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## SAP Contacts

### Walldorf

Dr. Alexander Grendel

### Subsidiaries

-

## Revisions to Previous Instructor Guide

Course IRT350 for Release 4.6B is a completely new course!

As of Release 4.6C, SAP Retail's Merchandise and Assortment Planning (MAP) tool supports the following new functions:

- Interfaces enable to create **promotions** and **allocation tables** in MAP
- **SAP Business Information Warehouse** (SAP BW) can be used as actual data source
- MAP supports the **SAP Business Workflow**

These new functions have been integrated into the 4.6C course IRT350. Therefore first chapter *MAP Components* has been extended with topic allocation table interface. The simple example scenario store plan is extended with an interface for creating allocation tables directly from manual planning.

The definition and configuration of the interfaces to create promotions and allocation tables is discussed in detail in chapter *MAP in Business Processes*. This chapter includes the connection of MAP with the SAP Business Information Warehouse (SAP BW) as well. The chapter *MAP in Business Processes* is completely new and restructures and replaces the former chapter *Additional MAP Functions* of Release 4.6B.

The topics seasonal planning, complex master data checks, user-exits and authorizations are moved to the next chapter *Advanced Planning Processes*. In that chapter is the Best Practice Scenario extended and the integration of MAP with SAP Business Workflow described.

## Course Details

### Duration

3 days

### Course Materials and Other Materials

Participant's handbook:

- Powerpoint slides (plus notes)
- Exercises and solutions

### Country-Specific Units

None.

The demonstrations in the training system are available in both English and German. Unfortunately, they could not be translated into other languages. If the training course is to be held in another language (or if the demonstrations are to be given in a different language), the course instructor must use the English or German as a template for translating into the logon language in question.

## **Course Instructor Profiles**

The instructor should be familiar with courses IRT100 and IRT310, and should also have a basic knowledge of information structures.

### **Level of Knowledge Required**

This course does not deal specifically with Data Warehouse design, but it is still useful to know what information structures are, how they are structured, and so on.

### **Courses Recommended as Preparation**

IRT100, IRT310, IRT350

### **Online Help Recommended as Preparation**

See **Important links!**

## **Hints on Preparing This Course**

As course instructor, you should work through **all** of the exercises in this course at least once before the course starts. You should familiarize yourself with demo scenarios TRMAP1, TRMAP2, TRMAP3, TRMAP4 and TRMAP5 in particular – these show the basic features of the standard solutions.

Please note that not all of the menu paths for demonstrations, etc. have been included in this instructor guide. As an instructor, you are expected to be familiar with MAP. All of the menu paths are, however, contained in the exercises and solutions. It is, therefore, more or less up to you how you present individual topics. You can always use the demo scenarios listed above to help participants understand and visualize the subject matter better. The same approach has been adopted in this instructor guide for the slides. Only the main points and special features of the slides are dealt with here (otherwise, we would just be rewriting the notes to the slides - ☺!)

## **Important links**

You may give these links to your participants:

SAP Help Portal:

<http://help.sap.com> (external side for everybody)

SAP Service-Marketplace and Expert Knowledge Corner

- as SAP-employee: SAPNet: alias Retail -> Expert Knowledge Corner
- for customer and partner: <http://service.sap.com/retail> -> Expert Knowledge Corner.

The Knowledge Corner can be accessed by customers and partners

who have an S-User in SAPNet. You can get one if you have an SAP installation

number (like most of the customers) or if you belong to a partner company (like IBM).

## Training System

You have to use the system and client which is assigned to your class and reserved by SAP Server Request or the local training center administration. At the time this instructor guide was written the following training systems for retail courses had been available:

TOR (server iwdf0106, system number = 00)

TSR (server iwdf0121, system number = 00).

Please note: There could be additional systems with other names or the name of the server might change! **Please use only that system and client which is reserved for your class!**

If you have a really urgent problem, you can call one of the following hotlines:

- **Training Systems:**  
**+49 6227 74 2887**
- **Demo Systems:**  
**+49 6227 74 7070**

## Data Required

The official Retail training systems at SAP AG in Walldorf are currently TOR and TSR. The systems are copied from TNR (the “parent” Retail system) for training purposes. The TOR and TSR systems contain all of the master data (articles, vendors, customers, retail sites, volume-rebate arrangements, ...) required for IRT350. This includes:

- Data for the system demonstrations to be given by you, the trainer
- Exercise data for up to 21 course participants (numbers 00 through 20)

If you plan to hold this course in your own system, please always import a copy of client 400 of the TNR system to your own system! In this case, please get in touch with **Gary Kilo** (System Management) as early on as possible.

## User ID and Passwords for Course Participants

Reference user ID: **IRT350**

Use transaction **ZUSR** to copy this reference user and create user IDs for the participants. The standard naming convention for a user ID is the course ID plus the course group number (##). A user ID for course IRT350, then, would look as follows: **IRT350-##**. The initial password is INIT.

This means that you should enter the following parameters in transaction ZUSR:

Copy template = **IRT350**

Copy (=name of training course) = **IRT350**

Number of course groups for exercises = maximum of **20**

Initial password = **INIT**

Country in which the course is to be held = for example, **DE** for Germany

**Note:** This transaction creates the number of course user IDs specified by copying them from reference user IRT350. Please remember, though, that it does not copy the start transaction for the Retail system (**W10T**). You must set this up individually for each participant. Go into transaction **SU01**, and enter W10T as the **start menu** on the *Default values* tab page. If you do not, the participants will not be able to access the Retail functionality immediately!

## Preparation in the System

You can prepare for the course in the system in client 899. The user TRAINER (password RETAIL) has been created specifically for this purpose. (You can also use the existing users MAP\_PLANNER and MAP\_COORD with the same password for preparation in 899!)

### Example ABAPs

There are 2 model reports which are not shipped with the standard system and which you can use for demonstrations and for simplification of the exercises of the topic on store groups.

These 2 reports are:

ZLIST\_REVENUE\_STORES\_MC

ZGROUP\_STORES\_MC

### CATTs

### Technical Hints

Before the course starts, use transaction SE38 or SA38 to run reports ZSENQOFF and ZSENQOF2 – this will prevent any problems and conflicts relating to the system's lock mechanisms (particularly in Customizing transactions) from arising during the course.

Before the course starts, use transaction SE16 to check the contents of tables TWISPC\_ZMERK, TWISPC\_MASCHPL and TWISPC\_PLVER for demo scenarios TRMAP1, TRMAP2, TRMAP3 and TRMAP5 – the number of the client in which the course is to be held must be contained in the names of the planning hierarchy tables (field TWISPC\_ZMERK-HIETAB, e.g. /1ISRWP/406H0102 in client 406), the automatic planning programs (field TWISPC\_MASCHPL-MPREPRORT, e.g. /1ISRWP/406M0201TRMAP1S1 in client 406) and planning step link programs (field TWISPC\_PLVER-CREPRORT, e.g. /1ISRWP/406V01010203 in client 406). If this is not the case (this can be caused by client copies in the parent TNR system), you must correct this by running report **ZACTUALIZE\_ZMERK\_MASCHPL\_PLVER** (transaction SE38 or SA38) for each of the 4 demo scenarios. This report checks the entries in the tables in question, and corrects them where necessary.

### Goals and Objectives

This course should familiarize participants with the most important MAP functionalities, and show how the individual components of this complex planning tool are interrelated. This course uses information structures and planning step link programs that have already been defined. The course itself does not look at how information structures are designed or generated (with separate characteristic levels and key figures), nor does it look at how planning step link programs are defined. These topics are too technical and complex to be included in this course. This is because the course focuses on MAP functionalities and options, not on the technical aspects of how they work. Of course, if you have time, you can look briefly at these issues and give demonstrations in the system.

### Course Structure and Flow

In the unit entitled **Introduction**, you should focus on how MAP can be used in a planning process and during the fiscal year. You should mention the most important functions and arouse participants' interest in the course and in MAP. You will complete this unit by introducing participants to the MAP user roles (coordinator and planner) and the user-friendly network plan, which is also used to design a scenario (designer or designer mode). This topic provides a suitable link and lead-up to the next unit, **MAP Components**. In the exercises to the introductory unit, the user roles introduced are applied practically – in other words, the course participants assume the various roles involved in the planning process. Make it quite clear that model scenarios will be developed in this and all further units, and that these scenarios can,

but do not necessarily have to be used as templates! In the unit entitled **MAP Components**, you will use a simple scenario (TRMAP1) to introduce participants to all components. You should demonstrate the most important steps slowly, and build up and demonstrate the same scenario that is used in the exercises. Don't go into too much detail here – this applies especially to topics that are dealt with in later units (layout, Report Painter, integration with Excel, inventory planning with formula groups and additional key figures, etc.). As of Release 46C this chapter was extended with the topic interface for creating allocation tables. In the example scenario store plan an allocation table will be created directly from manual planning. The configuration of the interface will be discussed in more detail in chapter *MAP in Business Processes*. In the unit entitled **Planning Layout and Planning Hierarchy**, you will use the ready-made scenario TRMAP2 to show participants the numerous design options provided by the Report Painter for manual planning. You should really only focus on the ready-made planning layouts and the most important settings in the Report Painter. Even though the participants will be asked to create this new scenario in the exercises to this unit, you do not need to demonstrate this in detail. There are many exercises that look at the issue of creating planning layouts (2-1 through 2-6), but it will not be possible to work through all of these in the time available. Tell participants that they should pick out the exercises that are of interest to them. The remaining exercises are optional, and should be viewed as descriptions of how to create the planning layouts in question. You will finish up this unit by looking at the option of having several proportional factors in a planning hierarchy, and by discussing the issue of planning hierarchy versions. In the unit entitled **Inventory Planning**, you will focus on and explain the special points that have to be borne in mind for inventory planning. To do this, you will use yet another new scenario (or you will get participants to create one). This scenario is available as the final result in demo scenario TRMAP3. This unit is quite complex – especially with regard to creating and using formula groups. Mention that formula groups and additional key figures can be used to plan opening stocks even though these are not saved, and that algorithms are available that enable you to calculate period-specific stocks, and also display these in manual planning. This does not have to be defined or programmed specially. The additional key figure “Average Retail” also comes with the system – this key figure can be used to automatically convert stock values into stock quantities.

Chapter **MAP in Business Processes** discusses how MAP can be used during fiscal year after planning is finished. Starting from planning allocation of merchandise or promotions can be triggered over interfaces of MAP. Planning might be running at a high level like store groups and / or merchandise categories. In the definition of the interface one can break down those groupings to individual stores and / or articles. Therefore the example scenario of the chapter before will be further developed. Furthermore this chapter describes the interaction of MAP and SAP Business Information Warehouse (SAP BW). It is possible to transport planning data with standard technologies for Planned-Actual Reporting from MAP into a SAP BW-system. The existing and delivered content in a SAP BW system (e.g. Info-Cubes and Queries) for such analysis for the Best Practice Scenario will be presented. As of release 4.6C it is possible to transport also actual data for planning purposes from a SAP BW system into MAP. The necessary steps of configuration to enable this are explained. The end of this chapter is the planned article.

In the unit **Advanced Planning Processes**, scenarios TRMAP2 and TRMAP3 are merged together into scenario TRMAP5. First the possibility of seasonal planning (e.g. fashion) is presented. The “best practice” scenario 1\_SAP, which comes with the system, is used for this. First of all, describe the scenario 1\_SAP without going into too much detail. The slides on scenario 1\_SAP should be regarded as a point of reference for participants. It is important that you explain what a standard planning hierarchy is, and what participants have to bear in mind when creating their own

advanced scenarios. Demonstrate how to create a new scenario (using 1\_SAP as a template), and base this on demo scenario TRMAP5. Briefly mention a possible planning process without actually entering/copying data. The participants should create the entire scenario and work through the planning process. The last slides in this unit “round off” the slides in the introductory unit, which show a possible planning process. SAP Business Workflow enables to control who has to run which planning at which time. First the main components of SAP Business Workflow are described shortly. Refer to the special workflow courses BC600 and BC601. It is not possible to go too much into detail of this big theme workflow at this point! It is more important to demonstrate that it is possible to control the whole planning process with workflow and to hide the complexity of the planning process (and the net plan) for the user. The involved user just have to use their office work center to perform the individual planning steps like manual planning, decisions or running reports in the right chronological order. The chapter closes with the possibilities of enhancements and the authorizations of MAP.

The final unit in the course is the **Conclusion**. Revisit the most important functionalities here, and emphasize the flexibility and diversity of MAP.

## Course Schedule

### Day One

| Approximate Times | Content: Units and Topics       | Activities: Instructor and Participants                                                 |
|-------------------|---------------------------------|-----------------------------------------------------------------------------------------|
| 45 mins.          | Course Overview<br>Introduction | Slide presentation<br>Slide presentation<br>Demo: network plan + user roles             |
| 30 mins.          | Introduction                    | Exercises                                                                               |
| 15 mins.          | Break                           |                                                                                         |
| 60 mins.          | MAP Components                  | Slide presentation<br>Demo: Creating a scenario right through to creating plan versions |
| 60 mins.          | Lunch                           |                                                                                         |
| 60 mins.          | MAP Components                  | Exercises 1-1 through 1-7                                                               |
| 45 mins.          | MAP Components                  | Slide presentation<br>Demo: Layout + manual planning                                    |
| 15 mins.          | Break                           |                                                                                         |
| 50 mins.          | MAP Components                  | Exercises 1-8 through 1-9                                                               |
| 15 mins.          | MAP Components                  | automatic planning (demo)                                                               |
| 25 min.           | MAP Components                  | Exercises 2-1 through 2-3                                                               |

### Day Two

| Approximate Times | Content: Units and Topics | Activities: Instructor and Participants                                                                                                                                                                             |
|-------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 60 mins.          | MAP Components            | Revisit topics dealt with on day one<br>Slide presentation<br>Demo: Create more layouts<br>Manual planning and automatic planning<br>Planning step methods – documents + program/transaction<br>Planning step links |
| 60 mins.          | MAP Components            | (Exercises 2-1 through 2-3 of day one + ) Exercises 2-4 through 3                                                                                                                                                   |
| 15 mins.          | Break                     |                                                                                                                                                                                                                     |
| 30 mins.          | MAP Components            | Slide presentation<br>Demo: Allocation                                                                                                                                                                              |

|              |                      |                                                                                  |
|--------------|----------------------|----------------------------------------------------------------------------------|
| 45 mins.     | MAP Components       | Exercises 4                                                                      |
| 60 mins.     | Lunch                |                                                                                  |
| 45 mins.     | Layout and Hierarchy | Slide presentation<br>Demo: Layouts                                              |
| 75 mins.     | Layout and Hierarchy | Exercises 1-1 through 2-6                                                        |
| 15 mins.     | Break                |                                                                                  |
| 20 mins.     | Layout and Hierarchy | Slide presentation<br>Demo: Excel integration                                    |
| 25 mins.     | Layout and Hierarchy | Exercise 3                                                                       |
| 30 mins.     | Layout and Hierarchy | Slide presentation<br>Demo: Proportional factors +<br>planning hierarchy version |
| Opt. 30 min. | Layout and Hierarchy | If time is left: optional Exercise 4                                             |

### Day Three

| Approximate Times | Content: Units and Topics   | Activities: Instructor and Participants                                                                                                                                             |
|-------------------|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 15 mins.          | Layout and Hierarchy        | Revisit topics<br>Slide presentation<br>Demo: Proportional factors +<br>planning hierarchy version                                                                                  |
| 45 mins.          | Inventory Planning          | Slide presentation<br>Demo: Formula groups +<br>Average Retail                                                                                                                      |
| 15 mins.          | Break                       |                                                                                                                                                                                     |
| 90 mins.          | Inventory Planning          | Exercises 1 - 3                                                                                                                                                                     |
| 45 mins.          | MAP in Business Processes   | Slide presentation<br>Demo: Store groups;<br>Definition Interface Allocation<br>and Promotion;<br>Break-Down of grouping<br>Slide presentation: MAP and<br>BW                       |
| 60 mins.          | Lunch                       |                                                                                                                                                                                     |
| 60 mins.          | MAP in Business Processes   | Exercises 1 through 4                                                                                                                                                               |
| 15 mins.          | MAP in Business Processes   | Slide presentation<br>Demo: Planned article                                                                                                                                         |
| 60 mins.          | Advanced Planning Processes | Slide presentation<br>Demo: Copy scenario +<br>Import standard layouts +<br>MAP and Workflow, running a<br>planning process controlled by<br>workflow; possible<br>enhancements and |

|          |                             |                       |
|----------|-----------------------------|-----------------------|
|          |                             | authorizations of MAP |
| 60 mins. | Advanced Planning Processes | Exercises 1 – 2       |
| 5 mins.  | Conclusion                  |                       |

Note: You can, of course, move around the coffee breaks as required. The times shown here are only a rough guide!

## Unit: Course Overview

10 mins.

### Contents of Unit

Course goals and objectives

Course content

Course overview diagram and main business scenario

### Putting the Topic in Context

This unit is an introductory unit that gives participants an overview of the objectives and structure of the course.



Introduce participants to the

- Course goals
- Course objectives
- Course structure

### Example Scenarios through to Main Business Scenario

Make it quite clear to participants that several scenarios will be developed during this course by way of example, and that these can – but do not necessarily have to be used as templates and proposals!

## Unit: Introduction to MAP

65 mins.

### Contents of Unit

Requirements for using MAP  
Graphic network plan  
User roles

### Putting the Topic in Context

The aim of this unit is to show the most important MAP functions, and to arouse participants' interest in the course.



At the conclusion of this unit, the participants should be able to:

- Explain MAP functionality
- Navigate in the graphic network plan for maintaining and running planning processes
- Name the most important MAP components
- Identify the different user roles for MAP

### Topic: MAP Functions

#### **Merchandise and Assortment Planning is ...**

This slide looks schematically at the “start” phase in an implementation project. Before MAP can be configured, there are many factors that have to taken into consideration – worked out with a pen and paper, if you like. Don’t spend too much time on this slide.

#### **MAP in a Planning Scenario**

Once again, this is only an example (it appears again at the end of the course)!

#### **MAP and the Fiscal Year**

Interfaces to allocation and promotion and connection to SAP BW are new to release 4.6C!

#### **Prerequisites for Using a Flexible Planning System (1 to 3)**

All of the points presented here will be dealt with during the course!  
Slide 3 of this series is new as it presents the functions of 4.6C.

## Topic: Graphic Network Plan

**Architecture and Components** through to **Planning Step**

### **Planning Hierarchies**

The planning hierarchy covers the entire scenario, and is important in understanding MAP!

### **Best Practice Scenario**

**Demonstration after slide entitled “Best Practice Scenario”**

5 mins.

Where can I find MAP?

Show the menu paths (as in the exercises):

MAP in application: use WXP1 to call up network plan

MAP in Customizing: use WXP2 to call up network plan

Explain the difference between WXP1 and WXP2.

Show the transaction WXP\_IMG.

## Topic: User Roles for MAP

**Designing a Planning Scenario** through to **Activity Groups in MAP**

Show just how user-friendly the network plan is. Mention that it is used not only in the application, but that it can be used almost independently to create a scenario (in other words, that it can replace the traditional Customizing activities).

**Demonstration after slide entitled “Activity Groups in MAP”**

10 mins.

Create three favorites folders using the appropriate transactions for the designer, coordinator and planner (do this as shown in the exercises):

1) Designer: **WXP2, WXP\_IMG**, eventual with subfolder “Workbench” with SE80, SE11, SE16

2) Coordinator: **WXP1, WXP51, WXP53, WXP55** (Drag+Drop)  
show how to change the name of a folder

3) Planner: **WXP02, WXP18**

Point out once again that the planner should not be confronted with the advanced network plan.

Show the menu path for accessing the activity groups: transaction PFCG (see solution to exercise). Show the menu of one of the two MAP activity groups.



Before the participants start the exercises, draw their attention to the data sheet for the exercises. Explain briefly which data they can use to work through the exercises at home (for example, information structure S685 is not shipped with the system, but participants can use S085 to work through the exercises again at home).

### **Exercise for User Roles in Merchandise and Assortment Planning**

30 mins.

## Unit: MAP Components

450 mins.

### Contents of Unit

Planning scenarios  
Planning steps  
Planning step methods  
Planning step links  
Interface allocation

### Putting the Topic in Context

This unit introduces participants to all of the functions and components of MAP – without going into detail about specific issues. The various functions and components will be looked at in detail in other units.



At the conclusion of this unit, the participants should be able to:

- Create a planning scenario using planning steps
- Configure and run different planning step methods for a planning step
- Define planning step links and run them within a planning scenario
- Create an allocation table in manual planning

### Topic: Business Scenario

10 mins.

#### Business Scenario: Planning Hierarchies

Stress that the example here has been chosen as a simple means of introducing participants to this topic. In real life, you should **not** plan right down to the article level since this will have an adverse effect on system performance (unless, for example, you need to plan for some specific selected articles such as very expensive articles). There are two factors that are critical to performance: the number of articles and the number of stores in a retail company. Of course, this means that the number resulting from multiplying the number of articles by the number of stores will be an especially important factor! For this reason, it is recommended that you only plan down to the merchandise category or store group level (see later unit)! Therefore in the example scenario of this chapter planning is performed to the level of merchandise category. But to keep the configuration of the interface to create an allocation table as simple as possible (no break-down of grouping, this is explained in chapter MAP in Business processes) some articles are maintained in the planning hierarchy also. The example shown here was chosen deliberately because it is clear and simple. Stress this to participants!

### **Business Scenario: Planning Process**

This slide describes the process that should eventually be worked through by the persons involved.

### **Configuring a Scenario in MAP (1 and 2)**

This is how the finished scenario should look and what the finished scenario should do.

### **Demonstration after slide entitled “Configuring a Scenario in MAP (2/2)”**

5 mins.

Show the scenario TRMAP1 as the end result – you will build up this scenario step by step. Use the same names and descriptions as in the exercises, and use the course group number 00 (i.e. ## = 00).

## **Topic: Planning Scenarios and Planning Steps**

230 mins.

### **Steps in Manual Planning**

This slide is very important for the exercises. The participants should document the steps and components listed here for their own scenario in an Excel spreadsheet, and update this spreadsheet constantly.

Start off as a designer, and then finish up planning by assuming the role of the coordinator and planner. Remember, you can also work with planning layouts and plan versions and make entries in the planning hierarchy if you are a coordinator (in other words, it is not just the designer who does this).

The blue ovals represent components that have to be created manually; the red ovals represent components that are generated by the system!

### **Planning Scenarios through to Business Document Navigator**

### **Demonstration after slide entitled “Business Document Navigator”**

15 mins.

Create scenario Z1MAP00 as detailed in exercise 1-1.

Store documents as detailed in exercise 1-2.

### **Basic Settings through to Activating the Planning Scenario**

Explain what information structures are, what they are used for, and how they are structured. Explain the terms “characteristic,” “key figure,” and “version.” Explain also what happens when a scenario is activated, and even at this early point in the course, explain the difference between planning hierarchy tables and information structures.

### **Demonstration after slide entitled “Activating the Planning Scenario”**

15 mins.

Create planning steps Z1MAP00S1 and Z1MAP00S2 as detailed in exercises 1-2 through 1-5. Explain that the worklist containing planning levels (characteristics) and key figures comes from information structure S685. Once you have activated the scenario, go to the Object Navigator (SE80), and show the generated hierarchy tables that have been created as local objects: there are 4, one for each planning level! The hierarchy tables are still empty! You might like to encourage participants who are particularly interested and experienced in the technical aspects to look at these again during the exercises. Special optional exercises have been drawn up for this – these are designed specifically for technically-minded participants, and are not mandatory for all participants (especially if they do not have much technical experience).

### **Planning Hierarchies through to Structuring a Planning Hierarchy Automatically**

Once again, point out clearly the difference between information structures and planning hierarchy tables, mentioning in particular what is stored in the planning hierarchy tables (planning level values, distribution keys and proportional factors) and how the planning data is stored in the information structures (most detailed level, distributed among the periods).

### **Demonstration after slide entitled “Structuring a Planning Hierarchy Automatically”**

10 mins.

First of all, create the planning hierarchy manually as described in exercise 1-6. Start in the upper planning step. Assign proportional factors as detailed in the exercises so that different planned sales data can be stored later for the departments. Explain this to the participants.

Then show the contents of the planning hierarchy tables again (transaction SE80). You will notice that the tables now contain entries (to be more precise, they contain the data you have just entered ☺).

At this point, you might also like to give a demonstration of structuring a planning hierarchy automatically. However, since this is not relevant to the exercises, you can also do this after the exercises (see below). But this will be done in exercise 4 later of this chapter and so can be dropped here.

### **Plan Versions through to Intermediate Status**

Explain what plan versions are and what they are used for. Mention the special features of an actual version and an active version.

### **Demonstration after slide entitled “Plan Versions”**

5 mins.

Create plan versions for both planning steps as detailed in exercise 1-7.

## Exercises: Scenarios through to Plan Versions

60 mins.

Exercises 1-1 through 1-7



Tell the participants just how important it is that they adhere precisely to the names of the planning scenario and planning step – otherwise, the last exercise will not function correctly (the name of the scenario and the planning step is “hard-coded” in the planning step link programs!!!).

The training system environment will determine whether or not you will be able to show the options for creating Office documents with the help of the BDN. For reasons of network security, participants will not usually be able to generate files locally (for example, participants normally cannot access the NT Explorer). In this case, participants will not be able to import data in exercise 1-1-2, but will have to create and store both Office documents in the BDN.

Two documents have been created in the demo scenario TRMAP1 – you can update the text between the pointy brackets <...> either before the course or during the demonstration. Point out to the participants that these documents have already been created. You can also create your own documents with their own texts. The documents are created in English, but you can of course overwrite the text in the language in which the course is held.

Info structure S685 has only a few characteristics and key figures – this is intentional since too many key figures would only confuse the participants at this stage. Standard info structures are used in the exercises for later units – these have a large selection/number of key figures!! You should also point this out when the time comes!

In demo scenario TRMAP1, the planning hierarchy is run with store R311 instead of with stores T1##.

### Demonstration of Structuring a Planning Hierarchy Automatically

5 mins.

This demonstration could be dropped out as this will be done in exercise 4.

First of all, create a new planning hierarchy version (H01, for example) when the participants are working on the exercises. Don't explain the term “planning hierarchy version” at this point – too many details will only confuse participants.

Next, generate the planning hierarchy for this new planning hierarchy version in scenario TRMAP1 using actual data from the year 1999. Then show the proportional factors that were generated.

### Planning Step Methods through to Creating Planning Data Manually

Manual planning is the most important method.

### Demonstration after slide entitled “Creating Planning Data Manually”

3 mins.

In the ready-made scenario, briefly show that several different layouts should

be defined for the coordinator and planner (depending on the problems that might arise).

### **Running Manual Planning through to Flexible Input Template**

Explain the terms Initial Screen, Characteristic Screen, Overview Screen and Period Screen and Header data row formulas and column formulas.

### **Demonstration after slide Flexible Input Template**

3 min

Navigate to the demo scenario TRMAP1 into the manual planning and explain the same terms of the slides before.

### **Planning Layout Structure through to Layout Appearance Flexibility 6/6**

A layout can be created or maintained within transaction WXPNI (coordinator) also. Switch between the slides and the system demonstration.

### **Demonstration of Layout Appearance Flexibility**

15 mins.

Show the finished layout TRMAP1LW of planning step TRMAP1S2 in scenario TRMAP1 first in the Report Painter and after that in the overview screen of manual planning. In a second session (window), create exactly the same layout for demo scenario Z1MAP00 in planning step Z1MAP00S2 (switch between the slides on this topic as you progress). Show the various settings in the Report Painter one after the other, explaining how each affects the characteristic screen and overview screen for manually planning.

1) General selections:

A) Characteristic fixed: You always plan for one store T100 -> site = T100 and not flagged as a variable.

B) Characteristic variable: You specify precisely which article (and consequently which merchandise category and department) you are planning for later on in manual planning -> These planning levels are flagged as "variable." You want to permit ranges of articles at the bottom level.

C) Header layout: Define the sequence of fields in the header of the overview screen (as per the planning hierarchy) and give reasons for this: site, department, merchandise category and article.

D) Optional characteristic – variable: you should leave it open whether planning is to be performed at a less detailed level (merchandise category) or at a detailed level (article). Flag the variables for the article as optional, and enter pertinent texts for the characteristic screen ("from" article, "to" article).

2) Lines (line definition):

Define the lines as shown in the exercise.

3) Column definition:

A) Characteristic - variable: planning data for a selectable version should be entered in the first column -> version is variable, but fiscal year = current year and months = 1 through 12.

B) The actual data of the previous year should be displayed in the second column -> version = 0 (fixed) and fiscal year = previous year and months = 1 through 12.

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