SAP Solution Brief
SAP Solutions for Small Businesses and Midsize Companies
SAP Business Planning and Consolidation, Edge Edition, Version for the Microsoft Platform

Objectives

Solution

Benefits

Quick Facts

Streamline Planning and Reduce Business Risk with Reliable, Consolidated Data

Bridging the gap between plans and operations

To manage performance efficiently, midsize companies need a unified planning, budgeting, and consolidation solution. The Edge edition of the SAP® Business Planning and Consolidation application, version for the Microsoft platform, streamlines the planning process and produces management reports that instill confidence and reduce business risk.

To be effective, business leaders need reliable, up-to-date financial and operational data both for planning purposes and for budgeting, forecasting, analysis, and statutory and management reporting. They must be able to integrate corporate and departmental planning, model cost scenarios, and perform sensitivity analysis to determine operational budgets. They also need to ensure a fully documented audit trail and compliance with regulatory mandates such as the Sarbanes-Oxley Act. The key to their success is an effective planning and consolidation environment.

SAP Business Planning and Consolidation, Edge edition, for the Microsoft platform is an integrated planning, budgeting, forecasting, and consolidation solution designed specifically for midsize organizations. It bridges the gap between the creation of financial and business plans and the daily execution of those plans, providing the tools you need to align plans across the entire organization – driving great results cost-effectively.

Designed for users, built for business

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Process centric and forward looking

Unified view of business performance

SAP Business Planning and Consolidation gives you access to reliable corporate data and optimizes your planning and consolidation processes. Designed for all business users, it gives everyone across your enterprise personalized, role-based access to functionality that is user focused, process centric, forward looking, and unified. Versions are available for the Microsoft platform and the SAP NetWeaver® technology platform.

Features for ease of use include the following:
• Familiar applications such as Microsoft Office, as well as an intuitive, 100% thin-client Web interface, serve as native interfaces to the application. For example, users can access Microsoft Excel spreadsheets that are linked directly to "live" operational data. As data is updated in real time, so is the spreadsheet. Working with tools they know well, users need minimal training.

• Intelligent action panes give users relevant, context-sensitive selections based on where they are in an application and their security profile, so they can understand what to do, when to do it, and why.
• Self-service reporting means any user can access information and create reports without having to make requests to IT. Drag-and-drop interfaces let users create custom reports or adapt the packaged reporting templates that come with the software to meet your corporate standards.

Process centric and forward looking

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Unified view of business performance

One of the challenges facing finance departments is to ensure that staff and line-of-business managers follow consistent processes across the enterprise. Self-service process flows in SAP Business Planning and Consolidation guide users through each step in a process and help ensure that the required steps for a given process, such as closing the books, are completed. Business process flows are automatically tracked and audited. The software comes with prepackaged process flows for common processes, such as quarterly or annual budgeting, that business users can modify without help from IT.

Successful businesses are always forward looking. SAP Business Planning and Consolidation helps you leverage your historical operations and financial data to model business scenarios and provide rolling forecasts. It automatically analyzes data and delivers critical information such as reasons and root causes. This functionality can help you assess what happened in the past and make risk-adjusted plans to improve future performance. In addition, the application provides automated variance and root cause analysis. With this feature, you can quickly find explanations for variances – and root causes – so you know where to focus management attention.

Unified view of business performance

Designed for users, built for business

Process centric and forward looking

Unified view of business performance

The centralized data repository in SAP Business Planning and Consolidation contains up-to-date actuals from your operational systems in addition to plans and budgets for the coming year. This gives you instant access to a complete picture of how your business performed and how it is expected to perform.

Should you need to drill into the specifics – to compare marketing expenditure last year to the budget for this year, for example – you can do so from one application. Activities such as budgeting and statutory reporting are transformed into efficient, collaborative processes that foster confidence. With a greater understanding of company performance, combined with insight into risk probabilities, you can make better decisions that help manage risk and contribute to future business results.

Make better decisions with immediate access to historical data, current actuals, and future plans and budgets – all in a single application.
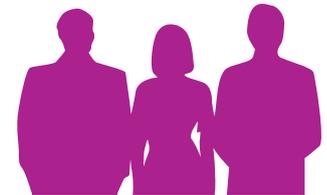
Easier planning and streamlined budgeting

Better forecasting, flexible reporting and analysis

Consolidated data for a faster close, greater transparency

With SAP Business Planning and Consolidation, you can perform bottom-up and top-down financial and operational planning with a single application and user interface. You can collaborate on plans, manage stakeholder interactions, track versions and changes, engage managers in the planning process, and help ensure clear ownership and accountability. Planning processes are supported by workflows and automation that help ensure that the right people participate at the right time. And you can incorporate unstructured data, such as Microsoft Office documents and e-mail, to help tell the story behind the plans.

The application also supports a streamlined process for preparing budgets that align with strategic plans. A Web-based interface allows widely distributed stakeholders to work together on spreadsheets, online and offline. And because you start with a single, consistent version of operational and financial data – both real-time and historical – you can have confidence in the integrity and accuracy of your budgets.

Enable the right people to collaborate effectively to create budgets that align as closely as possible with strategic plans.

Better forecasting, flexible reporting and analysis

Easier planning and streamlined budgeting

Better forecasting, flexible reporting and analysis

Consolidated data for a faster close, greater transparency

To help you achieve the most effective fore-casting possible, SAP Business Planning and Consolidation links business process flows tightly to the data and processes that support planning and budgeting. What-if modeling and scenario-planning functions enable assess-ment of budgeting in real time. Additional analytic functionality enables you to produce more accurate plans and budgets, create rolling forecasts, and incorporate real-time actuals with historical data.

With the application, you also benefit from powerful and flexible financial and operational reporting and analysis functionality. You can perform production and management report-ing (including exception reports), financial and operational analysis, and multidimen-sional analysis. The software provides a "park and go" feature that captures the data you are currently working with so that you can work on it remotely offline.

SAP Business Planning and Consolidation helps improve accuracy of forecasting, plans, and budgets by combining real-time and historical data.

Consolidated data for a faster close, greater transparency

Easier planning and streamlined budgeting

Better forecasting, flexible reporting and analysis

Consolidated data for a faster close, greater transparency

SAP Business Planning and Consolidation meets your legal and management consolidation and reporting requirements for a fast close process. Because a centralized data repository contains up-to-date actuals from your operational systems, you always have instant access to harmonized charts of accounts. This can shave weeks off your consolidation process while simultaneously supporting compliance with regulatory mandates such as the Sarbanes-Oxley Act. Specifically, you gain a single, centralized view of performance data and can generate clear, transparent financial statements and reports relating to, for example, profit and loss, cash flows, and balance sheets.

In addition, the software helps you compare budget-to-actuals data, automate the inter-company elimination process, gain transparency into corporate transactions at all levels, manage any number of currencies, and perform conversions, allocations, and eliminations. Automated reports support all reporting standards, including generally accepted accounting principles (GAAP), International Financial Reporting Standards (IFRS), International Accounting Standards (IAS), and the Financial Accounting Standards Board (FASB). Finally, SAP Business Planning and Consolidation improves compliance with regulatory and financial standards and generates a fully documented audit trail.

Summary

With the Edge edition of the SAP® Business Planning and Consolidation application, version for the Microsoft platform, you can streamline operations, instill confidence, and reduce risk. You gain planning, budgeting, and forecasting functionality together with support for financial consolidation and reporting operations – all in a single, cost-effective solution.

Business Challenges

- Reduce cycle time for planning and budgeting and increase user productivity
- Improve the accuracy and reliability of statutory, regulatory, and management reports
- Streamline the statutory consolidation process
- Keep compliance and auditing costs down
- Enable planning and consolidation with limited use of IT resources

Solution

- Streamlined and automated business planning and budgeting
- Rolling forecasts that incorporate real-time actuals with historical data analysis
- One-click access to up-to-date production and management reporting and analysis
- Consolidation of all performance-related data

Benefits

- Reduce cycle time in creating and approving budgets
- Enable better decision making by taking risk probabilities into account
- Increase user productivity with minimal training requirements
- Minimize business and compliance risk
- Reduce dependence on IT with self-service reporting

Learn more

To find out more, visit us online at www.sap.com/solutions/sme/business-analytics-for-medium-business.epx.