





Key User Training Document

PA103 - COPA Planning

29 / 12 / 2021

Version: 1.0

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Course Information



Course ID	PA103
Course Description	COPA Planning
Course Duration	2 hrs.
Course Pre-requisite	CO Overview
Course Objective	Understand COPA Planning Process

Course Information



Table of Content
(สารบัญ)

- Edit Planning Data
- Upload from Excel File



Course Outline





Course Overview

Edit Planning Data

Upload from Excel File

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Course Overview IB-C-COPA-020-010 COPA Planning Process





Planning in COPA



Sales forecast for sales volume and amount can be completed in SAP CO-PA. Then transfer cost estimation in Product Costing to Profitability Analysis based on sales volume and displays under COGS account. In this way, Profitability Analysis enables to obtain detailed information on the origin of costs, and to analyze contribution margins. After allocate planned Selling & Administration expenses are allocated to Profitability Analysis by various methods, the operating profit can be analyzed.

COPA Sales and Revenue and COGS planning can be approved outside SAP then upload to SAP. The planned data can be planned by Sales quantity and Sales amount for Plan & Actual Comparison.

Planning in COPA





Planning Version



Versions can be used for Planning in different Period/Time or Scenarios.

Version	Name
0	Plan/Act – Version
Q1	Revise Q1
Q2	Revise Q2
Q3	Revise Q3

Course Outline





Course Overview

Edit Planning Data

Upload from Excel File

Q&A

Planning Framework



- The planning framework is the main working environment for sales and profit planning. Firstly, this framework contains all the possible settings for building your planning architecture. Secondly, you can carry out planning from this framework screen.
 - Planning level: You use the planning level to determine the level at which planning is to occur. You do this by specifying the characteristics for planning. To set sequential of Characteristics to be Planned
 - Planning package: You specify characteristic values in a planning package. In this way, you determine the market segment for which planning is to take place for a particular period. A planning package can thereby be seen as a work package that determines which planning objects are relevant to a specific planner
 - Planning method: Planning methods are functions with which planning data can be entered and changed
 - Parameter set: A parameter set contains all the settings necessary for executing a planning method

Planning Framework (2)





Edit Planning Data: Transactions



COPA Planning consists of :

T-Code: **KEPM** Edit Planning Data





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- 1. Right Click at Planning levels – Create Planning Level
- **2. Planning Level** Input name and description of Planning level

3. Press 🗹 to confirm





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- **4. Characteristic List** Select desired Characteristic
- 5. Click
 To move
 Characteristics to Planning
 Level
- 6. Characteristics have been moved to Planning level

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Customer	KNDNR
Customer Group	KDGRP
Distr. Channel	VTWEG





7. Right Click at Planning levels – To Create Planning Package

8. Enter Planning Package

9. Press 🗹 to confirm

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Create Planning Layout

20. Press [] to create Layout

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Data saved



Create Planning Layout

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- **21.Layout** Enter Planning Layout
- 22. Characteristics Header or Lead column
- 23. Value Fields Select Value Fields by click
 24. Press

Layout "Z00-1" has been created



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Edit Planning Data: Exercise





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No.	Fiscal Year	Period	Comp Code	Version	Record Type	Plant	Material Number	Sales Quantity	Revenue
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3	2022	1-12	1035	0	F				
4	2022	1-12	1035	0	F				
5	2022	1-12	1035	0	F				
6	2022	1-12	1035	0	F				
7	2022	1-12	1035	0	F				
8	2022	1-12	1035	0	F				
9	2022	1-12	1035	0	F				
10	2022	1-12	1035	0	F				

Course Outline





Course Overview
Edit Planning Data
Upload from Excel File
Planning Valuation
Q&A

Edit Planning Data: Transactions



COPA Planning consists of :

T-Code: **KEPM** Edit Planning Data \rightarrow Excel Upload Management

T-Code: **KE13N** Upload Planning Data



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Navigation off Se Planning levels	et Personalization Profile			
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• 🚈 Z02	COGS Planning			Selection Desci
• 🚈 Z03	Sales by SKU			
• 🚈 Z04	Sales Qty			
▼ <u> <u> </u> <u> </u> [™] Z05 </u>	Service Revenue Planning	hand an an		Selection
• 🏄 Z01	Service Revenue Planning	000		Characteristic
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· 🛟 Z01	Service Revenue Planning	_		
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Excel Upload Preparation

1. Change Parameter Set Right Click at Parameter set → Change Parameter Set

2. Integrated Excel Select Active

3. Press 님

Planning levels	Description	Status	Parameter Set Z01 Service Revenue Planning
• 🖅 Planning leve	el		
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Planning H	ramework : Overview		
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Excel Upload Preparation

- **4. Execute Method** Right Click at Parameter set → Execute method
- 5. Excel Format System displayed Excel format

Change Sales and Profit Plan:								
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Excel Upload Preparation

- 6. Formatting Go to Menu → Setting → Formatting
- **7. Information** System displayed File description

8. Click









Excel Upload Preparation

9. Press Generic file to define File name to be Uploaded

10.Generic file name define File name

11. Click 🗹









Excel Upload Preparation

12. Press Save file description to save File description, System displayed message
✓ File description 02_CE1BTGG_SAP_001Z05 was saved
13. Press Save Excel layout to save Excel file format

The Excel file template was imported okay

14.Save As to save Excel Template to Local Drive



Upload from Excel File: Transactions KE13N – Excel Upload





Data in Excel File Format

- **1. Prepare Data in Excel File**
- **2. Save As** the file format as in Generic file name

File name:	PA 1027txt			\sim
Save as type:	Text (Tab delimited) (*.txt)			\sim
Authors:	Riesterer, Martin	Tags: Add a tag	Title: SAP Master	
Hide Folders			Tools Tools Cancel	

Upload from Excel File: Transactions KE13N – Excel Upload



☞ <u>P</u> rogram <u>E</u> dit <u>G</u> oto System <u>H</u> elp
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Operating concern 2 BTGG 1
Type of Profitability Analysis
Planning layout Z05 3
⊙Import single file
O Import file directory
Path or file D:\01 SAP Projects\07 Atos\05 Betagro\07 Key User Training\PA\PA 10
File descriptions
Decimal notation
 1.234.567,89 ● 1,234,567.89 5
Separator in CSV files
•;
Ο,
In TXT files, TAB is expected as separator
Logs
Delete Logs

D

Upload Excel File to System

- 1. Operating concern
- 2. Type of Profitability Analysis COPA Format = 1
- 3. Planning layout
- **4. Path or File** Location or Path of File to Upload
- **5. Decimal Notation**

6. Press 🐼 to Upload

Check Planning Data in
Transaction Code KE25

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\01 SAP Projects\07 Atos\05 Betagro\07 Key User Training\P	02_CE1BTGGSAP_001Z05	ОК	 Image: A second s

Upload from Excel File: Exercise



N	Planning	Planning	Enter Planning Data	Planning	File name
o.	Level	Package		Layout	format
1	ZSL <mark>XX</mark>	ZSL <mark>XX</mark>	Parameter set – ZSLXX	ZSL <mark>XX</mark>	Z <mark>XX</mark> *.txt

Course Outline





Course Overview

Edit Planning Data

Upload from Excel File

Q&A

Q&A





Exercise and Test



