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SAP Integrated Business Planning (SAP IBP)
Continuously Aligned, Real-time connected

Unified User Experience

Real-time insight and monitoring on aggregated and detailed level

Flexible and extensible data model and pre-built business model templates

Integrated business alignment for entire value chain

Real-time planning and simulation capabilities

Embedded social collaboration and process automation

Role-based user experience with consumer grade interface

Interoperability with Financial Planning in SAP Analytics Cloud

Interoperability with Business Network in SAP Ariba

Real Time Scenario Analysis
Sales & Operations Planning: Collaboration

Contextual Process Orchestration

- Contextually organize People, Documents, S&OP Process Steps, S&OP Data, Action items, Decisions, Alerts, etc. around the S&OP Process
- Enable People to stay on top of relevant, contextual updates
- Define and orchestrate the S&OP process(s)
IBP Process Management and JAM Collaboration

- Orchestrate IBP Process across cross functional teams
- Process Monitoring, Visualization and Collaboration
- Recurring Processes
- Process Automations
- Task Management
- Process Orchestration of Application Jobs
- Process controlled Key Figure Editability
- Process Mgmt and Custom Alerts integration
Monitor & Control the Planning Process

Process Management

Setup & Define the Process:
- Define process steps
- Assign involved/responsible people
- Define timelines per step
- Enable/disable data input per step
- Define automated processes at the beginning/end of a process step

Monitor & Control the Process:
- What is the current status?
- Where are everybody situated on their given timelines?
- Are there any delays in the process? If so, what or who is delayed?
- Can we start the next process step?
- …

View one or multiple processes in a Gantt Chart view
Redesigned Process Management for Process Automations and Monitoring

- Processes Templates and Visualizations with Gannt Chart Views
- **Process Orchestration** of Application Jobs
- **Process Automations** based on Dates, Tasks and Batch Job completions
- Collaboration across Stakeholders
- Quickly identify processes that need attention
- Global and Local processes
- Calendar Workday Settings
- Task Monitoring
Multiple Processes can be viewed and managed in a Dashboard.
SAP JAM is embedded within IBP to provide collaboration across different functional groups

Document repository and content management

Create JAM Groups for Collaboration. Feeds Updates on the Planning Activities

Engage stakeholders with Decision Making Tools
JAM Collaboration
Create Events and manage IBP Meetings


Share Planning data updates to JAM Group with Reason Codes and Comments on changes
Automated Recurring Processes

Manage Recurring Processes app allows you to automate the creation of new processes that repeat regularly.

Define Planning Cycles for recurring processes

Schedule all recurrences of a process in one go. You can decide if the process should repeat monthly or weekly.
### Process Orchestration of Application Jobs

Attach Application Job Template to Start and End of Process Step. These Application Jobs get triggered when the Step is started or completed through Process Automation or manually.

As process progresses when tasks are completed and/or dates are reached, the application jobs are triggered and its status tracked in Process monitoring.

**Example:**
- When Demand Review Step starts, trigger Statistical Forecasting run
- When Demand Review Step is complete, run Copy Operator to prepare for Supply Planning

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**Application Job Template:**

<table>
<thead>
<tr>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>DS_Statistical Forecasting Operator</td>
<td>DS_Statistical Forecasting Operator</td>
</tr>
<tr>
<td>S&amp;OP Copy Consensus Demand Plan</td>
<td>S&amp;OP Copy Consensus Demand Plan</td>
</tr>
</tbody>
</table>
## Process Automation Conditions

Automation criteria can be defined for Start or End of Step with condition on:

- Dates
- Tasks Completions
- Application Job Completions
- Alerts

**Example:** Demand Review Step automatically starts when the previous step Product Review is completed.

Demand Review Step automatically ends when the Tasks associated with the step are completed or when the End Date for the step has reached.
Process Feeds and Logs

- Chronological list of the events in the process
- Quickly identify exceptions/errors in the process.
- Records most relevant events like process automations, tasks completions, orchestration of application jobs associated with process and manual interventions
- Navigation to Application Logs
Task Management

- Define default Tasks for each Process Step and assign to Participants Groups and Users
- Tasks are automatically generated and assigned when Process is set to In-Progress
- Task email notifications are sent out to the Users
- Tasks can be completed from Tasks App or IBP Excel Add-In or JAM
- Tasks can be monitored in Process Dashboards or Manage Processes App
- As Tasks are completed the Process progress increases
Task Management in Excel

Open tasks that were assigned to your user, e.g. as part of an S&OP Process Step can be visualized in the IBP Microsoft Excel Add-In.

- Process and Process Step Details and Progress can be see as well.
- Task can be closed in Microsoft Excel.
- Tasks can be grouped and sorted by
  - Process
  - Priority
  - Due Date
Process Management - Tasks Notifications in Fiori

- Reminders for Automated Tasks from Process Management can be shown for a User as Notifications on the SAP Fiori Launchpad.

- The task reminders are sent to Users who have Open Tasks, n days (configured in process step) before the end date of the process step is approaching.
Mass Deletion of Processes - New Application Job Template to Purge Processes

Purges all processes that are older than the given number of days for all or specified processes templates.

Create Process Steps without Tasks

- E.g. Process steps that represent a milestone within the process, like the process step for the management review that concludes a process.
- E.g. Process steps that have application jobs assigned and that are configured to run automatically.
Control Key Figure editability based on Process Status

Control which key figures should be allowed to be edited by which Users during a process stage. e.g. lock sales key figures from editing after Sales Review step is completed.

Day 1-3
Sales Review
Sales Forecast Qty
Marketing Qty

Day 4-5
Marketing Review
Sales Forecast Qty
Marketing Qty

Sales Forecast Qty
Marketing Qty
Process Automation and Management by Exception

Assign Custom Alert Subscriptions to Process Step enabling process to run automated and intervene on exceptions in planning results.

e.g. Demand Planning should not start if the Actuals Qty has Null value Alerts

Supply Planning should start only if Demand Plan Accuracy > 85%

Supply Planning process should not finish if there are Capacity Overload Alerts
Process Automation and Management by Exception

Process Templates

Assign one or more Custom Alert Subscriptions to the Start or End of a Process Step

Custom Alert Subscriptions assigned to process steps can be configured for visibility of alerts and/or to control process automations

Manage Automation Criteria considering Alert Conditions

Define Custom End Condition
- Step Ends:
  - When Tasks Are Completed
  - No Custom Alerts at Start of Step
  - All of the conditions above are satisfied

- And When:...
  - At least one of the conditions above is satisfied
Process Automation and Management by Exception

- Alerts are triggered when the Process Step is Started / Ended
- Subsequent Step will not start until the Alerts are resolved (depending on automation criteria)

Navigate to Alerts in Monitor Custom Alerts App

Navigate to Custom Alert Definition

Visibility into Alerts
SAP Best Practices for SAP Integrated Business Planning
Process Management

V16.1908
IBP for sales and operations

Process Flow

Tactical
Frequency: Monthly
Horizon: 1-2 years
Buckets: Months, Weeks

Mid-Term
Operational
Frequency: Weekly
Horizon: 1-12 months
Buckets: Weeks, Days

Short-Term
Operational
Frequency: Daily
Horizon: 1-3 weeks
Buckets: Days

Execution

Demand Review
Consensus Demand Plan
- Review Sales Forecast
- Review Marketing Forecast
- Review Annual Operating Plan
- Create Consensus Demand Plan

Supply Review – Heuristic, Optimizer
Constrained Demand Plan
- Run Forecast Consumption (if you implement 3RT)
- Create Supply Plan

Reconciliation Review
Constrained Demand Plan
- Review Supply Scenarios

Management Business Review
Final Consensus Demand Plan
- Review Executive Proposal
- Approve Final Plan
IBP for sales and operations
Process Management - 1

**Demand Review**
- Review Sales Forecast
- Review Marketing Forecast
- Review Annual Operating Plan
- Create Consensus Demand Plan

**Start Step**
- On Start Date

**End Step**
- On End Date or
- When Tasks are Completed
- Copy Consensus Demand Plan

**Supply Review**
- Run Forecast Consumption
- Create Supply Plan

**Start Step**
- When End Application Job of Previous Step is Completed or
- When Previous Step is Completed

**Start Job**
- Copy of Final Safety Stock (from IO)

**End Step**
- On End Date or
- When Tasks are Completed

**Reconciliation Review**
- Review Supply Scenarios

**Start Step**
- When Previous Step is Completed

**End Step**
- On End Date or
- When Tasks are Completed
- Copy Constrained Demand Plan to Final Consensus Demand Plan

**Management Business Review**
- Review Executive Proposal
- Approve Final Plan

**Start Step**
- On start date or
- When Previous Step is Completed

**End Step**
- When Tasks are Completed

**End Job**
- Copy Constrained Demand Plan to Final Consensus Demand Plan
IBP for sales and operations
Process Management - 2

Process Template

Demand Review

- Start Step:
  - Automatically Start Step:
  - On Start Date

End Step:
- Automatically End Step:
- Custom: On End Date OR When Tasks Are Completed

Start Time:
08:00:00 AM

End Time:
06:00:00 AM

Application Job Settings

Start Job Template:
SAT1905_Si&OP_Copy Consensus Demand Plan

Tasks

Send Notification (Number of Days Before End of Step): 0

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Participant Groups</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Sales Forecast</td>
<td>Review Sales Forecast</td>
<td>DEMO_PM</td>
<td></td>
</tr>
<tr>
<td>Review Marketing Forecast</td>
<td>Review Marketing Forecast</td>
<td>DEMO_PM</td>
<td></td>
</tr>
<tr>
<td>Review Annual Operating Plan</td>
<td>Review Annual Operating Plan</td>
<td>DEMO_PM</td>
<td></td>
</tr>
</tbody>
</table>
IBP for sales and operations
Process Management - 3

Recurrent Process

Recurrent Scheduling

*Repeat:
Monthly

*On Day:
1st

*Number of Occurrences:
12

Starting:
01/01/2019

Monthly Occurrences (12)

<table>
<thead>
<tr>
<th>Name</th>
<th>Step Start / Step End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales &amp; Operations Planning_Apr_2019</td>
<td>04/03/2019 - 04/05/2019</td>
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<tr>
<td>Demand Review</td>
<td>04/03/2019 - 04/05/2019</td>
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<tr>
<td>Supply Review</td>
<td>04/09/2019 - 04/12/2019</td>
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<tr>
<td>Reconciliation Review</td>
<td>04/15/2019 - 04/18/2019</td>
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<tr>
<td>Management Business Review</td>
<td>04/22/2019 - 04/26/2019</td>
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<tr>
<td>Demo_Sales &amp; Operations Planning_May_2019</td>
<td>05/03/2019 - 05/07/2019</td>
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<td>Demand Review</td>
<td>05/03/2019 - 05/07/2019</td>
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<tr>
<td>Supply Review</td>
<td>05/08/2019 - 05/14/2019</td>
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<tr>
<td>Reconciliation Review</td>
<td>05/15/2019 - 05/21/2019</td>
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<tr>
<td>Management Business Review</td>
<td>05/22/2019 - 05/28/2019</td>
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<tr>
<td>Demo_Sales &amp; Operations Planning_June_2019</td>
<td>06/03/2019 - 06/07/2019</td>
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<tr>
<td>Demand Review</td>
<td>06/03/2019 - 06/07/2019</td>
</tr>
<tr>
<td>Supply Review</td>
<td>06/10/2019 - 06/14/2019</td>
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<tr>
<td>Reconciliation Review</td>
<td>06/17/2019 - 06/21/2019</td>
</tr>
<tr>
<td>Management Business Review</td>
<td>06/24/2019 - 06/28/2019</td>
</tr>
</tbody>
</table>
IBP for sales and operations
Process Management - 4

Test Scripts IBP for Sales and operations
demand review,
supply review – heuristic and optimizer,
reconciliation review,
management business review

Config Guide 12K (S&OP Process Management)

Create Process Template → Create Recurring Processes → Create Process Instance (1) → Add automatically created Process Instance to Dashboard → Process Management

Create Process Instance (2) → Create Process Instance (n)
SAP Best Practices for SAP Integrated Business Planning 1908:

A new Tips and Tricks document titled Process Management for Unified Planning Process describes the process orchestration within and between processes carried out, for example in Sales and Operations (S&OP) by a Sales and Operations Coordinator, or in Demand Planning by a Demand Planner and so on.

This illustrates an overall orchestration layer for the Unified Planning process. Integration points between the IBP modules shall be automated as much as possible. In scope for this orchestration layer are the time-series-based planning processes.

- Tips & Tricks Process Management for Unified Planning Process
SAP Best Practices for SAP Integrated Business Planning

Where to get it

http://help.sap.com/ibp
http://rapid.sap.com/bp/rds_ibp

Download the following assets:

- Test scripts
- Process flow diagrams
- Scope item recordings
- Configuration guides
- Excel planning view templates
- Sample data CSV files

- Tips & Tricks Process Management for Unified Planning Process
- Integrated Business Planning for sales and operations
  - IBP for sales and operations – demand review (2BQ)
  - IBP for sales and operations – supply review – heuristic (2BS)
  - IBP for sales and operations – reconciliation review (2BU)
  - IBP for sales and operations – management business review (2BW)
Future Topics for Process Management

- Process Adherence KPIs
- Workflow and Approval Process
- Event trigger for Processes
- Automations with Process Chains – Process Actions of type Task, Job, Event and Alert
- Process Hierarchies & Step Hierarchies
- Sequences of Steps and Tasks
- Tasks Completion by anyone in the Group
- Tasks App redesign – Tasks Escalation