



# EPM Data GmbH Company Overview

Hamburg, June 2017



# Welcome !



**Christoph Sommer**, Dipl.-Kfm., PMP®  
Senior Consultant SAP BI/BO, BPC&EPM and Founder of EPM Data

**EPM Data** is a small, specialized consulting company for **SAP Business Intelligence, SAP BI/BO, BPC & EPM** and **SAP Project Management** which I founded in 2015. I have project **experience in the SAP consulting business since 1998**. Starting with SAP ERP Financials & Controlling, my main project focus since 2003 is SAP Business Intelligence and especially planning with **SAP BI-IP, BPC embedded and BPC optimized**.

With a project experience of over 18 years, I have **successfully delivered over 46 project solutions for more than 30 customers** in multiple industries. My main goal is to satisfy my customers by applying **project management and technological best practices**. My aim is to be the **trusted advisor** for my clients. As a company, EPM Data partners with other successful consultants to deliver great project results and to support your business goals.

**Thank you for your interest in EPM Data !**

# Qualification Profile

Experienced Consultant for **SAP BI/BO, BPC&EPM**



## Christoph Sommer

Senior Consultant SAP BI/BO, BPC&EPM  
Project Management Professional (PMP®)



## About Christoph

**Senior Consultant SAP BI/BO, BPC&EPM and Project Management Professional (PMP®)** with over 19 years of SAP experience.

He worked in projects for **numerous prestigious clients** in multiple industries and for **renowned consulting companies**, e.g **SAP Consulting Germany, CubeServ, Consenso Consulting, Steria Mummert** or **Five1 Consulting**.

### Professional Certifications:

- Project Management Professional (PMP®)
- Scrum Master Advanced (SMA®)
- SAP Certified Application Professional (SAP BI/BO on HANA)

## Skills

SAP Project Management (PMP®, ScrumMaster)



SAP Business Intelligence (BW 7.x, BW 4/HANA)



Planning with SAP (BI-IP, BPC embedded/optimized)



SAP BO Frontend Tools (Analysis for Office, DesignStudio, Lumira)



SAP Programming Skills (ABAP, FOX, VB, JS)



SAP Financials (ECC FI/CO, S/4 HANA Finance)



# Special Expertise SAP BI/BO/EPM

We are experts in **project management, conceptual design and implementation of SAP BI solutions.**



## Project Management

Experienced practitioner of agile and classical project management methodologies.

Certified as Project Management Professional (PMP®) and Scrum Master Advanced (SMA®).



## Implementation Services

We cover the complete project lifecycle with design, build and operations phases.

We implement solutions including data modeling, extraction/transformation/loading, ABAP programming and report design.



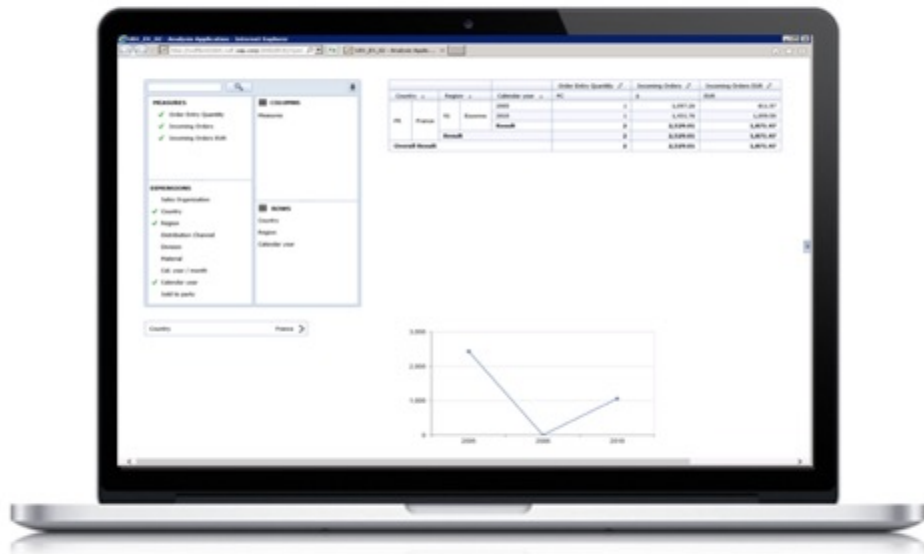
## Coaching & Know-how Transfer

Know-how-transfer and coaching is crucial, as planning solutions can become quite complex.

We support and empower our customers to successfully operate the solution when the project is handed over to production.

# SAP BI-IP & BPC with DesignStudio

We develop planning applications with SAP BO DesignStudio



## BI-IP Data Modeling

Core of BI-IP planning applications is the data model in the BI backend.



## Frontend DesignStudio

DesignStudio enables the development of browser-based planning applications.



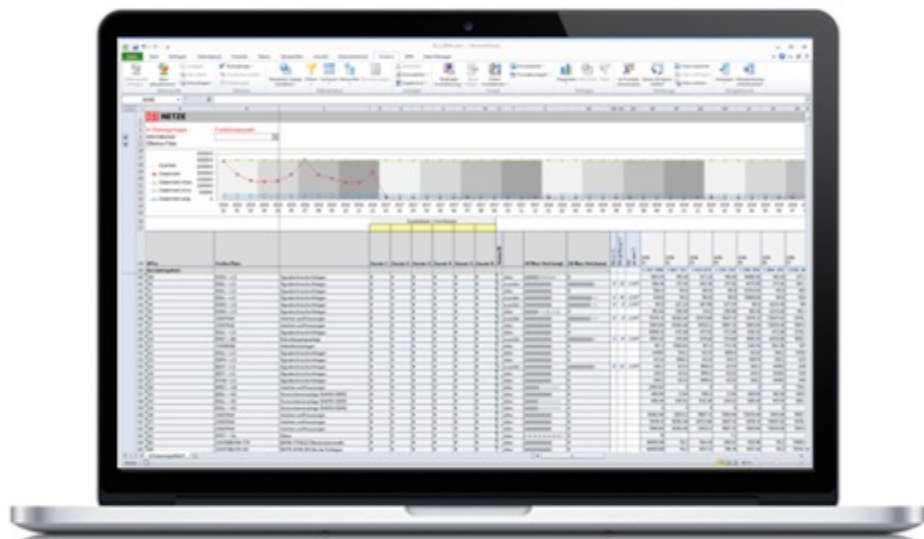
## JavaScript Programming

Interactive reporting and planning applications by usage of JavaScript functionality.



# SAP BI-IP & BPC with Analysis for Office

We develop planning applications with [SAP BO Analysis for Office](#)



## Frontend Analysis for Office

SAP BO Analysis for Office enables native MS Excel look and feel. Ideal for business departments that want to be able to quickly change layout designs.



## Highly Flexible Reports

At runtime, Analysis for Office allows flexible drill-downs and filter options for reports and planning grids.



## VisualBasic Programming

Makro programming with VisualBasic enables the development of customized reporting and planning workbooks.

# Industry Experience

We delivered projects for customers in **more than 6 different industries**

SAP Business Intelligence is required by customers in many industries. The generic software delivered by SAP can be customized and tailored according to customer requirements. We successfully delivered over **46 SAP Business Intelligence project solutions** for **more than 30 customers** in **6 different industries**.



**Utilities, Chemicals  
& Process Industry**  
SAP BI Project Management  
and Implementation Services



**Health & Pharma**  
SAP BI sales and distribution  
planning, system security and  
authorizations



**Aviation,  
Aerospace &  
Defense**  
SAP BI Project Management  
and Reporting Solutions

**Financial Services**  
Reporting and Planning  
solutions for P&L, B/S and  
Cost Planning



**Transport &  
Automotive**  
Maintenance Planning with  
SAP BI-IP/BO-Analysis and  
SAP ERP implementation  
services



**Retail &  
Consumer Products**  
SAP BI and BI-IP Solutions

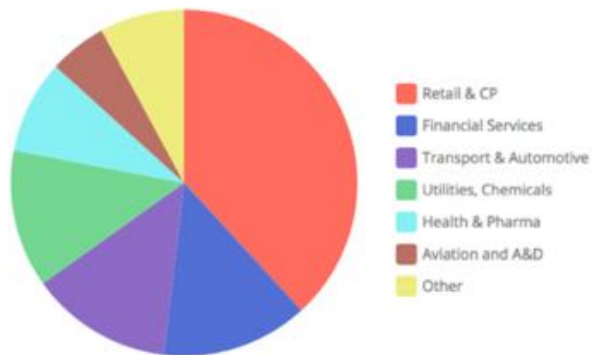


# Customer Projects by Industry

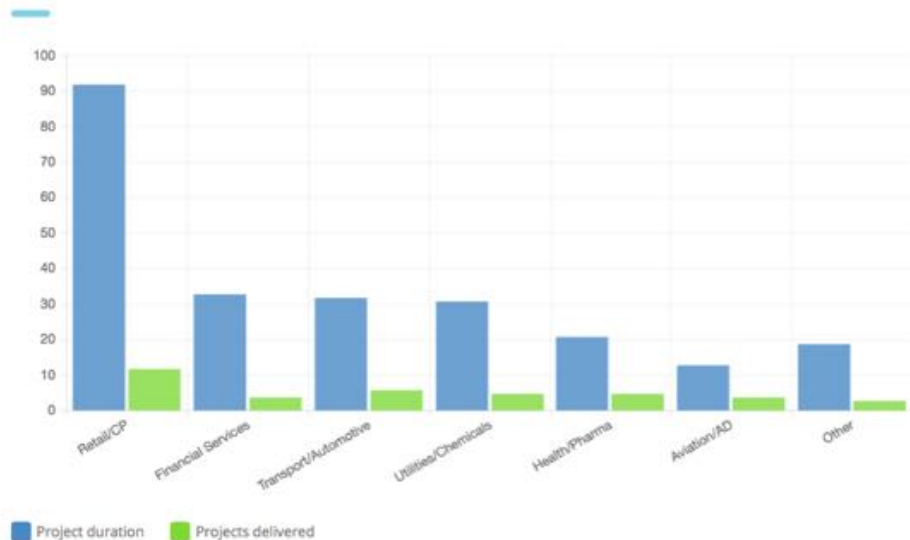
Industry experience by **number of projects and project duration**

## Customers of various industries

A graphical representation of our industry experience and duration in months of our customer projects:



## Number of Projects and Duration of Projects by Industry



Customers in the industries **Retail&Consumer Products**, **Financial Services**, **Transport&Automotive** and **Utilities/Chemicals** accounted for **over 75%** of our project activities.

Other important customers came from the industries **Health&Pharma** and **Aviation/A&D**.



# Selected Projects

Customer projects with the focus **SAP BI-integrated Planning**

We successfully delivered over 46 SAP Business Intelligence project solutions. The following 3 projects were focused on SAP BI-integrated Planning.



Retail & Consumer Products >

**P&L planning solution for a leading Swiss retail company**



Transport & Automotive >

**An integrated maintenance planning system for a large transportation company**



Utilities, Chemicals & Process Industry >

**Cross-functional planning application for a regional utilities company**

# 1 P&L Planning Solution

A project for a leading **Swiss retail company**



**For a leading Swiss retail company, a modern and flexible planning solution was required to streamline the P&L planning and forecasting process in the Accounting & Controlling department.**

In order to succeed in this competitive economic environment, the existing Excel-based tool needed to be redesigned. SAP BI-IP was chosen as the technological basis and EPM Data has been asked to develop and implement the new solution. The final solution vastly improved the company's planning and forecasting capabilities.

# 1 P&L Planning Solution

A project for a leading **Swiss retail company**

## challenge



Prior to the start of the project, the planning methodology has been redesigned by the controlling department. The new methodology heavily relied on flexible, MS Excel-based planning layouts with lots of interdependent formulas.

The main challenge was to develop a SAP BI-IP-based solution, that literally emulates the high-sophisticated offline templates while providing the additional benefits of SAP BI:

- **High system performance and flexibility to enable "quick simulation runs"**  
The solution should be suitable to support several planning rounds. The performance needed to be high, large amounts of data records should be processed within seconds to gain user acceptance.
- **Provide an integrated database to avoid the need for manual preparation efforts**  
With the old planning application, current actual and budget data had to be manually imported into an Access database to prepare the next forecasting process. This manual process caused a lot of effort, while the underlying dataset could not be updated easily during the planning process.

# 1 P&L Planning Solution

A project for a leading **Swiss retail company**

## solution



The final solution made use of the formula mode of SAP BO Analysis for Office-Frontend. The SAP BI data modeling has been implemented in SAP BW 7.5 using the Eclipse Neon version of the HANA Studio development environment.

- **Formula mode of SAP BO Analysis for Office**

Complex cell calculations are technically feasible with the SAP BEx Query Design tool but the resulting BEx queries would be very complicated and difficult to maintain. It has therefore been decided to use the 'formula mode' within the Excel-based SAP BO Analysis for Office frontend. The final solution therefore used a combination of technical possibilities of the BI-IP backend and SAP BO frontend.

- **SAP BW 7.5 / HANA Studio**

During the project, the system was upgraded from SAP BW 7.4 to SAP BW 7.5 on HANA. The underlying planning data model has been quickly transformed into a HANA-optimized data model. Planning-enabled Advanced DSOs were used instead of the former Real-time-InfoCubes. The MultiProvider was exchanged with a HANA Composite Provider.

- **FOX Formula Extension**

Parts of the planning functions were implemented using SAPs FOX macro language. While ABAP-based planning functions are always executed in the application server, FOX-based planning functions can be executed directly in the HANA database thus providing superior performance even for large datasets.

## results



The controlling department is now more empowered. Flexible planning layouts as requested backed by an integrated, reliable and stable database.

Actual/Plan/Forecasting reports can be instantaneously created whenever needed. They can now make decisions on the fly based on the latest real time data.

The effort vastly improved the company's planning and forecasting functions, streamlined the planning process and reduced manual efforts.



# 2 Integrated Maintenance Planning

A project for the [German Railroad Company](#)



Transport & Automotive

Planning of maintenance activities is a huge task at this customer, a large German transportation company. Bridges, tunnels, railroads and other assets have to be regularly inspected and maintained.

Responsible for conceptual design, implementation and support, EPM Data implemented an integrated information and planning system based on SAP Business Intelligence. The customer is now able to centrally plan, schedule and coordinate maintenance activities all across Germany with this new planning application.





# 2 Integrated Maintenance Planning

A project for the [German Railroad Company](#)

## challenge



The business requirements and the specification for the new maintenance planning application have been created by the customer before the start of the technical design phase without explicit consideration of SAP BI-IP functionalities. The goal was to integrate requirements from planners in the various regions of the customer and to replace existing local MS Excel-based planning solutions. The main challenge therefore was to develop and implement a technical solution that matched the given business requirements as closely as possible. Key project challenges were:

- **Support a flexible planning process while maintaining an integrated set of plan data:**  
During the planning process, it shall be possible to flexibly go back and forth by switching the status of selected plan data records. The solution needed to support this flexible process while avoiding to create multiple versions and copies of data records and to ensure data consistency.
- **Enable flexible input of textual information during the planning process:**  
The planners should be enabled to enter free textual information in the planning grid. Usually SAP BI-IP technically requires, that master data values for planning characteristics are created and saved to the database before the planning process starts.
- **Deliver a solution under time and resource constraints:**  
Compared to 'ordinary' SAP BI reporting projects, requirements in the area of SAP BI-integrated Planning are usually more complex from a technical and processual perspective. After reviewing the requirements and creating a first effort estimation for the technical implementation phase it became clear, that the project started 2-3 months late. Nonetheless – as in many project situations – the solution needed to be ready to go-live at a fixed date.

# 2 Integrated Maintenance Planning

A project for the [German Railroad Company](#)

## solution



The implemented solution is based on SAP-BI-integrated Planning and uses SAP BO Analysis for Office as a flexible MS Excel-based frontend tool. The Excel-based SAP BO Analysis frontend offers customization possibilities with VBA as the macro programming language. An additional advantage of this approach is high user acceptance. The users were able to use their Excel-skills and to learn the additional functions of the planning application very quickly. Key aspects of the solution were:

- **Data consistency is ensured with custom-designed status functions and locking algorithms:**  
Status changes for plan data records are possible by using specifically designed reposting functions. The reposting functions take business rules into account to ensure data integrity.
- **A custom-solution has been built to allow input of free texts and comments in the planning grid:**  
The know-how from two SAP How-to-Papers was combined to implement a customer-specific solution. InfoObjects with special master-data read classes and flexible reposting functions were used to allow input of free texts and comments in the planning grid without having to create master data upfront.
- **The solution was delivered using an agile project management approach:**  
As mentioned, the project started 2-3 months late and the end-product was required at a fixed go-live date. By using agile management techniques, the project scope was broken into small, manageable work packages. The work packages with the highest priority were tackled in the first 'iterations' to ensure customer value was created quickly. Scrum meetings, Kanban-style task-boards and burn-down-charts were used to identify and solve issues and track project progress. By using this agile approach, the first release of the solution could be delivered on time.

# 3 Cross-functional Planning

A complex, multi-module planning application for a regional Utilities company

Utilities, Chemicals & Process Industry



**For a regional utilities company, an enterprise-wide, cross-functional planning application was required.**

Our customer's requirement was to be able to execute planning tasks in a consistent and integrated manner. In order to create integrated Profit-and-Loss and Balance-Sheet plan data, several planning applications have been designed and implemented by EPM Data.

# 3 Cross-functional Planning

A complex, multi-module planning application for a regional Utilities company

## challenge



The biggest challenge was that the company requested an integrated, multi-module planning application. While some companies are able to create plan P&L and B/S statements directly, this was not an acceptable planning procedure at this company.

The P&L and B/S plan statements should instead be the result of planning activities in specialized sub-modules. The design and development activities of these modules had to be closely monitored using project management standards and technological best practices. Interfaces had to be designed to ensure system integrity and data consistency across the planning modules.



# 3 Cross-functional Planning

A complex, multi-module planning application for a regional Utilities company

## solution



Together with the customer, EPM Data developed an integrated, customer-specific solution. SAP BI-IP was used together with the Excel-based BEx-Analyzer frontend. The solution had following characteristics:

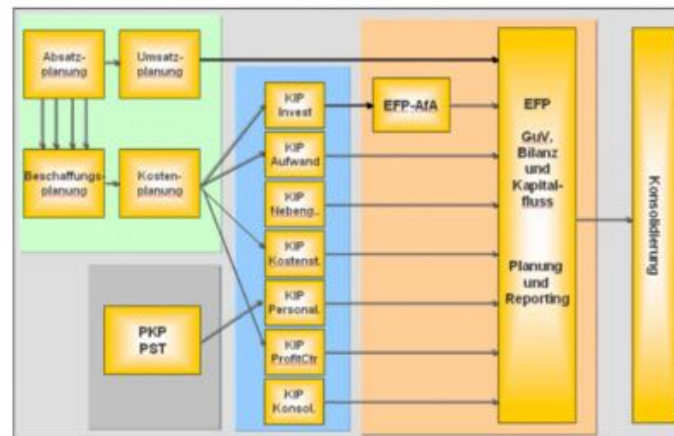
- **Specialized modules were created for the planning of balance sheet accounts, revenues, overhead costs and asset/project controlling:**  
Some balance sheet accounts were planned directly. Revenues had to be planned on planning positions using multiple characteristics of the customer dimension. Overhead costs were planned on cost centers as well as on internal orders as cost-carrying objects. Assets and investment positions were among the most complex objects, as the hierarchical structures of the ERP master data had to be used in planning.
- **The frontend was Excel-based and required a high amount of VBA-programming:**  
The planning layouts were built up with SAP's Excel-based frontend. Makro-programming was required to enable flexibility and communication with the backend.
- **Planning functions were developed in the SAP BW backend using both ABAP and FOX programming techniques:**  
All planning functions that had to be developed were categorized according to their complexity and difficulty. Based on this categorization, the best suited technological approach has been selected. Customized SAP standard planning functions were used for standard tasks. FOX functions were created for rather easy, but customer-specific functionality. Finally, the most demanding planning functions were created using ABAP programming skills.

## results



Within a project duration of only 12 months, EPM Data delivered a complex, integrated planning application in a fixed-price project environment. Despite the scope of this endeavour, the solution was user-friendly and custom-designed to gain high user-acceptance.

By using this integrated planning solution, the planning process of formerly isolated modules was streamlined. The resulting data quality of the P&L and B/S plan statements was high due to the integrated and real-time data transfer across the planning modules.





# Contact Us

We are looking forward to assist you in your SAP BI project

“ *EPM Data continues to deliver successful projects thanks to the confidence and trust our clients have in us.*

*We are ready to assist you in your project endeavors as well and would be glad to receive your business inquiry.*

*– Best regards, Christoph Sommer, Founder EPM Data*

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