THE LOGICAL UPGRADE FROM SAP BPC

deFacto Global

BACKGROUND

Your company decided to invest in SAP BPC (formerly OutlookSoft) to manage your corporate planning and reporting processes. But now you may be faced with challenges like increasing costs, declining support, performance concerns, changes in the direction of your firm's technology strategy, or even changes in SAP's product roadmap for BPC and successor products.

You don't want to lose the investment you've made in BPC, and you want to build on the success you've realized. As a result, you are evaluating the benefits of moving to a new platform, which will allow you to take advantage of the investment you've already made, but will also grow and scale with your company's corporate planning needs.

> Simply put, migrating to deFacto Planning from SAP BPC is fast and extremely cost-effective.

deFacto Planning represents a critical component of any organization's Corporate Planning or Performance Management strategy. It was developed to be a highly scalable solution that supports sophisticated enterprise-wide applications as well as more straightforward, department-level planning and analysis applications.

Much like the original versions of BPC, deFacto was built to use the vast features of Microsoft's Excel and the Relational and Multi-dimensional capabilities of SQL Server. deFacto Global has spent the past 10 years investing in deFacto Planning on the Microsoft Platform, unlike BPC which has focused on their proprietary NetWeaver and HANA platforms.

deFacto Planning is a fully unified, 100% Microsoft-centric Budgeting, Forecasting, Consolidation and Reporting tool. It was designed and built by the experts who designed and built the original BPC, and has proven to outperform and out-scale BPC as well as other enterprise-class products on the market. The shared heritage between BPC and deFacto Planning allows for your initial investment to be repurposed more so than with any other product. deFacto's design makes it extremely easy for customers to migrate from BPC:

> ## AT&T replaced BPC with deFacto Planning. On day one, they experienced a 1,000 times increase in performance.

SCALABILITY & PERFORMANCE:

• Customers that migrated to deFacto Planning from BPC
have seen models taking over 5 hours to process to less than 5 minutes on the same hardware. That enabled them to do significantly more detailed analyses, but with greater speed and accuracy.

PERPETUALLY OPTIMIZED

• Unlike the ongoing challenge with BPC, deFacto Planning's architecture does not require ANY optimizations, or any reason to take the application offline, especially during crunch time.

REMEMBER EXPANSIONS? DEFACTO PLANNING HAS THEM!

• An automated drill-down for zero maintenance reports.

EFFICIENT REPORTING:

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• deFacto Planning supports either Matrix-based or Formula- based reporting, so it's easy to convert from formulas like EVGet and EVSend to deFacto Planning's formulas.

PRODUCT COMPONENTS

There are six main components to a deFacto migration:

1. Dimensions and Hierarchies
2. Models
3. Formulas and Business Logic
4. Data
5. Reports and Input Schedules
6. Security

To see how easy it is to migrate to deFacto, let's walk through the six components step by step.

The nuts and bolts of migrating to deFacto Planning

1. DIMENSIONS AND HIERARCHIES

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deFacto Planning makes it easy to import your dimensions directly from your BPC model. Simply copy the dimension worksheet from the BPC dimension workbook into the deFacto Planning Excel template. Using the built-in "Import from Excel" functionality of the deFacto Planning Modeler, import the Excel template. This will import members and hierarchies from BPC. Alternate hierarchies would automatically get picked up here as well.

To add any required properties after import, you can easily create them in the deFacto Modeler, and then import them by using the "Import from Excel" button. If you are more comfortable working within SQL's SSIS, we also provide example packages that demonstrate how to easily bring your dimensions from the BPC dimension tables over to the deFacto equivalent. You will see this ease in transition as a common theme throughout the migration process.

2. MODELS

From within the deFacto Planning Modeler, create a deFacto Planning model for each BPC model. Assign the same dimensions as BPC to the deFacto Planning model.

3. FORMULAS AND BUSINESS LOGIC

Logic script formulas can be transferred easily and directly from BPC to deFacto Planning. Simply copy and paste them from BPC dimension sheets into a plain text file. Modify your formula to have MDX scope format, and then import them into deFacto as Dynamic rules.

Business Rules can also be brought into deFacto Planning as on-demand or automatic rules. deFacto Planning has the option of running rules Dynamically, On-Demand, or they can even be Scheduled.

4. DATA

For the initial data load from BPC to deFacto Planning, most customers use the deFacto Planning Data Manager from within the Excel Add-in. Export your data from the BPC model, log in to the deFacto Planning model, and then use the Data Manager to load it up. Error checking is done real-time, and feedback to the user is instantaneous.

As with dimension building, if you are more comfortable working within SQL's SSIS, we also provide sample packages that demonstrate how to easily bring your data from the BPC fact table(s) over to the deFacto equivalent (Just 1 Fact table).

For the ETL processes, just re-point your BPC scripts to the deFacto fact table, and your ETL should stay pretty much the same. There is no need to worry about multiple fact tables or dimension tables. The structure is very straightforward, resulting in much improved performance.

5. REPORTS AND INPUT SCHEDULES

For those reports that use functions like EVGET and EVPRO (In BPC 10: EPM formulas such as 'epmretrievedata' and 'epmmemberproperty'), you can easily convert them to the equivalent functions in deFacto – CLValue and CLProperty. Many customers just do a search and replace on their templates and their reports are easily converted.

LocalMembers can be replaced by business rules or native Excel formulas. Native Excel conditional formatting replaces the complicated formatting worksheet. deFacto's Investigate feature allows multi-dimensional drill downs that are not available in BPC.

For reports using other formulas or EVDRE (EPM formulas in BPC 10), our recommended approach is to evaluate the reports and templates you currently have with BPC, and then create those layouts using the deFacto Planning Report Editor, which has a similar feel to BPC report wizard but more flexible and easier to use.

6. SECURITY

It is easy to set up security in deFacto. Set up all the security roles you would like in the deFacto Modeler and then export those roles into Excel. Next, assign all your users and roles within Excel and import them back into deFacto from the deFacto Planning Modeler.

CONCLUSION

deFacto gives BPC customers a far more scalable, and cost- effective option that allows you to re-use the vast majority of the work you have already done. As we have shown above, the migration process is very straightforward & fast; so it is tremendously cost-effective. deFacto Planning is the perfect alternative for those who have already made the investment in BPC, but are looking to move away from SAP onto a modern, Microsoft-based platform that will grow with you.

For more information, please visit deFactoGlobal.com or contact us via email to Info@deFactoGlobal.com