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Configuration Guide (OCP-PB)

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1 Configuration of OCP - PB

This documentation describes the configuration of the consulting solution Optimized Capacity Planning – Planning Board (OCP – PB).

This documentation does not contain the SAP standard settings that are required for production processing.

The screens shown in this configuration guide are only examples of configurations. This does not mean that the delivery of OCP - PB contains the settings shown.

To use the OCP – PB planning board, the following prerequisites must be met:

- OCP – PB has been installed in your system
- The configuration required for production processing, including the organizational structure, has already been created.
- The plant settings for MRP planning have been made.
- The users have been assigned the required roles

2 Role Assignments for OCP - PB

To use OCP – PB, the following roles must be assigned to the respective user:

- SAP_BR_PROD_PLNR (or equivalent role)
- SAP_BR_PRODN_ENG_DISC (or equivalent role)
- SAP_BR_PRODMASTER_SPECIALIST (or equivalent role)

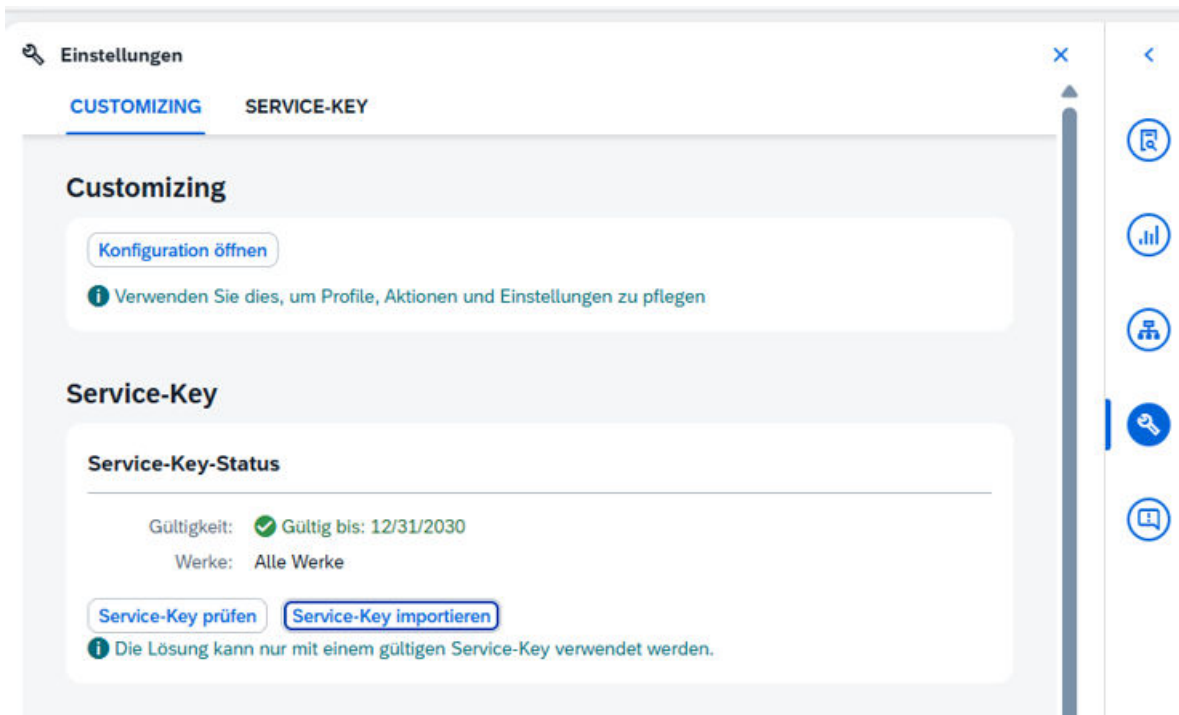
In addition, the user must be assigned the business catalog ZSAPLOM_OCPPB using a separate role to execute the application.

For the authorization to change the settings, the business catalog ZSAPLOM_OCPPB_CUST is also required. Users who do not have this business catalog cannot make any settings.

3 Service Key

A service key is required to use OCP – PB.

The service key is uploaded in the settings menu in the app. You can find the settings menu on the right edge of the app.



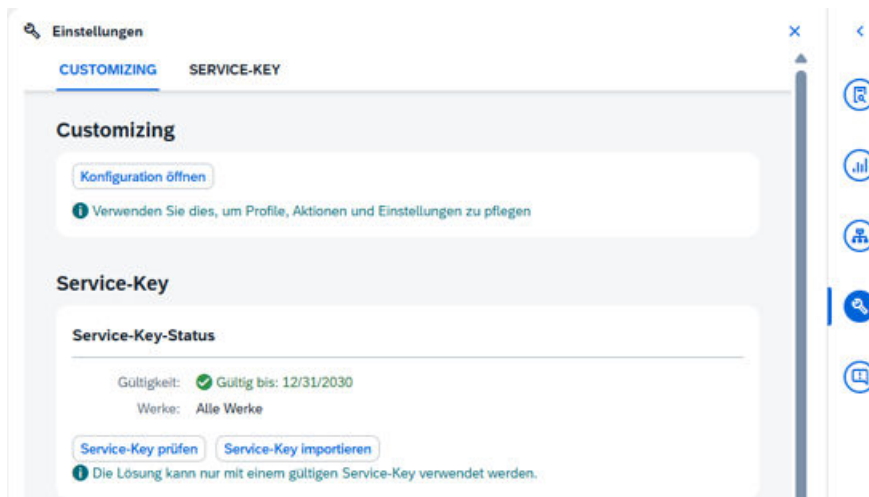
Menu for service key

If you have any questions about installing the solution or require a service key, please contact scm-consulting-solutions@sap.com.

4 OCP – PB Configuration Overview

The configuration of OCP – PB is done within the app. There is no separate app for making settings for the application.

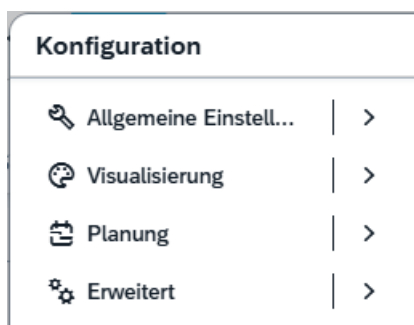
The configuration is opened using a button in the sidebar.



Calling the configuration

The following menu options are available:

- [Common Settings \[page 7\]](#)
- [Visualization \[page 12\]](#)
- [Planning \[page 17\]](#)
- [Advanced \[page 20\]](#)



Configuration overview

The individual menu options have further subchapters.

→ Remember

Changes to the settings will only take effect the next time you start the app. This means that you have to leave the app and call it again.

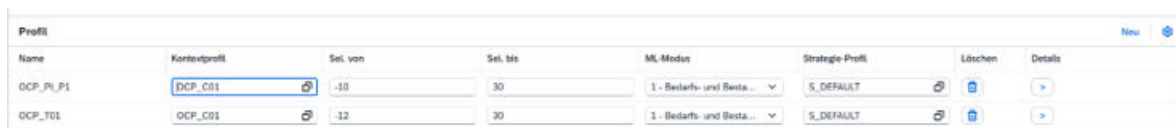
4.1 Common Settings

In the menu for the general settings, you find the following subitems:

- [OCP - PB Profile \[page 7\]](#)
- [Action Codes \[page 8\]](#)
- [Context Profile \[page 10\]](#)
- [Data Provider \[page 12\]](#)

4.1.1 OCP - PB Profile

The profile for OCP – PB bundles all settings for calling the app.



The screenshot shows a table titled 'Profil' with columns: Name, Kontextprofil, Set. von, Set. bis, ML Modus, Strategie-Profil, Löschen, and Details. There are two rows of data. The first row has Name 'OCP_PL_P1', Kontextprofil 'OCP_C01', Set. von '-10', Set. bis '30', ML Modus '1 - Bedarfs- und Besta...', Strategie-Profil 'S_DEFAULT', and buttons for Löschen and Details. The second row has Name 'OCP_TB1', Kontextprofil 'OCP_C01', Set. von '-12', Set. bis '30', ML Modus '1 - Bedarfs- und Besta...', Strategie-Profil 'S_DEFAULT', and buttons for Löschen and Details.

Name	Kontextprofil	Set. von	Set. bis	ML Modus	Strategie-Profil	Löschen	Details
OCP_PL_P1	OCP_C01	-10	30	1 - Bedarfs- und Besta...	S_DEFAULT	[Icon]	[Icon]
OCP_TB1	OCP_C01	-12	30	1 - Bedarfs- und Besta...	S_DEFAULT	[Icon]	[Icon]

OCP - PB OCP - PB Profile

The following settings are defined on the first level:

- The name of the profile.
- The context profile is used to define which functions are displayed in the app.
- The time period starting from today's date in days for which the data is read. Negative values mean reading in the past.
- The mode for reading the multilevel data. Loading additional low-level codes costs runtime. You have the following options:
 - Do not read multilevel data.
 - Read requirement and stock elements: read direct operations and successors of the orders.
 - Read multi-level hierarchy: Read hierarchies completely.
- The strategy profile for all planning functions to which no separate strategy profile was explicitly assigned

You can delete an entry by choosing the button on the right.

You can use the button on the right edge to access further settings for the profile.

The following information can be maintained there:

- Assignment of message groups. [Alerts \[page 13\]](#)
- Assign characteristic profiles. [Characteristics \[page 20\]](#)
- Assignment Gantt color groups. [Chart Colors \[page 14\]](#)
- A description for the profile in different languages.
- Assignment of field configuration groups. [Column Labels \[page 15\]](#).
- Assignment of work centers: This means that the work centers in the selection can be preset for a profile.

4.1.2 Action Codes

In this menu, you maintain the settings for the functions of the planning table.

A number of standard settings are delivered that should not be changed.

You can use this configuration to create additional functions with customer-specific settings.

Aktioncodes						
Name	Impl.-Klasse	Symbol	Opt. Parameter	Strategie-Profil	Löschen	Details
S_CO03	zsaplom_ocppb_300	gantt-bars	CROSSNAV			
S_CR03	zsaplom_ocppb_300	machine	CROSSNAV			
S_ORSP						
S_EPMULTI	zsaplom_ocppb_300	org-chart	S_EPMULTI			
S_EPPool	zsaplom_ocppb_300	multiple-radar-chart	S_EPPool	ST_POOL		

Overview action codes

Schließen

BESCHREIBUNG AKTIONSCODE-PARAMETER

Beschreibung

Beschreibung Neu

Sprache	Text	Löschen
D	Fertigungsauftrag anzeigen	
E	Display Production Order	

Aktionscode-Parameter

Aktionscode-Parameter Neu

Nr.	Name	Vorzeichen	Op.	Wert (von)	Wert (bis)	Löschen
1	SEMOBJ			ProductionOrder	display	
2	PARAM			ProductionOrder	@AUFNR	

Action code details

4.1.2.1 Jumps to other apps

The following preconfigured jumps to other apps are delivered:

- S_CO03: Display of production orders
- S_CR03: Display of the work center
- S_MD04: Requirements/stock list

- S_MD13: Display of planned orders
- S_MM03: Display of material master

📌 Note

Customer-specific jumps can be configured. These are not subject to support. The existing settings can serve as a template for configuring jumps to other apps.

To define a customer-specific jump, please follow the steps below:

1st Level

- Create a new Action Code.
- Enter “zsaplom_ocppb_300” as the class.
- The icon can be chosen freely.
- For the header-level parameter, use “CROSSNAV”.
- Leave the field for the strategy profile empty.

2nd Level

- Define a description for the function.
- Fill in parameters for the jump.

For a jump, you need at least 2 parameters: Semantic Object and a parameter for calling the app.

Semantic Object

Enter the semantic object in the value from field.

Enter the action in the value to field.

You can find the Semantic Object and the Action in the Fiori App Library. Filter for S/4Hana Public Cloud. [SAP Fiori Apps Reference Library](#)

There, select the desired app. Under “Implementation Information” -> “Configuration” you will find the values for the “Semantic Object” and the “Semantic Action.”

Parameters

Parameters are values that must be provided when calling an application, such as the number of an order.

You can also find the parameters in the Fiori App Library.

Using @FIELDNAME, a parameter value can be filled with a value from the OCP-PB table field.

4.1.2.2 Planning Functions

This chapter describes parameter settings for planning functions:

- Sorted dispatching, S_EPSRT: Parameter SEQ, value from = Technical name of the sorting. [Sorting Sequence \[page 18\]](#)
- Multi-level dispatching, S_EPMULTI: Parameter EARLIEST, value from = X. Dispatching at the earliest possible date. Parameter LATEST, value from = X. Dispatching at the requirement date. The parameters are mutually exclusive.

- Remove pool ID, S_POOLIDRM: Parameter REMOVE, value from = X. Removal of the pool ID.

Related Information

[Action Codes \[page 8\]](#)

4.1.3 Context Profile

Context profiles determine which functions are displayed above the list of operations. [Functions of the Capacity Requirements List](#)

The functions in OCP-PB are action codes. You assign action codes to a context profile. The context profile is then assigned to the OCP-PB overall profile. In this way, action codes can be provided to users. The assigned action codes are then displayed next to each other in the toolbar.

It is possible to create submenus in the toolbar that contain several action codes. To do this, a context menu is inserted in another context menu. A submenu generates a dropdown menu button that can be expanded. In this way, functions can be grouped into one button. This saves space on the toolbar.

1st Level

Kontextprofil				New	
Name	Symbol	Icon	Details		
OCP_C01					
OCP_P01	00000000				
OCP_P02	00000000				

Context profile 1st level

The technical name of the context profile is entered on the first level of the context profile. If a context profile is to act as a submenu, the icon for the button is stored.

You can use the delete button to delete the context profile.

2nd Level

On the second level, the action codes are entered.

SAP HANA

KONTEXTPROFIL-EINTRÄGE
BESCHREIBUNG

Kontextprofil-Einträge

Neu
⚙️

Nr.	Aktionscode	Ref. Kontextprofil	Sortierung	Auslöser	Untermenü	Status
0	S_CR03		100		Nein	
Löschen:						
1	S_MD04		200		Nein	
Löschen:						
2	S_MD13		50		Nein	
Löschen:						
3	S_CO03		55		Nein	
Löschen:						
4	S_MM03		20		Nein	
Löschen:						

Beschreibung

Neu
⚙️

Sprache	Text	Löschen
D	Navigation	
E	Navigation	

Action codes within context profile

The order in which the action codes are displayed can be adjusted via sorting. Sorting is optional. A function can be hidden via the status.

The fields Referenced Context Profile and Submenu are only used for submenus.

The description for the context profile is only necessary if the context profile is used as a sub-profile. The description is then displayed in the function bar next to the icon of the context profile.

Submenus

To integrate submenus into the function bar, context profiles are entered and the switch for the submenu is activated.

Schließ

KONTEXTPROFIL-EINTRÄGE BESCHREIBUNG

Kontextprofil-Einträge

Kontextprofil-Einträge

Neu

Nr.	Aktionscode	Ref. Kontextprofil	Sortierung	Auslöser	Untermenü	Status
2		OCP_PL	1	GRIDMEN...	X - Ja	
Löschen:						
3		OCP_NAV	2	GRIDMEN...	X - Ja	
Löschen:						

Beschreibung

Beschreibung

Neu

Sprache	Text	Löschen
D	Standard-Kontextprofil	
E	Default Context Profile	

Maintenance of submenus

4.1.4 Data Provider

Reading the data in the OCP -PB consulting solution is done with the help of data providers. Data providers are ABAP classes.

Currently, there is only a single class for reading the data. This area will be further expanded in future versions of OCP -PB.

4.2 Visualization

This menu summarizes all settings for the display of data.

This menu has the following subchapters:

- [Alerts \[page 13\]](#)
- [Calculated Fields \[page 13\]](#)
- [Chart Colors \[page 14\]](#)
- [Column Labels \[page 15\]](#)

- [Table Colors \[page 16\]](#)

4.2.1 Alerts

In the list of operations, there is a column for alerts. In this column, messages can be displayed that indicate certain constellations in the data.

The rules for generating alerts are defined in this menu item.

1st Level

Meldungen						Neu	
Name	Gruppe	Formel	Schweregrad	Löschen	Details		
REQU_DAT		@SEND0 + @DEMANDDATE	E - Fehler				
REQU_ENDD		@SEND0 EQ @DEMANDDATE	W - Warnung				

Configuration of alerts level 1

On the first level, the following fields are filled in:

- The technical name of the alert
- An alert group: Alerts that are not assigned to a group are processed for all profiles. Alerts that are assigned to a group are only processed in the profile that has the alert group assigned in the profile. [OCP - PB Profile \[page 7\]](#)
- The formula with which the message is checked. [Formula Definition \[page 22\]](#)
- The severity levels of the message: Success, Information, Warning, or Error.
- An entry can be deleted using the trash can icon.
- Using the button for details, you can jump to the second level of the rules.

2nd Level

On the second level, the message texts can be maintained in different languages.

Meldungstext			Neu	
Meldungstext				
Sprache	Text	Löschen		
D	Bedarftermin			
E	Requirements Date			

Alert text

4.2.2 Calculated Fields

In the list of data, there are 6 user fields.

These fields can be filled with values from calculations.

1st Level

To create a calculation, the following fields are filled in:

- Technical designation of the calculation
- Group: Calculations without group assignment are executed for every profile. Calculations with group assignment are only executed when using profiles that have the group assigned. The calculation group is entered in the profile in the section for field configuration. [OCP - PB Profile \[page 7\]](#)
- User field ID: Number from 1-6 to specify the field number into which the result of the calculation should be written.
- Formula for the calculation. Supported operators: +, -, *, /
- A calculation can be deleted using the button with the trash can.
- With the button on the right side, you can jump to the second level.

Berechnete Felder						Neu	
Name	Gruppe	Benutzerfeld-ID	Formel	Löschen	Details		
TEST_FIELD		3	@ORDER_QTY * 3			>	

Example Calculation

2nd Level

Field label

In the second level of maintenance, labels for the respective user field can be maintained in different languages.

Caution

Each user field should only have one formula assigned to it. It is not possible to display more than one value per field.

4.2.3 Chart Colors

If no colors are stored in Customizing, then the operations in the diagram are colored randomly. A color is randomly assigned per material so that orders for the same material have the same color.

A specific coloring can be predefined via Customizing.

1st Level

On the first level, the following fields are filled in:

- Technical name of the coloring
- Priority: Importance of the coloring. A coloring with higher priority overrides a coloring with lower priority.
- Group: Colorings without group assignment are executed for every profile. Colorings with group assignment are only executed when using profiles that have the group assigned. [OCP - PB Profile \[page 7\]](#)
- Color ID in hexadecimal format. A color code can be generated via the search help.
- Formula for the coloring. [Formula Definition \[page 22\]](#)
- A coloring rule can be deleted using the button with the trash can.
- The button on the right side allows you to jump to the second level.

Diagrammfarben							Neu	
Name	Prio.	Gruppe	Farbe	Format	Löschen	Details		
PB_GREEN	0		#3AE43A	@MATGR EQ GREEN				
PB_RED	0		#EF0000	@MATGR EQ RED				
PB_REQUDAT	0		#F000EF	@DEMANDDATE EQ @SENDG				

Maintenance of coloring rules

2nd Level

On the second level, a descriptive text for the coloring rule can be entered in various languages. The text is purely informative. It is not displayed in the application.

Beschreibung

Beschreibung

Neu

Sprache	Text	Löschen
D	Grünes Material	
E	Green material	

Labeling of the coloring rule

4.2.4 Column Labels

With this setting, the column headers in the data list can be changed.

1st Level

On the first level, the following fields are maintained:

- Technical name of the entry.
- Group: Entries without group assignment are executed for every profile. Entries with group assignment are only executed when using profiles that have the group assigned. [OCP - PB Profile \[page 7\]](#)
- Field name of the field to be renamed. The field is a selection field and displays all available fields.
- The renaming can be deleted using the button with the trash can.
- With the button on the right side, you can jump to the second level.

Spaltenbeschriftungen					Neu	
Name	Gruppe	Feldname	Löschen	Details		
MATGRP		MATGR - Materialgruppe				

Column labeling level 1

2nd Level

On the second level, the labels of the columns are maintained in different languages.

Description

Description

New

Language	Text	Delete
D	Grünes Material	
E	Green material	

Column labeling level 2

4.2.5 Table Colors

If no colors are stored in Customizing, then the operations in the list of operations will not be colored.

Coloring can be specified via Customizing.

1st Level

On the first level, the following fields are filled in:

- Technical designation of the coloring
- Priority: Importance of the coloring. A coloring with higher priority overrides a coloring with lower priority.
- Group: Colorings without group assignment are executed for every profile. Colorings with group assignment are only executed when using profiles that have the group assigned. [OCP - PB Profile \[page 7\]](#)
- Color: Due to technical limitations, there is only a small selection of possible colors for the list.
- Formula for the coloring. [Formula Definition \[page 22\]](#)
- Field name: Selection of the field that will be colored if the formula is evaluated positively. If no field is selected, the entire row will be colored.
- The trash can button can be used to delete a coloring rule.
- The button on the right side can be used to jump to the second level.

Name	Prio.	Gruppe	Farbe	Formel	Feldname	Löschen	Details
DISPATCHED	0		GRAY - Grau	@DISPATCHED EQ X	DISPATCHED - Eingep...		>
MATGR_GREE	0		GREEN - Grün	@MATGR EQ GREEN	MATGR - Materialgrup...		>
MATGR_RED	0		RED - Rot	@MATGR EQ RED	MATGR - Materialgrup...		>
MATGR_YELL	0		YELLOW - Gelb	@MATGR EQ YELLOW	MATGR - Materialgrup...		>
PROCDORD	0		YELLOW - Gelb	@ORDER_TYPE EQ PROCO	AUFNR - Auftrag		>

Maintenance of coloring rules for the list

2nd Level

On the second level, a descriptive text for the coloring rule can be entered in various languages. The text is purely informative. It is not displayed in the application.

Beschreibung

Beschreibung

Neu

Sprache	Text	Löschen
D	Eingeplanter Vorgang	
E	Dispatched operation	

Labeling of the coloring rule

4.3 Planning

In this menu you will find settings for planning with the app.

- [Strategy Profile \[page 17\]](#)
- [Sorting Sequence \[page 18\]](#)

4.3.1 Strategy Profile

Each dispatching function requires a strategy profile. In the strategy profile, certain settings for dispatching are made.

The standard strategy profile S_DEFAULT is used for all planning functions to which no other strategy profile has been assigned.

The assignment of a strategy profile to the action code is done in the menu for the action codes. [Action Codes \[page 8\]](#)

The maintenance of the strategy profiles is two-tiered.

1st Level

Strategieprofil							Neu	
Name	Richtung	Planungsdatum	Umfang	Eintügen	Kamp-Verf. berücks.	Löschen	Details	
ST_EPSORT	FORWARD - Vorwärts	MANUAL - Manuelle Ei...	FINITE - Finite	Lücke suchen	Nein			>
ST_POOL	FORWARD - Vorwärts	MANUAL - Manuelle Ei...	FINITE - Finite	Lücke suchen	Nein			>
S_DEFAULT	FORWARD - Vorwärts	Standard	FINITE - Finite	Lücke suchen	Nein			>

Strategy profiles

On the first level, the following fields are maintained:

- **Name:** Technical name of the strategy profile
- **Direction of scheduling:** Search forward or backward for the next possible scheduling date.
- **Planning date:** Date used to search for the next available scheduling date. Possible options:
 - **Manual entry:** Manual entry by the user via a pop-up window
 - **Earliest possible:** Find the earliest possible date in the future from the current time.

- **Current operation date:** Use the date on which the operation is currently already scheduled.
- **Scope of planning:** Finite or infinite planning. In finite planning, operations are scheduled where free capacity is available. In infinite planning, the capacity available at the workstation is not taken into account. Operations are scheduled for the specified date.
- **Insertion:** The operations can search for a free slot or be inserted into the production plan at the desired date. When inserting, the operations being inserted will, if necessary, shift all subsequently scheduled operations. Insertion is only relevant for finite scheduling.
- **Consideration of component availability:** If this function is activated, the logic searches for a time when all components are available. If a component is not available during the entire planning period, scheduling cannot be performed.
- An entry can be deleted using the button with the trash can.
- The button on the right edge can be used to open the maintenance of the second level.

Note

For some fields, you can also select the "Default" option. If "Default" is selected, the planning function behaves as it would in the standard version without passing a strategy profile.

2nd Level

On the second level, a description of the strategy profile can be maintained in various languages.

This description is purely informative and has no further function.

Beschreibung		Neu	Einstellungen
Sprache	Text	Löschen	
D	Strategieprofil für Aktionscode S_EPSORT		
E	Strategy Profile for Action Code S_EPSORT		

Description of strategy profiles

4.3.2 Sorting Sequence

In this section, you can define a sorting sequence, which is used by the function for sorted scheduling.

The maintenance is carried out in two levels.

1st Level

Sortierfolge			Neu	Einstellungen
Name	Löschen	Details		
EXAMPLE01				
MATGROUP				

Sorting sequence 1st level

In the first level, you maintain a technical name for the sorting sequence.

This technical name is passed to the planning function for sorted scheduling via the action code in the parameter named SEQ.

Example action code parameters:

The screenshot shows the SAP configuration interface for 'Aktionscode-Parameter'. It has two tabs: 'BESCHREIBUNG' (selected) and 'AKTIONSCODE-PARAMETER'. Under 'Beschreibung', there is a table with columns 'Sprache' and 'Text'. It contains two entries: 'D' with 'Sortierte Einplanung' and 'E' with 'Sorted dispatching'. Each entry has a 'Löschen' button and a trash icon. Under 'Aktionscode-Parameter', there is a table with columns: 'Nr.', 'Name', 'Vorzeichen', 'Op.', 'Wert (von)', 'Wert (bis)', and 'Löschen'. It contains one entry with 'Nr.' 1, 'Name' 'SEQ', 'Wert (von)' 'EXAMPLE01', and 'Wert (bis)' empty. It also has a 'Löschen' button and a trash icon.

Example action code for sorted dispatching

You can delete the entry using the button with the trash can. The button on the right side takes you to the details.

2nd Level

In the second level, you can specify a description for the sorting. This is optional. The description is for informational purposes only and has no function.

The screenshot shows the SAP configuration interface for 'Sortierfelder'. It has two tabs: 'BESCHREIBUNG' (selected) and 'SORTIERFELDER'. Under 'Beschreibung', there is a table with columns 'Sprache' and 'Text'. It contains one entry with 'Sprache' 'E' and 'Text' 'Example Sorting Sequence'. It has a 'Löschen' button and a trash icon. Under 'Sortierfelder', there is a table with columns: 'Nr.', 'Feldname', 'Aufsteigend/Absteigend', and 'Löschen'. It contains one entry with 'Nr.' 1, 'Feldname' 'MATGR - Materialgruppe', and 'Aufsteigend/Absteigend' 'Aufsteigend'. It also has a 'Löschen' button and a trash icon.

Sorting sequence 2nd level

All fields of the list can be maintained for the sorting. You must specify whether the sorting is ascending or descending.

A combination of several fields is possible. Example: Material group and material number.

4.4 Advanced

In this section, additional settings for the planning board can be made.

- [Characteristics \[page 20\]](#)

4.4.1 Characteristics

In this chapter, settings for reading characteristics and characteristic values are configured.

The maintenance is done on two levels.

1st Level

Merkmalsprofil		
Name	Löschen	Details
MERKMALE01		

Maintenance of characteristic profile 1st level

In the first level, the technical name for a characteristic profile is maintained. This characteristic profile is entered in the overall profile for OCP - PB. [OCP - PB Profile \[page 7\]](#)

With the button featuring the trash can icon, an entry can be deleted again.

With the button on the right edge, you can jump to the detailed maintenance.

2nd Level

5 Formula Definition

In various settings menus for OCP-PB, formulas can be stored for evaluation.

The evaluation of formulas can then trigger certain actions, such as coloring or an alert.

In OCP-PB, formulas must be defined in a very specific way.

Formulas must be defined so that their result is either true or false.

Example:

@SENDD > @DEMANDDATE

(The end date of an operation is greater than the required date)

The following rules must be observed:

- All components of the formula must be separated by spaces.
- Field values can be included in the formula using the notation @FIELDNAME (technical field name).
- Supported operators:
 - Arithmetic operators: +, -, *, /, ^
 - Comparison operators: >, <, >=, <=, EQ
 - Logical operators: AND, OR
- Parentheses are supported. There must be spaces before and after the parenthesis.
- Operator priorities are taken into account, but parentheses take precedence over priorities.
- Literal values can be used, but currently only if they do not contain spaces. Examples:
 - @FIELDNAME > 100
 - @FIELDNAME EQ ABC
 - 1 EQ 1 (for a formula that is always true).
- Calculations with date fields are possible. Example: (@DATEFIELD + 7) <= @OTHER_DATEFIELD

⚠ Restriction

- Formulas cannot be applied to the result of another formula, so for example, coloring cannot access the result of calculated field values.
- Action codes cannot access calculated values.

Important Disclaimers and Legal Information

Hyperlinks

Some links are classified by an icon and/or a mouseover text. These links provide additional information.

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