WEBINAR

Optimizing APOS Publisher for Cloud: Best Practices

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Today's Session – Key Topics

- **Multiple Formats & Format Management**
- **Configuration: Extracting tables to Excel Templates**
- **Excel & PowerPoint templates and how to automate the insertion of the content**
- **HTML Email Formatting**
- **Dynamic Bursting Definition Configurations**
- **Dynamic Recipient Data - Best Practices**
- **Dynamic Recipient Data Selection**
- **Scripting & Expressions**
- **Q&A** – see webinar console

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HOUSEKEEPING

You will have access to the slides via email

You will get the recording within 24 hours

Tell us how we did in the survey

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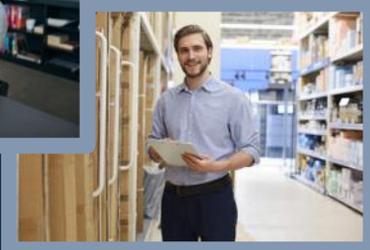# Report Information Access

- **Pull**

- **Push**

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Information Recipients

Finance Teams

Executives

Suppliers

Sales Teams

Customers

Store Managers

APOS

APOS Publisher for Cloud

APOS Publisher for Cloud is a software solution that automates the generation of personalized versions of reports, and then distributes the reports out to targeted users and locations.

The right information to the right people, in the right format, and at the right time.
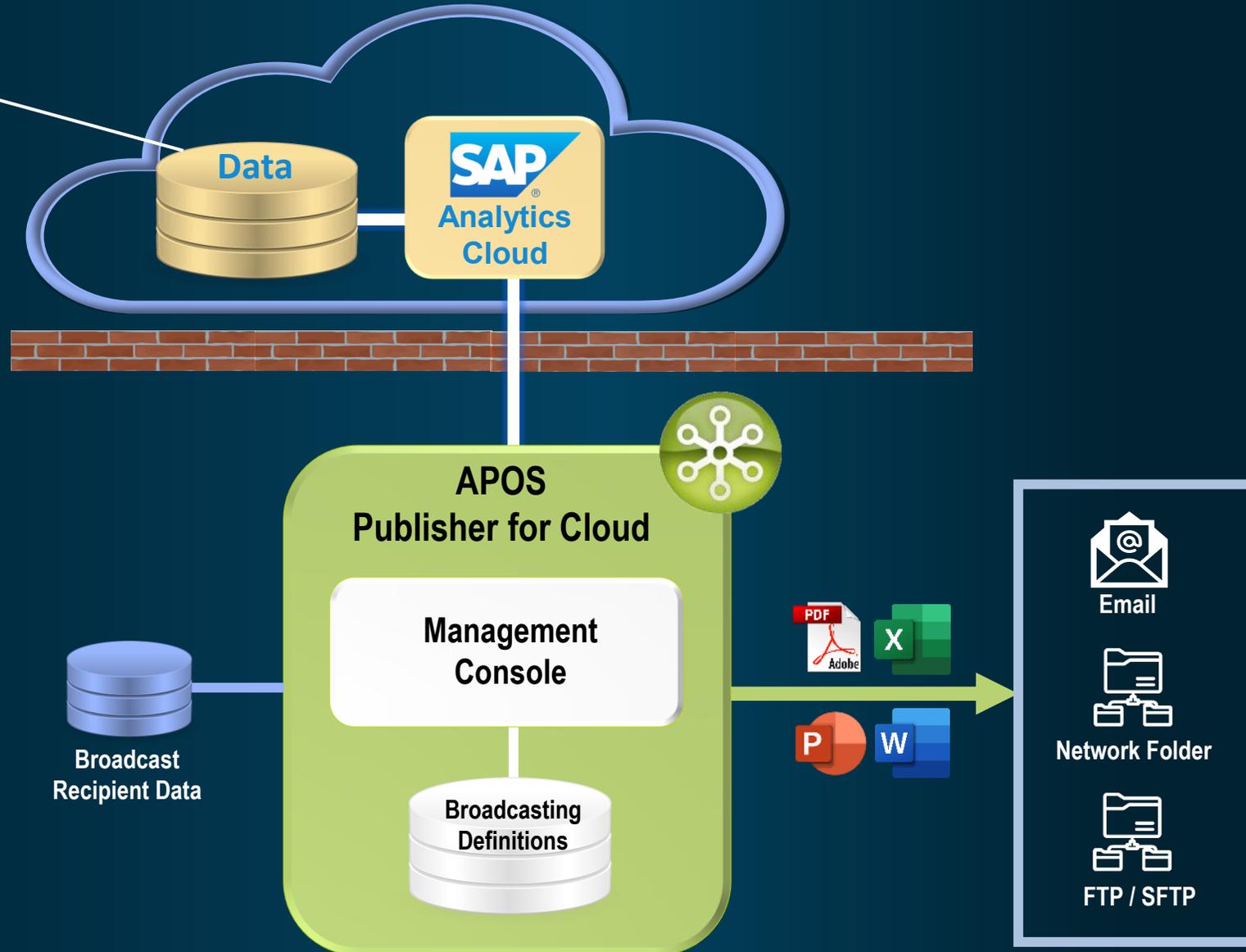
"Report Bursting"
"Report Broadcasting"

Supported Platforms:

- SAP Analytics Cloud
- SAP Analysis for Office
- Power BI
- Tableau
- Google Looker

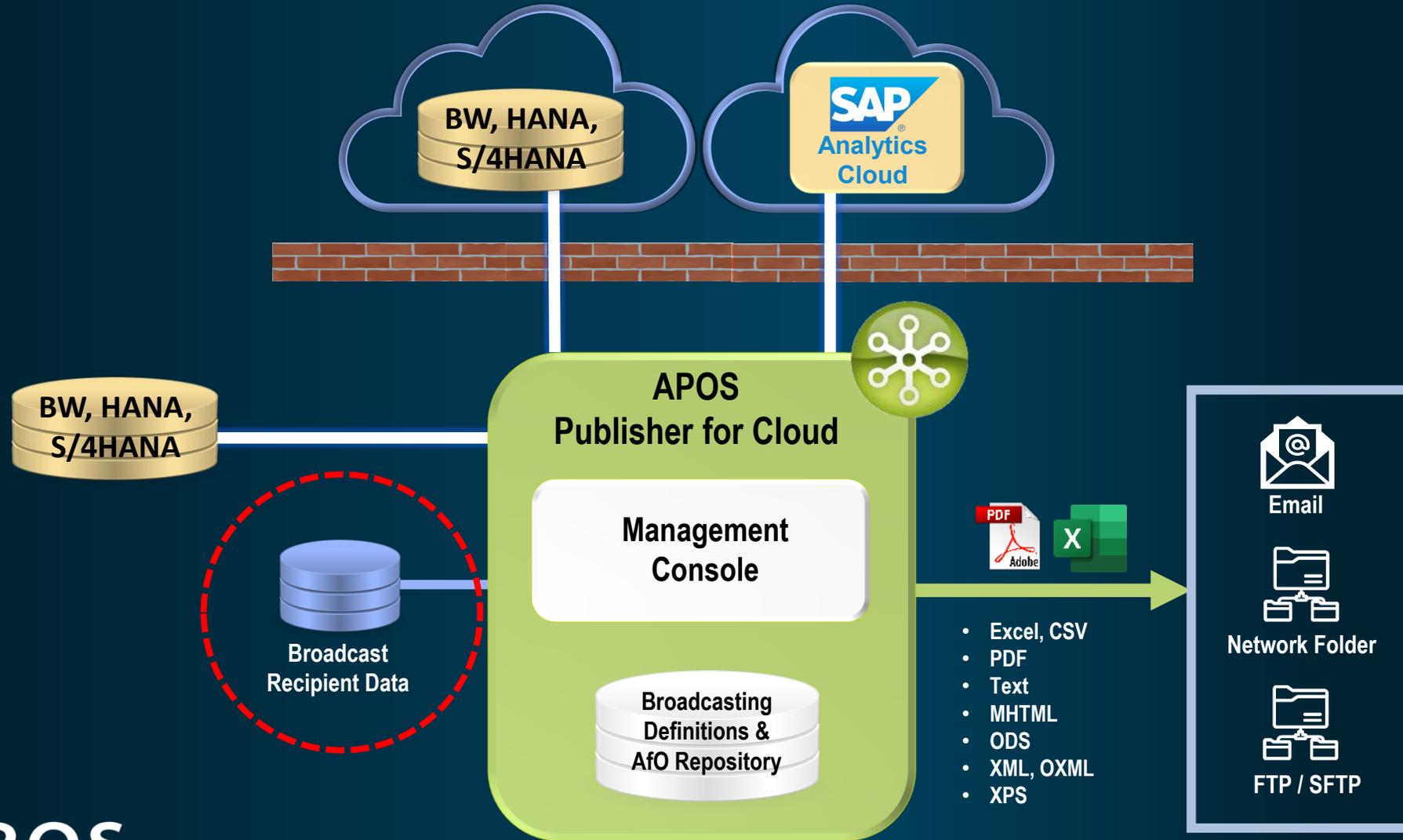# APOS Publisher for Cloud – SAC Stories

Any SAC Story

- Live & Import Data
- S/4HANA, BW, Datasphere
- SAP & Non-SAP Sources

Data

SAP
Analytics Cloud

APOS
Publisher for Cloud

Management Console

Broadcast Recipient Data

Broadcasting Definitions

PDF

Email

Network Folder

FTP / SFTP

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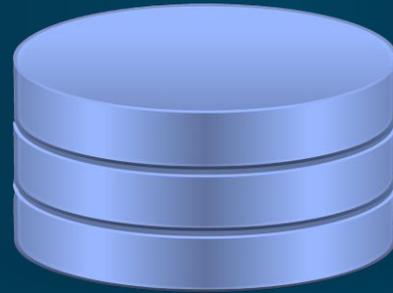# APOS Publisher for Cloud – Analysis for Office

Dynamic Recipient Data

A data source provided by customer which contains values to drive dynamic report filtering and control report distribution.

Any ODBC / OLE DB data source
- Excel
- SQL Server, Oracle, etc.
- S/4HANA, Datasphere, BW, BW/4HANA

**Dynamic
Recipient Data**

The Publisher for Cloud bursting definition creates the framework and rules for the broadcast.

The Dynamic Recipient Data drives the specific values of the broadcast.

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Process Timing - Execution Triggers

Date + Time
- Single or Recurring
- Hourly, Daily, Weekly, Monthly

Command Line
- Process chain integration
- Automation tool integration
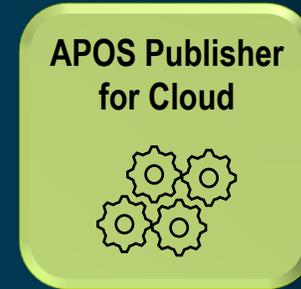- Bot integration

Conditional
- Business rules driven trigger
- Execution by threshold value criteria
- Data load completion triggers

Agentic AI
- Integration with Agentic AI
- AI can drive broadcast with dynamic selection of reports, recipients, filters

APOS Publisher for Cloud
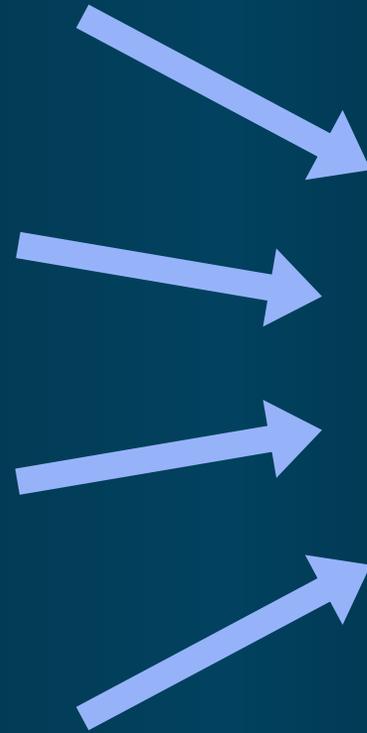
Automated Execution

Information Recipients

Reports Delivered & Consumed

(PDF, XLS, PPT, DOC, +)

Best Practices and Demonstrations

To view demonstrations, watch the webinar on demand <u>here</u>.

BROADCASTING BEST PRACTICES

- **Multiple Formats & Format Management**

- **Configuration: Extracting Tables to Excel Templates**

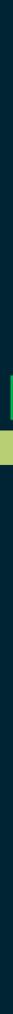- **Excel & PowerPoint Templates and how to automate the insertion of the content**

- **HTML Email Formatting**

Multiple Formats & Format Management

- Burst to PDF, Excel, PowerPoint, HTML in one definition.

- Define which pages go to which format using Exclude Formats.

- Each format has its own configuration (PDF options, Excel table mapping, PPT image placement, etc.).

- Supports sending multiple formats simultaneously (e.g., PDF + Excel in same email).

- Formats can be dynamically assigned per recipient.

Configuration: Extracting Tables to Excel Templates

- Select table ID from SAC story and map to Excel cell ranges.

- Supports extraction into multiple sheets or multiple tables into same sheet.

- Use Excel Templates for look-and-feel, formulas, calculations, macros, corporate formatting.

- Macro-enabled templates run macros before generating a final .xlsx file to ensure emails aren't blocked by security filters.

- Best Practice: Use a global template instead of page-level templates (more stable, required for macros).

Excel & PowerPoint Templates + Automated Content Insertion

Excel

- Use templates to control layout, formulas, styling.

- Automatic population of tables from SAC stories.

- Template can be shared across multiple pages within the bursting definition.

Power Point

- Two export options:
  - SAP Analytics Cloud PPT Export Engine → identical to SAC export.
  - Template-based PPT → full control of layout, positioning, branding.

- Best Practices:
  - Use PowerPoint's Selection Pane to name image placeholders uniquely.
  - Set alignment to Center and lock aspect ratio (Width) for consistent rendering.
  - Recommended when customers need branded slides.

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HTML Email Formatting

- HTML email templates are supported via the application's template folder.

- Allows logos, formatting, styling, custom layouts.

- Requires basic HTML knowledge (APOS does not create HTML templates for clients).

- Mapping of dynamic values from SAC tables to HTML elements is possible.

- Helpful for branded or content-rich email bodies.

BROADCASTING BEST PRACTICES

- **Dynamic Bursting Definition Configurations**

- **Dynamic Recipient Data – Best Practices**

- **Dynamic Recipient Data Selection**

- **Scripting & Expressions**

Dynamic Bursting Definition Configurations

- Most setup fields (delay, timeout, formats, template path, file names, destinations) can be dynamically overridden at runtime.

- Enables individualized distribution for each recipient.

- Supports multiple data sources (SQL, ODBC, Excel, HANA).

- Useful for complex splitting logic across business units, regions, etc.

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Dynamic Recipient Data Selection

- Controls which recipients are processed in each run.

- Supports filters (region, product, entity, etc.).

- Allows partial bursts during testing or phased rollouts.

- Essential for scaling bursting to large audiences.

Dynamic Recipient Data – Best Practices

- Store all recipient parameters in a database table (format, destination, filters, file name, message content, etc.).

- Prefer SQL/database sources over Excel (more stable, scalable).

- Use dynamic fields to personalize email subject, body text, output format.

DATASOURCE COMPARISON MATRIX

Feature/Consideration	Excel File	Database (e.g. SQL Server)
Ease of Use	✔ User-friendly interface; ideal for non-technical users	✖ Requires SQL knowledge or a technical user to manage
Setup & Accessibility	✔ Easy to set up and access **locally.** Needs to be accessible on network	✖ Requires configuration, access permissions, and setup
Data Update Process	✖ Manual – users must open and edit the file	✔ Automated – can be scheduled or triggered by processes
Data Volume Handling	✖ Not suitable for large datasets	✔ Efficient handling of large and complex datasets
Formula Flexibility	⚠ Limited to Excel formulas	✔ Supports advanced SQL logic (e.g., dynamic date calculations)
Version Control / Audit Trail	✖ Hard to track changes or maintain version history	✔ Database logs and audit capabilities
Concurrent Access	✖ Prone to file lock issues when multiple users access	✔ Supports multiple simultaneous users
Integration with Systems	⚠ Limited; depends on file paths or file shares	✔ Easily integrates with enterprise systems and ETL tools
Performance	✖ Slower performance as data volume grows	✔ Optimized query performance and indexing
Security	✖ Security depends on file system access	✔ Role-based access control and encryption options
Portability	✔ Easy to move, copy, or share	✖ Less portable; tied to server environment
Data Connection type	✖ Must be 64 bit ODBC driver. Need to download & install	✔ Can use OLE DB or ODBC
Advanced database querying	✖ Limited	✔ More advanced querying options available

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Scripting & Expressions

- Used for advanced logic: variables, filters, dynamic behaviors.

- Supports live connections (Datasphere, BW, HANA, etc.).

- Enables dynamic filtering per burst, conditional rules, or data-driven personalization.

- Expressions further refine dynamic control by enabling calculated values, conditional text, and branching logic that affects how content is exported or delivered.

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Publisher for Cloud New Features

Multi–Platform Support

One solution for report bursting across several BI platforms

- Powerful new capabilities for these platforms
- Single solution deployment
- Common methodology
- Centralized management
- Unified governance

SAP Analytics Cloud

Power BI

SAP Analysis for Office

Tableau

Looker

Publisher for Cloud New Features

Agentic AI Integration

'Next level' automation and process orchestration

- Harness agentic AI scenario tracking & monitoring
- Conditional execution based on AI analysis logic
- AI driven broadcasts – dynamic selection of reports, recipients, filters
- Unlimited use case possibilities

Publisher for Cloud New Features

Agentic AI Integration

Agent tracks & monitors a wide range of conditions & metrics

When trigger conditions exist, Agent writes key details into Dynamic Recipient Data
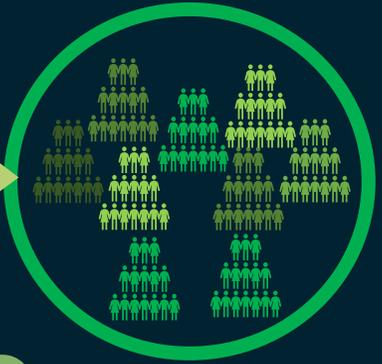
Dynamic Recipient Data

Targeted recipients receive personalized, proactive report

Information Recipients

AI Agent

APOS Publisher for Cloud

Publisher for Cloud triggers processing and executes burst based on report, recipient & filter instructions from Agent

Next Steps

- New uses cases

- Solution Technical Review

Interested in learning more about
SAP Analytics Cloud and sharing your experience?

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on LinkedIn and request to join

QUESTIONS?

Please enter your questions in the Q&A panel.

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Thank you!

Get in touch

WEBSITE

www.apos.com

EMAIL ADDRESS

info@apos.com

PHONE NUMBER

(+1) 519 894 2767

SAP Partner