Tips & Tricks for the Planning Areas application

Webinar

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October 24, 2019
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Model Configuration UI timeline
Phasing out Configuration UI

Set Up and Manage Your Master Data Library
Create, maintain, and manage master data required for all planning operations
- Manage Attributes
- Manage Master Data Types
- Manage Time Profiles

Configure Planning Area
Define and manage planning models to measure KPIs for selected master data
- Define Planning Area
- Manage Planning Levels
- Manage Key Figures
- Manage Versions

Miscellaneous Settings
Configure Home Page and Planning View Settings
- Display SAP Sample
- Manage Reason Codes
- Manage Global Configurations
- Manage Planning Operators
- Manage Snapshot Configurations
- Download Configuration History
- Use Planning Area Application

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 9 applications were delivered by our team. The most important – and the biggest – is:

Planning Areas
Model Configuration
Tips and Trick
System Demo
Customer users see only the "Business" related Global Configuration Settings... and SAP internal colleagues can see and change all of them...
Default Planning Area is to be maintained in the Fiori settings.
Attribute creation is possible on-the-fly during Master Data Type maintenance.
How to switch object types in SAME
You can export a PA to CSV.

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

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Base Planning Level</th>
<th>Type</th>
<th>Key Figures</th>
</tr>
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<tbody>
<tr>
<td>ABCSERVICELEVEL</td>
<td>ABC Service Level</td>
<td>WKABCSEGMENTATION</td>
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<td></td>
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<tr>
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<td>ABC/XYZ Segment Counter</td>
<td>PRODABCDXYZID</td>
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</tr>
<tr>
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<td>ABC/XYZ Segment Counter Helper</td>
<td>PROD</td>
<td></td>
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<td>Actuals Price</td>
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<td>Actuals Production</td>
<td>DAYPRODLOC</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>ACTUALSPURCHASE</td>
<td>Actuals Purchase</td>
<td>DAYPRODLOC</td>
<td>2</td>
<td></td>
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<tr>
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<td>Actuals Qty</td>
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<td>5</td>
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</tr>
<tr>
<td>ACTUALSREV</td>
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<td>WKPR</td>
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<td>ACTUALSTOCKTRANSFERS</td>
<td>Actual Stock Transfers</td>
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<td>ADDITIONALLOTSIZEDEMAND</td>
<td>Additional Lot-Size Policy Demand</td>
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<td>Outbound Customer Demand Adj.</td>
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<td>2</td>
<td></td>
</tr>
</tbody>
</table>
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 see which objects have Active state. Active / Inactive pattern for all object types (Attr / MDT / TP / PA / subobjects). Active state can be restored if present. Objects’ active state are displayed in this mode. Links are available to related application log details for <3 months old entries.
All objects and sub-objects have similar administrative information.

The origin of the PA is visible in the General tab.
If you need a new tile to the Fiori Launch Pad that opens directly your favourite PA… then use this function, and the Planning Areas worklist is skipped!
There are a TON 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, right into the relevant details when possible....

**Application Logs**

**Settings for Change History**

**Time Profiles**

**Master Data Types**

**Planning Operator maintenance applications that are relevant for this PA**
... some other links offer further details – popovers – with extra navigation possibilities....
... and the in-app navigation help you to quickly jump back and forth.

If you feel lost, use the standard Fiori navigation patterns, ....

... or just use the breadcrumb navigation!
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!
Activation is running in the background after 5 seconds of waiting……

The system lets you know who is blocking you in case an Activation is already running.
Do not forget to refresh your screen („Go“ or F5) to check if Activation has finished, …

… or just navigate to the application log and follow it there!
While modeling, PERIODID of a time profile level need to be known. The system shows you the PERIODIDs in the Planning Areas application... and in the Time Profiles application.
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?
- ....
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 MDT 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.
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.
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.
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 KF 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](#)
Different key figure types are represented by icons. You can use your mouse to see the tooltip to learn them!

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</tr>
</thead>
<tbody>
<tr>
<td>ALERT</td>
<td>Alert Key Figure</td>
<td>PL3</td>
<td>Calculated</td>
<td>Alert</td>
<td>Inactive</td>
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<td>PL3</td>
<td>Technical</td>
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<td>PL3</td>
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<td>Fixed Key Figure</td>
<td>PL3</td>
<td>Attribute as Key Figure</td>
<td>Inactive</td>
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<td>Geo Latitude</td>
<td>PL3</td>
<td>Helper</td>
<td>Inactive</td>
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<tr>
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<td>HELPER</td>
<td>PL3</td>
<td>Attribute Transformation</td>
<td>Inactive</td>
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<tr>
<td>PERIODID</td>
<td></td>
<td>PL3</td>
<td></td>
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</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>
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.

\[
\text{ACTUALSQTYPRIORYEAR@REQUEST} = \sum(\text{ACTUALSQTYPRIORYEAR@WKPRODLOCCUSTOFFSETUOMTO})
\]

\[
\text{ACTUALSQTYPRIORYEAR@WKPRODLOCCUSTOFFSETUOMTO} = \text{UOMCONVERSIONFACTOR@PRODUOMTO} \times \text{ACTUALSQTYPRIORYEAR@WKPRODLOCCUSTOFFSET}
\]

\[
\text{ACTUALSQTYPRIORYEAR@WKPRODLOCCUST} = \text{ACTUALSQTYP}@WKPRODLOCCUST
\]
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!

The system parses the calculation expression and automatically identifies all the “direct” inputs.
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.
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.
Valid attributes in the calculation expressions are color-coded and have a popover available for them.
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“. 
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/Curr conversion modeling.
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 😊
You can freely tag your KFs, creating your own categories. It does not inactivate the Planning Area.

Use your #tags for easy KF filtering.
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).
For experimental purposes, we plan to include „Focus Mode“ for IBP 1911, where you can quickly jump between key figures for mass maintenance.

It’s feature set will be enhanced in 2002, and any feedback is welcome here.
Some of the Planning Operator types that are relevant for the Planning Area are direct links to the corresponding maintenance application.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Copy to Safety Stock</td>
<td>Copy Past Safety Stock (for IC) to Final Safety Stock Last Cycle (for IC)</td>
</tr>
<tr>
<td>DP Forecast Error: 1M</td>
<td>DP Forecast Error: Create 1M Lag Data</td>
</tr>
<tr>
<td>DP Forecast Error: 3M</td>
<td>DP Forecast Error: Create 3M Lag Data</td>
</tr>
<tr>
<td>S&amp;OP Forecast Error: 1M</td>
<td>S&amp;OP Forecast Error: Create 1M Lag Data</td>
</tr>
<tr>
<td>S&amp;OP Forecast Error: 3M</td>
<td>S&amp;OP Forecast Error: Create 3M Lag Data</td>
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</tbody>
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Thank you.

Contact information:

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