Meet the Expert : SAP IBP Web-Based Planning UI

Pramod Mane, SAP – Ralf Heimburger, SAP
November 5th 2019
Agenda

- Planning UIs in IBP
- Overview of Web-Based Planning UI
- Demonstration
- Roadmap
- Q&A
Unified User Experience

Browser-based WebUI
- Real-time insight & monitoring
- Web-based Planning
- Exception handling / alerts
- S&OP Process & Task Management
- Model Configuration
- Job Scheduling

Planners and Business Users
Administrators
Consultants

IBP Add-In for Microsoft Excel
- Real-time insight & monitoring to analyze the data
- Advanced planning and data management
- Real-time what-if scenario simulations
- Master Data Management

Planners and Business Users

SAP JAM
- Embedded social collaboration platform
- Exchange ideas
- Keep all stakeholders informed about the latest activities
- S&OP Task Management

Planners and Business Users

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Planning UIs in IBP

IBP Excel Add-In

Web-Based Planning App

- Occasional users e.g. Key Account Managers / Sales Reps at customer sites with basic planning tasks
- Collaboration with Business Partners (Suppliers and Customers)
The IBP Excel Add-In

- Review and Change Data (Online & Offline)
- Master Data Management
- Define Planning View for the Task at Hand
- Save as Templates and Favorites, and Share with Users
- Change History Views for Auditing
- Ad-hoc Drill Down Capabilities
- Key Figure Value Fixing

Scenario Management & What-If Simulations
Planning Notes
Add custom VBA code to finetune the planning capabilities
Alert Key Figures

Advanced Formatting Rules to indicate what actions a user can take

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Planning UIs in IBP

IBP Excel Add-In

Web-Based Planning App

- Occasional users e.g. Key Account Managers / Sales Reps at customer sites with basic planning tasks.
- Collaboration with Business Partners (Suppliers and Customers)
# IBP Planning UIs

<table>
<thead>
<tr>
<th><strong>IBP Excel Add-In</strong></th>
<th><strong>Web-Based Planning UI</strong></th>
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</thead>
</table>
| **Key users**        | · Planner, Key-Account Manager, Marketing & Sales, Management  
· Supporting occasional, advanced, and power planners with complex business processes being covered | · In current 1911 release, supporting occasional users e.g. Key Account Managers / Sales Reps at customer sites with basic planning tasks.  
· Enable collaboration with business partners |
| **Business processes** | · Complex planning processes supported by Microsoft Excel native features, such as:  
· Very flexible extensions with VBA, macros, and custom formatting  
· Excel formulas / local key figures  
· Offline Usage of Planning View Workbooks (share with external users) | · Basic planning process in scope:  
· Today: Create planning view, analyze data, change data, save, simulate, user-defined scenarios, cell-fixing, planning notes |
| **Prerequisites**     | · Add-in for Microsoft Excel requires Windows and Office installed on user’s computer  
· Tablets (except for MSFT Surface) not supported.  
· MacBooks only with Virtual Machine (Windows and Office) installed. | · Browser-based app started from the IBP Web-UI  
· Tablets and MacBooks supported. |
Web-Based Planning UI for basic planning tasks
Fiori app to analyze and change planning data in IBP

Customer or Supplier using PC or Tablet
(External IBP user)

- Customer / Sales representative updates forecast in IBP WebUI
- IBP makes forecast available to customer / sales representative in IBP WebUI
- Collaboration on Consensus Forecast
- Forecast Commit on supply plan

Planner using a PC
(Internal User)

Sales Representative at customer location using a tablet
(Internal User)
## The Web-Based Planning UI

### Scenario Management & What-If Simulations
- **Review and Change Data**
- **Define Planning View for the Task at Hand**
- **Save as Planning View, and Share with Users**
- **Planning Notes (planned for 2002)**

### Key Figure Value Fixing
- **Drill Down Capabilities**

### Other enhancements:
- Freeze columns, column filtering, full-screen mode, last refresh

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### Table: Consensus Planning View

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**Other enhancements:**
- Freeze columns, column filtering, full-screen mode, last refresh
Web-based Planning app

Continuous investment to complete the set of planning capabilities required for the occasional planning user

- **Versions**: Compare *(Delivered with 1905)* and Promote
- **User-defined Scenarios**: Create, Compare, & Manage *(Delivered with 1908)*
- **Simulations and Drilldown**: e.g. Simulate (basic) *(Delivered with 1908)*
- **Fixing**: Open planning view with fixing indicator, Fix and Unfix Key figure values *(Delivered with 1908 and 1911)*
- **Support Attribute permissions** *(Delivered with 1911)*
- **Other usability enhancements**: Freeze columns, column filtering, full-screen mode, last refresh

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This is the current state of planning and may be changed by SAP at any time.
Web-Based Planning UI Demo
Basic Simulations

- You can now simulate the effects of your data changes on dependent key figures on-the-fly.
- Note that only basic simulations for dependent key figures are supported. Simulations using planning operators are not possible.

### Consensus Planning View

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<th>Description: Consensus Planning View</th>
<th>Versions/Scenarios: Base Version</th>
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#### Product Family: FAMILY 100-HEADPHONES

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User-Defined Scenarios

- If you have simulated any changes, and you want to save these changes separately so as not to impact the operational data, you can save them as a scenario.

- The **Web-Based Planning** app provides all the functionalities to manage your scenarios and those shared with you. This includes scenarios that were created in the IBP Excel add-in.
Display Settings for User-Defined Scenarios

- Select the user-defined scenarios in edit planning view settings.

Consensus Planning View

General Information | Time Settings | Planning Level | Key Figures | Filter | Sharing

Name: Consensus Planning View

Description: Consensus Planning View

Planning Area:

BINUPA (Unified Planning Area)

Versions/Scenarios:

- Base Version/Demand Spike
Manage User-Defined Scenarios

- Select the user-defined scenarios in edit planning view settings.
Other enhancements

- **Display of fixed values:** A visual help now indicates which values in the planning view are fixed. A fixed value is now indicated by a filled padlock sign. A partially-fixed value is indicated by a padlock sign that is filled diagonally.

- **Freezing of columns:** To keep the most important attributes visible while you scroll horizontally through your planning view, you can now freeze multiple columns in the planning view.

- **Column filtering:** To focus on specific data in the planning view, you can now temporarily hide information that you’re not interested in by filtering in the columns directly.
Other enhancements

- **Full screen mode**: You can now use the whole space of your browser window for the planning view by opening the planning view in full screen mode. This way you can see more data at a glance.

- **Display of last refresh**: A new icon above the planning view shows you when you last refreshed the data.

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## Cell fixing and Unfixing

**Demand Planning View**

**Description:**
Demand Planning View

**Versions/Scenarios:**
Base Version

**Target UoM:**
EA

**Target Currency:**
USD

### Table: Demand Planning View

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- **Fix Those Cells:**
- **Unfix Those Cells:**
- **Display Planning Notes:**
- **Create Planning Notes:**
- **2 minutes ago**

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Web-Based Planning UI for basic planning tasks
Fiori app to analyze and change planning data in IBP

Planner using a PC
(Internal User)

Sales Representative at customer location using a tablet
(Internal User)

Customer or Supplier using PC or Tablet
(External IBP user)

- Customer / Sales representative updates forecast in IBP WebUI
- IBP makes forecast available to customer / sales representative in IBP WebUI
- Collaboration on Consensus Forecast
- Forecast Commit on supply plan
Collaboration with Business Partners using the Web-Based Planning app in SAP IBP

- You can now collaborate with your business partners directly in IBP using the Web-Based Planning app by giving access to your business partners access to your IBP system and the Web-Based Planning app. (internal, customer and supplier collaboration)

- You can create and share a planning view with your business partners that contains the key figures that are relevant for your collaboration. Business partners can then view the data in the planning view and enter their input into the key figures for which they have editing permission.
Collaboration with Business Partners

- Enable collaboration with your business partners directly by using set of Web-Based Planning apps.
- Two Web-Based planning apps are available depending on type of business partner
  - Customers can use the Web-Based Planning - Customers app.
  - Suppliers can use the Web-Based Planning - Suppliers app.
- Access to IBP and permissions to data set you want to collaborate is given by IBP system owner.
- IBP system owner can create and share a planning view with your business partners that contains the key figures that are relevant for your collaboration.
- Business partners can then view the data in the planning view and enter their input into the key figures for which they have editing permission.
Overview of the set-up steps

- Create permission filter
- Create user group
- Assign permission filter to user group
- Create business user role
- Create employees
- Create business users
- Create user in identity provider
- Assign business users to user group
- Create and share planning view
- Send URL to users
Business Partner Collaboration Demo
Demand side: Forecast Collaboration

Customer

Receive Forecast (Baseline + Promotion)

Adjust + Confirm Forecast

SAP IBP

Manufacturer/Supplier

Create Forecast (Baseline + Promotion)

Receive Confirmed Forecast

Create Final Forecast

Create Supply Plan

Inventory Optimization / Demand Sensing

...
Positioning: **Supply Chain Planning Collaboration**

<table>
<thead>
<tr>
<th>Business Network Collaboration via IBP and message integration to Ariba Supply Chain Collaboration</th>
<th>Collaboration with Business Partners via SAP IBP Web UI using the Web-based Planning App</th>
</tr>
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<tbody>
<tr>
<td><strong>Target</strong></td>
<td>Channel Master wants to collaborate end-to-end in Supply chain with many Suppliers or Subcontractors in a standardized way</td>
</tr>
<tr>
<td><strong>Scope</strong></td>
<td>Supplier Collaboration</td>
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<tr>
<td><strong>How</strong></td>
<td>Collaborate via Business Network offering from Ariba Ariba SCC Web UI or/and message integration to supplier backend system</td>
</tr>
</tbody>
</table>
| **Pros** | • Ariba SCC offers a true and standardized business network  
• B2B-Message integration to partner backend system is possible  
• Ariba SCC supports comprehensive supplier collaboration going beyond SC Planning, supporting also SC Execution including direct procurement and quality collaborations  
• Advanced Partner Enablement / Onboarding service is provided | • Downstream and Upstream planning collaboration is supported  
• Easy to set up  
• Flexible configuration & modelling of usable key figures  
• Advanced Supply Chain Planning Collaboration use cases possible |
| **External Business Partners** | Many business partners (Suppliers, CMs) are involved | Only a few strategic collaborative partners (Customers, Suppliers, CMs) |
SAP Integrated Business Planning – Foundation
Product road map overview – key themes and capabilities

**Model configuration**
- **Activation:**
  - Enhanced activation to provide a faster, more stable and robust activation of the planning area (now default for all customers)
- **Configuration**
  - Simplified assignment of new attribute to multiple planning levels in “Planning Areas” Fiori app
  - Usability enhancements for Planning Area Fiori App: (main improvements listed)
    - Focus Mode for simplified maintenance of multiple key figures
    - Hashtag assignment to key figures for easier filtering
    - Coloring of missing calculation inputs
    - Validation of disaggregation expression

**Analytics**
- Dashboard filters for versions and scenarios
- Chart thresholds on nongeographic chart types
- Supply Chain Network Fiori app: Horizontal and vertical layout options, display attribute description for data model attributes in chart pop-over

**Web-Based Planning**
- Fixing and unfixing of cells
- Performance improvements

**General enhancements**
- Support SAP Theme Designer
- Improvements for Task Monitor SAP Fiori App
- Transport of attribute permissions
- SAP Integrated Business Planning Calendar Fiori App (Display Mode)

**Model configuration**
- **Configuration**
  - Usability enhancements for Planning Area Fiori app: (main improvements listed)
    - Enhancements to focus mode for simplified maintenance of multiple key figures
    - Interactive dialog to show status of activation process
    - Copy from unified planning area for:
      - Custom alerts, analytics, network visualization, web-based planning, alert overview, dashboard
    - Lifecycle Management:
      - Planning Area Comparison
- **Activation**
  - Simplified key figure calculations to offset key figure values (by fixed period)

**Analytics**
- Copy of Analytics content from UPA

**Web-Based Planning**
- Support planning notes
- Comments and Reason Codes
- Global Planning View

**General enhancements**
- Merge of Copy and Disaggregation Operator
- Usability Enhancements for Resource Consumption Fiori app
- Copy attribute permissions
- E-Mail notification for job failures
- SAP Integrated Business Planning Calendar Fiori app (Edit Mode)

**Model configuration**
- **Configuration**
  - Enhance Snapshot Configuration to support active / inactive status
  - Planning Areas Fiori app supporting calendars (incl. key figure calculations)
- **Activation**
  - Simplified key figure calculations for:
    - rolling aggregation
    - projected coverage
  - Enhancement to Key Figure Calculations Fiori app to visualize filter-blocks

**Analytics**
- Drill-down in charts on dashboards
- Usability improvements for “Supply Chain Network” SAP Fiori app

**Web-Based Planning**
- Display of orders for Order Key Figures
- Side-panel layout for enhanced usability

**General enhancements**
- New “Job Scheduling Assistant” Fiori app for scheduling and monitoring of SAP Integrated Business Planning application jobs
- Email notification for high memory and/or CPU resources
- Planning calendar key figures to represent the working and non-working days

**Security**
- Cloud Key Management Service for SAP Integrated Business Planning customers (“Bring Your Own Key”)

**Model configuration**
- **Configuration**
  - Partial copy from unified planning area and merge into customer planning area
  - Lifecycle Management:
    - Tool for comparing planning area with historical version
  - Activation:
    - Simplified key figure calculations
    - offset key figure values (by key figure or attribute)
    - weighted average

**Analytics**
- Transport of charts and dashboards
- Planning notes on analytical charts
- Supply Chain Network app: Offer color palette options and customize range of values for heatmap legend

**Web-Based Planning**
- Usability and Performance enhancements

**General enhancements**
- Improvements for “Job Scheduling Assistant” Fiori app

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# Planning Notes

## American Sales

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**Create Planning Note**

Enter text of planning note here.

The note will be attached to 7 cells.
New Side-Panel Layout

Planned for 2005
Thank you.

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