Tips & Tricks for the Planning Areas application

Webinar

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May 19, 2020
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Model Configuration UI timeline

1811 1902 1905 1908 1911 2002

PHASED OUT
Phasing out Configuration UI

- Applications already available
- Uses Planning Area app (1908/1911)
- Still used, also as separate apps
4 years ago we started with a DT workshop.

Since then multiple applications were delivered for Model Configuration. The most important – and the biggest – is:

Planning Areas
Master Data Types Application
Attribute creation is possible on-the-fly during Master Data Type maintenance.
Sample Model Entities Application
How to switch object types in SAME

<table>
<thead>
<tr>
<th>Name</th>
<th>Level</th>
<th>Time Profile Levels</th>
<th>Description</th>
<th>Start Date</th>
<th>End Date</th>
<th>Planning Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>1</td>
<td>Daily (1)</td>
<td>Technical Week</td>
<td>01.01.2014</td>
<td>31.12.2019</td>
<td>1</td>
</tr>
<tr>
<td>Weekly (technical)</td>
<td>2</td>
<td>Weekly (technical) (2)</td>
<td>12 Technical Weeks</td>
<td>30 Days</td>
<td>10 Weeks</td>
<td>12 Technical Weeks</td>
</tr>
<tr>
<td>Weekly</td>
<td>3</td>
<td>Weekly (technical) (2)</td>
<td>Week</td>
<td>01.01.2014</td>
<td>31.12.2019</td>
<td>1</td>
</tr>
<tr>
<td>Monthly</td>
<td>4</td>
<td>Weekly (technical) (2)</td>
<td>Month</td>
<td>01.01.2014</td>
<td>31.12.2019</td>
<td>1</td>
</tr>
<tr>
<td>Quarterly</td>
<td>5</td>
<td>Monthly (4)</td>
<td>Quarter</td>
<td>01.01.2014</td>
<td>31.12.2019</td>
<td>1</td>
</tr>
<tr>
<td>Yearly</td>
<td>6</td>
<td>Quarterly (5)</td>
<td>Year</td>
<td>01.01.2014</td>
<td>31.12.2019</td>
<td>1</td>
</tr>
</tbody>
</table>
Analytics and Alerts can be copied from SAP Sample

Unified Planning Area: IBP 2002
SAP7: IBP 2008
You can choose a new integration profile during copy.

All target external MDTs’ and PA’s integration profile can be changed in one shot.
You can export a PA to CSV

How to enable Chrome to allow multiple file download: [link](#)

PA Comparison CSV: IBP 2002
PA Comparison UI: IBP 2008
Planning Area Comparison UI
Planned release: IBP 2008
Planning Areas Application
PA Worklist
You can see which objects have an active state. The active state can be restored if present. Active state is displayed for all object types (Attr / MDT / TP / PA / subobjects). Links are available to related application log details for entries that are less than 3 months old. Objects' active state is displayed in this mode.
All objects and sub-objects have similar administrative information.

The origin of the PA is visible in the General tab.
The Activation dialog shows the overview about the ACT progress. Feel free to close it – it opens again when you click „Last Action Status” link:
The Planning Area deletion now can delete all the Master Data Types that are not used anywhere else.

The Planning Area comparison is available from here as well (Planned: IBP 2008).
Planning Areas Application
PA Details – Good to know
Do you want to open a specific Planning Area directly from the Fiori Launch Page?

... then use this function, and the Planning Areas worklist is skipped!
There are tons of links everywhere in our apps…
Do not be shy, click around and see what is offered!
Some links and buttons navigate to other applications in a new browser tab, right into the relevant details when possible….
some other links offer further details – popovers – with extra navigation possibilities...
If you feel lost, use the standard Fiori navigation patterns. ... or just use the breadcrumb navigation!

... and the in-app navigation help you to quickly jump back and forth.
The Planning Area deletion now can delete all the Master Data Types that are not used anywhere else.

While working with a Planning Area, global operations are available here.

CSV download features are grouped behind this button.

Navigation and convenient features are to be found here.
Planning Areas Application
PA Details – General tab
Changing the Time Profile is possible, but handle this operation with extra care as it adjusts the Planning Area heavily. Make sure you read the documentation first!
The Activation dialog shows the overview about the ACT progress.
Feel free to close it – it opens again when you click „Last Action Status“ link.

The Application Log Details – now with the Refresh button.
While modeling, PERIODID of a time profile level need to be known. The system shows you the PERIODIDs in the Planning Areas application...
The operation history table shows all the copy and transport operations back to the origin.
Planning Areas Application
PA Details – Attributes tab
… you can assign attributes to the Planning Area without using it in any Planning Levels.

After making visible the „Planning Level Independent” column…

... you can assign attributes to the Planning Area without using it in any Planning Levels.
Adding a (new) attribute to **multiple** PLs was never so easy!

You can add the new attribute right after assigning it to the PA..

... or you can assign it later.
The assignment dialog groups the planning levels by the Master Data Type presence, and even supports you with analyzing the calculation chain and the attribute sourcing criteria to meet in the related calculations.
Deleting an attribute from the Planning Area also deletes it from the Planning Levels.
Master Data Types will have type dependent popovers with IBP 2008…

… with flexible navigation possibilities
Planning Areas Application
PA Details – Planning Levels
You can review relevant key figures related to a Planning Level… with flexible navigation possibilities.
Planning Areas Application
PA Details – Key Figures worklist
By default, all key figures are shown in the KF worklist, including read-only, system generated KFs for fixing.

... and you can display only the user created KFs for simplicity.
Different key figure types are represented by icons. You can use your mouse to see the tooltip to learn them!

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Base Planning Level</th>
<th>Type</th>
<th>Key Figures</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALERT</td>
<td>Alert Key Figure</td>
<td>PL3</td>
<td>Calculated</td>
<td>Alert</td>
<td>Inactive</td>
</tr>
<tr>
<td>DIS_FIXIND_FIXED</td>
<td>Fixing indicator for FIXED</td>
<td>PL3</td>
<td>Technical</td>
<td></td>
<td>Inactive</td>
</tr>
<tr>
<td>DIS_FIXQTY_FIXED</td>
<td>Fixed quantity for FIXED</td>
<td>PL3</td>
<td>Stored</td>
<td></td>
<td>Inactive</td>
</tr>
<tr>
<td>FIXED</td>
<td>Fixed Key Figure</td>
<td>PL3</td>
<td>Attribute as Key Figure</td>
<td></td>
<td>Inactive</td>
</tr>
<tr>
<td>GEOLOCATION</td>
<td>Geo Latitude</td>
<td>PL3</td>
<td>Helper</td>
<td></td>
<td>Inactive</td>
</tr>
<tr>
<td>HELPER</td>
<td>HELPER</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERIODID</td>
<td>PERIODID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STORED</td>
<td>Stored KF</td>
<td>PL3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STOREDCALCULATED</td>
<td>Stored and Calculated</td>
<td>PL3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
You can display some hidden, but relevant columns in the worklists.
- Is this Key Figure editable?
- What is the sourcing of my attributes in a PL?
- Is this Planning Level external?
- Who and when created this entry?
- ....
If you need a special filter criteria, just use the filter function. You can save it as a variant, and later apply with a single click.
The key figure search field searches the actual list (controlled by the variant / filter). It is really powerful, you can search by any key figure characteristics!

For example filter/search by:

- any part of ID / Name / Description
- Base Planning Level
- status
- Convert Using KF name
- Disaggregation Expression (yes/no)
- Edit Allowed (by different options)
- Change History Enabled (yes/no)

Watch explanatory video [here](#)

When searching amongst KF characteristics with free text forms, you can use search <criteria>:

- `<text>` → infix search
- `<text*>` → prefix search
- `<*text>` → postfix search
- `<“text”>` → exact search
You can freely tag your KFs, creating your own categories. It does not inactivate the Planning Area.

Use your #tags for easy KF filtering.
Key Figure deletion is now much easier. The system deletes all the references after listing them and user confirmation. Therefore, you are not forced to disassemble your Planning Area from top to bottom…
... however, you still need to adjust the referring objects and maintain their consistency.
Not-yet-existing or deleted calculation inputs are marked with orange to grab attention.

Later, when you define or fix the incorrect calculation inputs, the system automatically displays them as „normal”. 
Focus Mode enables you to edit existing key figures and planning levels in quick succession, or to create new ones.

Actually applied search criteria and/or variants are shared between „normal” and „focus” mode screens.
Planning Areas Application
PA Details – Key Figure details
The Base Planning Level in the Key Figure Details screen now has a popover to quickly show relevant details – available from IBP 2008.
Hover your mouse over a KF, and the system highlights the same KF@PL forms in the all calculations. It makes easy to see and understand where is it defined or used.
If a valid KF@PL form is originated from an attribute transformation, the system marks it with this icon and helps the understanding with a popover.
Popovers are available for each KFs and PLs in the calculations. Use them to get a quick overview about that object’s details.
It can be a good idea to open some details (KF, PL) in a new browser tab, and use both tabs to analyze, compare, copy, understand.

And it you wish, you can navigate directly, within the same window.
Calculations’ status is displayed on aggregated level (if possible) to save space.

If an input is stored for a calculation, it is directly visualized by the „stored” icon.

```
ACTUALSOTYPRIORYEAR@REQUEST = SUM("ACTUALSOTYPRIORYEAR@WKPRODLOCUSTOFFSETUOMTO")

ACTUALSOTYPRIORYEAR@WKPRODLOCUSTOFFSETUOMTO = "UOMCONVERSIONFACTOR@PRODUOMTO*" * "ACTUALSOTYPRIORYEAR@WKPRODLOCUSTOFFSET"

ACTUALSOTYPRIORYEAR@WKPRODLOCUST = "ACTUALSOTY@WKPRODLOCUST"
```
The system parses the calculation expression and automatically identifies all the "direct" inputs.

When you maintain a calculation, the system predicts if the inputs are used in Stored or Calculated form. You can adjust it, but in most of the cases you do not have to!
Additional calculation inputs are not hidden anymore – they are being displayed dynamically.

You are free to enter a not-yet-existing direct or additional input – the system issues a warning, but this is allowed.
Valid attributes in the calculation expressions are color-coded and have a popover available for them.
You can always display the graph representing the key figure calculation chain in a new tab.
Depending on **Base Planning Level** and **Convert Using** characteristics, the system tries to identify the **Conversion Planning Level** used for standard UoM and Currency modeling.

If **Conversion Planning Level** is successfully identified, the system proposes it and prepares the standard calculation in the calculation editor to speed up standard UoM/Currency conversion modeling.
The Key Figure calculation expression can be edited in full screen, if needed, and... bracket pairs are highlighted when cursor is positioned.
When you validate a calculation, the system checks the attribute set present on the input and output side required for successful Activation.
Drag&drop is available from any panels displaying a key figure calculation – even between separate browser tabs. Just drag the KF@PL by the @ symbol to the target area.

You can also copy/paste an expression (Ctrl+C / Ctrl + V)
See if you can find and invoke our easter egg 😊
When you create or edit a Key Figure, the versions in the Planning Area are listed, so the KF can be directly assigned to them. This will help you keep this important step in mind, and thus maintain consistency.
The disaggregation related fields have been enhanced with IBP 1905 in order to provide better overview about the logic.

For example, a new Proportionality field has been introduced. This particular example means that the proportionality is based on the actual key figure’s calculated values – and the system generates the disaggregation expression for this during Activation.
The Disaggregation Expression now has code completion and a Validation to prevent and catch errors early (IBP 1911).
Some of the Planning Operator types that are relevant for the Planning Area are direct links to the corresponding maintenance application.
Thank you.

Contact information:

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