

Duet with Demand Planning Process



Applies to:

Industries which have implemented “SAP SCM-Demand planning”. For more information, visit the [Supply Chain Management homepage](#).

Summary

This article explains the process of Demand Planning using Duet, now planners can access SAP Demand Planning data using Microsoft Excel.

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Created on: 22nd October 2008

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Introduction

With Duet you can access and interact with SAP System business processes using your Microsoft Office Outlook 2003 and Microsoft Office Excel 2003.

Demand Planning

With Demand Planning you can create planning sheets, as well as analyze and manage demand planning data from the SAP System using Microsoft Office Excel.

You can access the most recent demand planning data from the SAP System and use Excel capabilities (side calculations, referencing other spreadsheets, sums, and so on) to analyze and prepare updated demand plans. Planning can be done offline; for example, you are meeting a client or a vendor, once the demand plan is complete and you are online again, you can synchronize the new information with the SAP System and the new demand plan is automatically available to be used for the next ordering and production cycle.

Objective

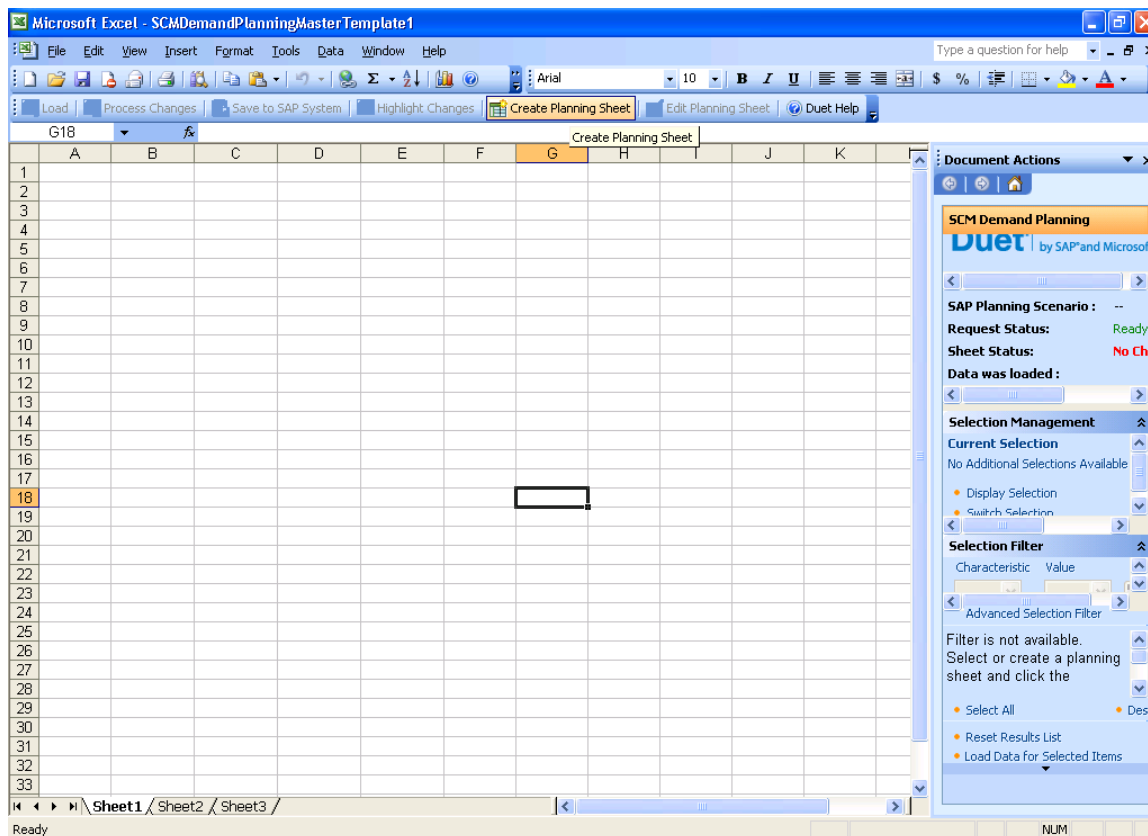
The objective of this article is to explain the Demand Planning process using Duet (excel) Functionality

Business Requirement

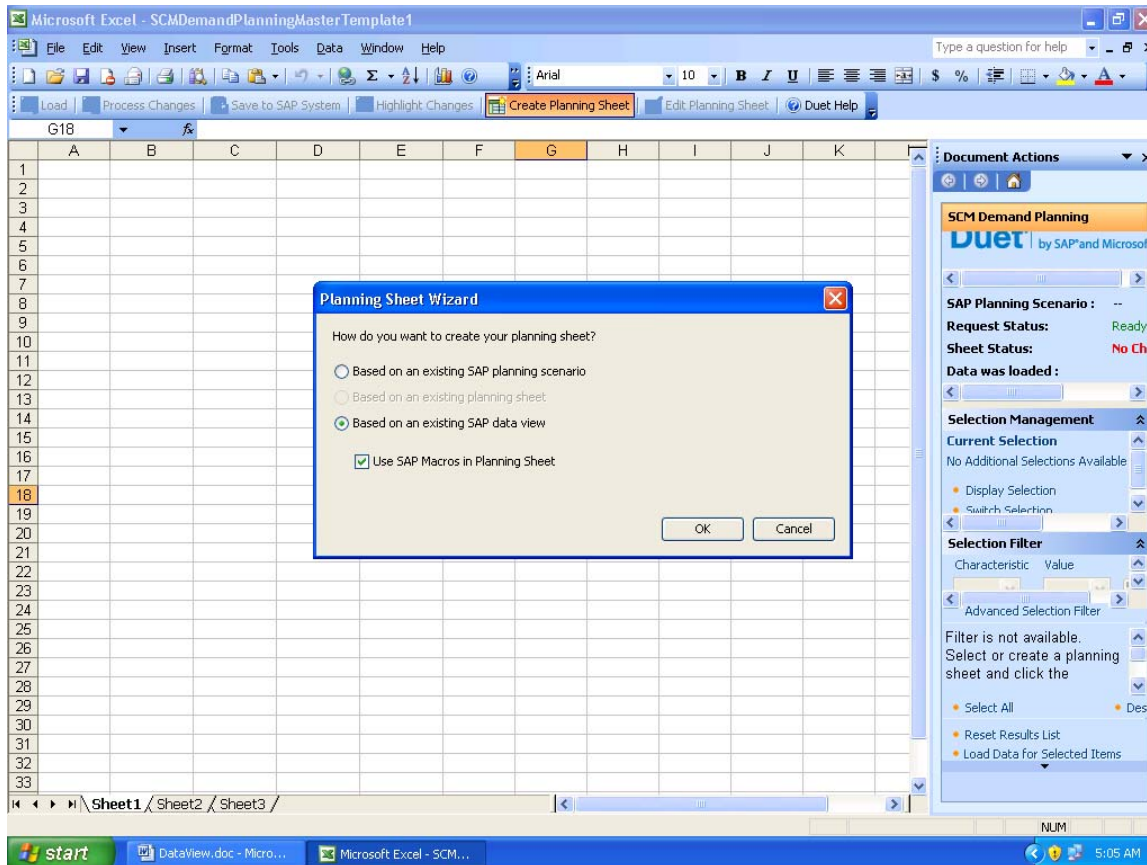
The business requires the planning data which is stored in the Demand Planning (SCM - APO) system, can now be accessed directly using Micro-soft Excel with Duet Functionality. The changes in planning data made by the planners in Excel will be automatically updated in SCM system.

Demand planning process

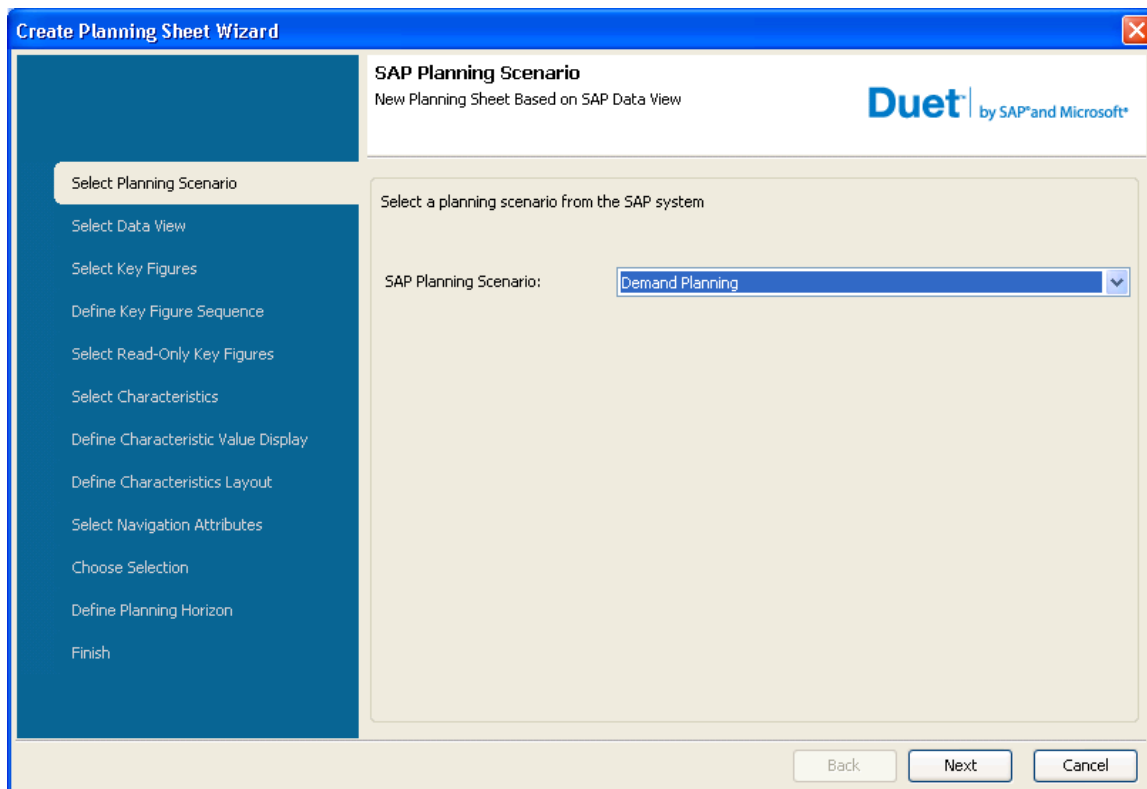
DUET - Planning Sheet – Template



Click on “Create Planning Sheets” button to create a Planning Sheet.



Select the Demand Planning option in the SAP Planning Scenario.



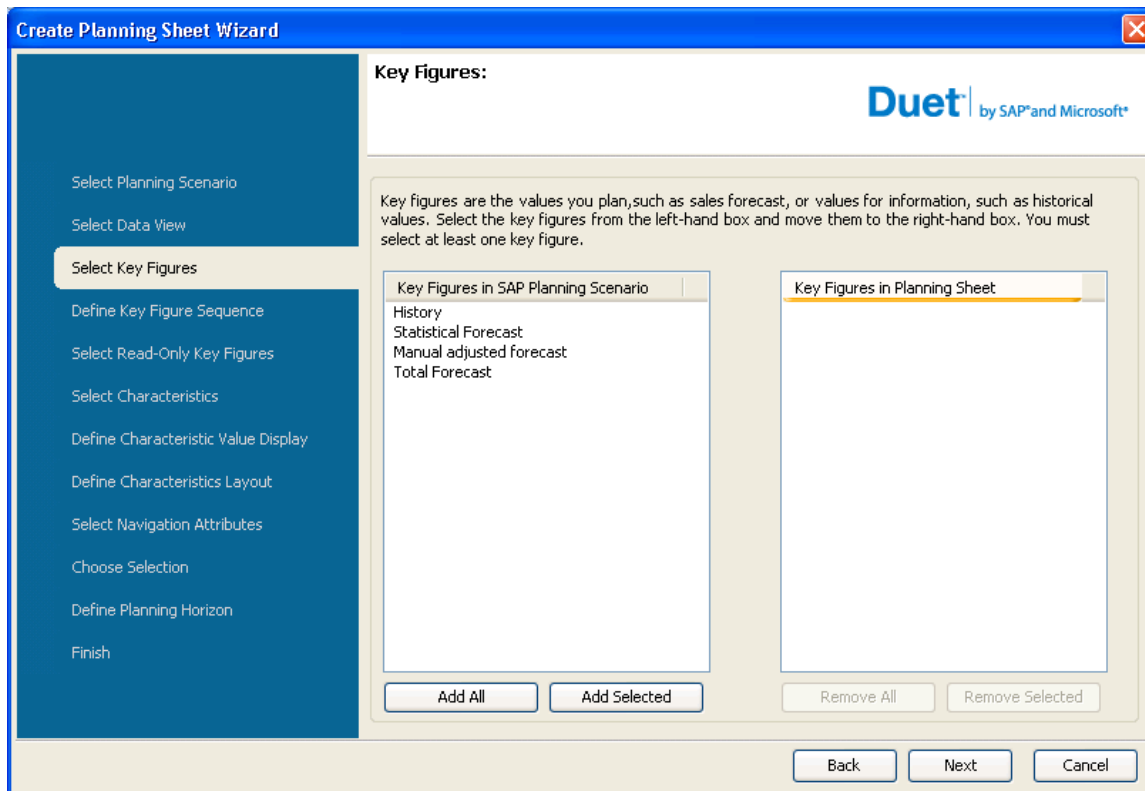
It shows the SAP Data Views which are assigned to this user profile.

Enter the description of the Sheet Name.

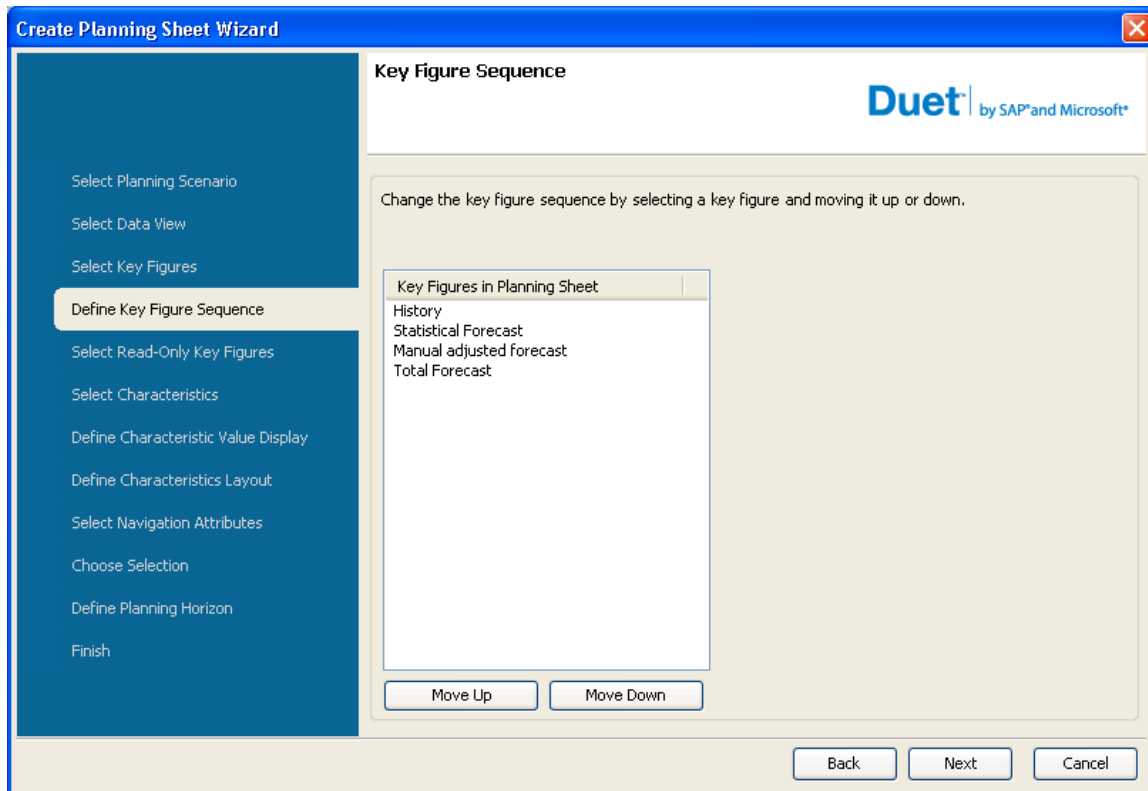
The screenshot shows the 'Create Planning Sheet Wizard' dialog box, specifically the 'SAP Data View' step. The dialog has a blue title bar with the text 'Create Planning Sheet Wizard' and a close button. On the left, there is a dark blue sidebar with a list of steps: 'Select Planning Scenario', 'Select Data View' (highlighted), 'Select Key Figures', 'Define Key Figure Sequence', 'Select Read-Only Key Figures', 'Select Characteristics', 'Define Characteristic Value Display', 'Define Characteristics Layout', 'Select Navigation Attributes', 'Choose Selection', 'Define Planning Horizon', and 'Finish'. The main area is titled 'SAP Data View' and contains the text 'New Planning Sheet Based on SAP Data View' and the 'Duet by SAP and Microsoft' logo. Below this, there is a instruction: 'Select an SAP data view from the SAP system and enter a new name for the planning sheet.' There are two input fields: 'SAP Data View:' with a dropdown menu showing 'DATA VIEW - PGI DEMO' and a red asterisk, and 'Sheet Name:' with a text box containing 'Data_View' and a red asterisk. At the bottom right, there are three buttons: 'Back', 'Next', and 'Cancel'.

Planning Sheet – Settings

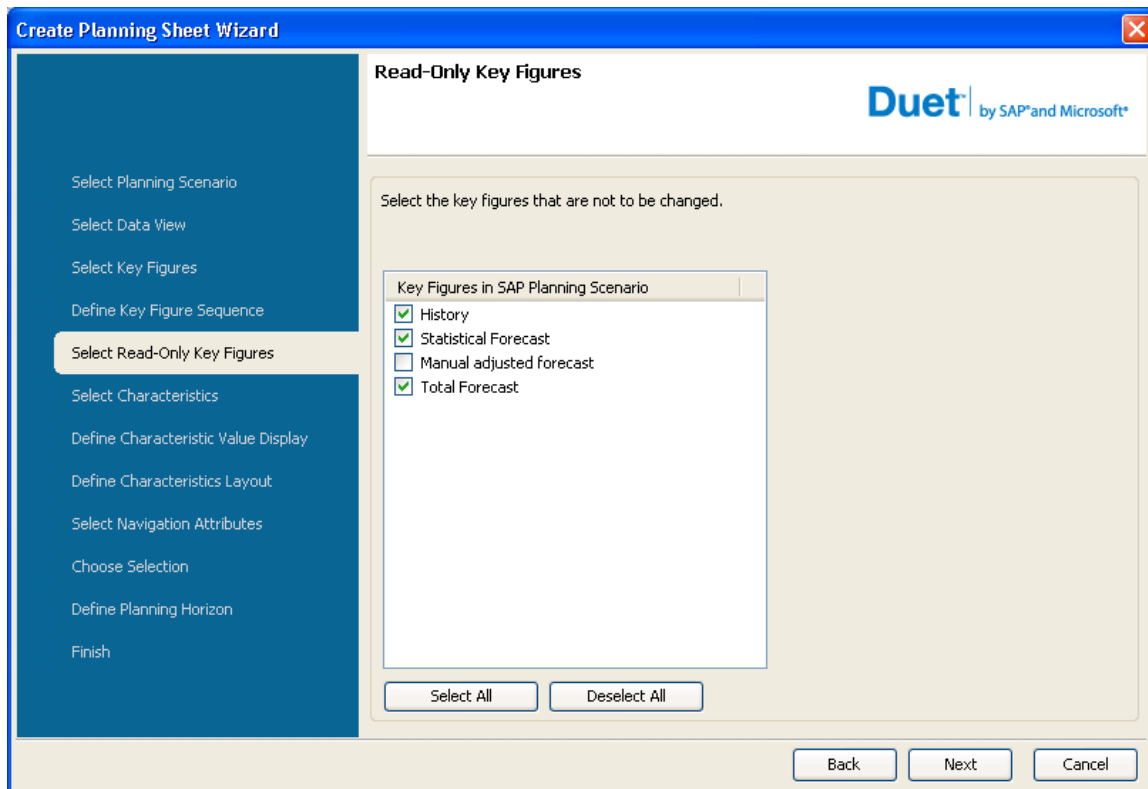
- **Add and remove key figures** – Here the planner's can assign the key-figures for their planning sheets by selecting the required key-figures.



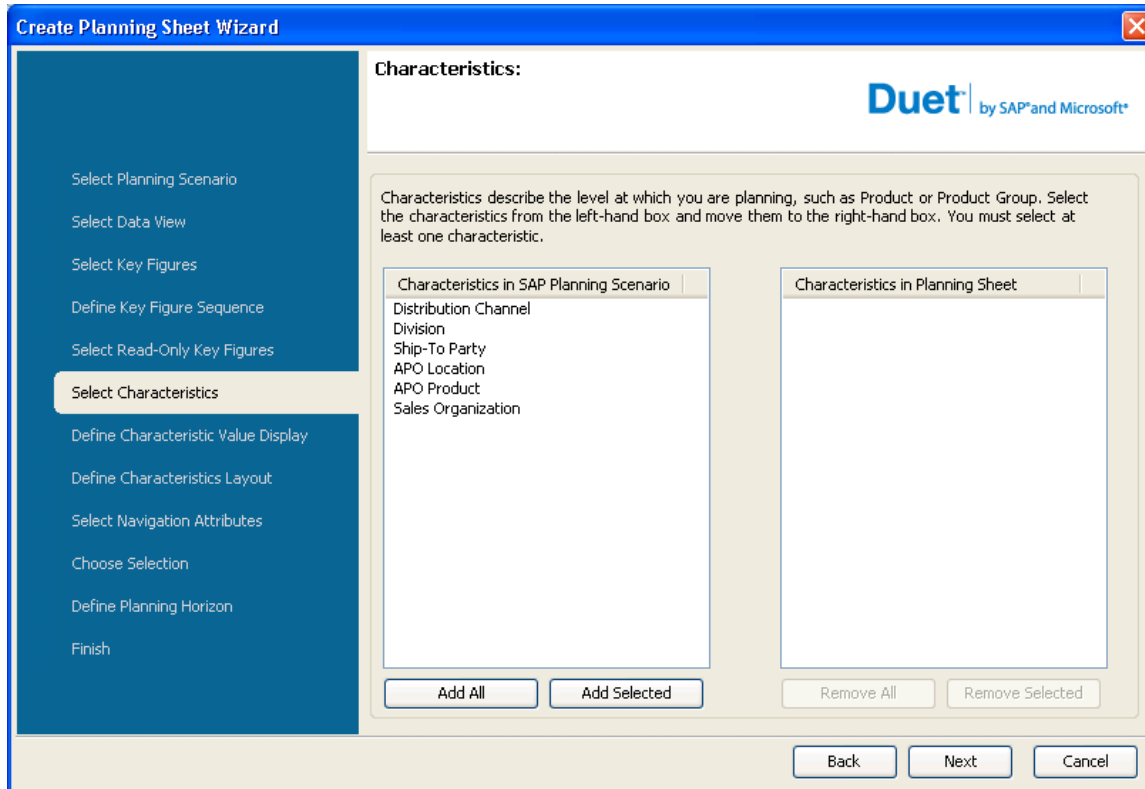
- **Changing the sequence of key figures** – The planner can put the key figures in a sequence by selecting the particular key figure and clicking on move up or down button.



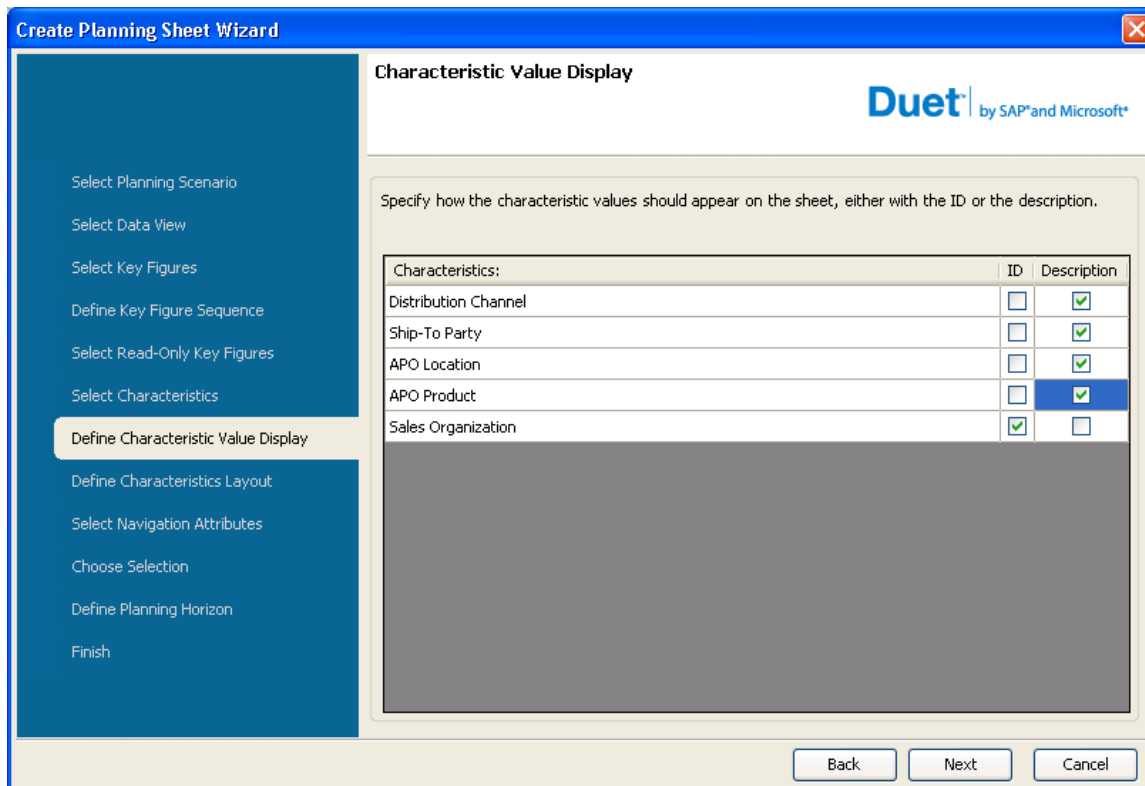
- **Fixing of key figures** – If the planner put's the check mark for any key figure, then the planner can not edit that particular key figure data in the planning sheet.



- **Adding and removing characteristics** – In this step, the planner can add and remove characteristics to/from planning sheets.



- **Changing the characteristics value display** – By selecting the Description or ID the planner can view the Info-object ID or Description in the Planning sheet.



- **Changing the characteristics layout** – The planning can change the sequence of the characteristics values. (It's like aggregation and disaggregation of the characteristics values.)

Create Planning Sheet Wizard

Characteristics Layout

Duet[™] by SAP[®] and Microsoft[®]

Specify which characteristics should appear on the sheet.

Characteristic 1: APO Location

Characteristic 2: APO Product

Preview (Planning Sheet)

	A	B	C	D
1				
2	[Key Figure]	APO Location	APO Product	
3			APO Product	
4		APO Location	APO Product	
5			APO Product	

- **Add and remove navigation attributes** – If the planner wants to select more characteristics in the planning sheets which info-object has a navigational attribution, then the planner can select the navigation attribution in this step. (in this scenario, info-object doesn't have any navigational attributes).

- **Changing the assignment of selections** – In this step the planner can select more than one selection ID's which are defined in SAP APO system.

The screenshot shows the 'Create Planning Sheet Wizard' dialog box, specifically the 'Selection' step. The window title is 'Create Planning Sheet Wizard' and it features the 'Duet by SAP and Microsoft' logo in the top right corner. On the left side, there is a vertical navigation pane with the following steps: 'Select Planning Scenario', 'Select Data View', 'Select Key Figures', 'Define Key Figure Sequence', 'Select Read-Only Key Figures', 'Select Characteristics', 'Define Characteristic Value Display', 'Define Characteristics Layout', 'Select Navigation Attributes', 'Choose Selection' (highlighted in a light blue bar), 'Define Planning Horizon', and 'Finish'. The main area of the dialog is titled 'Selection' and contains the following text: 'Selections are defined in the SAP system. They restrict the data so that the user can only see the data for which he or she is responsible. Choose the selections that are available for the user in question'. Below this text, there is a 'Default Selection:' dropdown menu currently set to 'LOCATION 1011'. Underneath, there is a question 'Do you want to use further selections?' with two radio buttons: 'No' (unselected) and 'Yes' (selected). A list box titled 'Selection' contains three items: 'LOCATION 1011' (checked), 'LOCATION 1012' (unchecked), and 'PRODUCT LINE 1013' (checked). At the bottom of the list box are two buttons: 'Select All' and 'Deselect All'. At the very bottom of the dialog are three buttons: 'Back', 'Next', and 'Cancel'.

- **Changing the planning horizon** – Here, the planner has the option to set the planning horizon (past & future) to view the planning data in the Planning sheet.

Create Planning Sheet Wizard

Planning Horizon

Duet[™] by SAP[®] and Microsoft[®]

Select whether you want to work in weeks, months, quarters, and so on. Specify a reference date when the past changes to the future and how many periods are displayed. Unless you select the fixed reference date, this date is updated automatically.

Periodicity: Month

Reference Date: 9/23/2008 Fixed Reference Date

Periods in the Past: 24 Month

Periods in the Future: 12 Month

End of Read-Only Period: 8/31/2006

Back Next Cancel

This screen explains that what are the settings are done for this planning sheet.

Create Planning Sheet Wizard

Finish

Duet[™] by SAP[®] and Microsoft[®]

Planning Scenario: Demand Planning

Sheet Name: Data_View

Key Figures: History
Statistical Forecast
Manual adjusted forecast

Characteristics: Distribution Channel
Ship-To Party
APO Location

Drill Down Levels: . APO Location
.. APO Product

Navigation Attributes:

Selection: LOCATION 1011

Periodicity: Month

Reference Date: 9/1/2008

Periods in the Past: 24

Periods in the Future: 12

Read-Only Until: 8/31/2006

Click Finish to create the planning sheet.

Back Finish Cancel

Results of the DUET - Planning Sheet

SAP SCM Demand Planning Sheet

Final Selection ...

History	APO Location	PGI Product	APO Author	Unit	M 07.2007	M 08.2007	M 09.2007
	Total	Total		EA	3523	3925	37
	Atlanta	Total		EA	3523	3925	37
		Disney Princess ML	PRICE, ROGER	EA	360	393	
		Alex Rider: Stormbre	HOROWITZ, ANTHONY	EA	346	391	
		Best Democracy Money	PALAST, GREG	EA	346	391	
		Change Function, The	COBURN, PIP	EA	351	391	
		French Kiss	MANNING, SARRA	EA	366	397	
		Microthrills	WENDY SPERO	EA	336	400	
		Oh No, Gotta Go!	ELYA, SUSAN MIDDLETO	EA	351	400	
		Rangers Apprentice 2	FLANAGAN, JOHN	EA	356	391	
		Story of Honk Honk 2	COSENTINO, RALPH	EA	360	391	
		Tarot, The: Wisdom o	CASE, PAUL FOSTER	EA	351	380	
	Total	Total		EA	0	0	
	Atlanta	Total		EA	0	0	
		Disney Princess ML	PRICE, ROGER	EA	0	0	
		Alex Rider: Stormbre	HOROWITZ, ANTHONY	EA	0	0	
		Best Democracy Money	PALAST, GREG	EA	0	0	
		Change Function, The	COBURN, PIP	EA	0	0	
		French Kiss	MANNING, SARRA	EA	0	0	
		Microthrills	WENDY SPERO	EA	0	0	
		Oh No, Gotta Go!	ELYA, SUSAN MIDDLETO	EA	0	0	
		Rangers Apprentice 2	FLANAGAN, JOHN	EA	0	0	
		Story of Honk Honk 2	COSENTINO, RALPH	EA	0	0	
		Tarot, The: Wisdom o	CASE, PAUL FOSTER	EA	0	0	

Document Actions

SCM Demand Planning

Duet by SAP and Microsoft

SAP Planning Scenario: Test
 Request Status: Ready
 Sheet Status: No Changes
 Data was loaded: 7/30/2008 4:55:36 PM

Data was loaded. (7/30/2008 4:55:36 PM)
 Show all (0 Error, 1 Total)

Selection Management

Current Selection: DUET TEST
 Additional Selections Available

Display Selection
 Switch Selection

Selection Filter

Characteristic Value
 Filter is not available.
 Select or create a planning sheet and click the 'Advanced Selection'

Interactive Demand Planning View of a new selection id.

The screenshot displays the SAP Planning Book interface for a new selection ID. The main window shows a table of demand planning data for 'PGI PLANNING BOOK' at 'APO Location 3200 Atlanta'. The table includes columns for months from M 12/2008 to M 06/2009 and rows for History, STAT Forecast, Promotion, and FINAL Forecast. A 'Multiple object selection' dialog is open, showing a list of single values with '66' and '67' selected. The background interface includes a menu bar, a toolbar, and a left-hand navigation pane with 'Object Selection' and 'Selection profile' tabs.

PGI PLANNING BOOK	Unit	M 12/2008	M 01/2009	M 02/2009	M 03/2009	M 04/2009	M 05/2009	M 06/2009
History	EA							
STAT Forecast	EA	178	172	134	130	126	126	120
Promotion	EA							
FINAL Forecast	EA	178	172	134	130	126	126	120

Planning Sheet View of the above Interactive demand planning view.

The screenshot displays a Microsoft Excel window titled 'SCMDemandPlanningMasterTemplate1'. The main content is a spreadsheet with the following structure:

		APO Location	PGI Product	Unit	M 07.2007	M 08.2007	M 09.2007	M 10.2007
10	History	Total	Total	EA	105	114	117	
11		Atlanta	Total	EA	105	114	117	
12			Tarot, The: Wisdom o	EA	105	114	117	
13	STAT Forecast	Total	Total	EA	0	0	0	
14		Atlanta	Total	EA	0	0	0	
15			Tarot, The: Wisdom o	EA	0	0	0	
16	Promotion 1	Total	Total	EA	0	0	0	
17		Atlanta	Total	EA	0	0	0	
18			Tarot, The: Wisdom o	EA	0	0	0	
19	FINAL Forecast	Total	Total	EA	120	126	135	
20		Atlanta	Total	EA	120	126	135	
21			Tarot, The: Wisdom o	EA	120	126	135	

On the right side, the 'Document Actions' sidebar is open, showing 'SCM Demand Planning' with a timestamp of 5:42:50 PM. It includes a 'Selection Management' section with 'Show all (0 Error, 17 Total)' and a 'Selection Filter' section with a 'Ship-To Party' dropdown menu. The dropdown is currently set to 'Amazon' and 'Apple Book Co' are checked. Below the filter are buttons for 'Select All', 'Deselect All', 'Reset Results List', and 'Load Data for Selected Items'. A 'You Can Also' section contains links for 'Edit Selection...', 'Delete Selection...', and 'List Automatic Macros...'.

Promotion Key Figure value for the Months 05 2009 & 06 2009 are "0 & 0" respectively

The screenshot shows a Microsoft Excel spreadsheet titled "SCMDemandPlanningMasterTemplate1". The spreadsheet contains a data table with the following structure:

	M 11.2008	M 12.2008	M 01.2009	M 02.2009	M 03.2009	M 04.2009	M 05.2009	M 06.2009
10								
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	160	178	172	134	130	126	126	120
15	160	178	172	134	130	126	126	120
16	160	178	172	134	130	126	126	120
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0

On the right side of the Excel window, there is a "Document Actions" sidebar. It includes a "SCM Demand Planning" section with a timestamp of 5:42:50 PM and a "Show all (0 Error, 17 Total)" link. Below this is a "Selection Management" section with "Additional Selections Available" and buttons for "Display Selection" and "Switch Selection". The "Selection Filter" section has a "Characteristic" dropdown, a "Value" dropdown, and an "Advanced Selection Filter" button. Under "Ship-To Party", there are checkboxes for "Amazon" and "Apple Book Co", both of which are checked. At the bottom of the sidebar, there are buttons for "Select All", "Deselect All", "Reset Results List", and "Load Data for Selected Items". A "You Can Also" section contains links for "Edit Selection...", "Delete Selection...", and "List Automatic Macros...".

Change the Promotion Key Figure value of the Months 05 2009 & 06 2009 to “100 & 200” respectively & click on **“HIGHLIGHT CHANGES”**

The screenshot shows the Microsoft Excel interface with the 'SCMDemandPlanningMasterTemplate1' workbook. The 'Highlight Changes' button is highlighted in the ribbon. The 'Document Actions' pane on the right shows the 'SCM Demand Planning' section with a 'Show all (0 Error, 17 Total)' button. The spreadsheet data is as follows:

	M 11.2008	M 12.2008	M 01.2009	M 02.2009	M 03.2009	M 04.2009	M 05.2009	M 06.2009
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	160	178	172	134	130	126	126	120
15	160	178	172	134	130	126	126	120
16	160	178	172	134	130	126	126	120
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	100	200
20	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0

The Changes are highlighted with RED color & now Click on **“SAVE TO SAP SYSTEM”**, the values will be updated in SAP System.

The screenshot shows the Microsoft Excel interface with the 'SCMDemandPlanningMasterTemplate1' workbook. The 'Save to SAP System' button is highlighted in the ribbon. The 'Document Actions' pane on the right shows the 'SCM Demand Planning' section with a 'Show all (0 Error, 17 Total)' button. The spreadsheet data is as follows:

	M 11.2008	M 12.2008	M 01.2009	M 02.2009	M 03.2009	M 04.2009	M 05.2009	M 06.2009
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	160	178	172	134	130	126	126	120
15	160	178	172	134	130	126	126	120
16	160	178	172	134	130	126	126	120
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	100	200
20	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0

Values for the Promotion Key figure are updated in SAP System.

Planning Book: [Live] PGI PLANNING BOOK / ZPGIDP1_VIEW

Selected Objects: APO Location: Atlanta

Selection profile: SCMGEN

PGI PLANNING BOOK	Unit	M 12/2008	M 01/2009	M 02/2009	M 03/2009	M 04/2009	M 05/2009	M 06/2009
History	EA							
STAT Forecast	EA	178	172	134	130	126	126	120
Promotion	EA						100	200
FINAL Forecast	EA	178	172	134	130	126	226	320

Planning Book/Data View: ZPGIDP1_BOOK, ZPGIDP1_VIEW, ZPOS_PB01

Macros: For data view: ZPGIDP1, Directly Execut. Macr, Default

SCMGEN njsapnet3 INS

Planning Sheet – Action Pane Flexibility

- **Manage Selections** - Display, Switch, Create, Edit & Delete Selection id.
- Restrict a Selection with the Quick Entry & Advanced Selection Filter.
- List & Execute Automatic Macros (Default, Start, Exit & Level Change Macros).
- If a Key figure is fixed in DP Interactive Planning it is reflected in Planning Sheet.

Planning Sheet – Scenarios

There are “Three” options to create a Planning Sheets.

1. Based on an existing SAP Planning scenario

Your administrator can manually create a planning sheet, based on an existing planning scenario in the SAP System. This planning sheet is then available for the other users to display, edit, or use as a basis to create their own planning sheets.

2. Based on an existing Planning sheet

You can create a planning sheet based on an already existing planning sheet in the current Excel workbook. The settings for the planning sheet are loaded into the new planning sheet, and, depending on your user profile, you can make several changes in the new planning sheet.

The screenshot displays the Microsoft Excel interface for 'DUET TEST'. The main area shows a 'Demand Planning Sheet' with the following data:

	APO Location	PGI Product	Unit	M 07.2007	M 08.2007	M 09.2007	M 10.2007
History	Total	Total	EA	351	360	391	416
	Atlanta	Total	EA	351	360	391	416
STAT Forecast	Total	Total	EA	0	0	0	0
	Atlanta	Total	EA	0	0	0	0
Promotion 1	Total	Total	EA	0	0	0	0
	Atlanta	Total	EA	0	0	0	0
FINAL Forecast	Total	Total	EA	400	420	451	420
	Atlanta	Total	EA	400	420	451	420
		Tarot, The Wisdom o	EA	400	420	451	420

The right-hand pane shows 'Document Actions' and 'Selection Management' options. The 'Current Selection' is 'DUET TEST1'. The 'Selection Filter' section indicates that the filter is not available and provides options to 'Select All', 'Reset Results List', and 'Load Data For Selected Items'.

3. Based on an existing SAP data view (using SAP Macros in Planning Sheet)

You can create a planning sheet based on an existing SAP data view. If the SAP data view contains macros, you can use them in your planning sheet when you check the Use SAP macros in planning sheet box. The settings for the data view are loaded into the new planning sheet, and, depending on your user profile, you can make several changes in the new planning sheet.

The screenshot shows the 'List Automatic Macros' dialog box in Microsoft Excel. The dialog box contains a table with the following data:

Description	Start Macro	Default Macro	Level-Change Macro	End Macro
Final Forecast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The main Excel window displays a planning sheet with the following data:

	386	418	480	534	513	405	390	378	378	360
9	386	418	480	534	513	405	390	378	378	360
10	386	418	480	534	513	405	390	378	378	360
11	386	418	480	534	513	405	390	378	378	360
12	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0
15	386	418	480	534	513	405	390	378	378	360
16	386	418	480	534	513	405	390	378	378	360
17	386	418	480	534	513	405	390	378	378	360
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30										
31										
32										

The 'Document Actions' pane on the right shows the 'SCM Demand Planning' section with the following options:

- Automatic macros (if available) have been executed. Use the 'List Au...
- Selection Management**
 - Current Selection: DUET TEST1
 - No Additional Selections Available
 - Display Selection
 - Switch Selection
- Selection Filter**
 - Characteristic: Value
 - Advanced Selection Filter
 - Filter is not available. Select or create a planning sheet and click the
 - Select All
 - Reset Results List
 - Load Data for Selected Items
- You Can Also**
 - Edit Selection ...
 - Delete Selection ...
 - List Automatic Macros ...
 - Get Demand Planning Help ...

The status bar at the bottom indicates 'Processing: 1 Command' and the system clock shows 7:04 PM.

Related Content

<https://www.sdn.sap.com/irj/sdn/go/portal/prtroot/docs/library/uuid/40dd5567-d853-2b10-69ae-cc0fd059fef2>

<https://www.sdn.sap.com/irj/sdn/go/portal/prtroot/docs/library/uuid/f0ee4ed6-ee32-2a10-9cb7-f1dae667649a>

http://help.sap.com/saphelp_duet150/helpdata/en/index.htm

For more information, visit the [Supply Chain Management homepage](#).

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