SAP Analytics Cloud (SAC) - Planning Course

Unlike SAC BI (dashboards & reporting), SAC Planning focuses on **budgeting, forecasting, financial planning, driver-based planning, and integration with SAP ERP/BPC**.

Module 1: Introduction to SAC

- Overview of SAP Analytics Cloud (BI, Planning, Predictive, Augmented Analytics)
- SAC architecture & deployment on SAP BTP
- Key use cases (finance, sales, HR, supply chain)
- Navigation & user interface overview
- SAC terminology: Stories, Models, Dimensions, Measures
- Understanding tenants, roles, and licenses
- Overview of data sources (SAP & non-SAP)

Module 2: SAC Core Cloud Components

Business Intelligence (BI)

- Data connections (live vs import)
- Data modeling in SAC
- Creating & managing models (dimensions, measures, hierarchies)
- Stories: visualizations, dashboards, filters, charts, geo maps
- Calculations & restricted measures
- Data blending & wrangling

Planning

- Planning models & versions
- Data entry, forecasting, driver-based planning
- Allocations, spreading, distribution
- Value driver trees
- Integration with SAP BPC and S/4HANA for planning

VipasAcademy@gmail.com **|**   Phone: +91 9966652099

Predictive Analytics

- Predictive scenarios in SAC (classification, regression, time series)

- Smart Predict functionality

- Automated forecasting (e.g., sales, revenue, demand)

- Integration with SAP AI Core & external ML

Augmented Analytics

- Smart Insights (automated data exploration)

- Smart Discovery (finding hidden relationships)

- Search to Insight (natural language query)

- Explainable AI in SAC

Module 3: Introduction to SAC Planning

- Overview of SAC Planning vs SAC BI

- SAC Planning architecture

- Planning workflows and use cases (finance, sales, HR, supply chain)

- Roles in SAC Planning (planners, reviewers, administrators)

Module 4: Data Connections & Integration

- Import vs Live connections for planning

- Data acquisition from SAP & non-SAP sources

- Integration with SAP S/4HANA, SAP BW/4HANA, SAP Datasphere

- Integration with SAP BPC (Business Planning & Consolidation)

- Flat file data uploads (Excel/CSV)

📌 Hands-on: Load financial data into a planning model

Module 5: Planning Models

- Creating planning models (dimensions, measures, hierarchies, attributes)

- Time dimensions & granularity (year, quarter, month, day)

- Currency conversion & exchange rates

- Version management (actuals, plan, forecast, rolling forecast)

- Managing public vs private versions

📌 Hands-on: Create a financial planning model with multiple versions

Module 6: Data Entry & Spreading

- Manual data entry in stories

- Spreading data across time & entities

- Data-driven distribution rules

- Allocations & driver-based calculations

- Value driver trees (VDT)

📌 Hands-on: Build a value driver tree for revenue planning

Module 7: Planning Functions

- Data actions (copy, allocate, forecast, custom logic)

- Multi-step data actions & process automation

- Predictive forecasting (Smart Predict integration)

- Advanced formula scripting in planning models

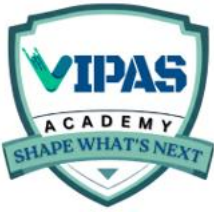📌 Hands-on: Automate forecast generation with data actions

Module 8: Collaboration & Workflow

- Assignments, tasks, and input forms

- Review & approval workflows

- Commenting, discussions & collaboration features

- Integration with Microsoft Teams for planning collaboration

📌 Hands-on: Create a workflow for budget submission & approval

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Module 9: Forecasting & Predictive Planning

- Rolling forecasts vs static budgets

- Predictive planning scenarios (time series forecasting)

- Integration with Smart Predict for demand & sales forecasting

- Integration with ML models (Python/R) for advanced forecasting

📌 Hands-on: Create a rolling forecast for sales using predictive planning

Module 10: Reporting & Analysis for Planning

- Building planning stories & dashboards

- Combining actuals, plan, and forecast data

- Variance analysis & version comparison (e.g., Actual vs Plan vs Forecast)

- KPI dashboards for financial planning

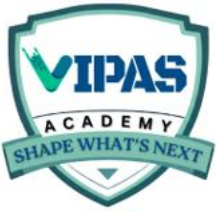📌 Hands-on: Create a CFO dashboard showing Actual vs Plan

Module 11: Security & Administration

- User roles for planning (input providers, reviewers, admins)

- Data access control & data locking

- Managing public/private versions securely

- Tenant administration in SAC

📌 Hands-on: Implement region-level planning security

Module 12: Advanced Topics

- Multi-model planning (cross-model calculations)

- Hybrid planning with SAC + BPC

- Integration with SAP Datasphere for enterprise planning

- Best practices for large-scale enterprise planning

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Module 13: Capstone Project

- End-to-end financial planning scenario:

Load actuals from SAP S/4HANA

Create planning model with versions (Actual, Plan, Forecast)

Build a value driver tree for revenue planning

Set up workflows for planners & approvers

Create a forecast using predictive planning

Build a final CFO dashboard for management reporting