

Steps

- 1) Select your desired employee on the table, then select the action to perform
- 2) The resulting FTE and costs will be displayed in the tables
- 3) When done with planning, click "Confirm"

20. In the New Hires perspective, you will see open positions, i.e., planned positions which are not yet filled with an employee.
 21. To plan a new position, click on **Create Position**.



SAP Workforce Planning FTE Plan & Salary Costs

Company Code (1)
BestRun Germany

Detailed Internal Employee FTE Plan

Absence & Movement **New Hires** (highlighted with a red box)

Steps

- 1) Select your desired employee on the table, then select the action to perform
- 2) The resulting FTE and costs will be displayed in the tables
- 3) When done with planning, click "Confirm"

Total Costs
in Million USD | 8 Filters

Quarter	Actual	Budget	Plan
Q1	2.39	2.03	3.04
Q2	2.00	1.74	2.00
Q3	2.00	2.60	2.03
Q4	2.03		

Head Count
in FTE | 5 Filters

Quarter	Actual	Budget	Plan
Q1	66.5	58.3	88.5
Q2	57.6	55.5	58.8
Q3	63.5	63.5	59.8
Q4	59.8		

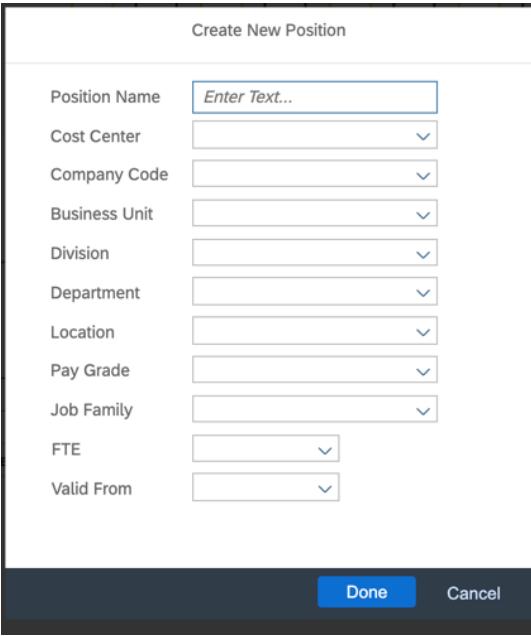
Position: (Click on a new position) **Create Position** (highlighted with a red box) Delete Position Confirm Reset

Overview FTE (Reference Only)

Company Code	Cost Center	Employee	Position	Job Family	Location	Pay Grade	Measures						
							Detailed_Plan*						
Totals	BestRun Germany	Germany Production	Unassigned	Maintenance Engineer	Engineering & Technical	Munich	Salary Grade 05	Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)	P05 (2021)
							FTE		1.00	1.00	1.00	1.00	1.00
							FTE		1.00	1.00	1.00	1.00	1.00

Overview FTE Costs (Reference only - except for adjustments) Show Adjustment

22. In the pop-up window, you can provide attributes for the new position.



Create New Position

Position Name	Enter Text...
Cost Center	dropdown
Company Code	dropdown
Business Unit	dropdown
Division	dropdown
Department	dropdown
Location	dropdown
Pay Grade	dropdown
Job Family	dropdown
FTE	dropdown
Valid From	dropdown

Done Cancel

23. Fill in some reasonable values and click on **Done** to create the position.

Create New Position

Position Name	Maintenance Engineer 2
Cost Center	Germany Production
Company Code	BestRun Germany
Business Unit	Global Consulting Servi...
Division	Manufacturing
Department	Engineering DE
Location	Berlin
Pay Grade	Salary Grade 14
Job Family	Managers - Business Ops
FTE	1
Valid From	P06 (2021)

Done **Cancel**

24. The new position is created, and the costs related to this position are calculated and shown in the cost overview at the bottom of the page.

Overview FTE (reference only)							Detailed_Plan*				
Company Code	Cost Center	Employee	Position	Job Family	Location	Pay Grade	Measures				
							Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)
Totals							FTE	1.00	1.00	1.00	1.00
BestRun Germany	Germany Production	Unassigned	Maintenance Engineer	Engineering & Technical	Munich	Salary Grade 05	FTE	1.00	1.00	1.00	1.00

Overview FTE Costs (reference only - except for adjustments)							Detailed_Plan*				
Company Code	Cost Center	Employee	Position	Job Family	Location	Pay Grade	Measures				
							Date	P01 (2021)	P02 (2021)	P03 (2021)	P04 (2021)
Totals							Total	€64.08 k	€3.35 k	€3.35 k	€3.39 k
BestRun Germany	Germany Production	Unassigned	Maintenance Engineer	Engineering & Technical	Munich	Salary Grade 05	> Total Costs	€40.63 k	€3.35 k	€3.35 k	€3.39 k
			Maintenance Engineer 2	Managers - Business Ops	Berlin	Salary Grade 14	> Total Costs	€23.45 k	—	—	—

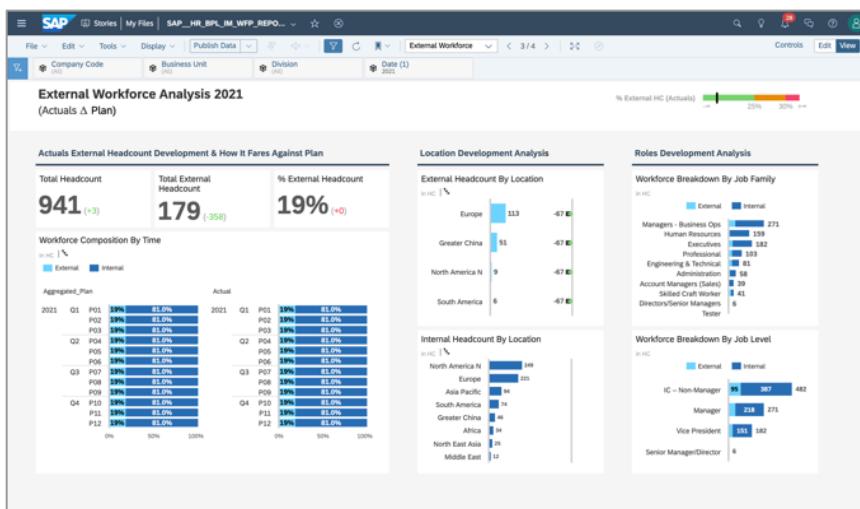
25. Navigate back to the overview page.



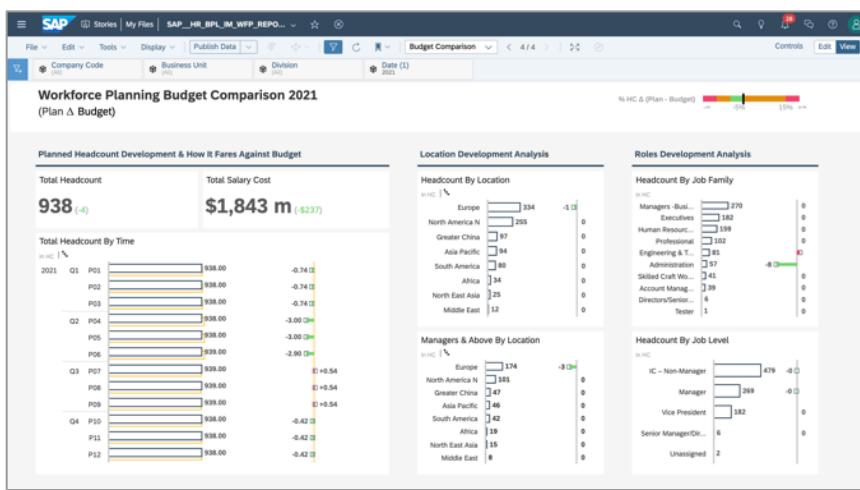
Exercise 6 – Reporting

Explanation	Screenshot
<ol style="list-style-type: none"> On the overview page, click on Progress Overview to open the first page of the reporting story. The story has four pages which you can directly open from the landing page. 	
<ol style="list-style-type: none"> The page Progress Overview shows actual headcount numbers and the deviation to the plan. 	
<ol style="list-style-type: none"> The page Gender Analysis shows KPI's and breakdowns related to the gender distribution of the workforce. 	

5. The page **External Workforce** shows headcount information related to external workforce and variances between actual and plan data.



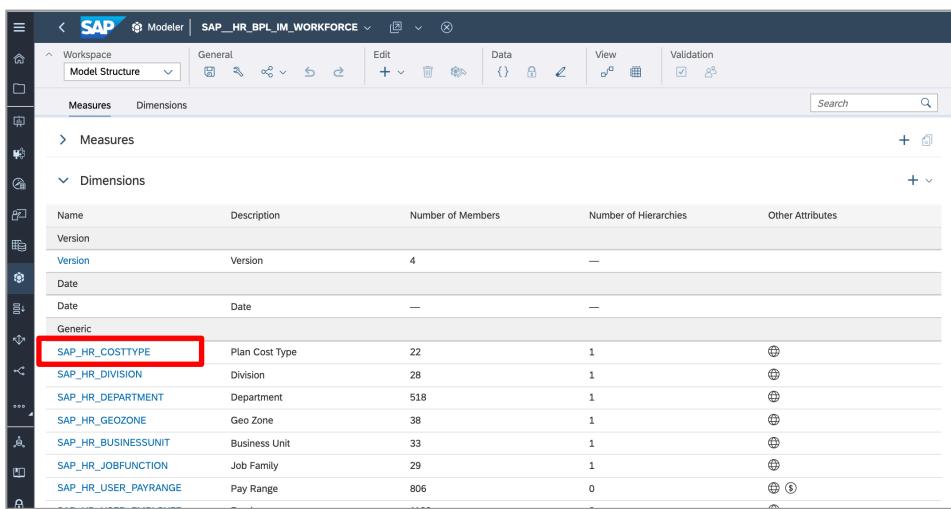
6. The page **Budget Comparison** shows Plan/Budget comparisons.



Exercise 7 – Integration to Financial Planning

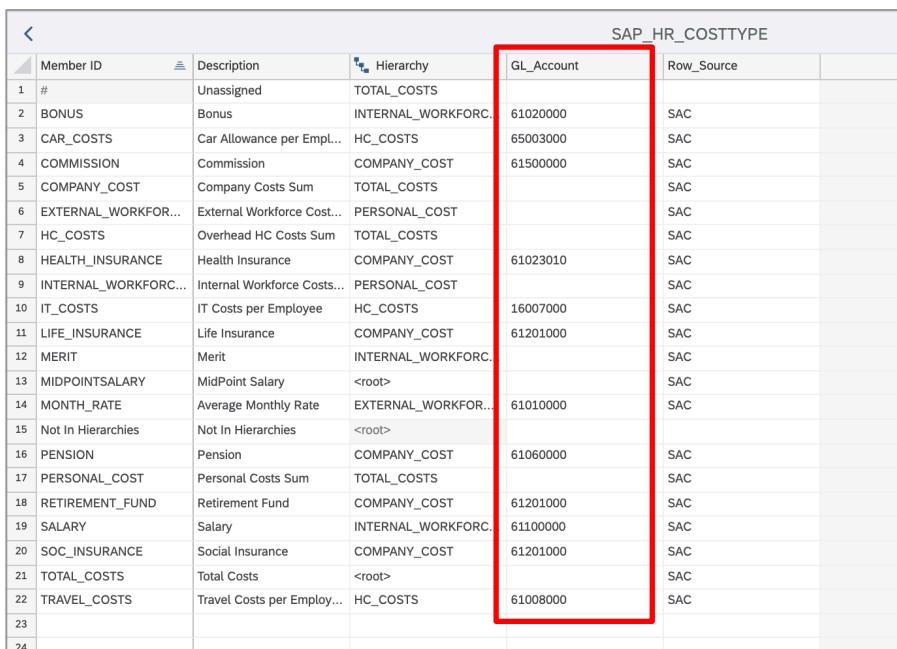
Explanation	Screenshot
<ol style="list-style-type: none"> For this exercise, the business content Integrated Financial Planning for SAP S/4HANA needs to be imported as a pre-requisite. Navigate to Files in the main menu. Type in HXM in the search field. Click on the model HXM Integrated Workforce Planning. 	

5. Click on the **SAP_HR_COSTTYPE** to open the maintenance view for the dimension.



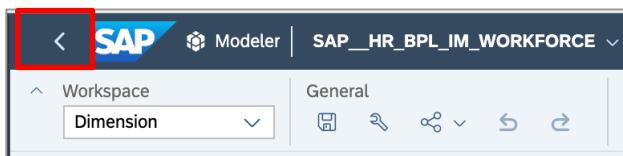
Name	Description	Number of Members	Number of Hierarchies	Other Attributes
Version	Version	4	—	
Date	Date	—	—	
Generic				
SAP_HR_COSTTYPE	Plan Cost Type	22	1	⊕
SAP_HR_DIVISION	Division	28	1	⊕
SAP_HR_DEPARTMENT	Department	518	1	⊕
SAP_HR_GEOZONE	Geo Zone	38	1	⊕
SAP_HR_BUSINESSUNIT	Business Unit	33	1	⊕
SAP_HR_JOBFUNCTION	Job Family	29	1	⊕
SAP_HR_USER_PAYRANGE	Pay Range	806	0	⊕ (i)

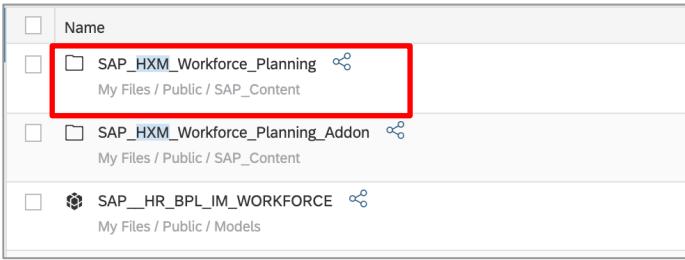
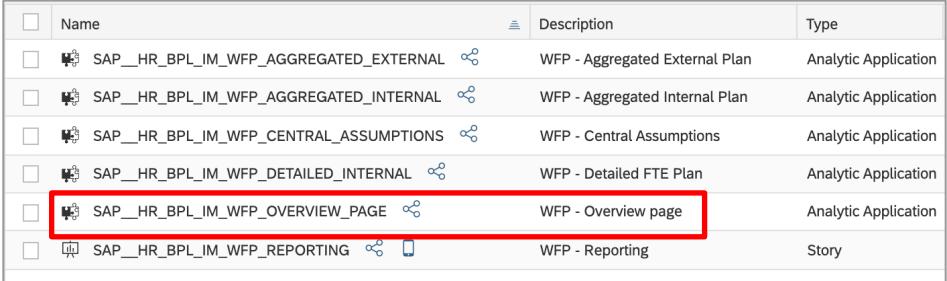
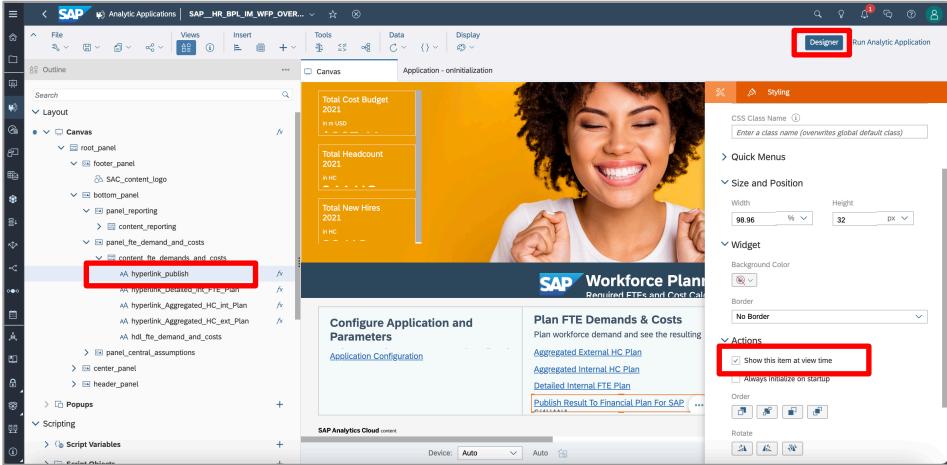
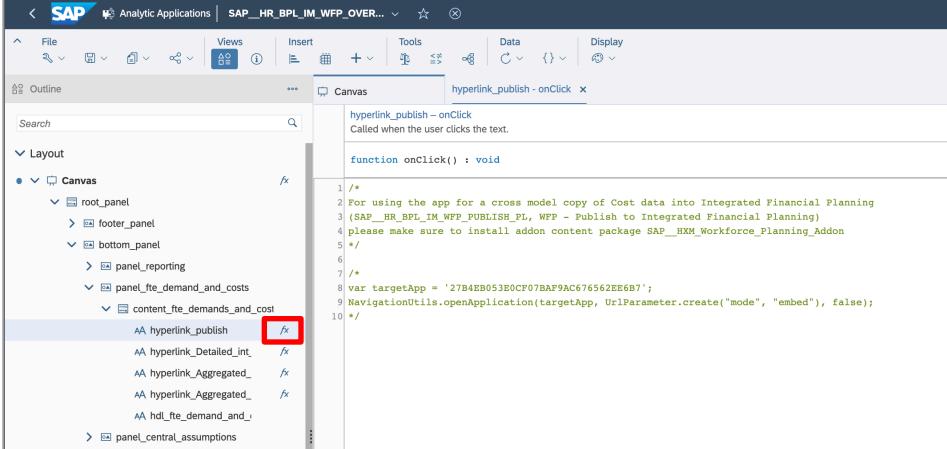
6. The dimension Cost Type has an attribute **GL_Account** which maps the cost type for HR planning to a GL account in the financial planning model. Make sure that you maintain the GL account attribute as shown in the screenshot.

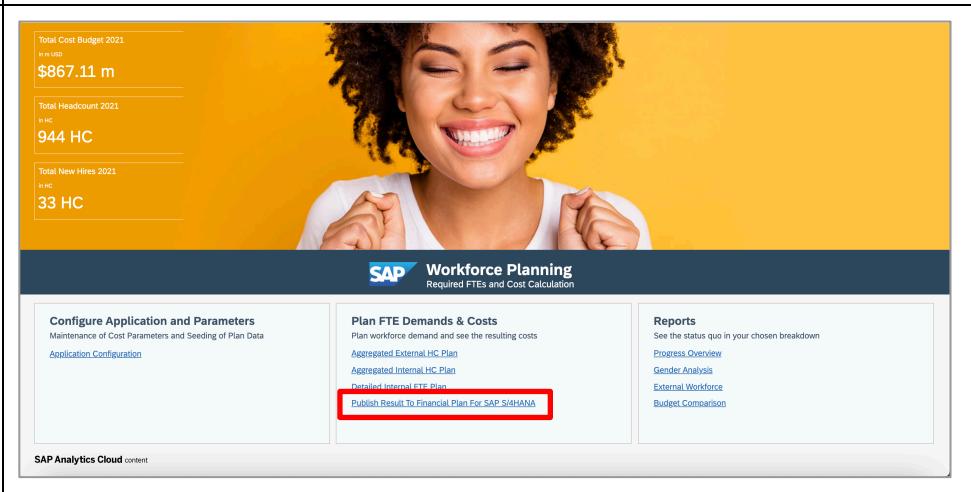
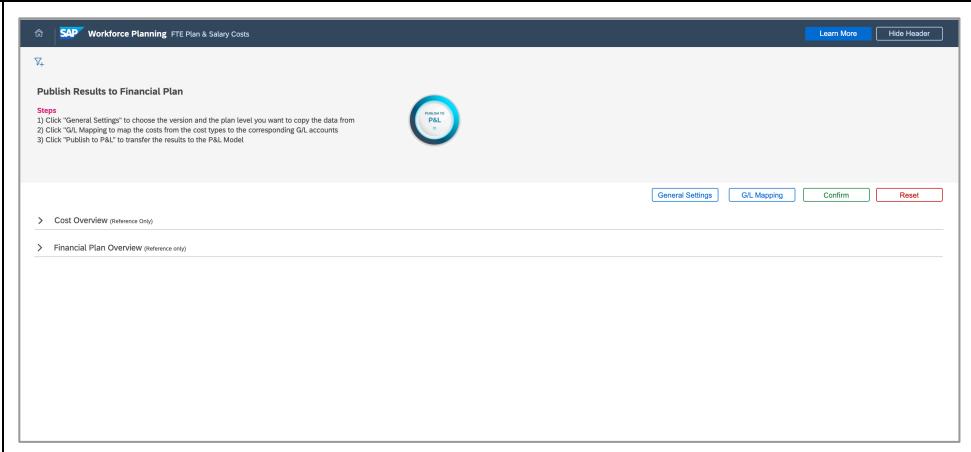


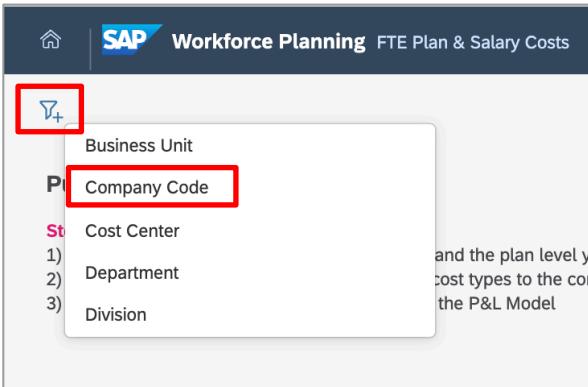
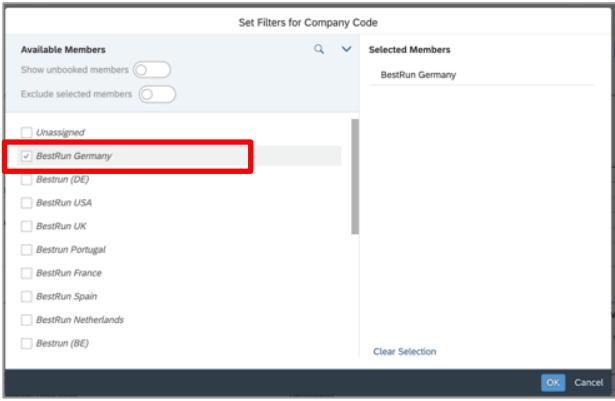
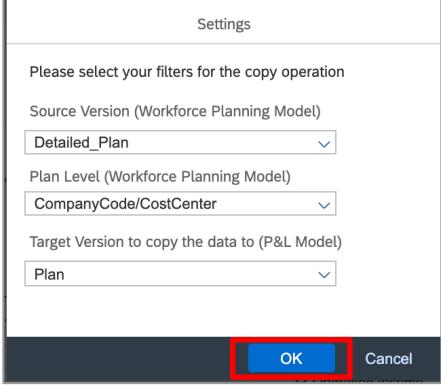
Member ID	Description	Hierarchy	GL_Account	Row_Source
1 #	Unassigned	TOTAL_COSTS		
2 BONUS	Bonus	INTERNAL_WORKFORC.	61020000	SAC
3 CAR_COSTS	Car Allowance per Empl...	HC_COSTS	65003000	SAC
4 COMMISSION	Commission	COMPANY_COST	61500000	SAC
5 COMPANY_COST	Company Costs Sum	TOTAL_COSTS		
6 EXTERNAL_WORKFOR...	External Workforce Cost...	PERSONAL_COST		SAC
7 HC_COSTS	Overhead HC Costs Sum	TOTAL_COSTS		SAC
8 HEALTH_INSURANCE	Health Insurance	COMPANY_COST	61023010	SAC
9 INTERNAL_WORKFORC...	Internal Workforce Costs...	PERSONAL_COST		SAC
10 IT_COSTS	IT Costs per Employee	HC_COSTS	16007000	SAC
11 LIFE_INSURANCE	Life Insurance	COMPANY_COST	61201000	SAC
12 MERIT	Merit	INTERNAL_WORKFORC.		SAC
13 MIDPOINTSALARY	MidPoint Salary	<root>		SAC
14 MONTH_RATE	Average Monthly Rate	EXTERNAL_WORKFOR...	61010000	SAC
15 Not In Hierarchies	Not In Hierarchies	<root>		
16 PENSION	Pension	COMPANY_COST	61060000	SAC
17 PERSONAL_COST	Personal Costs Sum	TOTAL_COSTS		SAC
18 RETIREMENT_FUND	Retirement Fund	COMPANY_COST	61201000	SAC
19 SALARY	Salary	INTERNAL_WORKFORC.	61100000	SAC
20 SOC_INSURANCE	Social Insurance	COMPANY_COST	61201000	SAC
21 TOTAL_COSTS	Total Costs	<root>		SAC
22 TRAVEL_COSTS	Travel Costs per Employ...	HC_COSTS	61008000	SAC
23				
24				

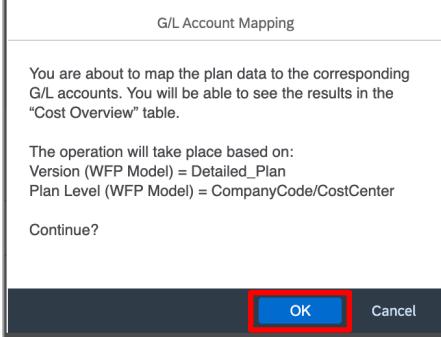
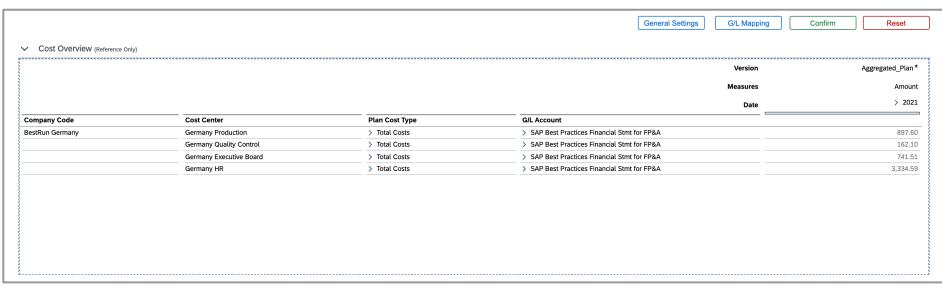
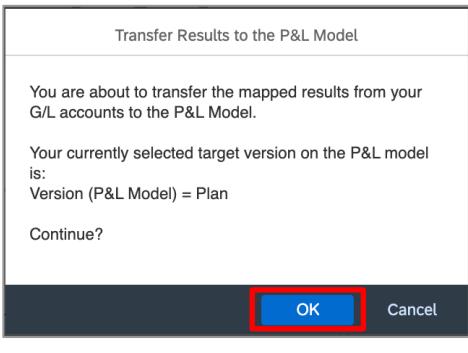
7. Click on the back icon to navigate back to the search results.



<p>8. Click on SAP HXM Workforce Planning to open the folder.</p>	
<p>9. Click on the item WFP – Overview page to open the application in the analytics designer.</p>	
<p>10. Select the item hyperlink_publish in the Outline window. 11. Click on Designer to open the Styling panel. 12. Make sure that the check box Show this item at view time is active.</p>	
<p>13. Click on the fx icon next to the hyperlink_publish element to open the script editor.</p>	 <pre> function onClick() : void { /* 2 For using the app for a cross model copy of Cost data into Integrated Financial Planning 3 (SAP_HR_BPL_IM_WFP_PUBLISH_PL, WFP - Publish to Integrated Financial Planning) 4 please make sure to install addon content package SAP_HXM_Workforce_Planning_Addon 5 */ /* 8 var targetApp = '27B4EB053E0CF07BAF9AC676562EE6B7'; 9 NavigationUtils.openApplication(targetApp, UrlParameter.create("mode", "embed"), false); 10 */ } </pre>

<p>14. Uncomment the lines 8 and 9 to activate the code.</p> <p>15. As a result, the user will navigate to the application which transfers the plan data to the financial planning model.</p>	<pre>hyperlink_publish – onClick Called when the user clicks the text. function onClick() : void 1 /* 2 For using the app for a cross model copy of Cost data into Integrated Financial Planning 3 (SAP__HR_BPL_IM_WFP_PUBLISH_PL, WFP - Publish to Integrated Financial Planning) 4 please make sure to install addon content package SAP__HXM_Workforce_Planning_Addon 5 */ 6 7 8 var targetApp = '27B4EB053E0CF07BAF9AC676562EE6B7'; 9 NavigationUtils.openApplication(targetApp, UrlParameter.create("mode", "embed"), false); 10 </pre>
<p>16. Click on the Save icon in the toolbar to save your changes.</p>	
<p>17. Click on Run Analytic Application to start the application.</p>	
<p>18. On the overview page, you will see the entry Publish Result To Financial Plan for SAP S/4HANA.</p> <p>19. Click on Publish Result To Financial Plan for SAP S/4HANA to open the application.</p>	
<p>20. In this application, you can derive the corresponding G/L accounts for the planned HR costs and transfer the data to the financial planning model.</p>	

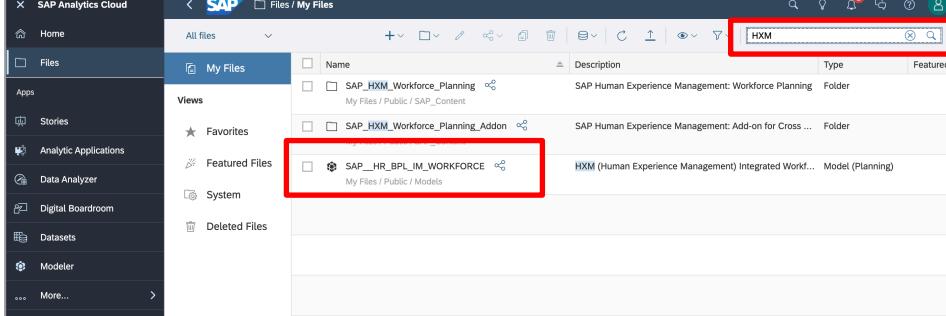
<p>21. Add a filter by clicking on the filter icon at the top left corner of the page.</p> <p>22. Select Company Code from the list of available dimensions.</p>	
<p>23. From the member selector, pick BestRun Germany. Click on OK to confirm your selection.</p>	
<p>24. Click on General Settings to set some parameters for the data transfer to the financial plan.</p>	
<p>25. In the settings dialog, you can specify the source version in the HXM model as well as the planning level. In addition, you can define the target version in the financial planning model.</p> <p>26. Click on OK to confirm the settings.</p>	
<p>27. Click on G/L Mapping to derive the G/L accounts.</p>	

<p>28. Click on OK to confirm the mapping parameters and start the derivation.</p>	
<p>29. In the Cost Overview table, you will see the planned cost types together with the corresponding G/L accounts.</p>	
<p>30. Click on the button PUBLISH TO P&L to transfer the data to the financial planning model.</p>	
<p>31. Click on OK to confirm the settings and start the transfer.</p>	

32. In the table **Financial Plan Overview** you can see the result of the transfer.

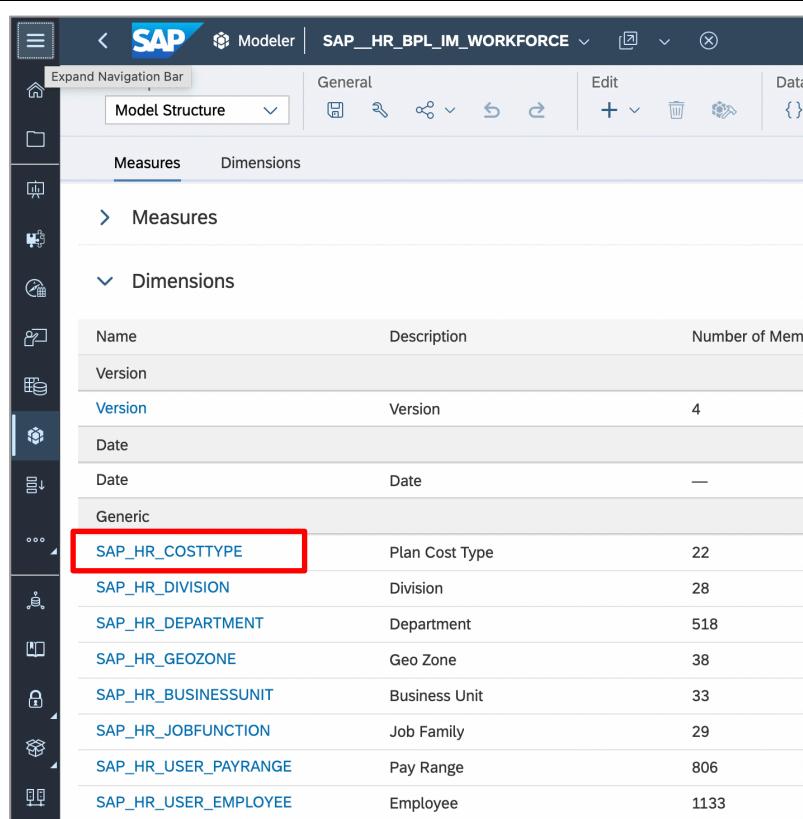
Cost Overview (Reference Only)		
<input type="button" value="General Settings"/> <input type="button" value="GIL Mapping"/> <input type="button" value="Confirm"/> <input type="button" value="Reset"/>		
Company Code	Cost Center	GIL Account
Betrun Germany	Germany Production	<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A <input checked="" type="checkbox"/> Net Income <input checked="" type="checkbox"/> Operating Income <input checked="" type="checkbox"/> Operating Expenses <input checked="" type="checkbox"/> Employee Expense <input checked="" type="checkbox"/> Payroll and Benefits <input checked="" type="checkbox"/> Payroll Other <input checked="" type="checkbox"/> Payroll - Other Personnel Expenses
	Germany Quality Control	<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A <input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for Payroll - Other Personnel Expenses
	Germany Executive Board	<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A
	Germany HR	<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A
	Professional Services - DE	<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A
Betrun (DE)		<input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A <input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for Payroll - Other Personnel Expenses <input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A <input checked="" type="checkbox"/> SAP Best Practices Financial Stmt for FP&A

Exercise 8 – Add additional cost type

Explanation	Screenshot
<ol style="list-style-type: none"> In the main menu, click on Files. Type in HXM in the search bar to see the related objects in the file repository. Click on the model HXM Integrated Workforce Planning. 	 <p>The screenshot shows the SAP Analytics Cloud interface with the 'My Files' view selected. A red box highlights the search bar at the top containing the text 'HXM'. Another red box highlights the model 'SAP_HXM_IM_WORKFORCE' listed in the results, which is described as 'HXM (Human Experience Management) Integrated Workforce Planning Model (Planning)'.</p>

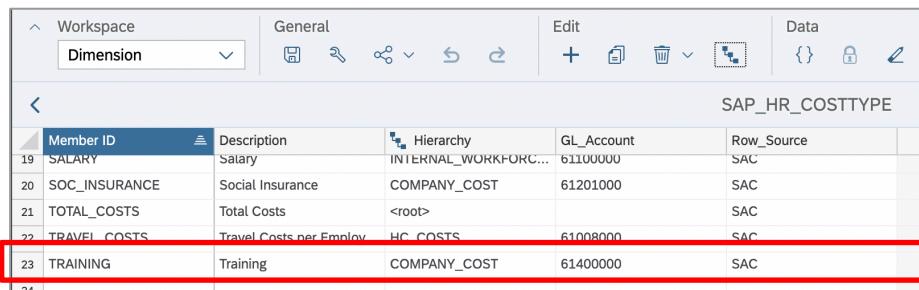
ANA360

4. In the Model Structure, click on the dimension **SAP_HR_COSTTYPE** to open the master data maintenance view.



Name	Description	Number of Mem
Version	Version	4
Date	Date	—
Generic		
SAP_HR_COSTTYPE	Plan Cost Type	22
SAP_HR_DIVISION	Division	28
SAP_HR_DEPARTMENT	Department	518
SAP_HR_GEOZONE	Geo Zone	38
SAP_HR_BUSINESSUNIT	Business Unit	33
SAP_HR_JOBFUNCTION	Job Family	29
SAP_HR_USER_PAYRANGE	Pay Range	806
SAP_HR_USER_EMPLOYEE	Employee	1133

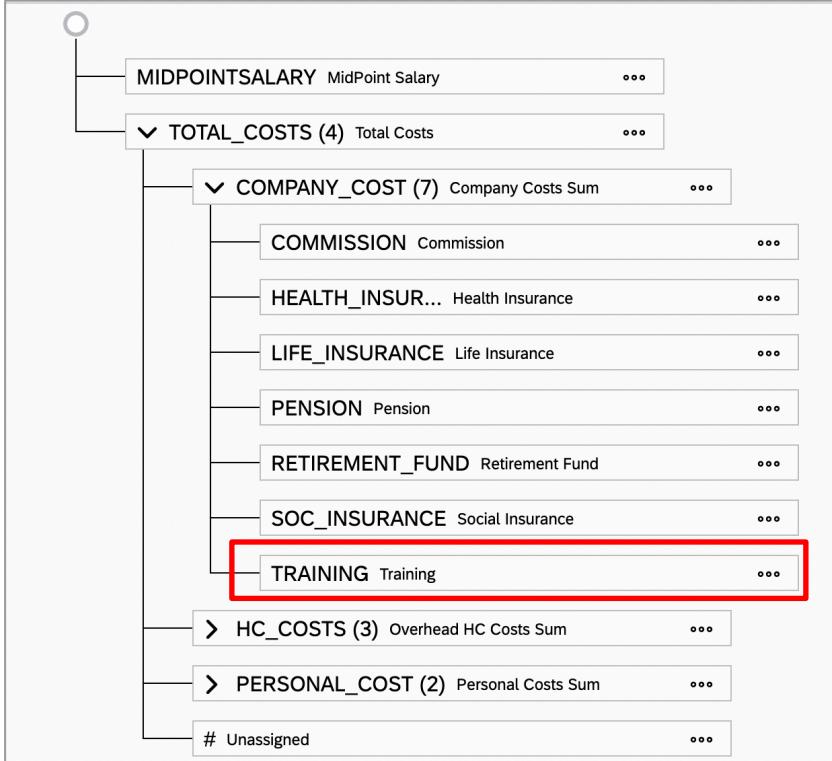
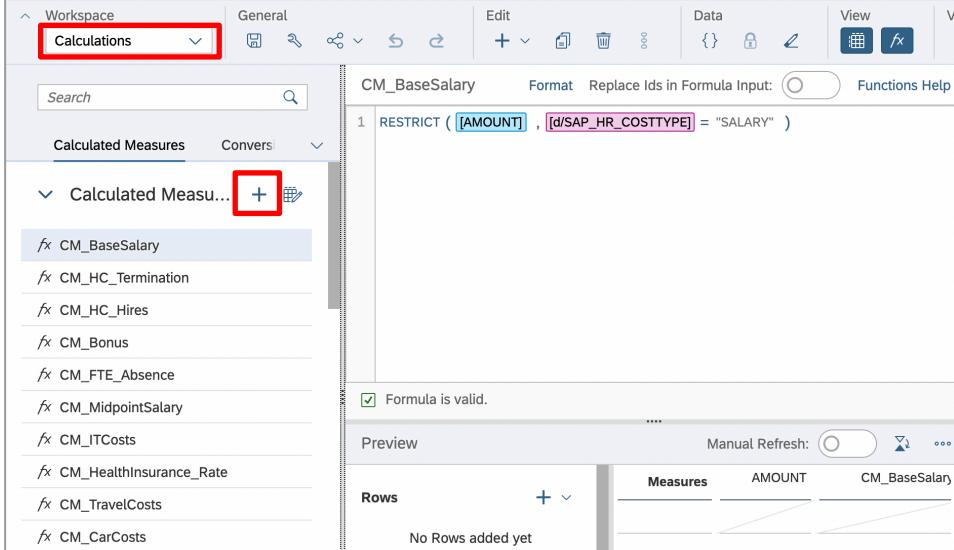
5. Add an additional entry at the bottom of the table with the following information:
- Member ID: **TRAINING**
 - Description: **Training**
 - Hierarchy: **COMPANY_COST**
 - GL_Account: **6140000**
 - Row_Source: **SAC**



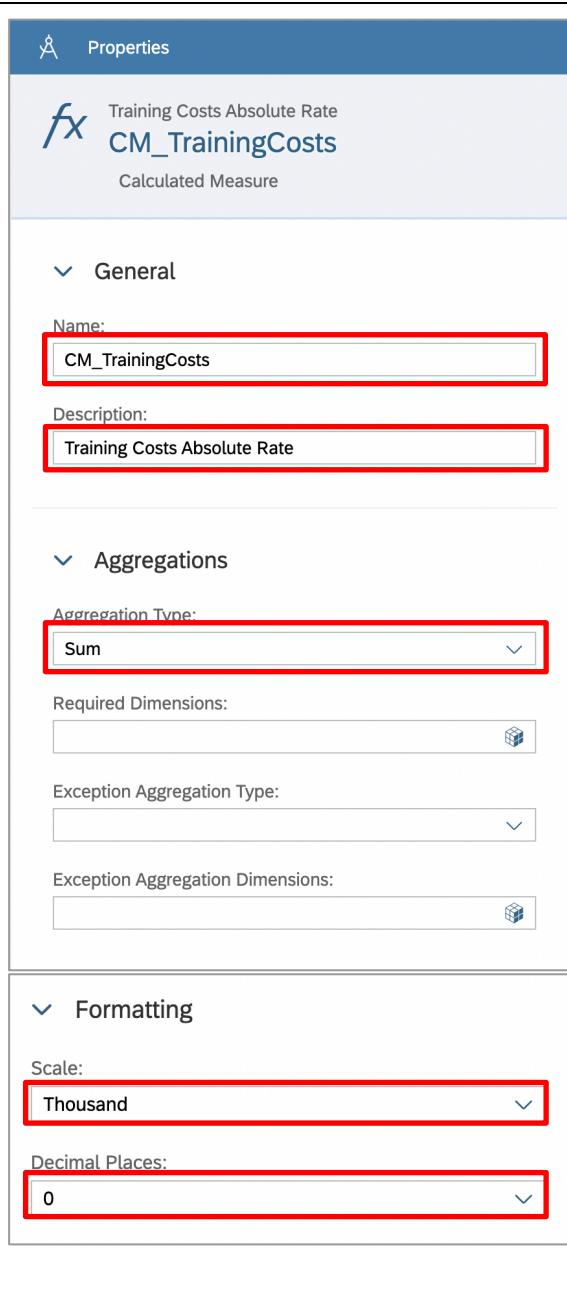
Member ID	Description	Hierarchy	GL_Account	Row_Source
19 SALARY	Salary	INTERNAL_WORKFORCE...	61100000	SAC
20 SOC_INSURANCE	Social Insurance	COMPANY_COST	61201000	SAC
21 TOTAL_COSTS	Total Costs	<root>		SAC
22 TRAVEL_COSTS	Travel Costs per Employee	HC_COSTS	61008000	SAC
23 TRAINING	Training	COMPANY_COST	61400000	SAC
24				

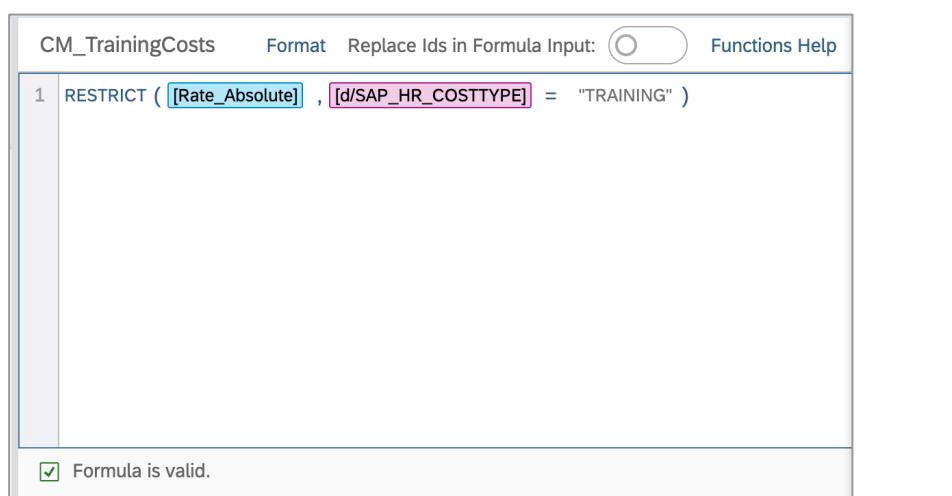
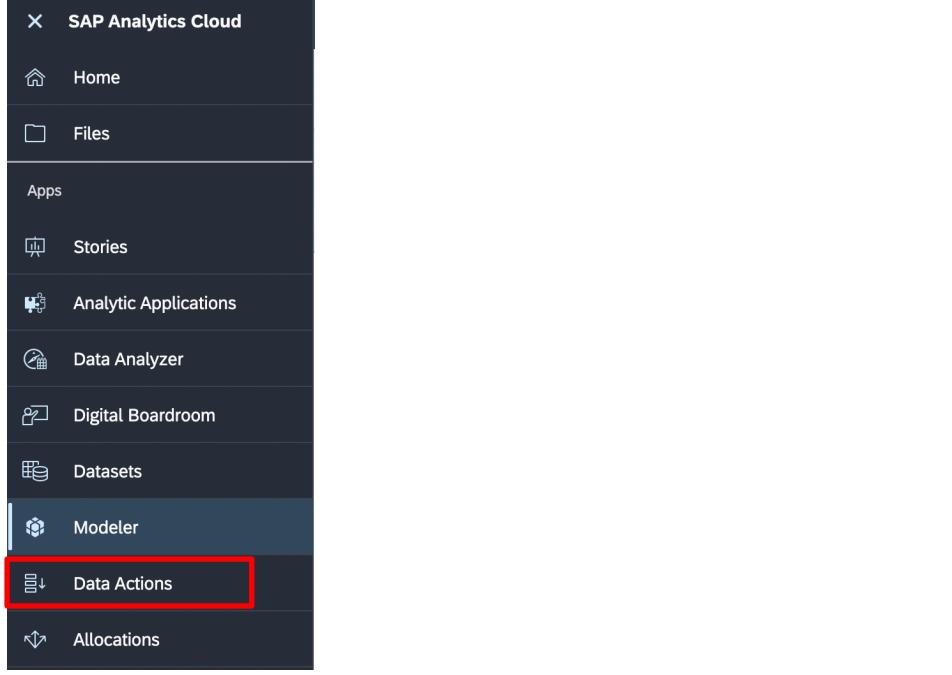
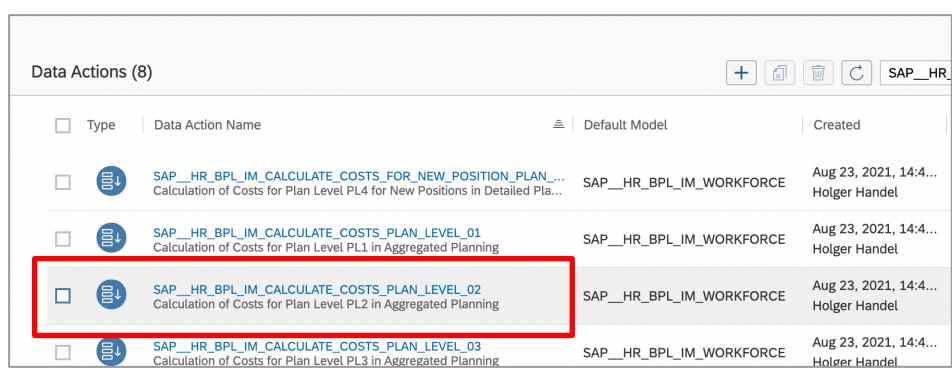
6. Click on the hierarchy icon in the toolbar to open the hierarchy view.

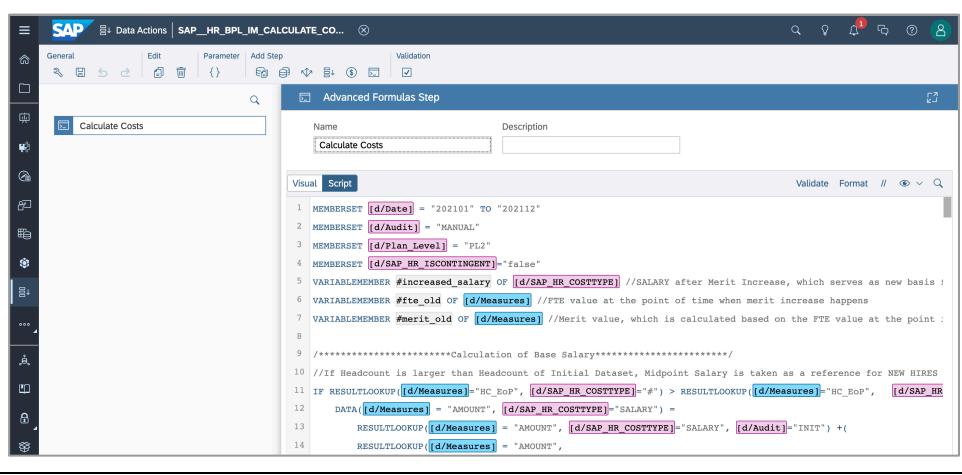
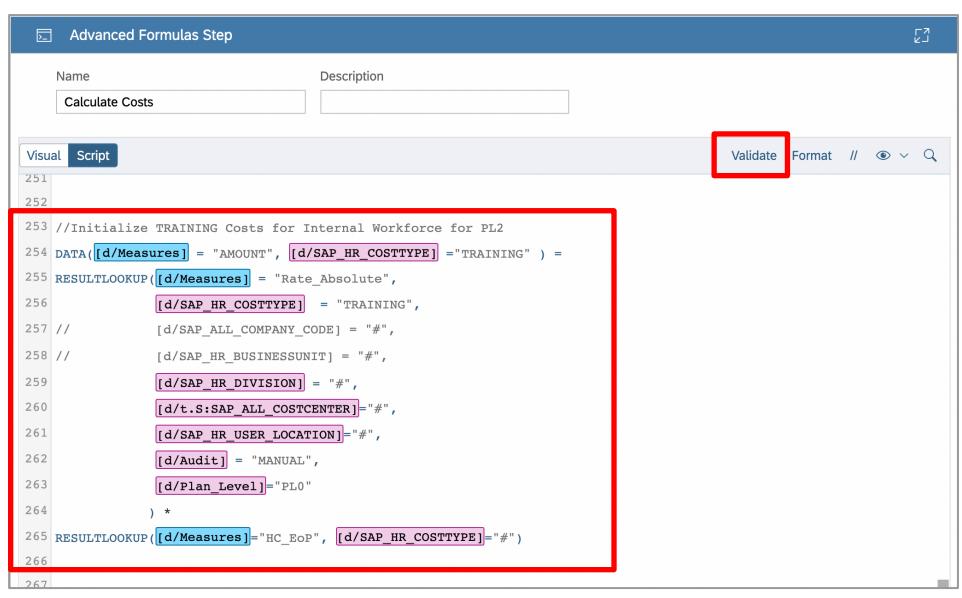
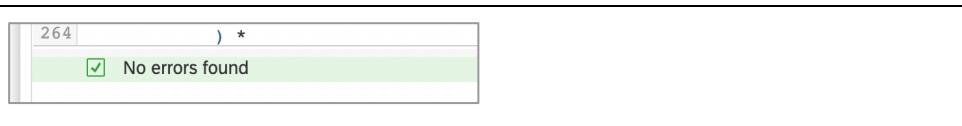
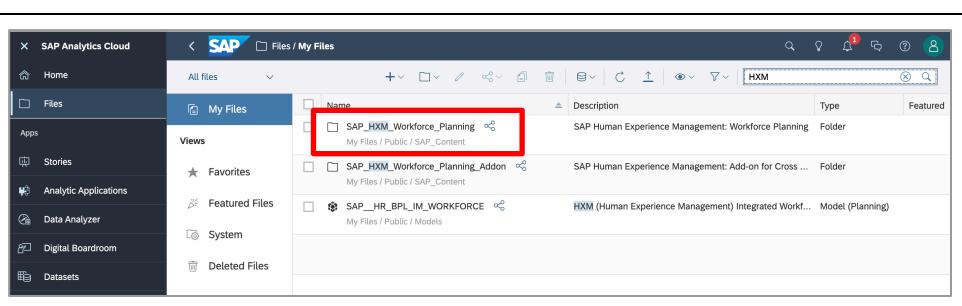


<p>7. If you expand the hierarchy tree, you should see the new cost type TRAINING as a child element of Company Costs Sum.</p>	 <pre> graph TD MIDPOINT[MidPoint Salary] --- TOTAL_COSTS[TOTAL_COSTS (4) Total Costs] TOTAL_COSTS --- COMPANY_COST[COMPANY_COST (7) Company Costs Sum] COMPANY_COST --- COMMISSION[COMMISSION Commission] COMPANY_COST --- HEALTH_INSUR[HEALTH_INSUR... Health Insurance] COMPANY_COST --- LIFE_INSUR[LIFE_INSURANCE Life Insurance] COMPANY_COST --- PENSION[PENSION Pension] COMPANY_COST --- RETIREMENT_FUND[RETIREMENT_FUND Retirement Fund] COMPANY_COST --- SOC_INSUR[SOC_INSURANCE Social Insurance] COMPANY_COST --- TRAINING[TRAINING Training] HC_COSTS[HC_COSTS (3) Overhead HC Costs Sum] PERSONAL_COST[PERSONAL_COST (2) Personal Costs Sum] UNASSIGNED[# Unassigned] </pre>
<p>8. Click on the hierarchy icon again to close the hierarchy view.</p>	
<p>9. Click on the back icon to navigate back to the Model Structure workspace.</p>	
<p>10. Switch to the Calculations workspace by selecting the workspace from the drop-down box at the top left.</p> <p>11. Add another calculated measure by clicking the +-icon.</p>	 <p>The screenshot shows the SAP Calculations workspace. The top navigation bar has a dropdown menu set to "Calculations". A new calculated measure, "CM_BaseSalary", is selected in the list. A red box highlights the "+" icon next to the list, indicating where to click to add another measure. The formula editor shows a single restriction: <code>RESTRICT ([AMOUNT], [d/SAP_HR_COSTTYPE] = "SALARY")</code>. The preview area shows the formula is valid and no rows have been added yet.</p>

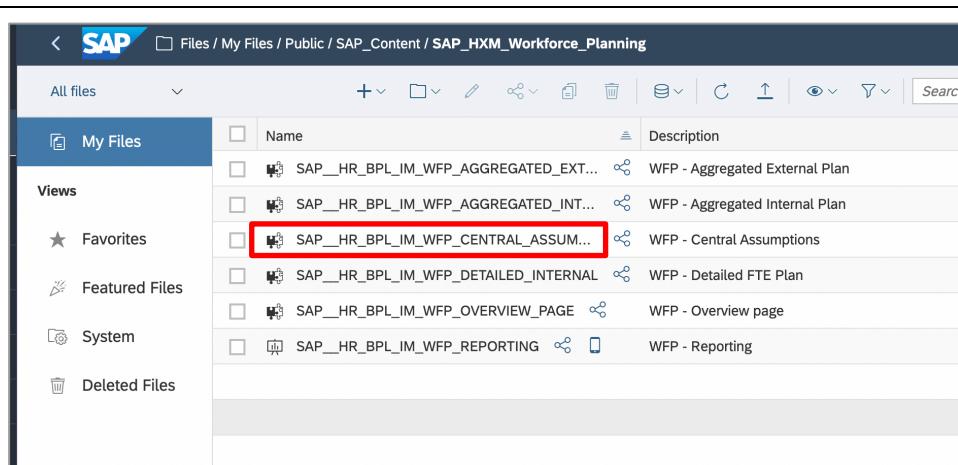
12. Provide the information for the new calculated measure:
- Name: **CM_TrainingCosts**
 - Description: **Training Costs Absolute Rate**
 - Aggregation Type: **Sum**
 - Scale: **Thousand**
 - Decimal Places: **0**
13. This measure will serve as a restricted measure for the training costs.

A screenshot of the Power BI Properties dialog box for a calculated measure named "CM_TrainingCosts". The dialog is divided into sections: General, Aggregations, and Formatting. The "Name" field contains "CM_TrainingCosts", the "Description" field contains "Training Costs Absolute Rate", the "Aggregation Type" dropdown is set to "Sum", the "Scale" dropdown is set to "Thousand", and the "Decimal Places" dropdown is set to "0". The "Required Dimensions" and "Exception Aggregation Dimensions" fields are empty.

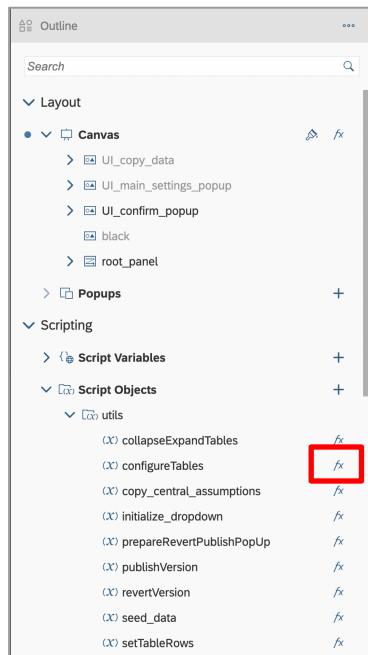
<p>14. In the formula window, enter the formula to define the restricted measure: RESTRICT([Rate_Absolute], [d/SAP_HR_COSTTYPE] = "TRAINING")</p>	 <pre>CM_TrainingCosts Format Replace Ids in Formula Input: ⓘ Functions Help 1 RESTRICT ([Rate_Absolute] , [d/SAP_HR_COSTTYPE] = "TRAINING")</pre> <p>Formula is valid.</p>																														
<p>15. Click on the Save icon in the toolbar to save the model changes.</p>																															
<p>16. Next, you need to adjust the calculation logic for cost calculation to include the cost for training. Click on Data Actions in the main menu.</p>	 <ul style="list-style-type: none"> X SAP Analytics Cloud Home Files Apps Stories Analytic Applications Data Analyzer Digital Boardroom Datasets Modeler Data Actions Allocations 																														
<p>17. Click on the entry for the data action Calculation of Costs for Plan Level PL2 in Aggregated Planning.</p> <p>Note: PL2 refers to the Planning level Company Code / Business Unit.</p>	 <table border="1"> <thead> <tr> <th colspan="5">Data Actions (8)</th> </tr> <tr> <th>Type</th> <th>Data Action Name</th> <th>Default Model</th> <th>Created</th> <th>SAP_HR...</th> </tr> </thead> <tbody> <tr> <td></td> <td>SAP_HR_BPL_IM_CALCULATE_COSTS_FOR_NEW_POSITION_PLAN_...</td> <td>SAP_HR_BPL_IM_WORKFORCE</td> <td>Aug 23, 2021, 14:4...</td> <td>Holger Handel</td> </tr> <tr> <td></td> <td>SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_01</td> <td>SAP_HR_BPL_IM_WORKFORCE</td> <td>Aug 23, 2021, 14:4...</td> <td>Holger Handel</td> </tr> <tr> <td></td> <td>SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_02</td> <td>SAP_HR_BPL_IM_WORKFORCE</td> <td>Aug 23, 2021, 14:4...</td> <td>Holger Handel</td> </tr> <tr> <td></td> <td>SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_03</td> <td>SAP_HR_BPL_IM_WORKFORCE</td> <td>Aug 23, 2021, 14:4...</td> <td>Holger Handel</td> </tr> </tbody> </table>	Data Actions (8)					Type	Data Action Name	Default Model	Created	SAP_HR...		SAP_HR_BPL_IM_CALCULATE_COSTS_FOR_NEW_POSITION_PLAN_...	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel		SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_01	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel		SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_02	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel		SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_03	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel
Data Actions (8)																															
Type	Data Action Name	Default Model	Created	SAP_HR...																											
	SAP_HR_BPL_IM_CALCULATE_COSTS_FOR_NEW_POSITION_PLAN_...	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel																											
	SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_01	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel																											
	SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_02	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel																											
	SAP_HR_BPL_IM_CALCULATE_COSTS_PLAN_LEVEL_03	SAP_HR_BPL_IM_WORKFORCE	Aug 23, 2021, 14:4...	Holger Handel																											

<p>18. The design time for defining data actions is opened. This data action has one step of type Advanced Formula. The script of this steps recalculates the total workforce cost based on planned head count and central cost drivers.</p>	 <pre> 1 MEMBERSET [d/Date] = '202101' TO '202112' 2 MEMBERSET [d/Audit] = 'MANUAL' 3 MEMBERSET [d/Plan_Level] = 'PL2' 4 MEMBERSET [d/SAP_HR_ISCONTINGENT] = 'false' 5 VARIABLEMEMBER #increased_salary OF [d/SAP_HR_COSTTYPE] //SALARY after Merit Increase, which serves as new basis : 6 VARIABLEMEMBER #fte_old OF [d/Measures] //FTE value at the point of time when merit increase happens 7 VARIABLEMEMBER #merit_old OF [d/Measures] //Merit value, which is calculated based on the FTE value at the point : 8 9 ****Calculation of Base Salary***** 10 //If Headcount is larger than Headcount of Initial Dataset, Midpoint Salary is taken as a reference for NEW HIRES 11 IF RESULTLOOKUP([d/Measures] = "HC_EoP", [d/SAP_HR_COSTTYPE] = "#") > RESULTLOOKUP([d/Measures] = "HC_EoP", [d/SAP_HR 12 DATA([d/Measures] = "AMOUNT", [d/SAP_HR_COSTTYPE] = "SALARY") = 13 RESULTLOOKUP([d/Measures] = "AMOUNT", [d/SAP_HR_COSTTYPE] = "SALARY", [d/Audit] = "INIT") + 14 RESULTLOOKUP([d/Measures] = "AMOUNT", </pre>
<p>19. At the end of the existing script, add the code snippet you see in the screenshot. You can also find this as a text file in the download section of the session.</p> <p>20. Click on Validate to check that the script is correct.</p>	 <pre> 251 252 253 //Initialize TRAINING Costs for Internal Workforce for PL2 254 DATA([d/Measures] = "AMOUNT", [d/SAP_HR_COSTTYPE] = "TRAINING") = 255 RESULTLOOKUP([d/Measures] = "Rate_Absolute", 256 [d/SAP_HR_COSTTYPE] = "TRAINING", 257 // [d/SAP_ALL_COMPANY_CODE] = "#", 258 // [d/SAP_HR_BUSINESSUNIT] = "#", 259 // [d/SAP_HR_DIVISION] = "#", 260 // [d/t:S:SAP_ALL_COSTCENTER] = "#", 261 // [d/SAP_HR_USER_LOCATION] = "#", 262 // [d/Audit] = "MANUAL", 263 // [d/Plan_Level] = "PL0" 264) * 265 RESULTLOOKUP([d/Measures] = "HC_EoP", [d/SAP_HR_COSTTYPE] = "#") 266 267 </pre>
<p>21. If there are no mistakes, the system will prompt No errors found.</p>	
<p>22. Click on the Save icon in the toolbar to save your changes.</p>	
<p>23. Click on Files in the main menu.</p> <p>24. Type in HXM in the search bar to show the relevant objects.</p> <p>25. Click on the folder SAP HXM Workforce Planning to open the folder.</p>	

26. Click on the analytic application **WFP – Central Assumptions** to open the app in the analytics designer.



27. In the Outline view, click on the icon **fx** next to the script object named **configureTables**.

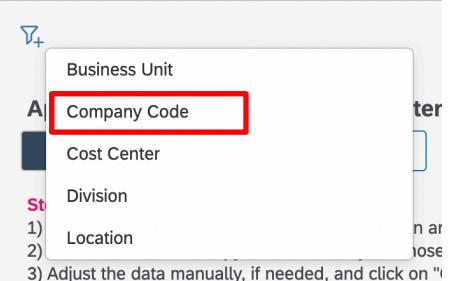
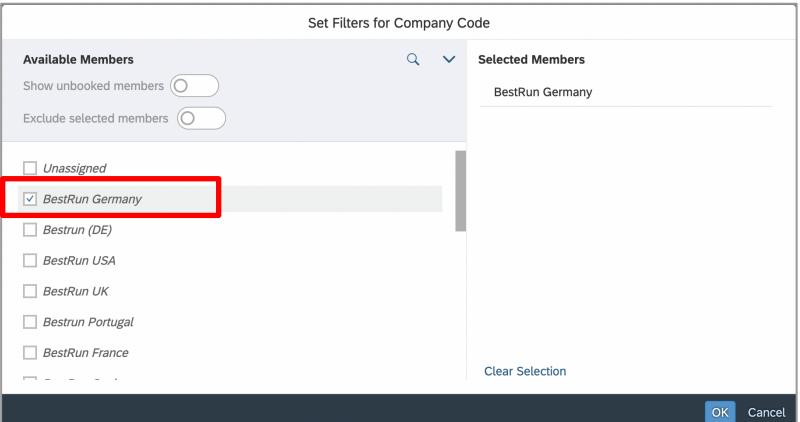
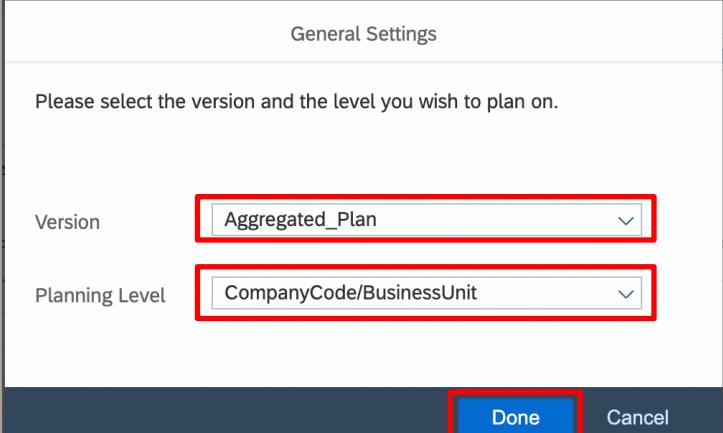


28. The script editor is opened. Adjust line 7 in the script to include the item **CM_TrainingCosts** in the list of measures.
 29. Make sure that you insert commas in an appropriate way to get a valid list.
 30. This list of measure names will be used to set the filters of the table. As a result, you will see the measure to plan the average amount of per-employee training expenses.

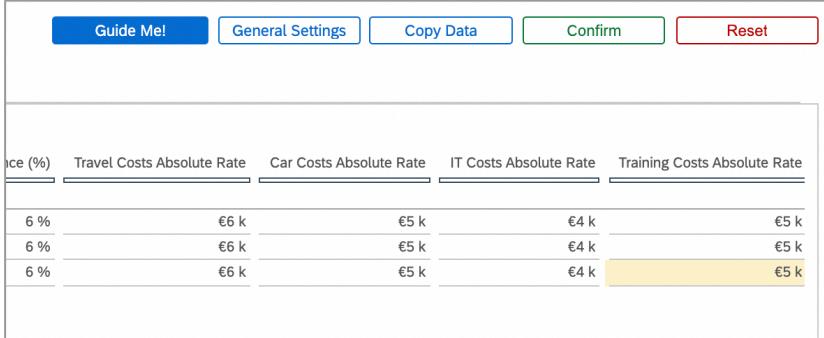
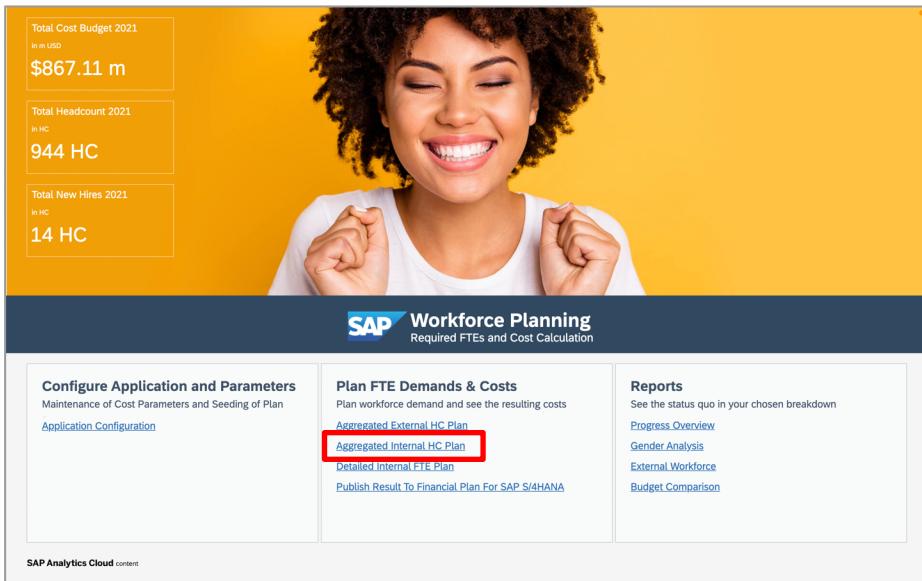
```

1 switch (InputMode) {
2     case "Internal":
3         //Set Filters for Internal Mode
4         previous_mode = is_InternalMode;
5         is_InternalMode = true;
6
7         table_central_assumptions.getDataSource().setDimensionFilter(Alias.MeasureDimension,
8             ["CM_Travelcosts", "CM_SocialInsurance", "CM_RetirementFund", "CM_Pension", "CM_MidpointSalary", "CM_LifeInsurance",
9             "CM_ITCosts", "CM_HealthInsurance_Rate", "CM_CarCosts", "CM_TrainingCosts", "CM_Bonus", "CM_Comission_Rate", "CM_Me-
10            ritIncrease_Rate"]);
11         //Set Date Filter on 2021 per default
12         table_central_assumptions.getDataSource().setDimensionFilter("Date", "[Date].[FYQP].[Date.FISCAL_YEAR]."
13             [2021]);
14         //Set filter on selected version
15         table_central_assumptions.getDataSource().setDimensionFilter("Version", planningVersion);
  
```

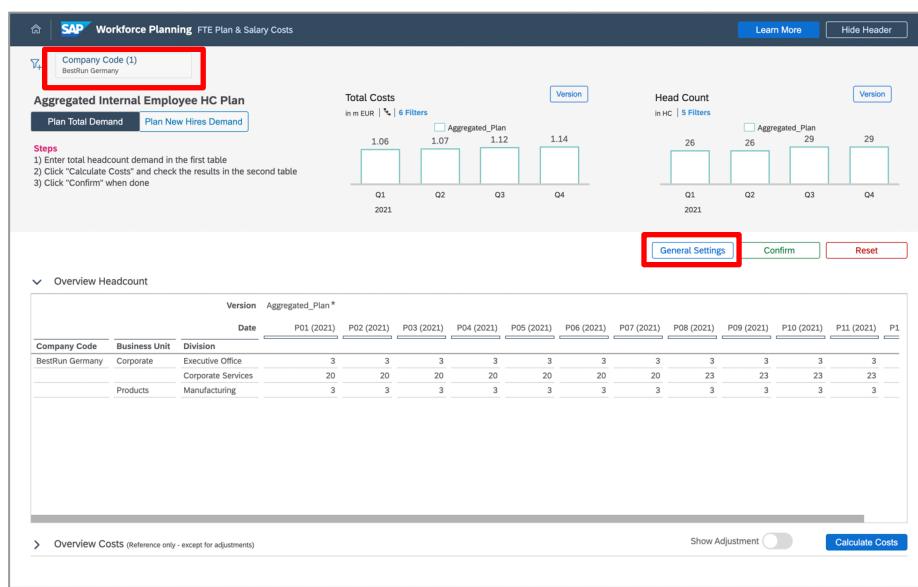
ANA360

31. Click on the Save icon in the toolbar.	
32. Click on Run Analytic Application to start the app.	
33. Click on the filter icon at the top left corner of the page and select Company Code from the list of available dimensions.	 <p>3) Adjust the data manually, if needed, and click on "OK".</p>
34. Select BestRun Germany to filter the data shown in the application.	
35. Click on the button General Settings .	
36. Select the version Aggregated_Plan and the planning level CompanyCode / BusinessUnit . 37. Click on Done to confirm your selection.	

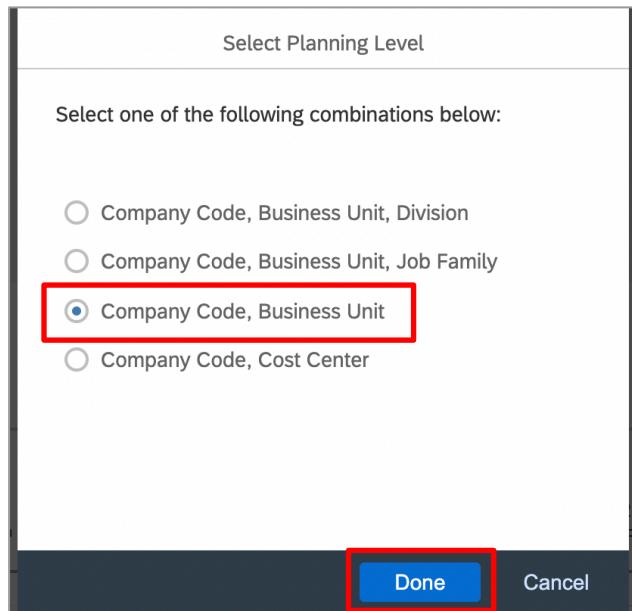
ANA360

<p>38. Scroll the table to see the column Training Costs Absolute Rate. 39. Enter some values.</p>	 <table border="1"> <thead> <tr> <th>Value (%)</th> <th>Travel Costs Absolute Rate</th> <th>Car Costs Absolute Rate</th> <th>IT Costs Absolute Rate</th> <th>Training Costs Absolute Rate</th> </tr> </thead> <tbody> <tr> <td>6 %</td> <td>€6 k</td> <td>€5 k</td> <td>€4 k</td> <td>€5 k</td> </tr> <tr> <td>6 %</td> <td>€6 k</td> <td>€5 k</td> <td>€4 k</td> <td>€5 k</td> </tr> <tr> <td>6 %</td> <td>€6 k</td> <td>€5 k</td> <td>€4 k</td> <td>€5 k</td> </tr> </tbody> </table>	Value (%)	Travel Costs Absolute Rate	Car Costs Absolute Rate	IT Costs Absolute Rate	Training Costs Absolute Rate	6 %	€6 k	€5 k	€4 k	€5 k	6 %	€6 k	€5 k	€4 k	€5 k	6 %	€6 k	€5 k	€4 k	€5 k
Value (%)	Travel Costs Absolute Rate	Car Costs Absolute Rate	IT Costs Absolute Rate	Training Costs Absolute Rate																	
6 %	€6 k	€5 k	€4 k	€5 k																	
6 %	€6 k	€5 k	€4 k	€5 k																	
6 %	€6 k	€5 k	€4 k	€5 k																	
<p>40. Click on Confirm to publish your plan version.</p>																					
<p>41. Click on the Home icon to navigate to the Overview page.</p>																					
<p>42. On the Overview page, click on Aggregated Internal HC Plan to open the application for aggregated planning.</p>																					

43. In the planning application, set the filter for the dimension **Company Code** to **BestRun Germany**.
44. Click on the button **General Settings**.



45. Select **Company Code, Business Unit** as the planning level.
46. Click on **Done** to confirm your selection.



47. Click on the button **Calculate Costs** to recalculate the costs and include training expenses.

Calculate Costs

48. In the Cost Overview table, drill down in the dimension Plan Cost Type and check that you can see a new line **Training**.

Plan Cost Type	Date	Measures	Total Amount
Company Costs Sum			812.01
Commission			85.88
Health Insurance			200.38
Life Insurance			57.25
Pension			143.13
Retirement Fund			28.63
Social Insurance			171.75
Training			125.00
Overhead HC Costs Sum			360.00

Congratulations! You have finished the exercise.