Meet the Expert: SAP IBP Web-Based Planning UI

Pramod Mane, SAP – Ralf Heimburger, SAP
June 25th 2020
Agenda

- Planning UIs in IBP
- Overview of Web-Based Planning UI
- Demonstration
- Collaboration with Business Partners
- Roadmap
- Q&A
Planning UIs tailored to the needs of the end user

**Adjust Data via IBP Excel Add-In**

- Advanced Planning
- Master Data Maintenance
- Flexible & Customizable

**Adjust Data via Web-based Planning App**

- Basic Planning
- External Users (e.g. suppliers)
- Order Visibility
- Browser-based

This is the current state of planning and may be changed by SAP at any time.
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**
- **Scenario Management & What-If Simulations**
- **Planning Notes**
- **Add custom VBA code to finetune the planning capabilities**
- **Advanced Formatting Rules to indicate what actions a user can take**
- **Alert Key Figures**
- **Key Figure Value Fixing**
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>IBP Excel Add-In</th>
<th>Web-Based Planning UI</th>
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<tbody>
<tr>
<td><strong>Key users</strong></td>
<td><strong>Business processes</strong></td>
</tr>
<tr>
<td>- Planner, Key-Account Manager, Marketing &amp; Sales, Management</td>
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<tr>
<td>- Supporting occasional, advanced, and power planners with complex business processes being covered</td>
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<tr>
<td>- In current 2005 release, supporting occasional users e.g. Key Account Managers / Sales Reps at customer sites with basic planning tasks.</td>
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<td>- Enable collaboration with business partners</td>
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<tr>
<th><strong>Business processes</strong></th>
<th><strong>Complex planning processes supported by Microsoft Excel native features, such as:</strong></th>
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<tr>
<td>- Very flexible extensions with VBA, macros, and custom formatting</td>
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<td>- Excel formulas / local key figures</td>
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<td>- Offline Usage of Planning View Workbooks (share with external users)</td>
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<tr>
<th><strong>Prerequisites</strong></th>
<th><strong>Basic planning process in scope:</strong></th>
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<tr>
<td>- Add-in for Microsoft Excel requires Windows and Office installed on user’s computer</td>
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<tr>
<td>- Tablets (except for MSFT Surface) not supported.</td>
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<td>- MacBooks only with Virtual Machine (Windows and Office) installed.</td>
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<tr>
<td>- Today: Create planning view, analyze data, change data, save, simulate, user-defined scenarios, cell-fixing, create/edit/delete planning notes</td>
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</table>

**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

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
The Web-Based Planning UI

Consensus Planning View

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<th>Versions/Scenarios:</th>
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<td>Consensus Planning View</td>
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**Edit Plan**

- Shared with: 25 Users, 4 User Groups

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**Key Features**
- Scenario Management & What-If Simulations
- Key Figure Value Fixing
- Drill Down Capabilities
- Planning Notes
- Reason Codes and Comments
- Other enhancements: Freeze columns, column filtering, full-screen mode, last refresh, flexible side-panel layout

**Additional Features**
- Review and Change Data
- Define Planning View for the Task at Hand
- Save as Planning View, and Share with Users
- Order Information for Order-based key figures

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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*)
- **New Side Panel for Planning view settings** (*Delivered with 2005*)
- **Order Visibility and drill down** (*Delivered with 2005*)
- **Planning notes** (*Delivered with 2002/2005*)
- **Other usability enhancements**: Freeze columns, column filtering, full-screen mode, last refresh
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.
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.
Manage User-Defined Scenarios

- Select the user-defined scenarios in edit planning view settings.
Cell fixing and Unfixing
Planning Notes

- You can use this feature to view planning notes that have been created in the IBP Excel add-in to get more contextual information about key figure values.
- As of 2002 release any existing planning notes for a key figure are automatically shown in the planning view.
- **Caution:**
  - Planning notes are shown for all planning levels and switching them off is not possible.
  - If planning notes should impact the performance of your system, try to remove some key figures from your planning view for which a lot of planning notes exist.
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**Planning Notes for Consensus Demand Plan Qty in Time Period 2020 CW07 (2)**

- **Increased by 5%**
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  - Changed On: 1/17/2020, 11:27:35 PM
  - Changed By: Pramod Mane
  - Time Period: 2020 CW07
  - LOCREGION: APJ
  - PRDFAMILY: FAMILY 100-HEADPHONES

- **APJ region Semi-Annual Sale head phones product family**
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  - Changed On: 1/17/2020, 11:25:33 PM
  - Changed By: Pramod Mane
  - Time Period: 2020 CW07
  - LOCREGION: APJ
  - PRDFAMILY: FAMILY 100-HEADPHONES
Web-Based Planning Enhancements

Indication of Personal Data
• A new icon in the column header indicates if a master data attribute in your planning view contains personal data.

Reason Codes and Comments in Planning View
• Allows to select reason codes and write comments to provide more information about key figure changes. These reason codes and comments are captured along with the key figure changes in change history, or they can be shared with a SAP Jam group.
• Using reason codes and comments is optional.
Web-Based Planning Enhancements

Enhanced Refreshing and Loading of Data for the Planning View

- Two separate options can help speed up refreshing and loading of data for the planning view.
- You can now decide to refresh only the key figure data together with any changed metadata, that is, data that makes up the planning view such as names, descriptions, and values of planning level attributes, names and descriptions of key figures, versions, scenarios, and time periods.
- Or, if required, you can decide to refresh the key figure data together with the full set of metadata for the planning view.
Web-Based Planning: New Side Panel for Planning view settings

- Improved usability with a new side panel screen for the planning view settings
- You no longer need to navigate away from the planning view if you want to change its settings
- You can change the settings, apply your changes, and check if you’re satisfied with the result right away

**Value Proposition**
- Improved usability with grid and planning view settings on the same screen
- Allows to change the settings, apply your changes, and visualize the results immediately

**Capabilities**
- Collapsible side-panel layout for planning view settings
- See at a glance which of the key figures you selected isn’t shown in the planning view.
- If the 📊 icon is shown next to a key figure, this tells you that there’s no planning data available for the key figure in the selected time interval. This icon is only available on the new panel

New Panel for Planning view settings

This is the current state of planning and may be changed by SAP at any time without notice and key innovations do not reflect licensing
Order information in Web-Based Planning

Connect time series data with order data
A user can now show order information from order-based planning in the Web-Based Planning app. It’s now possible to show the orders that make up certain key figure values, which helps the user understand the results of a planning run.

A new icon tells you whether detailed order information is available for a key figure. The user can show the order information for one or more key figure values on the same screen as the planning view. A table containing the relevant orders is displayed below the planning view.
Web-Based Planning: Show order information in an OBP planning view

Value Proposition
• Show key figure values and underlying order information on the same screen.
• Understand which orders sum up to the selected key figure cell values.

Capabilities
• Show order information for supported order-based planning key figures.
• Show different types of orders:
  • Planned & production orders,
  • Stock transfer requisitions and orders,
  • Purchase requisitions and orders,
  • Sales order schedule line information
• Navigation to View Confirmation app and Analyze Supply Usage app
You can view order information for any combination of attributes that the definition of the key figure allows. This means that you can show the information at different levels of detail.

Show order information as follows:
- Select one or more cells in a row
- Open context menu and choose “Show Order Information”
- Order details list is shown in a table below the key figures
- Number of orders is shown next to description of selected key figure

Web-Based Planning: Show order information in an OBP planning view
Web-Based Planning: Sales Order information

Sales order schedule line information is shown for external key figures:

- Sales Order (Request)
- Sales Order (Confirmed)
- Sales Order (Confirmed in Time)
- Sales Order (Confirmed Late)

Sum of order information quantity = sum of selected cells in the grid

Navigation to app “View Confirmations“
Web-Based Planning: Planned Order and Production Order

Planned order and production order information is shown for external key figures:

- Production (Planned)
- Production (Confirmed)

Sum of order information quantity = sum of selected cells in the grid

Navigation to app “Analyze Supply Usage“
Web-Based Planning: Purchasing Documents

- Purchase Requisitions and Purchase Orders
- Stock Transfer Requisitions and Stock Transfer Orders
- Supported external key figures
  - Distribution Demand (Planned)
  - Distribution Demand (Confirmed)
  - Distribution Demand (Lane)
  - Distribution Demand (Lane; Planned)
  - Distribution Demand (Lane; Confirmed)
  - Dependent Demand (Planned)
  - Dependent Demand (Confirmed)
  - Distribution Receipt (Planned)
  - Distribution Receipt (Planned; Goods Receipt)
  - DistributionReceipt (Lane)
  - Distribution Receipt (Lane; Planned)
  - Distribution Receipt (Lane; Planned; Goods Receipt)
  - Distribution Receipt (Confirmed)
  - Sum of order information quantity = sum of selected cells in the grid
  - Navigation to app “Analyze Supply Usage“
System Administration

This new feature is only available in the **Web-Based Planning** app.

- Not available in **Web-Based Planning Customers** and **Web-Based Planning Suppliers**

The business catalog SAP_IBP_BC_WBP_PC has been enhanced with the new restriction type **Order Details**, where the system administrator can define the planning areas and key figures that users can view order information for.
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
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.
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.
## 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>
</thead>
<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>
</tr>
<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) |
Roadmap and Outlook
## SAP Integrated Business Planning – Planning UI
### Product road map overview – Key innovations

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Add-in for Microsoft Excel</strong></td>
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<tr>
<td>▪ Stability and maintainability:</td>
<td>▪ Performance</td>
<td>▪ Sorting of attribute values in planning views</td>
<td>▪ Editability time horizon for key figures in planning views</td>
</tr>
<tr>
<td>– Decoupling from EPM versions &amp; other EPM-based solutions, and with that, retirement of the side-by-side installers</td>
<td>– Optimize waiting time for the user when simulating data: Accelerate the preparation of UI consumable query data</td>
<td>– Alert key figure usability in planning view definition</td>
<td>– Share attribute-based planning filters with other users directly within the Microsoft Excel add-in.</td>
</tr>
<tr>
<td>▪ Advanced setup options for the installer</td>
<td>▪ Usability enhancements</td>
<td>▪ Planning workbook refresh: Refresh all sheets in a workbook at once</td>
<td>▪ Sub-Totals in planning view</td>
</tr>
<tr>
<td>▪ Performance</td>
<td>– Rename templates and favorites</td>
<td>▪ Planning workbook filter: Apply attribute filters across all sheets of a workbook at once</td>
<td>▪ Personalize the attribute and key figure column width as part of user planning view settings</td>
</tr>
<tr>
<td>– Optimize waiting time for the user when simulating data: Partially read the planning view only with the data that was affected by the data changes</td>
<td>▪ Folders for planning filters</td>
<td>▪ Easier switching of planning views on the same screen</td>
<td>▪ Personalization to hide fields per default in order details</td>
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<tr>
<td>▪ Usability enhancements</td>
<td></td>
<td>▪ Filter, sort &amp; search functionality in order details</td>
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<tr>
<td>– Support different Microsoft Office themes (for example, dark theme)</td>
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<tr>
<td>– Offline mode for planning views</td>
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<tr>
<td><strong>Web-based planning</strong></td>
<td></td>
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</tr>
<tr>
<td>▪ Show key figure values and underlying order information on the same screen.</td>
<td>▪ Contextual navigation for order key figures to cross-systems (S/4, ECC) and other relevant IBP apps.</td>
<td>▪ Contextual chart and grid view</td>
<td></td>
</tr>
<tr>
<td>▪ Navigation to View Confirmations &amp; Analyze Supply Usage apps for order key figures</td>
<td>▪ Create, edit, and deletion for planning notes</td>
<td>▪ Usability enhancements</td>
<td></td>
</tr>
<tr>
<td>▪ Usability enhancements</td>
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<td>– Key figure value-based filter</td>
<td></td>
</tr>
<tr>
<td>– Side-panel layout planning view settings</td>
<td>– Pro-active time-out warnings and ability to extend session</td>
<td>– Easier switching of planning views on the same screen</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Default attribute and key figure column freeze</td>
<td>– Filter, sort &amp; search functionality in order details</td>
<td></td>
</tr>
</tbody>
</table>

¹ This is the current state of planning and may be changed by SAP at any time without notice.
Planning UIs tailored to the needs of the end user

Support users in core and advanced planning activities

- Sorting of attribute values (e.g. z > a and Custom Sorting Rules)
- Workbook Refresh & Filtering across sheets
- Editability Horizon for key figures
- Side Panel
- Extensibility (e.g. access functions via VBA code or shortcuts)
- …

SAP IBP, Excel add-in

Web-based Planning app

Support users in core planning activities

- Create, Edit and Delete Planning Notes
- Contextual navigation for order key figures to cross-systems (S/4, ECC)
- Value-based filter for key figure values
- Sub-Totals
- Contextual Chart and Grid
- Editability Horizon for key figures
- Filter, Sort, and Search for order information
- Order-data creation and editability
- …

Outlook

This is the current state of planning and may be changed by SAP at any time.
Support users in core and advanced planning activities

- Sorting of attribute values (e.g. z > a and Custom Sorting Rules)
- Workbook Refresh & Filtering across sheets
- Editability Horizon for key figures
- Side Panel
- Extensibility (e.g. access functions via VBA code or shortcuts)
- ...
Create, edit and delete Planning notes

- Planners can now create planning notes directly on the planning view by choosing a cell, opening the context menu, and selecting the corresponding option.

- They can edit and delete planning notes in the table containing all the planning notes for a key figure value.

- This table also provides information about the editing status of a planning note in the form of icons.
Create, edit and delete Planning notes

- The authorization for creating planning notes and the authorization for editing and deleting planning notes can be granted separately.

- To enable planners to create planning notes, the administrator needs to grant write access for planning notes in the Administration Functions restriction type.

- To enable planners to edit and delete planning notes, the administrator needs to make settings in the new Planning Note Editability restriction type that has been added to the business catalog for the Web-Based Planning app.
Usability enhancements

- **Proactive Session Time-out:**

  The system now notifies you when your planning session is about to timeout. This way you can save your recent key figure changes, simulate the effect of their changes, or refresh the key figure data before the planning session expires.

  If you’re not ready yet to take action, you can also prolong your planning session for another 30 minutes.
Contextual navigation for orders in WBP

Context based navigation target(s) selectable in „Navigate To“ drop down box when a single line is selected

- Navigation target can be dependent on
  - Object type
  - System

- Example:
  - Sales Order Fact sheet (system A)
  - Sales order details (system B)
  - …
Q&A
Thank you.

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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.
Display Settings for User-Defined Scenarios

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

Consensus Planning View

<table>
<thead>
<tr>
<th>General Information</th>
<th>Time Settings</th>
<th>Planning Level</th>
<th>Key Figures</th>
<th>Filter</th>
<th>Sharing</th>
</tr>
</thead>
</table>

**Name:** Consensus Planning View

**Description:** Consensus Planning View

**Planning Area:** BINUPA (Unified Planning Area)

**Versions/Scenarios:**
- Base Version/Demand Spike
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.
Web-Based Planning Enhancements

Filtering for Multiple Planning Areas in the Planning View List

• Previously, you could filter the list of planning views only for a single planning area. To help support users who work with planning views from different planning areas, it is now made possible to filter for multiple planning areas.

Display of Decimal Places for Key Figures

• In the planning view, the decimal places of a key figure are now displayed as configured for the key figure

Improved Attribute Value Search

• When you search for an attribute value, you no longer need to enter the exact name of the attribute value. If you just add part of it, the system will search for all the attribute values that contain the characters you entered.
Web-Based Planning Enhancements

Dynamic Selection of Attribute Values

- As of this release, dynamic selection of attributes is active in the Web-Based Planning app.

- This means that the user can search for any attribute values that are not loaded because of the threshold set in the MAX_DIM_MEMBERS global configuration parameter by searching for them in the search field.

- Up to now, the system only loaded as many attribute values for the value help in the ad hoc filter as configured in the system. If there were more attribute values than the configured threshold allowed, there was no possibility for the user to select these values.

- To make the remaining attribute values available, the configuration expert had to increase the value of the MAX_DIM_MEMBERS global configuration parameter. This parameter controls how many attribute values the system shows in the value help. Loading more attribute values, however, could impact performance, because it increased loading time.
Settings for Displaying Planning Notes

• As of this release, planning notes are no longer shown automatically.
• You can now define in the planning view settings whether you want them to be shown.
• You can decide whether you want to see the planning notes for the planning level that you’ve set for the planning view, or whether you want to see the planning notes for all planning levels.
• In the planning views that you created before the update to 2005, planning notes continue to be shown by default, so you don’t need to actively switch them on in the planning view settings.