Entering Planning Data in the Workflow (CO-PA)

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Purpose

The delivered workflow *Execute CO-PA Planning* (COPA_PLAN_M1) enables you to produce during sales and profit planning a planning set into which several planners can enter their planning data. You can assign planners to the planning packages centrally by starting the workflow and you can use the SAP Business Workflow [Ext.] to monitor the process flow and execute a work item analysis [Ext.], for example.

Process Flow

1. First set up the *Planning Framework* and thereby the architecture for planning (see Setting Up Planning Content [Ext.]). At the same time, define a parameter set for the planning method *Enter planning data*.

2. Assign planners to the *planning packages* defined in the planning framework. For more detailed information, see the section Set Up and Customizing [Page 9].

3. Start the *Perform CO-PA Planning* workflow manually by choosing *Office → Start workflow*. Enter the number of planning packages and the parameter set to be used in planning.

4. For each planning package, the system generates a work item and sends it automatically to the inbox belonging to the assigned planner.

5. The planners enter their planning data - possibly in separate phases - and then end the workflow manually.

See also:

BC - Workflow Scenarios in the Applications [Ext.]

Technical Implementation

Object types

For sales and profit planning with workflow support, only the following object type [Ext.] is relevant:

Object type BUS1166 (COPAPlanningPackage)

You can use the object type BUS1166 to process planning packages in CO-PA Planning. The key fields for the object type are:

- *Operating Concern*

- *Type of Profitability Analysis*

- *Planning level*

- *Planning package*

You define a planning level and the associated planning packages when setting up planning content [Ext.].

The object type BUS1166 contains the following methods:

- ChangePlanData to change planning data

- DisplayPlanData to display planning data

Tasks

The following tasks delivered by SAP are available as modules and can be used in a workflow scenario without having to be changed beforehand (for more information, see Tasks and Task Groups [Ext.]).

One task is used to enter planning data whereas the other task is used to display it.

Task COPA_PLAN_01

Definition

Task: 20000612

Short name: COPA_PLAN_01

Description: Entering CO-PA planning data

Structure

Object type: BUS1166 (COPAPlanningPackage)

Referenced object method: ChangePlanData

Attributes: Object method with dialog, confirm end of processing

Agent assignment: no restriction on possible agents

This is where you specify which agents can be selected as the responsible agent. The responsible agent for this task is determined by the role. Any agent can be the responsible agent.

For this reason, it is necessary to classify the task in Customizing as a *general task*. For more information, see: <u>Set Up and Customizing [Page 9]</u>.

Task COPA_PLAN_02

Definition

Task: 20000664

Short name: COPA_PLAN_02

Description: Displaying CO-PA planning data

Structure

Object type: BUS1166 (COPAPlanningPackage)

Referenced object method: DisplayPlanData

Attributes: Object method with dialog, confirm end of processing

Agent assignment: no restriction on possible agents

This is where you specify which agents can be selected as the responsible agent. The responsible agent for this task is determined by the role. Any agent can be the responsible agent. For this reason, it is necessary to classify the task in Customizing as a *general task*. For more information, see: <u>Set Up and Customizing [Page 9]</u>.

Workflow

Each workflow can contain one or more tasks. The business flow for this task is implemented as the workflow definition within a workflow.

Workflow COPA_PLAN_M1

You can use this workflow to influence sales and profit planning when several planning packages are to be processed.

Definition

Workflow: 20000377

Short name: COPA_PLAN_M1

Description: Performing CO-PA Planning

Workflow Container

The import parameters of a workflow are placed in the workflow container.

The following two sources of information are essential for the workflow COPA_PLAN_M1 to be processed and therefore must b available:

- A table containing object references to the planning packages to be processed. These planning packages are placed into the multiple-lined container element *COPAPlanningPackage*.

- A parameter set for executing the method *ChangePlanData*. This parameter set is placed into the container element *ParameterSet*. The parameter set contains the parameters for manual planning, such as the planning layout and the entry currency. You create them in the same way as planning packages when setting up the planning framework.

Technical Implementation

You must enter both sets of information when starting the workflow.

Workflow Steps

The workflow COPA_PLAN_M1 consists of a single step, the task *Enter CO-PA Planning Data*. However, the distinguishing feature of this step is that its dynamic processing occurs in parallel (tab page *Miscellaneous* in the step definition): the system creates a work item with a planning package for every entry in the multiple-lined container element *COPAPlanningPackage*.

Agent for the Workflow Step *Enter CO-PA Planning Data*

You can enter in a workflow step the planning data for a planning package. There are many different ways of determining the responsible agent for this workflow step. Role COPA_PLAN_R1 is used to find the agent in the delivered workflow COPA_PLAN_M1 (see below).

Starting the Workflow

You do not use an event to start the workflow COPA_PLAN_M1. Instead, you start it directly by choosing *Office → Start Workflow* in the menu.

When starting the workflow, you need to enter one or several planning packages and a parameter set.

Role COPA_PLAN_R1

Definition

This is a role used to determine the agent for a planning package. It is used in the delivered workflow template COPA_PLAN_M1.

Role: 20000069

Short name: COPA_PLAN_01

Description: Person responsible for the CO-PA planning package

Role Parameters

You can copy all key fields for the object type BUS1166 as role parameters: *operating concern, type of profitability analysis, planning level* and *planning package*. Your assignment of an agent is then dependent on these fields. For more information, see: <u>Set Up and Customizing [Page 9]</u>.

Set Up and Customizing

Use

Prior to being able to execute the *Perform CO-PA Planning* workflow, you need to carry out the initial steps described below.

Prerequisites

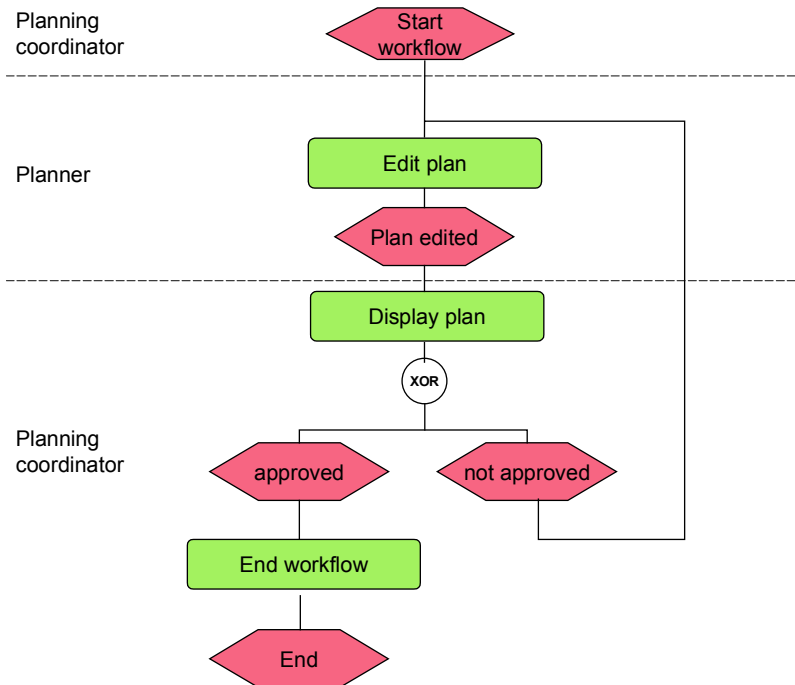You need to have set up the SAP Business Workflow.

Activities

1. Enter a *planning level*, *planning packages* and a *parameter set* for the planning method *Enter planning data* (see Setting Up Planning Content [Ext.]).

2. Classify the task *Enter Planning Data* as a general task. You do this in Customizing for *Basis Components* by choosing *Business Management → SAP Business Workflow → Perform task-specific Customizing → Controlling → Profitability Analysis → Assign Tasks to Agent*.

3. Specify which planning package is to be assigned to which agent's inbox for entering planning data. For this, you need to maintain agent assignment in the role COPA_PLAN_R1. You do this in the workflow development menu. In the SAP menu, choose *Tools → Business Workflow → Development → Definition tools → Standard roles → Display → Responsibilities.*

   You enter the following in a *responsibility*: the planning package and the corresponding operating concern, the form of the operating concern and the planning level. You then assign one or several agents to this responsibility.

Example: Planning Approval

You have the choice between using the delivered workflow *Execute CO-PA Planning* (COPA_PLAN_M1) or defining your own workflows. In this way, you can produce a process for approving planning, similar to the following one:

Planning coordinator

Start workflow

Planner

Edit plan

Plan edited

Display plan

XOR

Planning coordinator

approved　　　not approved

End workflow

End

To implement the process depicted in the diagram, you can use the delivered tasks *Enter CO-PA Planning Data* (COPA_PLAN_01) and *Display CO-PA Planning Data* (COPA_PLAN_02). For detailed information on these tasks, see the section Technical Implementation [Page 6].

See also:

Defining Workflows [Ext.]