

Oracle® Demand Planning

Implementation and User's Guide

Release 11*i*

Part No. B10238-01

August 2004

Oracle Demand Planning Implementation and User's Guide, Release 11i

Part No. B10238-01

Copyright © 1999, 2004, Oracle Corporation. All rights reserved.

Primary Authors: Carol Chang and William Coe

Contributors: Vikash Goyal, Mary Martin, Elizabeth Looney, Hugh Mason, and Vinay Molasi

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments	xiii
Preface.....	xv
How To Use This Guide	xvi
Other Information Sources	xvii
Installation and System Administration	xix
Training and Support.....	xxii
Do Not Use Database Tools to Modify Oracle Applications Data	xxiii
About Oracle	xxiii
Your Feedback.....	xxiv
 1 Demand Planning Overview	
About Oracle Demand Planning	1-2
Demand Planning Architecture	1-3
Planning Cycle	1-4
Demand Planning Roles.....	1-6
 2 Demand Planning Setup	
Setup Instances.....	2-2
Setup Data Collections	2-4
Setup Demand Planning Dimensions.....	2-8
Setup Demand Planning Hierarchies	2-10
Setup Demand Planning Levels	2-15
Setup Demand Planning Hierarchy Levels	2-16

	Setup Profile Options	2-18
	Demand Planning Setup Procedures	2-22
3	Flexible Data Streams	
	About Flexible Data Streams	3-2
	Flexible Data Stream User Procedures.....	3-3
	Uploading Flexible Data Streams	3-18
4	Data Collection	
	About Data Collection	4-2
	Procedure for Collecting Data	4-4
	Graphical Display of Hierarchies	4-29
	Pulling Data into Fact Tables	4-30
	Net Change	4-31
	Integrating Legacy Data.....	4-31
5	Data Validation	
	About Data Validation	5-2
	Overview of Data Validation Programs.....	5-3
	Audit Fact	5-3
	Level Value Audit	5-8
	Setting Up the Audit Query	5-12
6	Events	
	About Events.....	6-2
	Business Applications.....	6-4
	Promotions	6-17
	New Product Introductions and Cannibalization	6-18
	Product Phase Outs.....	6-26
	Events Calendar.....	6-27
7	Defining a Demand Plan	
	About defining a Demand Plan	7-2

Procedure to define a Demand Plan.....	7-2
Input Parameters.....	7-12
Scenarios.....	7-23
Events.....	7-28
Price lists.....	7-30
Options.....	7-31
Scope.....	7-33
Validate plan.....	7-34

8 Demand Planning Administration

Building a New Demand Plan.....	8-2
About the Stages in the Planning Cycle.....	8-3
Downloading Data from the Planning Server (Stage 1).....	8-6
Populating Measures (Stage 2).....	8-9
After you populate measures.....	8-10
Distributing to Planners (Stage 3).....	8-11
Collecting Data from Planners (Stage 4).....	8-13
Uploading Measures to the Planning Server (Stage 5).....	8-15
Automating the Planning Cycle.....	8-16
Viewing the Batch Log.....	8-21
Publishing Forecast Data Back to the Source.....	8-24
Renewing the Forecasting Cycle.....	8-26

9 Demand Plan Administration: Setting Up the User Environment

About Setting Up the User Environment.....	9-2
Measures.....	9-3
Events.....	9-10
Planner Assignments.....	9-14
Scenarios.....	9-23
Comment Reason Codes.....	9-26
User Page Setup.....	9-29
Predefined Reports.....	9-31
Database Information.....	9-37
Workflow Settings.....	9-39
Batch Log.....	9-41

Collaboration History	9-42
-----------------------------	------

10 Environment for Planners and Demand Plan Manager

Logging In as a Planner or Demand Plan Manager	10-2
Navigation List	10-4
Notifications List.....	10-9
Document Workspace	10-10
Activity Log.....	10-14
Getting Help	10-16
Exiting Demand Planning	10-17

11 Using Worksheets

About Worksheets.....	11-2
Creating Worksheets	11-4
Opening Worksheets	11-5
Selecting Data for Worksheets	11-6
Arranging and Viewing Data in Worksheets	11-8
Viewing Events for Measures in Worksheets	11-11
Modifying Data in Worksheets	11-12
Formatting Worksheets	11-26
Printing Worksheets	11-34
Saving Worksheets.....	11-37
Exporting Data from Worksheets.....	11-39
Closing Worksheets	11-41
Renaming Worksheets	11-41
Viewing Worksheet Properties.....	11-42
Deleting Worksheets	11-42

12 Using the Planning Percentages Worksheet

About the Planning Percentages Worksheet	12-2
Calculating Dependent Demand for Input Parameters	12-3
Opening the Planning Percentages Worksheet.....	12-3
Setting up the Planning Percentages Worksheet.....	12-5
Display and Calculations in the Planning Percentages Worksheet.....	12-8

Modifying Data in the Planning Percentages Worksheet.....	12-9
Averaging Existing Percentages to Forecasting Levels.....	12-15
Changing the Layout to Enhance Analysis.....	12-15
Calculating Dependent and Total Revenues.....	12-15
Copying Planning Percentages.....	12-16
Repopulating Planning Percentage Objects.....	12-16
Displaying Parent and Child Values in the Worksheet.....	12-16
Saving Data in the Planning Percentages Worksheet.....	12-17
Printing the Planning Percentages Worksheet.....	12-17
Exporting Data from the Planning Percentage Worksheet.....	12-19
Closing the Planning Percentages Worksheet.....	12-21

13 Preserving Forecast Adjustments

Persistent Forecast Adjustments.....	13-2
Why Preserve Forecast Adjustments?.....	13-2
Designating Data as Cycle Persistent.....	13-2
Standard Versus Persistent Locks.....	13-3
Cycle-Persistent Locks and the Planning Process.....	13-3
Copying Data and Locks to Another Measure.....	13-4
Accessing Advanced Locking Functionality.....	13-6
Making Your Data Cycle-Persistent.....	13-7
Applying Persistent Locks in Worksheets.....	13-8
Removing Persistent Locks in Worksheets.....	13-13
Using Standard Locks in Your Worksheets.....	13-16
Resolving Locking Conflicts.....	13-17
Preserving Locked Data for Submission to the Planning Manager.....	13-18
Applying Previous Adjustments to New Planning Cycles.....	13-18
Distributing Adjusted Forecasts with Cycle-Persistent Data.....	13-20

14 Using Ad Hoc Reports

About Ad Hoc Reports.....	14-2
Creating Ad Hoc Reports.....	14-4
Opening Ad Hoc Reports.....	14-5
Selecting Data for Ad Hoc Reports.....	14-6
Arranging and Viewing Data in Ad Hoc Reports.....	14-7

Creating Ranking/Exception Reports.....	14-11
Viewing Events for Measures in Ad Hoc Reports	14-23
Formatting Ad Hoc Reports	14-24
Formatting Ad Hoc Reports Based on Data Conditions (Color Coding)	14-34
Printing Ad Hoc Reports	14-40
Saving Ad Hoc Reports.....	14-43
Copying Data from Ad Hoc Reports	14-44
Exporting Data from Ad Hoc Reports.....	14-46
Closing Ad Hoc Reports	14-48
Renaming Ad Hoc Reports	14-48
Viewing Ad Hoc Report Properties.....	14-49
Deleting Ad Hoc Reports	14-49

15 Using Ad Hoc Graphs

About Ad Hoc Graphs	15-2
Creating Ad Hoc Graphs	15-6
Opening Ad Hoc Graphs.....	15-7
Selecting Data for Ad Hoc Graphs	15-7
Arranging and Viewing Data in Ad Hoc Graphs	15-8
Formatting Ad Hoc Graphs.....	15-11
Printing Ad Hoc Graphs.....	15-14
Saving Ad Hoc Graphs	15-16
Exporting Data from Ad Hoc Graphs	15-17
Closing Ad Hoc Graphs.....	15-20
Renaming Ad Hoc Graphs	15-20
Viewing Ad Hoc Graph Properties.....	15-21
Deleting Ad Hoc Graphs	15-21

16 Using Predefined Reports

About Predefined Reports	16-2
Comparison Accuracy Document	16-3
Aged Accuracy Document.....	16-6
Other Predefined Reports	16-9
Opening Predefined Reports.....	16-12
Changing Data in Predefined Reports.....	16-12

Viewing Data in Predefined Reports.....	16-14
Printing Predefined Reports.....	16-16
Copying Data from Predefined Reports.....	16-19
Exporting Data from Predefined Reports	16-20
Closing Predefined Reports.....	16-22

17 Working with Measures

About Measures	17-2
Types of Measures	17-2
Creating Forecast Measures	17-4
Creating Simple Copy Measures	17-16
Creating Complex Copy Measures.....	17-24
Creating Accuracy Measures	17-33
Creating Formula Measures.....	17-37
Editing Measures	17-40
Renaming Measures.....	17-41
Viewing Measure Properties	17-42
Deleting Measures.....	17-44
Importing Data into a Measure from a Flat File	17-45

18 Working with Events

About Events.....	18-2
Creating Promotion Events.....	18-2
Creating Product Introduction Events.....	18-7
Creating Product Phase out Events	18-13
Modifying Events	18-16
Viewing Event Properties.....	18-17
Deleting Events	18-18
Applying Events to Measures	18-18
Using the Events Calendar.....	18-18

19 Working with Custom Aggregates

About Custom Aggregates	19-2
Defining Custom Aggregates	19-2

Applying Custom Aggregates to Open Documents.....	19-5
Editing Custom Aggregates	19-8
Renaming Custom Aggregates	19-8
Viewing Custom Aggregate Properties	19-9
Deleting Custom Aggregates	19-10

20 Working with Saved Selections

About Saved Selections	20-2
Defining Saved Selections	20-2
Applying Saved Selections to Open Documents	20-7
Editing Saved Selections	20-10
Renaming Saved Selections.....	20-10
Viewing Saved Selection Properties	20-11
Deleting Saved Selections.....	20-12

21 Working with Document Folders

About Folders	21-2
Creating Folders	21-3
Adding Documents to Folders	21-3
Moving Documents Between Folders.....	21-4
Copying Documents to Folders.....	21-6
Changing the Order of Documents in Folders.....	21-8
Deleting Documents from Folders	21-9
Renaming Folders	21-10
Viewing Folder Properties	21-10
Deleting Folders	21-10

22 Selecting Data

About Selecting Data	22-2
Selecting Values From a List.....	22-3
Selecting Values by Level.....	22-7
Selecting Values by Family Relationship	22-9
Selecting Values by Attribute.....	22-12
Selecting Values that Match a Character String.....	22-14

Selecting Values that Meet a Value Condition.....	22-17
Selecting Values that Meet a Measure Condition	22-21
Selecting Top and Bottom Values	22-25
Selecting Time Values by Range.....	22-28
Sorting Selected Values	22-30
Saving Value Selections.....	22-32
 23 Sharing Data	
About Sharing Data.....	23-2
Sending Measures	23-4
Notifications About Collaboration Measures	23-6
Receiving Measures.....	23-7
Viewing Collaboration History.....	23-8
 24 Selecting Measures to Submit or Upload	
About Scenarios	24-2
Demand Planner: Selecting Measures to Submit.....	24-2
Demand Plan Manager: Selecting Measures to Upload.....	24-5
Automating the Submissions Process	24-10
The Benefits of Automatic Submissions.....	24-10
Administrator Options for Configuring Submissions Measures	24-10
Procedure: Setting Up Automatic Submissions Measures	24-11
Viewing Scenario Properties	24-11
 25 Working with Alerts and Notifications	
About Alerts.....	25-2
Defining Alerts.....	25-3
Modifying Alerts	25-11
Disabling Alerts	25-12
Enabling Alerts.....	25-13
Manually Running Alerts	25-14
Renaming Alerts	25-14
Viewing Alert Properties.....	25-15
Deleting Alerts	25-15

Working with Notifications	25-17
----------------------------------	-------

26 Advanced Topics

Customizing Demand Planning hierarchies	26-2
Forecasting for Dependent Demand	26-10
Multiple Step UOM Conversion	26-32
Using Sales Forecasts and Opportunities.....	26-36
Forecasting for Service Parts.....	26-46
Line of Business Specific Demand Plans.....	26-52

A Reference: Stored Measure Options

Forecast Methods	A-2
Measure Property: Unit of Measure Association.....	A-6
Effect of Events on Measures.....	A-7

B How Demand Planning Uses Oracle Workflow

Overview of Workflow	B-2
Prerequisites for Using Workflow with Oracle Demand Planning.....	B-3
Workflow Processes Within the Demand Planning Cycle.....	B-4

C Profile Options

Demand Planning Profile Options.....	C-2
Main Planning Profile Options.....	C-4

Glossary

Index

Send Us Your Comments

Oracle Demand Planning Implementation and User's Guide, Release 11i

Part No. B10238_01

Oracle welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: (650) 506-7200 Attn: Oracle Applications Documentation Manager
- Postal service:
Oracle Corporation
Oracle Applications Documentation Manager
500 Oracle Parkway
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Welcome to the Oracle Demand Planning Implementation and User's Guide Guide, Release 11*i*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Demand Planning.

If you have never used Oracle Demand Planning, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Demand Planning Implementation and User's Guide Guide contains the information you need to understand and use Oracle Demand Planning.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Demand Planning.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on *OracleMetaLink*.

Related Guides

Oracle Demand Planning shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Demand Planning.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Demand Planning Installation and Configuration Guide

Provides information for a system administrator who installs and sets up the software for the Demand Planning Engine (DPE).

Oracle Advanced Planning and Scheduling: Implementation and User's Guide

Provides information for a system administrator who sets up the Advanced Supply Chain Planning application, including the Demand Planning Server (DPS).

Oracle Demand Planning Technical Reference Manual, Volume I Demand Planning Server

Describes the underlying structures of the Demand Planning Server (DPS).

Oracle Demand Planning Technical Reference Manual, Volume II Demand Planning Engine

Describes the underlying structures of the Demand Planning Engine (DPE).

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Demand Planning implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetalink*

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Demand Planning and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Demand Planning working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Demand Planning and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Demand Planning or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to appsdoc_us@oracle.com.

Demand Planning Overview

This section describes Oracle Demand Planning, explains the major activities in the planning cycle, and describes user roles.

The section includes the following topics:

- [About Oracle Demand Planning](#)
- [Demand Planning Architecture](#)
- [Planning Cycle](#)
- [Demand Planning Roles](#)

About Oracle Demand Planning

Oracle Demand Planning is a Web-based application that enables organizations to produce unconstrained forecasts for future demand and generate tactical, operational, and strategic business plans. Demand Planning captures and processes information from multiple sources and consolidates demand so that it can be summarized by item, product line, region, time, and organization. Demand Planning uses Oracle Workflow and supports control mechanisms based on an event or calendar.

Oracle Demand Planning is integrated with Oracle Inventory Optimization (IO) and Oracle Advanced Supply Chain Planning (ASCP) to ensure optimal inventory planning and supply chain management.

Key features of Oracle Demand Planning

The following list highlights features of Oracle Demand Planning:

- Supports Internet-based collaboration between users in various locations and departments. The collaborative capabilities ensure global visibility and provide tools for adjusting forecasts based on judgment.
- Incorporates a best-of-breed statistical forecasting engine: Geneva Forecasting™ from Roadmap Technologies. Developed specifically for demand forecasting applications, this engine has multiple forecasting methods (linear and non-linear regression, variations of exponential smoothing), efficient parameter search and outlier detection algorithms, and a rule based system for automatic best fit forecasts based on time and frequency domain analysis and predefined decision rules generated from cross-client studies. The statistical interface supports both novice and expert users.
- Accommodates flexibility in information acquisition, information management, information analysis, and forecast reconciliation. The system supports a variety of inputs including sales and opportunities forecasts, marketing intelligence, custom forecasts, and external data streams.
- Enables end users to define attributes of custom data streams such as sales forecasts, measurement type, aggregation rule, allocation rule, unit of measure, dependent demand, price list, and related events.
- Provides a reporting interface that supports multiple views of the data, rotation, drill down, and aggregation. The ability for planners to define their own measures, custom aggregates, and saved selections provides further support for flexible modeling and analysis.

- Enables planners and the Demand Plan Manager to use a variety of techniques to edit data.
- Creates a knowledge base by maintaining planners' comments and audit trails. Supports reason codes for forecast modifications.
- Includes capabilities for modeling and viewing information about events such as product introductions, product cannibalization, and product phase outs.
- Provides feedback to planners through performance monitoring, exception reporting, comparative reports, and user-defined alert mechanisms.

Demand Planning Architecture

Oracle Demand Planning has component architecture. This means that in lieu of working directly from data generated by other Oracle Applications, Oracle Demand Planning copies the data to a localized data store in a process called collection. This is done for two reasons:

- It allows the computational-intensive planning and forecasting calculations to be off-loaded to a separate Demand Planning Server, where the localized data store resides, to avoid excessive load on the server hosting the transactions.
- It allows Oracle Demand Planning to be deployed against multiple versions of Oracle Applications (versions 10.7, 11 and 11*i*). There are separate collection programs for each version.

The business process of demand planning requires analyzing demand along different dimension levels. For example, manufacturing planners may plan and view demand at a product/manufacturing location level, whereas sales managers may plan and view demand at a product family/geographic region level. The ability to accept demand data input at one set of dimension levels, display it at another set of dimensional levels, and maintain a consistent set of underlying demand data that is independent of the levels at which it is displayed is covered by a technique known as Online Analytical Processing (OLAP). The database engine that runs Online Analytical Process (OLAP) calculations for Oracle Demand Planning is known as Express.

Oracle Demand Planning consists of two major components: the Demand Planning Server and the Demand Planning Engine. The Demand Planning Server holds the inputs such as sales history, as well as the forecast outputs for feeding to Advanced Supply Chain Planning and other Oracle applications. The Demand Planning Engine is the processing engine of Oracle Demand Planning, and is based on the Express database.

Planning Cycle

The following are the steps in the planning cycle.

Collecting data

Data such as items, sales history, and inventory organizations are collected from the source into staging tables in the Demand Planning Server. The purpose of the staging tables is to provide a temporary repository that allows users to review the collected data, adjust the data as necessary, and clean out any irrelevant data, thus making the data more useful for forecasting. Note that Oracle Demand Planning does not provide an explicit data viewing or cleansing tool. You can use any data manipulation tool such as SQL for this purpose. The data are then pulled into fact tables on the Demand Planning Server. If the data are clean, then it can be collected directly into the fact tables.

Defining the demand plan

The administrator defines a demand plan in the Demand Planning Server. He or she specifies the dimensions and hierarchies within dimensions such as geography and sales group. The administrator also specifies one or more scenarios based on different histories or date ranges for forecast horizons.

The administrator also specifies what type of historical data will be used and how much of the history to use. In addition to historical data, the administrator can select reference data such as manufacturing data for comparing forecasts generated by Oracle Demand Planning based on historical data.

If the system collects data from the Bills of Material (BOM), the administrator can set up the Demand Planning Server so that planners and the Demand Plan Manager can view and edit data for dependent demand and planning percentages.

Downloading data from the Demand Planning Server to the shared database

Data from the Demand Planning Server database is downloaded into a shared database in the Demand Planning Engine. The Demand Planning Server is a source of integrated data that can include the following:

- Forecast data from Sales, Manufacturing, Supply Chain, or third party at any aggregate level.
- Historical data at the lowest aggregate level (e.g., SKU).
- Planning percentages from the Bills of Material (BOM).

- Data from external sources, such as customer data.

The Demand Planning Server defines the parameters of the source data as well as events, scenarios, demand plans and system setup. The downloaded data is used as a basis for populating *measures* which hold the information for data streams from the Demand Planning Server such as booking history or customer forecasts. The Demand Planning Administrator can create additional measures to be used by planners and the Demand Plan Manager.

Distributing data to planners

Data in the shared database are distributed to individual planners, based on assignments that are defined by the Demand Planning System Administrator. Assignments determine the dimension value combinations (measures and dimension values) that each planner is responsible for forecasting and submitting to the shared database as well as the dimension value combinations that each planner can view. In a collaborative planning environment, assignments establish the areas by which planners can collaborate.

Creating and modifying forecasts

Individual planners generate forecasts and use worksheets to review and modify forecast values. Planners can adjust the data in a number of ways, select different data values, and copy and paste data. As planners work, they can use ad hoc reports and graphs to visualize data, perform what-if analyses, and look at the data in a variety of ways. Planners can also define custom data streams to use in analyses. Planners can share their most recent updates with the Demand Plan Manager and other authorized collaborators.

Selecting final forecasts to submit to the shared database

When forecasting is complete, planners choose the measure that contains the forecast data that they want to submit to the shared database for each scenario in the demand plan.

Reviewing forecasts

The Demand Plan Manager reviews the consolidated forecast in the shared database. He or she might make further judgmental adjustments. Optionally, he or she can upload the forecast to the Demand Planning Server.

Uploading data to the Demand Planning Server

If the Demand Plan Manager has not already performed this function, the Demand Plan Administrator uploads the consolidated forecast from the shared database to the Demand Planning Server.

Publishing final forecasts and renewing the planning cycle

The consolidated data is published from the Demand Planning Server to the source instance. This integrates the final estimate of demand into the transaction system.

The forecasts for the demand plan can be published back to the source database for supply chain planning and scheduling. For example, you can write data from Oracle Demand Planning back to Advanced Supply Chain Planning, Oracle Inventory Optimization, and other Oracle applications. The same demand plan can also be used for the next planning cycle after adjusting the time horizon.

Demand Planning Roles

Oracle Demand Planning supports the following user roles:

- Demand Planning System Administrator
- Demand Plan Manager
- Demand Planner

Demand Planning System Administrator

The Demand Planning System Administrator is responsible for integrating Oracle Demand Planning with other products and for administering the planning cycle. The integration requires collecting data into Oracle Demand Planning from the source transaction instance, such as Oracle Applications, making sure that data is clean and usable, and publishing Oracle Demand Planning output back to the source for planning and scheduling.

The setup tasks require determining overall default settings for the demand planning system from a deep understanding of the business process. This includes specifying the forecast level, assigning data to individual demand planners, selecting and setting defaults for predefined reports, and invoking data consolidation after planners send their forecasts to the shared database.

The Demand Planning System Administrator should have thorough knowledge of the demand planning process and be familiar with how the Demand Planning Express engine works.

Demand Plan Manager

The Demand Plan Manager gets a view of the entire data without any restriction or scoping. He or she works directly in the shared database and is responsible for reviewing planners' consolidated forecasts.

The Demand Plan Manager is responsible for the final forecast numbers that are written back to the Demand Planning Server. After planners submit their forecasts, the Demand Plan Manager reviews the consolidated forecast numbers and decides whether to accept or reject them. He or she could modify the numbers, or choose to re-assign them to the individual planners.

Note: If your planning group is very small, you might want to set up all users to have the Demand Plan Manager responsibility. Note, however that the Demand Plan Manager works directly in the shared database. This means that if more than one person has this responsibility, only one individual at a time will be able to perform functions such as creating measures, editing data, and saving documents.

Demand Planner

The Demand Planner is responsible for analyzing and forecasting demand in an assigned data segment and for submitting demand forecasts. A Demand Planner is an individual forecaster. Qualifications for this role include forecasting and data analysis abilities and a good understanding of the business processes governing the data to be forecasted.

Demand Planning Setup

This section describes how to set up Oracle Demand Planning in the Demand Planning Server.

The section includes the following topics:

- [Setup Instances](#)
- [Setup Data Collections](#)
- [Setup Demand Planning Dimensions](#)
- [Setup Demand Planning Hierarchies](#)
- [Setup Demand Planning Levels](#)
- [Setup Demand Planning Hierarchy Levels](#)
- [Setup Profile Options](#)
- [Demand Planning Setup Procedures](#)

Setup Instances

Oracle Advanced Planning (consisting of the modules Advanced Supply Chain Planning, Demand Planning, Global Order Promising, Inventory Optimization, and Collaborative Planning) employs a component architecture that allows transaction processing and planning to occur in separate database instances (source and destination instances, respectively.) If you are deploying or intend to deploy any Oracle APS module using this multi-instance configuration, please note the following important restriction:

Both source and destination database instances must be on the same major release of the Oracle database. Either both source and destination instances must be on Oracle 8i, or both instances must be on Oracle 9i. The configurations (source on 8i, destination on 9i) and (source on 9i, destination on 8i) are not supported.

Instances setup is required to link the source Oracle Applications instance to the Demand Planning Server instance.

To set up instances:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Instances.

The Application Instances window appears.

Instance Code	Instance Type	Version	From Source To APS	From APS To Source
TST	Discrete & Process	11i		
art	Discrete	11i	apsqa115	apsrt
aps	Discrete	11i		
dmt	Discrete	11i	apsqa115	dmtst11i
LEG	Discrete & Process	11i		
omt	Discrete	11i	apsqa115	omtst11i
LID	Others			
LIO	Others			
LG5	Others			

3. Complete the fields in the Application Instances window as follows:

Field	Function	Legal Values
Instance Code	Identifies source transaction instance.	VARCHAR2(3)
Instance Type	Describes the type of data in the source instance.	Discrete, Process, Discrete & Process, Other
Version	The Oracle Application version of the source instance.	10.7, 11.0, 11i
From Source to APS	Name of database link defined on the Demand Planning Server side that allows collection of data from the source instance.	Valid database link name
From APS to Source	Name of database link defined on the source instance that allows publishing of forecast data from the Demand Planning Server back to the source instance.	Valid database link name
GMT Difference	A numerical offset indicating the difference between the source instance time zone and GMT. Not used by Oracle Demand Planning.	NUMBER

Field	Function	Legal Values
Currency	Base currency of the source instance.	Lookup values
Assignment Set	Not used by Oracle Demand Planning.	Not applicable

4. Select Organization, and select all inventory organizations in the source instance that contains data that is collected by the Demand Planning Server for demand planning purposes.

Setup Data Collections

The purpose of this setup is to collect the basic data required for initialization. It collects names of inventory organizations and product categories from the Oracle Applications source instance to the Demand Planning Server. It caches data essential to the collection process in Demand Planning Server so that collections can proceed.

To set up data collections:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Setup Collections.

The Planning Data Collection window appears.

Planning Data Collection

Run this Request...

Request Set **Demand Planning Setup Data Collection** Copy...

Program	Stage	Parameters	Language
Demand Planning Setup Data Collection	Demand Planning Setup		American English
Demand Planning Setup Data Collection	Demand Planning Setup		American English

Options...

At these Times...

As Soon As Possible Schedule...

Help (A) Submit Cancel

3. Select the Parameters field in the Planning Data Collection window.
The Parameters window appears.

Parameters

Instance

Number of Workers

Timeout (Minutes)

Purge All Previously Collected Data

Collection Method

4. Complete the fields in the Parameters window as follows:

Field	Function and Value
Instance	Select the instance from which the data is to be collected.
Number of Workers	Specify the number of workers, between 1 to 3. The default is 2. The greater the number of workers, the greater the computational resources devoted to the collection process.
Timeout (Minutes)	How long before the collection process will abort. The default value is 30 minutes.
Purge All Previously Collected Data	This field and the next determine whether and how previously collected data will be refreshed. If this is set to No, the Collection Method can be set to Targeted Refresh or Net Change. If this field is set to Yes, the Collection Method must be set to Complete Refresh. For details on purging, see: To purge fact data : on page 2-7.

Field	Function and Value
Collection Method	<p>The method that can be selected in this field is determined by what you enter in the Purge All Previously Collected Data field. The Collection Methods are:</p> <p>Complete Refresh: This method clears all transaction data from the Planning Server (for the source instance being collected), then copies over the new data. This mode should be used with great caution especially when you have also implemented Advanced Supply Chain Planning or Inventory Planning applications. However, it is useful to occasionally purge the previous snapshots to ease storage requirements and to improve system performance.</p> <p>Targeted Refresh: This method clears transaction data for only the user selected business entities from the Planning Server, and then copies the entity information over from the transaction instance. Information about non-selected entities remains intact on the Planning Server. All planning business entities are supported by Targeted Refresh collections.</p> <p>Netchange Refresh: This method copies only incremental changes to business entities to the Planning Server and is thus faster.</p>

5. Make your selections and select OK.

The Planning Data Collection window reappears.

6. If you select the second parameters field, a window appears that allows you to select the Instance and Number of Workers. However, this is not required because from this window you are launching a concurrent collection request set and the parameters you selected for the first parameter field are the ones that apply.

The source instance inventory organizations from which Setup Collections retrieves data are dictated by the organizations selected by the user in Setup Instances.

Setup Collections needs to be run each time the following changes:

- The source instance from which data is collected.
- The source instance inventory organizations from which data is collected.
- The product categories in the source inventory organizations.
- Customer or supplier information.

To purge fact data:

1. Choose the Demand Planning System Administrator responsibility.

1. In the Navigator, select Other >Purge Fact Data.

2. Enter a From Date and a To Date.

You need to specify the purge data range in such a way that it covers the entire time period for booked dates as well as requested date.

Choose Yes for Booking Data.

3. Select OK.

4. Submit.

Setup Demand Planning Dimensions

Simple demand data has two dimensions: product and time. With each demand, there is an associated item and a time bucket. Product and time are the minimum dimensions required by Oracle Demand Planning in any demand plan. However, in many global organizations, data comes from various sources. For example, sales forecasts may come from various parts of the world, from various sales groups and teams, from various business groups, and from key customers. Similarly, shipments can be made from various business units and distribution centers.

In this situation, typically a number of planners will be working on specific segments of the data for demand analysis and forecast enhancements. Oracle Demand Planning facilitates this by providing the following most frequently used dimensions: ship from location, geography, sales channel, and sales representative besides the product and time dimensions.

Note: This setup step is typically not needed unless user defined dimensions are needed. For details on user defined dimensions and customization of hierarchies within dimensions, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

To set up Demand Planning dimensions:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Dimensions.

The Application Utilities: MSD_DIMENSIONS Lookups window appears.

Application Utilities: MSD_DIMENSIONS Lookups

Type: **MSD_DIMENSIONS**

User Name: **MSD_DIMENSIONS**

Application: **Oracle Demand Planning**

Description: **Demand Planning Dimension**

Access Level:
☐ User
☐ Extensible
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
CHN	Sales Channel	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
GEO	Geography	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
ORG	Ship from Location	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
PRD	Product	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
REP	Sales Representative	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
TIM	Time	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
UD1	User Defined Dimens	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
UD2	User Defined Dimens	Demand Planning Dim		15-OCT-1999		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Use this window to view the six predefined Demand Planning dimensions and to change the Meaning and Description names. Two user defined dimensions are also available.

- Complete the fields in the Application Utilities: MSD_DIMENSIONS Lookups window as follows:

Field	Function	Legal Values
Code	Lookup code that uniquely identifies the Demand Planning Dimension	CHN, GEO, ORG, PRD, REP, TIM, UD1, and UD2.
Meaning	Name of the Demand Planning Dimension	Default values can be changed by user.
Description	Describes the Code as being a Demand Planning Dimension	Default values can be changed by user.

Setup Demand Planning Hierarchies

Each dimension may contain multiple hierarchies. For example, the product dimension may contain the Product Category and Product Family hierarchies. A product (an automobile model: the Corvette) may fit into both a Product Family (a marketing brand: Chevrolet) and a Product Category (a vehicle style: sports car). Each hierarchy may need to be analyzed separately. Oracle Demand Planning provides a set of most frequently used hierarchies for the six dimensions:

Product Dimension

- Product Category Hierarchy
 - Product > Product Category > All Products
- Product Family Hierarchy
 - Product > Product Family > All Products
- Interest Type Hierarchy
 - Product > Interest Type > All Products

Time Dimension

- Manufacturing Calendar Hierarchy
 - Day > Mfg. Week > Mfg. Period
- Gregorian Calendar Hierarchy
 - Day > Month > Quarter > Year
- Fiscal Calendar Hierarchy
 - Day > Fiscal Month > Fiscal Quarter > Fiscal Year
- Composite Calendar Hierarchy
 - Day > Week > Month > Quarter > Year

Geography Dimension

- Geography Hierarchy
 - Ship to Location > Region > Country > Area > All Geography
 - Ship to Location > Customer Zone > Zone > All Geography
- Customer Group Hierarchy

- Ship to Location > Customer > Customer Group > All Geography

Note: The customer group information is not available in 11i source. To support the customer group hierarchy in 11i source, you should modify the customer group collection source views. For details on how to modify the source views, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

- Customer Class Hierarchy
 - Ship to Location > Customer > Customer Class > All Geography

Ship From (Organization) Dimension

- Organization Hierarchy
 - Organization > Operating Units > Legal Entity > Business Group > All Organizations

Sales Channel Dimension

- Organization Hierarchy
 - Sales Channel > All Sales Channels

Sales Representative Dimension

- Sales Representative Hierarchy
 - Sales Rep > Sales Manager 1 > Sales Manager 2 > Sales Manager 3 > Sales Manager 4 > All Sales Rep
- Sales Group Hierarchy
 - Sales Rep > Sales Group 1 > Sales Group 2 > Sales Group 3 > Sales Group 4 > All Sales Rep

Note: This setup step is typically not needed, unless custom hierarchies are needed. For details on customization of hierarchies within dimensions, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

Hierarchies are used for aggregating data, allowing one hierarchy to be used for allocation while others are used for reporting.

To set up Demand Planning Hierarchies:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Hierarchies.

The Demand Planning Hierarchies window appears.

The screenshot shows the 'Demand Planning Hierarchies' window. It contains a table with the following columns: Name, Description, Dimension, and Valid []. The table lists several hierarchies, including 'Customer Class', 'Customer Group', 'Geography', 'My Geo Hierarchy', 'Product Category', 'Product Family', 'Sales Channel', 'Sales Group', 'Sales Representative', and 'Organization'. Each hierarchy is associated with a specific dimension, such as 'Geography', 'Product', 'Sales Channel', 'Sales Representative', and 'Ship from Location'. The 'Valid' column has checkboxes for each hierarchy. A 'Hierarchy Levels' button is located at the bottom right of the window.

Name	Description	Dimension	Valid []
Customer Class	Customer Class Hierarchy	Geography	<input checked="" type="checkbox"/>
Customer Group	Customer Group Hierarchy	Geography	<input checked="" type="checkbox"/>
Geography	Geography Hierarchy	Geography	<input checked="" type="checkbox"/>
My Geo Hierarchy	Test New Hierarchy	Geography	<input type="checkbox"/>
Product Category	Product Category Hierarchy	Product	<input checked="" type="checkbox"/>
Product Family	Product Family Hierarchy	Product	<input checked="" type="checkbox"/>
Sales Channel	Sales Channel Hierarhcy	Sales Channel	<input checked="" type="checkbox"/>
Sales Group	Sales Group Hierarchy	Sales Representative	<input checked="" type="checkbox"/>
Sales Representative	Sales Rep Hierarchy	Sales Representative	<input checked="" type="checkbox"/>
Organization	Organization Hierarchy	Ship from Location	<input checked="" type="checkbox"/>

Hierarchy Levels

Use the Demand Planning Hierarchies window to view the preseeded hierarchies and their associations with a Demand Planning Dimension defined in the previous window.

In this example, the hierarchy name My Geo Hierarchy has been created for the Geography Dimension with a description of Test New Hierarchy.

You can see in the example that multiple hierarchy names can be created for a dimension as in the case of Geography that has Customer Group, Geography, My Geo Hierarchy, and so forth.

3. Complete the fields in the Demand Planning Hierarchies window as follows:

Field	Function	Legal Values
Name	Hierarchy Name	VARCHAR2(30)
Description	Detailed description for the hierarchy name	VARCHAR2(240). Note that users can change the names.
Dimension	Demand Planning Dimension Name	List of Values. Note that users can changes the names.

One of the major implementation issues is to decide on the dimensions and hierarchies to be used for demand analysis. Oracle Demand Planning provides a set of six predefined dimensions along with their hierarchies. These preseeded hierarchies are designed to meet most business needs. However, it will be necessary for the users to map their specific business process to these dimensions and hierarchies.

Dimension viewer

One of the key concepts and features in Oracle Demand Planning is hierarchy levels by which users can view, compare and analyze demands of their products over various dimensions, for example, geography and organizations. It is difficult to visualize the complex interrelationships between hierarchy levels and dimensions where multiple hierarchy levels and dimensions exist. This feature enables you to see the various hierarchy levels and their relationships within each dimension in a user friendly graphical display, helping you to visualize the complex interrelationships.

Dimension viewer features include:

- The ability to view the hierarchical relationships of levels within each dimension.
- A tool to train new users on the concepts of dimensions and hierarchies.

The Dimension Viewer shows Levels, Hierarchies, and Hierarchy Levels windows.

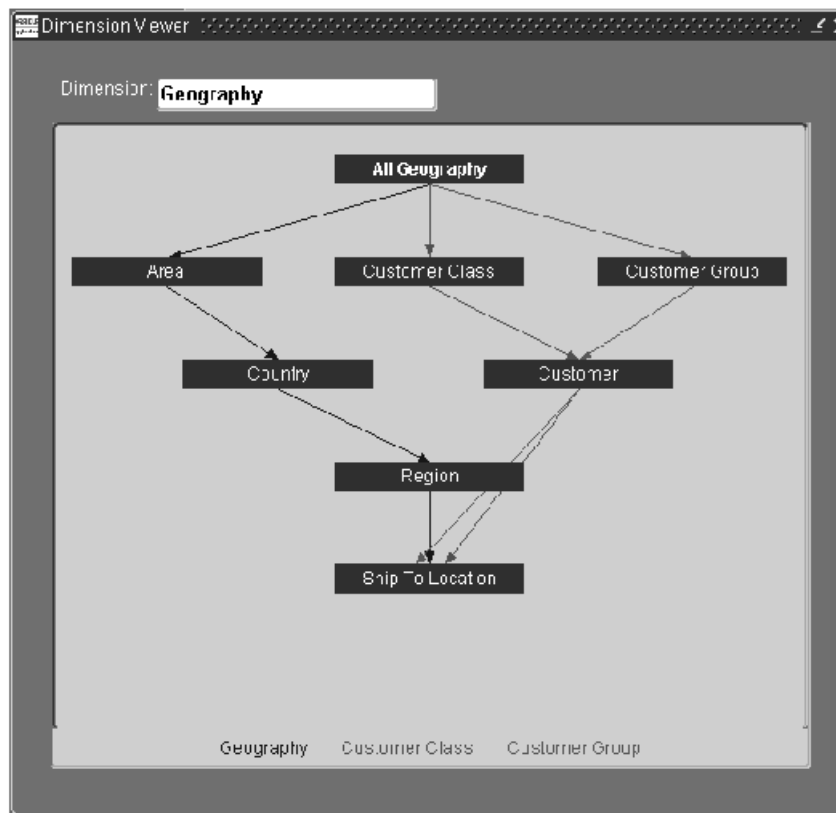
To run the dimension viewer:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Other > Dimension Viewer.
3. Select in the Dimension field.

The Dimensions window appears.

4. Select the dimension for which you want to view the hierarchy.

The hierarchies for the selected dimension appear.



Setup Demand Planning Levels

Demand Planning Levels represent different ways of aggregating data within a Dimension.

Note: This setup step is typically not needed, unless custom hierarchies are needed. For details on customization of hierarchies and levels within dimensions, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

To set up Demand Planning levels:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Levels.

The Demand Planning Levels window appears. Use this window to view preseeded hierarchy levels and identify the position of the level in the dimension.

The screenshot shows the 'Demand Planning Levels' window. It contains a table with the following columns: Name, Description, Dimension, Level Type, and User Attribute 1. The table lists several levels for the Geography and Product dimensions. The 'All Geography' level is highlighted in yellow and is of 'Top' type. Other levels for Geography are 'Intermediate' type, and 'All Products' is of 'Top' type for the Product dimension.

Name	Description	Dimension	Level Type	User Attribute 1
All Geography	All Geography Level	Geography	Top	
Area	Area Level	Geography	Intermediate	
Country	Country Level	Geography	Intermediate	
Customer	Customer Level	Geography	Intermediate	
Customer Class	Customer Class Level	Geography	Intermediate	
Customer Group	Customer Group Level	Geography	Intermediate	
Region	Region Level	Geography	Intermediate	
SD_custlevel	SD_custlevel	Geography	Intermediate	
Ship To Location	Ship To Location Level	Geography	Bottom	
All Products	All Products Level	Product	Top	

At the bottom right of the window, there is a button labeled 'Hierarchy Levels'.

In this example, the following level names: All Geography, Area, Country, Region, and Ship To Location have been defined for the Geography Dimension with detailed description names. The positioning of the levels in the hierarchy have also been defined with All Geography being the top level and Ship to Location the bottom level. Area, Country, and Region level names are the intermediate Levels.

3. Complete the fields in Demand Planning Levels window as follows:

Field	Function	Legal Values
Name	Level Name.	VARCHAR2(30). Note that users can change the name.
Description	Detailed Description for the Level.	VARCHAR2(240). Note that users can change the description.
Dimension	The Demand Planning Dimension to which the Level is associated.	Lookup Values.
Level Type Code	The position of the Level in a Hierarchy.	Lookup Values 1: Top, 2: Bottom, and 3: Intermediate.
User Attributes 1-5 (This field is not currently functioning.)	The User Attribute associated with the Level.	VARCHAR2(240).

Setup Demand Planning Hierarchy Levels

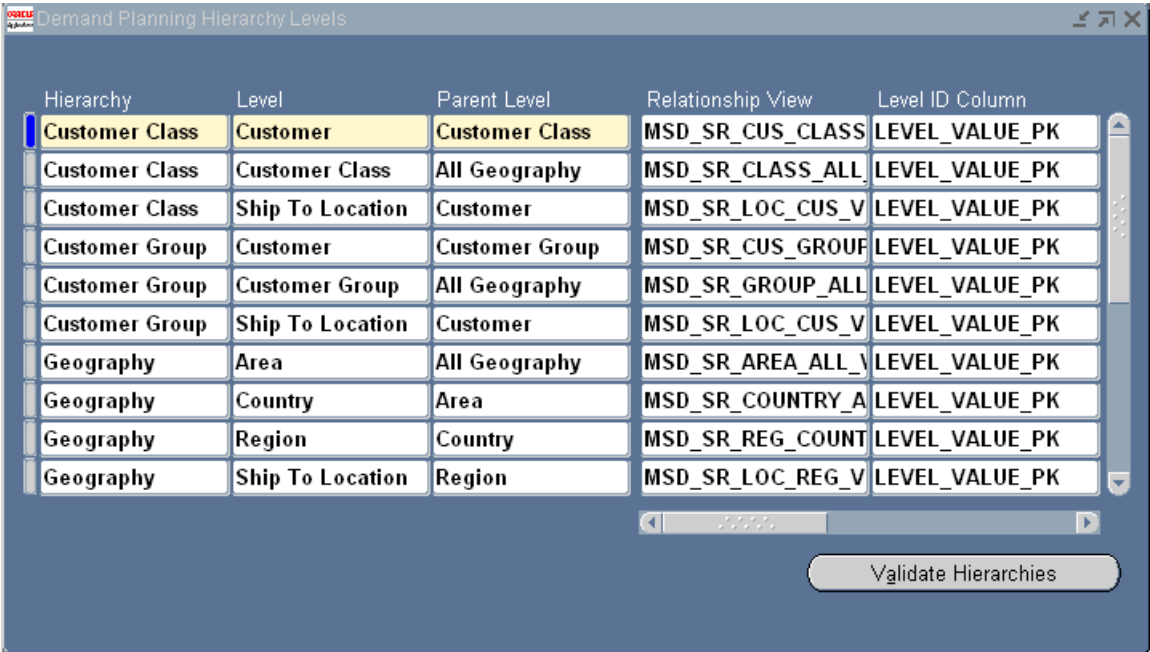
A Hierarchy Level is created by associating a hierarchy name with a level name.

Note: This setup step is typically not needed, unless custom hierarchies are needed. For details about customization of hierarchies and levels within dimensions, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

To set up Demand Planning hierarchy levels:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Hierarchy Levels.

The Demand Planning Hierarchy Levels window appears.



Hierarchy	Level	Parent Level	Relationship View	Level ID Column
Customer Class	Customer	Customer Class	MSD_SR_CUS_CLASS	LEVEL_VALUE_PK
Customer Class	Customer Class	All Geography	MSD_SR_CLASS_ALL	LEVEL_VALUE_PK
Customer Class	Ship To Location	Customer	MSD_SR_LOC_CUS_V	LEVEL_VALUE_PK
Customer Group	Customer	Customer Group	MSD_SR_CUS_GROUP	LEVEL_VALUE_PK
Customer Group	Customer Group	All Geography	MSD_SR_GROUP_ALL	LEVEL_VALUE_PK
Customer Group	Ship To Location	Customer	MSD_SR_LOC_CUS_V	LEVEL_VALUE_PK
Geography	Area	All Geography	MSD_SR_AREA_ALL_V	LEVEL_VALUE_PK
Geography	Country	Area	MSD_SR_COUNTRY_A	LEVEL_VALUE_PK
Geography	Region	Country	MSD_SR_REG_COUNT	LEVEL_VALUE_PK
Geography	Ship To Location	Region	MSD_SR_LOC_REG_V	LEVEL_VALUE_PK

Validate Hierarchies

In this example, the level name of Area is associated with parent level name of All Geography, the level name of Country is associated with the parent level name of Area, the level name of Region is associated with the parent level name of Country, and the level name of Ship To Location is associated with parent level name of Region for the Hierarchy Name Geography. This forms one of the hierarchies in the Geography Dimension. For details, see: [Geography Dimension](#) on page 2-10.

In this window, you can view the associations between levels to parent levels through the same Hierarchy. Once the links are defined and saved, you can use Validate Hierarchies to verify that the levels in a Hierarchy are valid.

- Complete the fields in the Demand Planning Hierarchy Levels window as follows:

Field	Function	Legal Values
Hierarchy Name	Name of the hierarchy.	VARCHAR2(30) [Lookup Values]

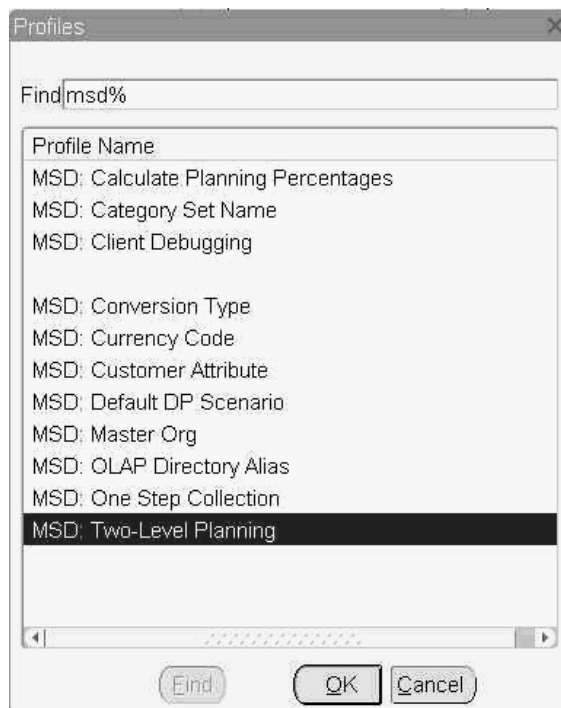
Field	Function	Legal Values
Level Name	Name of the level.	VARCHAR2(30) [Lookup Values]
Parent Level Name	The Parent Level to which the level is aggregated in this Hierarchy.	VARCHAR2(30) [Lookup Values]
Relationship View	The view from which this relationship information can be collected into the Planning Server.	VARCHAR2(30)
Level Value Column	The column from which the Level Value are fetched.	VARCHAR2(30)
Parent Value Column	The column from which the Parent Level Value are fetched.	VARCHAR2(30)

Setup Profile Options

Demand Planning profile options begin with three letters: MSD. The letter is an abbreviation for Manufacturing, Supply Chain, Demand Planning.

To set up profile options:

1. Choose the System Administrator responsibility.
2. In the Navigator, select Profile > Personal.
An empty Personal Profile Values window appears.
3. Search for MSD%.
The Profiles window opens with the MSD profile options.



Select the profile you want to use.

4. Complete the fields in the Personal Profile Values window as follows:

Field	Function
MSD: Calculate Planning Percentages	<p>This profile controls planning percentage calculation behaviors. Valid values are:</p> <ul style="list-style-type: none"> ■ No, use existing planning percentages: this is the default value that indicates the planning percentages are not to be calculated in Oracle Demand Planning and only the existing planning percentages specified in the enterprise resource planning (ERP) source are used to explode the forecast. When this profile value is selected, model bills and planning percentages are brought into Oracle Demand Planning from the source ERP. Only items for which the forecast control flag is either Consume or Consume & Derive are considered. ■ Yes, for Consume & Derive Options and Option Classes: this represents the case when you calculate planning percentages in Oracle Demand Planning from the sales history of Options and Option Classes, based on the model bills as defined in ERP. When this profile value is selected, sales history of models, options, and option classes are brought into Oracle Demand Planning from the ERP source in addition to the model bills, and planning percentages. Only items for which the forecast control flag is either Consume or Consume & Derive are considered. ■ Yes, for Consume & Derive Options only: this value enables all the functionality of the preceding profile value except that the option classes are excluded from Oracle Demand Planning and treated as phantoms. The Bills of Material are adjusted in Oracle Demand Planning to roll directly from options to models. This allows the user to set unique planning percent combinations for options when their parent Option Class is associated to different ATO models. Only those items for which the forecast control flag is either Consume or Consume & Derive are considered. ■ Yes, for all the Options and Option Classes: this value enables all the functionality of the Yes, for Consume & Derive Options and Option Classes value. All of the Options and Option Classes, specified as Optional in the Order Entry tab of Bills of Material, are brought into Oracle Demand Planning regardless of the forecast control flag, as long as the models' forecast control is set to Consume or Consume & Derive. Thus, this profile can be used to collect the planning percentages for all the optional items regardless of the forecast control.
MSD: Category Set Name	<p>This profile designates the category set. The product categories pertaining to the selected category set are collected. For an 11i source system, you must select a category set that does not allow multiple category roll up, such as an item rolling up to multiple categories within the same category set for the same organization. Multiple category roll up is controlled by the attribute <code>mult_item_cat_assign_flag</code> in <code>mtl_category_sets</code>. If this source flag is set to Yes, all the items of the category set roll up to the Other Category Set in Oracle Demand Planning. For Sales Forecast Integration, you use the Sales and Marketing Category Set.</p>
MSD: Conversion Type	<p>This profile determines what currency conversion rates are collected from the General Ledger tables.</p>
MSD: Currency Code	<p>This profile designates the currency used as the base currency in Oracle Demand Planning. The amounts (revenues) are converted to and displayed in this base currency.</p>

Field	Function
MSD: Customer Attribute	This is a source profile option used to selectively bring the customer names into Oracle Demand Planning to improve system performance. This profile holds the descriptive flexfield column name that is used to indicate if a customer in the customer table will be used by Oracle Demand Planning. Only those customers in the Geography dimension that have this flexfield populated will be collected. This profile option value is one of the attribute columns of the RA_CUSTOMERS entity, which indicates whether or not the customer will be used for demand planning purposes. In the customer table, you need to reflect this in a descriptive field. All of the source views for the geography dimension that use the RA_CUSTOMERS entity filter using this attribute column. If the profile option is not provided, then no filtering will occur. If the profile option is provided, then only the entities in the geography dimension that have the attribute in the RA_CUSTOMERS entity specified as Yes will be collected. To set up Key Customers, go to the Customer setup screen in Oracle Applications. Select the relevant customer and set an available flexfield column to Yes. For example, if you use attribute10, then you need to use this information in MSD profile option setup, too. You also need in the source instance setup, the following information for profile option value MSD_CUSTOMER_ATTRIBUTE: list of values from ATTRIBUTE1 to ATTRIBUTE15.
MSD: Master Organization	This profile is used to select a master organization if there are multiple master organizations. The item attributes pertaining to the selected master organization are used in Oracle Demand Planning. Note that the demand is exploded based on the item attributes in the respective inventory organizations, and is not exploded based on those in the master organization.
MSD: One Step Collection	This profile controls the number of steps in the data collection process. If the value of the profile is selected as Yes, the collection programs take the data directly into the fact tables in a single step. However, if the value is selected as No (as default), then a two-step collection process is used. In the first step, collection programs take the data in to the Staging Tables where the data can be consolidated and cleansed by the user if required. In the second step, the pull programs carry the data over to the fact tables from the staging tables. Both sets of tables exist on the Planning Server itself.
MSD: Two-Level Planning	This profile allows you to forecast demand at product family level on the basis of sales histories of member items. You can collect all the product family members and their sales histories regardless of the forecast control as long as the product family forecast control is 'Consume' or 'Consume & Derive' and the planning method for product family as well as members is not set to 'Not Planned'. This is achieved by setting the profile value to: Collect all family members and their sales histories. The default profile value, Exclude family members with forecast control 'None' enforces the existing behavior that is, only 'Consume' or 'Consume & Derive' product family members are collected.

For a list of all the MSD profile options, see: [Demand Planning Profile Options](#) on page C-2.

For a complete list of all of the MSD profile options, see: the Profile Options appendix in the *Oracle Advanced Planning and Scheduling Implementation and User's Guide*.

Demand Planning Setup Procedures

The typical sequence for setting up Demand Planning is as follows:

1. **Customize Hierarchies** (if needed): establish the way the information is aggregated from a lower level (for example, product) to the higher level (for example, product family). For details on the Dimensions, Hierarchies, Levels, and Hierarchy Levels setup windows, see: [Setup Demand Planning Dimensions](#) on page 2-8 and [Setup Demand Planning Hierarchies](#) on page 2-10. For details about customizing hierarchies, see: [Customizing Demand Planning hierarchies](#) on page 26-2.
2. **Setup Instances**: specify the source application instance from where the data is collected. Organizations can also be enabled while setting up instances. The data pertaining only to the enabled Organization is then being collected. For details on this setup step, see: [Setup Instances](#) on page 2-2.
3. **Customize Data Streams** (if needed): define a new data stream such as Customer Forecast. Use this step when the preseeded data streams such as Booking History, Shipment History, and Manufacturing Forecast are not adequate for your demand planning process and you need to use more information.
4. **Setup Collections**: collect basic setup related data pertaining to organizations and product category sets. For details, see: [Setup Data Collections](#) on page 2-4.
5. **Setup Profile Options**: select a data collection mode (one-step and two-step), category set, and currency conversion. For details, see: [Setup Profile Options](#) on page 2-18.

Flexible Data Streams

This section introduces the concept of flexible data streams and describes how to import data streams into the Demand Planning Server.

The section includes the following topics:

- [About Flexible Data Streams](#)
- [Flexible Data Stream User Procedures](#)
- [Uploading Flexible Data Streams](#)

About Flexible Data Streams

Demand Planning supports flexible data streams. This means that you can define, import, and use arbitrary data streams, such as sales forecasts, customer forecasts, and supply plans. This feature makes the demand planning process more flexible and configurable to the specific needs of your business.

You can define a data stream and indicate its source and the type of demand data that it will hold, the dimensions and dimension levels to which the data will be associated, and the ways to allocate and aggregate the data across dimension levels. These data streams enter Oracle Demand Planning during the plan definition phase. Inside the planner's or planning manager's workspace, you can view, manipulate and combine data streams, and then subsequently submit them as forecast scenarios. You can now use any kind of historical or forecast data in Oracle Demand Planning. The flexible data stream capability is meant to bring in the time series data only. Oracle Demand Planning does not support timeless or dimensionless data such as average allocation weights and economic performance indicators.

You can bring a flexible data stream into Oracle Demand Planning in one of three ways:

- Use the Demand Planning collections process to collect the data from a source database. This process first brings the data from the source instance into the Oracle Demand Planning staging tables. The data are validated and then moved to the Demand Planning custom fact data table using a Pull program. You need to specify a source database view that tells Demand Planning where to find the data on the source instance.
- Load custom data contained in flat files into the Oracle Demand Planning staging tables. The data are validated and then moved to the Oracle Demand Planning custom fact data table using a Pull program.
- Access data through a Planning Server database view. In this case, the data are not collected into the staging table; they go directly into the Oracle Demand Planning custom fact data table.

A flexible data stream consists of the following:

- Flexible data stream definition: This is a set of characteristics that specifies the nature of the data stream. For example, the manner in which the data stream comes into Oracle Demand Planning.
- Column Mappings: These describe how the different data in the data stream will be labeled when they are presented in the Oracle Demand Planning user interface.

There are two modes of defining data streams: basic and advanced. Basic mode allows you to define and import most flexible data streams into Oracle Demand Planning. Advanced mode provides a superset of the basic mode's functionality, at the cost of some exposure to the technical details of the Oracle Demand Planning data model. The basic mode assumes that the data stream is not chaotic; that is, the data is available only at a fixed level in each dimension, for example: product family level in the product dimension, the week level in the time dimension, and the customer level in the geography dimension. For the basic mode, the aggregation and allocation rules are preseeded.

Flexible Data Stream User Procedures

The user procedure for flexible data streams will be explained by means of an example. In this example, we will bring the following two customer forecasts into Oracle Demand Planning as a flexible data stream.

Forecast Name	Item	Time	Forecast Quantity	Forecast Dollars
Forecast for customer 1, FCC1	A	Week 50, 15Dec01	10	100
	A	Week 51, 22Dec01	15	150
	B	Week 50, 15Dec01	20	400
	B	Week 51, 22Dec01	25	500
Forecast for customer 2, FCC2	A	Week 50, 15Dec01	30	300
	A	Week 51, 22Dec01	35	350
	B	Week 50, 15Dec01	40	800
	B	Week 51, 22Dec01	45	900

To define a customer forecast as a flexible data stream:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Data Streams > Define-Advanced. Or select Define-Basic if you are not familiar with the Oracle Demand Planning data model and architecture.

Note: As described earlier, there are two modes of defining data streams: Define-Basic and Define-Advanced. You should select only one of them. If you are not familiar with Oracle Demand Planning data model and architecture, you should use the Define-Basic, which provides only the basic functionality. The steps in this section explain the functionality of Define-Advanced, and indicates anything that is similar or different for Define-Basic.

The Select Data Definition window appears. There is no difference in this window for the two modes of setup, except that the window name reflects the mode; that is, either Define-Basic or Define-Advanced.

Code	Name	Composite Group	Valid
ALLOCTEST	Allocation Floor Testing	2	<input checked="" type="checkbox"/>
CUST_PRD_WEIGHT_MONTH	CUST_PRD_WEIGHT_MONTH		<input checked="" type="checkbox"/>
DPIO_BOOKING	DPIO_BOOKING		<input checked="" type="checkbox"/>
DPIO_PRODFAMILY	DPIO_PRODFAMILY		<input checked="" type="checkbox"/>
GMTEST2	GMTEST2		<input checked="" type="checkbox"/>
INSTALL BASE HISTORY	INSTALL BASE HISTORY		<input type="checkbox"/>
LEG ERP STREAM	LEG ERP STREAM		<input checked="" type="checkbox"/>
MSD_BOOKING_ALLOCFL	Booking History AllocFI		<input checked="" type="checkbox"/>

All the data streams on the Select Data Definition window are preseeded data streams (identified by Code and Name). You can add your own flexible data streams to the list of preseeded data streams.

Composites allow you to group types of data (columns) by dimensions and data patterns (levels of dimensions). Composites allow the Demand Planning

Engine to efficiently store and manipulate sparse data. You assign the same number to each of the data streams you want to form a Composite Group. The number is user defined. You can leave the Composite Group field blank. This can also serve as a composite group. If you want to change the composite group that a data stream belongs to, purge the Demand Planning database.

You can find the characteristics or attributes of these data streams by selecting a data stream and selecting Next.

3. Select New to define a new data stream.

The Define Characteristics window appears.

The screenshot shows a software window titled "Define Data Stream - Advanced". Inside, there's a section titled "Define Characteristics". It contains the following fields and options:

- Code:** CUSTOMER FORECAST
- Name:** Customer Forecast
- Source of Data:** Interface
- Type of Data:** Amount and Quantity
- Source View:** (empty)
- Collect Filter Condition:** (empty)
- Planning Server View:** MSD_CS_DATA_V
- Checkboxes:**
 - ☐ Multiple Stream
 - ☒ Data at Fixed Level
 - ☐ Dependent Demand Data
 - ☒ Editable
 - ☒ Aggregation Allowed
 - ☒ Enabled
 - ☒ Allocation Allowed to
- Dropdown:** Lowest Dimension Level

At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

4. Complete the required fields in the Define Characteristics window as follows:

Field	Value	Description
Code	Preseeded value.	Name of the data stream. This is a short name with less than or equal to 30 characters that Oracle Demand Planning uses internally to uniquely identify the data stream.

Field	Value	Description
Name	User defined.	Description of the data stream. This is a longer description with less than or equal to 240 characters that you will henceforward use to identify the data stream in Oracle Demand Planning.
Source of Data	Planning Server, ERP, Interface.	<p>Possible values are:</p> <p>Planning Server: where data comes from the same instance as that of Demand Planning Server.</p> <p>ERP: where data comes from some source database instance other than the Demand Planning Server.</p> <p>Interface: where data comes from a legacy system loaded as flat files into the Oracle Demand Planning staging tables.</p>
Type of Data	Amount, Quantity, Amount and Quantity, Amount and Price, and Quantity and Price.	Possible values are amount, quantity, amount and quantity, amount and price, and quantity and price. The selected value indicates what types of data will be stored in the data stream.
Source View	Applicability varies.	Applicable when ERP is selected as the source of data. The Source View is a SQL view that defines where to find the quantity, amount, and price data for the flexible data stream. The Source View also defines where to find the dimension level values, such as product, geographic regions, time periods, sales channels, and customers to which those data are associated.
Collect Filter Condition	Applicability varies.	Applicable when ERP is selected as the Source of Data. Enter the relevant Where clause that describes the data that should be collected into Oracle Demand Planning. This functionality is only available in Define-Advanced. For details, see: Uploading Flexible Data Streams on page 3-18.
Planning Server View	MSD_CS_DATA_V (example)	This is the name of the view that Oracle Demand Planning accesses to populate its flexible data stream repository or fact table (for example, MSD_CS_DATA). If you are using Interface or ERP as the Source of Data, select the preseeded view MSD_CS_DATA_V. This view sits on top of the Oracle Demand Planning staging table MSD_ST_CS_DATA, which is the interface table that initially gets populated when you bring in flexible data streams from flat files or from an Oracle Applications source. Oracle Demand Planning reads specifically named columns from MSD_CS_DATA_V into specific columns in its flexible data stream fact table (for example, MSD_CS_DATA). If you are using the planning server as the Source of Data, then you must define your own view and enter its name here. This view must bring together information from the planning server tables of your choosing, and it must have the same column names as MSD_CS_DATA_V. The column names of MSD_CS_DATA_V are shown in the Define Data Usage window.

Field	Value	Description
Designator View	Applicability varies.	This view allows users to restrict the data stream names that show up in various list of values, such as input parameter list of values. It is primarily meant for planning server based data streams, such as supply plan and constrained forecast, because as you run more and more supply plans in Oracle Advanced Supply Chain Planning, over time the list of values for these supply plans gets very large and takes a long time to show up in Oracle Demand Planning.
Multiple Stream	Checked or unchecked.	Check this box if many different streams with the same characteristics will be used; for example, if you will be using forecasts from multiple customers. If not checked, the stream identifier row (in Step 5) does not appear. The default status is not checked. This default status is non-editable in the Define-Basic mode.
Editable	Checked or unchecked.	Check this box if the data needs to be modified in the Demand Planning Planner or Manager workspace. The default status is checked. This default status is non-editable in the Define-Basic mode.
Enabled	Checked or unchecked.	Check this box if the data stream should be visible to the Demand Planning Planner or Manager workspace. If this is not checked, the data stream will not be used. The default status is checked.
Data at Fixed Level	Checked or unchecked.	Check this box if the data are not chaotic, that is, all the data will be at one fixed Dimension Level. For example, all the data will enter Oracle Demand Planning at the Item level in the Product Dimension. If not checked, the Dimension Level (in Step 4) and aggregation/allocation functions (in Step 6) cannot be selected. The default status is checked.
Allocation Allowed To	Checked or unchecked. Stream Dimension Level	<p>Check this box if the data can be allocated down the Oracle Demand Planning hierarchies by the system. The default status is checked.</p> <p>If checked, you must specify the allocation floor from the drop-down list. This is applicable only when the 'Data at fixed level' box is checked.</p> <p>The allocation floor determines the level to which data is allocated for a measure. The possible values are Stream Dimension level and Lowest Dimension level. Selecting the Lowest Dimension level allocates the data to the lowest levels of each dimension included in the demand plan. Selecting the Stream Dimension level restricts the data allocation for this data stream to the dimension levels at which the data is brought into Oracle Demand Planning. For details, see: Input Parameters on page 7-12.</p>
Aggregation Allowed	Checked or unchecked.	Check this box if the data should be aggregated up the DP hierarchies by the system. Applicable only when the Data at Fixed Level checkbox is checked. The default status is checked.

Field	Value	Description
Dependent Demand	Checked or unchecked. Drop-down values: read or calculate	<p>Check this box if the custom data stream is dependent demand enabled; that is the data stream contains dependent demand data in addition to independent demand data. Only when this box is checked can this data stream be used to calculate planning percentages. For details, see: Planning Percentages on page 26-15.</p> <p>If Dependent Demand checkbox is checked, then Define Dimension and Levels pages automatically presets Product Dimension Level to Item Level.</p> <ul style="list-style-type: none">■ Selecting Read means that the data stream contains dependent demand data. This value should be selected for sales history data streams when it contains the dependent sales history of options and option classes. <p>Note that only booking history and shipment history can contain dependent demand data and are set to read in the dependent demand by default.</p> <ul style="list-style-type: none">■ Selecting Calculate means that the data stream does not contain dependent demand data. It has independent demand for models, which should be exploded to the options and option classes based on the model bills of material and existing planning percentages collected from source ERP.

5. Select Next.

The Define Dimension and Levels window appears.

Dimension	Enable	Level
Geography	<input checked="" type="checkbox"/>	Customer Level
Product	<input checked="" type="checkbox"/>	Item Level
Sales Channel	<input type="checkbox"/>	
Sales Representative	<input type="checkbox"/>	
Ship from Location	<input checked="" type="checkbox"/>	Organization Level
Time	<input checked="" type="checkbox"/>	Manufacturing Week
User Defined Dimension 1	<input type="checkbox"/>	
User Defined Dimension 2	<input type="checkbox"/>	

Buttons: Cancel, < Back, Next >, Finish

In this window, you can select the Level, such as Item or Product Category, for each Dimension at which the information exists in the data stream. The levels can only be selected if the checkbox, Data at Fixed Levels in the Define Characteristics window (in Step 3) is checked. Select the Enable checkbox to activate a dimension for the data stream.

In our example, select the Enable boxes for Geography, Product, Ship From Location, and Time Dimensions. You can then select a level for each of the chosen Dimensions.

This functionality is not applicable for chaotic data and is optional for the data at fixed level. If you do not select a level here, the system assumes the level to be the same as that of the first record that it encounters at the time of data collections.

In our example, select the following level values for the Geography, Product, Ship From Location, and Time dimensions respectively: Customer Level, Item Level, All Organization Level, and Manufacturing Week.

6. Select Next.

The Define Data Usage window appears. This window tells you which columns in the MSD_CS_DATA table correspond to which columns in the view, MSD_CS_DATA_V, (or a view that you specify) used by Oracle Demand Planning to access the flexible data stream information. The MSD_CS_DATA table is where Oracle Demand Planning stores flexible data stream information.

If the source of the flexible data stream information is Interface, then the default view is MSD_CS_DATA_V. It has columns displayed in Planning View Column that are automatically mapped to the columns of MSD_CS_DATA and displayed in Table Column. Note that the elements of Source View Column are not editable.

If the source of the flexible data stream information is Planning Server, then the planning server view provided must have the same column names as MSD_CS_DATA_V. The mapping between the planning server view and table MSD_CS_DATA is done automatically, so the Source View Column is not editable.

If the source of the flexible data stream information is ERP, then there is no restriction on the structure of the source view. In this case, the Planning View Column gets relabeled to Source View Column, and it becomes editable. Enter the column names in the source view that correspond to the structure of the table, MSD_CS_DATA, shown in the Table Column.

You must select the Column Name for quantity, date, and amount from the list of values. The selected names are used to label the data in the Oracle Demand Planning user interface. For details, see: [Customizing the Display Labels for Amount, Quantity, and Time](#) on page 3-17.

Several other rows appear for a dimension depending on the selection for the drop-down list at the top right of the window, where Dimension Level Primary Key has been selected from the list of values. The other rows that may appear include:

- Dimension Level Value: If the level value (for example, name of the customer) is used for identifying the data.
- Dimension Level Primary Key: If the level primary key is used for identifying the data.
- Dimension Source Primary Key: If the source primary key is used for identifying the data.

If you select any one of these values, only the corresponding record shows up for each Dimension. However, when the source of data is the Demand Planning Server, only Dimension Level Primary Key appears and the other two data

identifiers are not applicable. These records do not show up for the Time Dimension. One row for Level ID appears for every selected dimension.

Note: The drop-down list selection of Dimension Level Value, Dimension Level Primary Key, or Dimension Source Primary Key affects only which subset of rows are displayed in the Define Data Usage window. It does not alter which planning server view or source view columns are mapped to which columns in the demand planning flexible data stream table MSD_CS_DATA.

To summarize, you will see the following rows on this window:

- One row for each Type of Data, such as amount and quantity.
- One row for the Date if Time Dimension has been selected (in Step 4).
- One row for Level ID for each Dimension Level selected (in Step 4).
- One row for Level Value, Level Primary Key, or Source Primary Key based on the selection.
- Instance: Note that this field is for information only and cannot be modified.
- Stream Identifier representing the name of the stream, such as Forecast for Customer 1. Note that this row appears only if the checkbox Multiple Stream on the Define Characteristics window was checked (in Step 3).

This step applies to Define-Advanced only. Scroll to the right on the Define Data Usage window and check the UOM Conversion checkbox for the Quantity field.

Checking this box ensures that the units of measure are appropriately converted when the data are rolled up (for example, aggregated up) along Oracle Demand Planning hierarchies.

The UOM Conversion checkbox can be checked only for Quantity and Amount and cannot be checked for any other row. Quantity numbers must be brought into Oracle Demand Planning in the primary units of measure of the items.

The aggregation and allocation functions are used to aggregate and allocate the data along the hierarchies defined in Oracle Demand Planning. These can be selected only for the Quantity and Amount. The list of values include:

- Aggregation Function: Additive, Average, First, Last, Maximum, Minimum, and Weighted Average.
- Allocation Function: Allocation based on Weights in Another Measure, Average Weights based on History, Even, and None.

For example, three items X, Y, and Z belong to a product category C. The customer forecast for the three items is 10, 20, and 30 respectively for the Week 50 ending 15 December 2001. Then, the customer forecast for the product category C for Week 50 would be as shown in the following table:

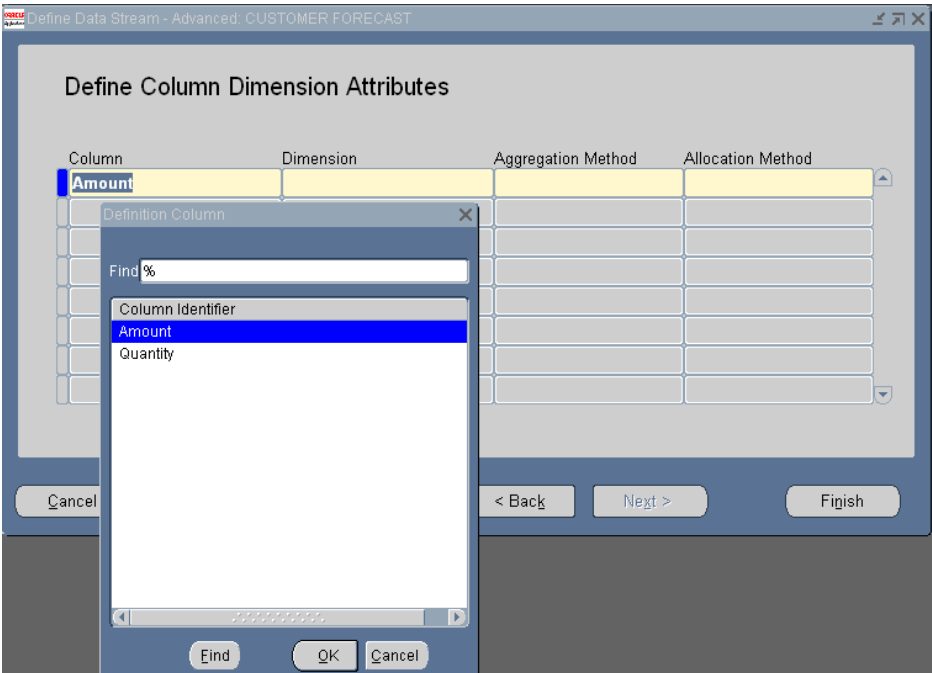
Aggregated Customer Forecast for Product Category C for Week 50	Aggregation Function
60	Additive.
20	Average.
10	First. Note that this is assuming that item X forecast is the earliest entry.
30	Last. Note that this is assuming that item Z forecast is the last entry.
30	Maximum.
10	Minimum.
Based on the data stream selected at the time of defining the Demand Plan.	Weighted Average.

Extending the scenario, let us assume that the forecast for product category C for the Week 50 is 60. Then the customer forecast for the three items (X, Y, and Z) for week 50 would be as shown in the following table:

Customer Forecast for the Three Items for Week 50	Allocation Function
Based on the data stream selected at the time of defining Demand Plan.	Allocations based on weights in another measure.
Based on the history data stream selected at the time of defining the Demand Plan.	Average weights based on history.
20 for each of the items X, Y, and Z.	Even.
Zero for each item.	None.

For our example, select the following Aggregation and Allocation Functions from the lists of values:

- Additive and Allocation based on Weights in Another Measure respectively for Amount.
 - Additive and Even respectively for Quantity.
7. This step applies to Define-Advanced only. Select Next.
The Define Column Dimension Attributes window appears.



In this window you can specify different aggregation and allocation functions for different dimensions. For example, you may allocate the data for the product dimension, such as product category to items, differently than that for other dimensions. If an aggregation or allocation function is not selected for some dimension, the functions selected in the previous step apply.

For our example, the functions selected in the previous step in the Define Data Usage window are used as the default for all the dimensions, such as

geography, time, or ship from location (in Step 4) except for product dimension for which the selections in this window apply.

8. Select Finish.

The definition process for the flexible data stream is complete. The flexible forecast data stream appears on the Select Data Definition window, the first window with which the flexible data stream definition process started (in Step 2).

To load a customer forecast:

- 1. Now the data needs to be staged in the staging table, MSD_ST_CS_DATA in the Demand Planning Server, as the Source of Data was selected as Interface in Define Characteristics window (in Step 3). For details on the format suitable for this staging table, see: [Attributes of Staging and Fact tables](#) on page 3-19. Generally, the data may not be available for all columns shown in the format and some columns may be empty. For the customer forecast in this example, assume that the information is available only for the following columns:

Data Stream Definition ID (CS_DEFINITION_ID)	Data Stream Name (CS_NAME)	Instance Attribute	Product Level ID Attribute	Product Level Value Attribute	Geography Level ID Attribute	Geography Level Value Attribute
21	FCC1	Legacy1	1	A	15	Customer 1
21	FCC1	Legacy1	1	A	15	Customer 1
21	FCC1	Legacy1	1	B	15	Customer 1
21	FCC1	Legacy1	1	B	15	Customer 1
21	FCC2	Legacy1	1	A	15	Customer 2
21	FCC2	Legacy1	1	A	15	Customer 2
21	FCC2	Legacy1	1	B	15	Customer 2
21	FCC2	Legacy1	1	B	15	Customer 2

The following table is a continuation of the columns of the previous table for customer forecast:

Data Stream Definition ID (CS_DEFINITION_ID) continued	Data Stream Name (CS_NAME) continued	Org Level ID Attribute	Organization Level Value Attribute	Time Level ID Attribute	Quantity Attribute	Amount Attribute	Date Attribute
21	FCC1	29	All Organizations	1	10	100	2002-12-15
21	FCC1	29	All Organizations	1	15	150	2002-12-22
21	FCC1	29	All Organizations	1	20	400	2002-12-15
21	FCC1	29	All Organizations	1	25	500	2002-12-22
21	FCC2	29	All Organizations	1	30	300	2002-12-15
21	FCC2	29	All Organizations	1	35	350	2002-12-22
21	FCC2	29	All Organizations	1	40	800	2002-12-15
21	FCC2	29	All Organizations	1	45	900	2002-12-22

To find out the CS_DEFINITION_ID, choose the relevant data stream on the Select Data Definition window (in Step 2). From the Oracle Applications menu bar, select Help > Diagnostics > Examine.

The Examine Field and Variable Values window appears.

Select DEFN_QUERY for Block and CS_DEFINITION_ID for Field.

The Value that appears is the Custom Data Stream definition identifier.

Select OK.

2. The data that has been loaded in the staging tables need to be pulled in to the Fact Table, MSD_CS_DATA using a preseeded Pull program. To perform this, select Collections > Pull Data > Custom Data Stream. Select a Data Stream from the Find window. The Data Stream Collection window opens.

Data Stream Collection

Data Stream Name: **Customer Forecast**

Source of Data: **Staging Table**

Collection Parameters

Collection Type: **Pull** Single Step Collection: ☐

Instance:

Complete Refresh: ☒ Validate Data: ☒

Stream Name:

Submit **Cancel**

- **Collection Type:** set to Pull. This program moves data from the staging tables to the fact tables.
- **Single Step Collection checkbox:** is for information only. It appears as checked if you have specified Yes for the profile, MSD_ONE_STEP_COLLECTION. The single step collection means that you want to bring the flexible data directly in to the Oracle Demand Planning fact tables rather than bringing the data first in to the staging tables and in the second step, pulling the data in to the fact tables.
- **Instance:** identifies which source instance to collect the data from.
- **Complete Refresh checkbox:** if the Complete Refresh box is checked, the previously collected data are deleted from the staging or fact tables, depending on the tables into which you brought the data.

- Validate Data checkbox: is always checked and is not editable for pulling the data in to the fact tables or when the single step collections are performed. The data are always validated at the time of pulling into the fact tables.
 - Stream Name: it is possible to bring in only one individual data stream by specifying the Data Stream Name, such as FCC1 for Forecast for Customer 1. If this field is left blank, all the data pertaining to the Customer Forecast data stream definitions exist.
3. Select Submit to run the data pull concurrent program.

The collection process for the flexible data stream is complete. For details, see: [Uploading Flexible Data Streams](#) on page 3-18.

To use a data stream in a demand plan, see: [Procedure to define a Demand Plan](#) on page 7-2.

Customizing the Display Labels for Amount, Quantity, and Time

To customize the labels for Amount, Quantity, and Time displayed:

1. Choose the Demand Planning Administrator responsibility.
2. In the Navigator, select Setup > Data Streams > Column Names.

The Column Names window appears.

Name	CONTRACT PURCHASES
Description	Based on flexible contracts
Type	Date
User Prompt	Contract Purchases

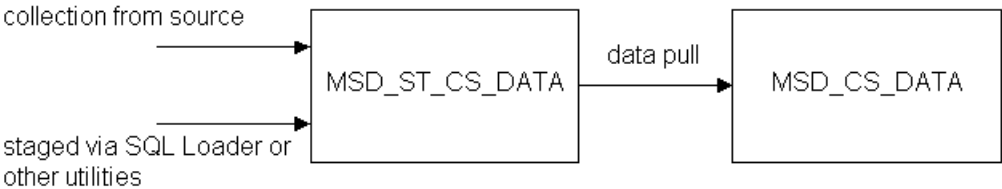
You can specify new column names that would then appear in the list of values for the Column Name in Define Data Usage window (in Step 6). New column names can be specified only for amount, time, and quantity columns. For example, if you want Amount to appear as Contract Purchases in the Oracle Demand Planning user interface, use the values in the following table:

Name	Description	Type	User Prompt
Contract Purchases	Based on flexible contracts	Amount	Contract Purchases

The label Contract Purchases is now displayed in place of Amount. From the Define Data Usage window (in Step 6), select Contract Purchases for the Column Name.

Uploading Flexible Data Streams

The following diagram explains the process of uploading the data into Oracle Demand Planning after the flexible stream has been defined.



Data can be staged into the staging table, MSD_ST_CS_DATA by using SQL*Loader or other utilities. Once data has been staged, you must run the Custom Data Pull program. This pull program pulls valid rows into the fact table, MSD_CS_DATA while invalid rows remain in MSD_ST_CS_DATA. This process was explained earlier in the User Procedure section (in Step 12).

Collecting data from an ERP source instance

If the source of data is an ERP Source Instance, the flexible data stream should be brought into the Oracle Demand Planning staging table, MSD_ST_CS_DATA by running a preseeded Custom Data collection program. The Demand Planning System Administrator can invoke the collection program.

To collect data into a flexible data stream from an ERP source instance:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect Data > Custom Data Stream.

Follow the collection process as described in the Data Collection section.

Depending on the source of flexible data stream data, you may need to run Data Collection from the source instance. This brings data into the demand planning flexible data stream staging table. You may then need to run a Data Pull program to move the data from the demand planning flexible data stream staging table into the demand planning flexible data stream fact table (in Step 12). These dependencies are shown in the following table:

Source of Data	Collect Data into Staging Table, MSD_ST_CS_DATA	Pull Data from the Staging Table to the Fact Table, MSD_CS_DATA
Interface	Not applicable. The data staged by some SQL Loader or other utility.	Applicable.
Planning Server	Not applicable.	Not applicable.
ERP	Applicable.	Applicable.

The data for a data stream must be at the same level as specified for that data stream. The data at levels other than the data stream definition are discarded during the data pull process.

Attributes of Staging and Fact tables

Oracle Demand Planning holds information about flexible data streams in two identically structured tables: a staging table MSD_ST_CS_DATA and a fact table MSD_CS_DATA. If you are bringing data from an ERP source instance into Oracle Demand Planning, that means running the preseeded collection program to bring your data into the demand planning flexible data stream staging table, and then running the data pull program to bring the data into the demand planning flexible data stream fact table. Or if you are bringing data from flat files into Oracle Demand Planning, that means you are populating the demand planning flexible data stream staging table directly, perhaps via SQL*Loader. In either case, you will need to know what kind of flexible data stream information each staging table column is intended to hold. In the first case, you will need this information so that you can appropriately fill out the mapping between the columns of your source data view and the staging table columns (in Step 5). In the second case, you will need this information to know which parts of your flat file information to load into which staging table columns.

If you are bringing information from the Demand Planning Server into Oracle Demand Planning, you will need to note the default mapping between the Planning

Server view columns and the demand planning flexible data stream fact table columns provided in the Define Data Usage window (in Step 5), and build your planning server view appropriately so that the right kind of flexible data stream information gets populated into each column of the flexible data stream fact table MSD_CS_DATA.

The required information about what each column in the demand planning flexible data stream staging and fact tables is intended to hold is shown in the following table:

Table Column	Column Identifier	Comments
ATTRIBUTE_1	INSTANCE	Instance that represents the data stream.
ATTRIBUTE_2	PRD_LEVEL_ID	Level identifier for the Product Dimension.
ATTRIBUTE_3	PRD_SR_LEVEL_VALUE_PK	Source primary key of the level value for the Product Dimension.
ATTRIBUTE_4	PRD_LEVEL_VALUE	Level value for the Product Dimension.
ATTRIBUTE_5	PRD_LEVEL_VALUE_PK	Primary key of the level value for the Product Dimension.
ATTRIBUTE_6	GEO_LEVEL_ID	Level identifier for the Geography Dimension.
ATTRIBUTE_7	GEO_SR_LEVEL_VALUE_PK	Source primary key of the level value for the Geography Dimension.
ATTRIBUTE_8	GEO_LEVEL_VALUE	Level value for the Geography Dimension.
ATTRIBUTE_9	GEO_LEVEL_VALUE_PK	Primary key of the level value for the Geography Dimension.
ATTRIBUTE_10	ORG_LEVEL_ID	Level identifier for the Ship From Location Dimension.
ATTRIBUTE_11	ORG_SR_LEVEL_VALUE_PK	Source primary key of level value for Ship From Location Dimension.
ATTRIBUTE_12	ORG_LEVEL_VALUE	Level value for the Ship From Location Dimension.
ATTRIBUTE_13	ORG_LEVEL_VALUE_PK	Primary key of the level value for the Ship From Location Dimension.
ATTRIBUTE_14	Not applicable.	Reserved for future use.
ATTRIBUTE_15	Not applicable.	Reserved for future use.
ATTRIBUTE_16	Not applicable.	Reserved for future use.
ATTRIBUTE_17	Not applicable.	Reserved for future use.
ATTRIBUTE_18	REP_LEVEL_ID	Level identifier for the Sales Representative Dimension.

Table Column	Column Identifier	Comments
ATTRIBUTE_19	REP_SR_LEVEL_VALUE_PK	Source primary key of level value for Sales Representative Dimension.
ATTRIBUTE_20	REP_LEVEL_VALUE	Level value for the Sales Representative Dimension.
ATTRIBUTE_21	REP_LEVEL_VALUE_PK	Primary key of the level value for the Sales Representative Dimension.
ATTRIBUTE_22	CHN_LEVEL_ID	Level identifier for the Sales Channel Dimension.
ATTRIBUTE_23	CHN_SR_LEVEL_VALUE_PK	Source primary key of the level value for Sales Channel Dimension.
ATTRIBUTE_24	CHN_LEVEL_VALUE	Level value for the Sales Channel Dimension.
ATTRIBUTE_25	CHN_LEVEL_VALUE_PK	Primary key of the level value for the Sales Channel Dimension.
ATTRIBUTE_26	UD1_LEVEL_ID	Level identifier for the User Defined Dimension 1.
ATTRIBUTE_27	UD1_SR_LEVEL_VALUE_PK	Source primary key of the level value for User Defined Dimension 1.
ATTRIBUTE_28	UD1_LEVEL_VALUE	Level value for the User Defined Dimension 1.
ATTRIBUTE_29	UD1_LEVEL_VALUE_PK	Primary key of the level value for the User Defined Dimension 1.
ATTRIBUTE_30	UD2_LEVEL_ID	Level identifier for the User Defined Dimension 2.
ATTRIBUTE_31	UD2_SR_LEVEL_VALUE_PK	Source primary key of the level value for User Defined Dimension 2.
ATTRIBUTE_32	UD2_LEVEL_VALUE	Level value for the User Defined Dimension 2.
ATTRIBUTE_33	UD2_LEVEL_VALUE_PK	Primary key of the level value for the User Defined Dimension 2.
ATTRIBUTE_34	TIME_LEVEL_ID	Level identifier for Time Dimension; MSD_PERIOD_TYPE lookup.
ATTRIBUTE_35	Not applicable.	Reserved for future use.
ATTRIBUTE_36	Not applicable.	Reserved for future use.
ATTRIBUTE_37	Not applicable.	Reserved for future use.
ATTRIBUTE_38	Not applicable.	Reserved for future use.
ATTRIBUTE_39	Not applicable.	Reserved for future use.
ATTRIBUTE_40	Not applicable.	Reserved for future use.

Table Column	Column Identifier	Comments
ATTRIBUTE_41	QUANTITY	Quantity.
ATTRIBUTE_42	AMOUNT	Amount.
ATTRIBUTE_43	END_DATE	Date: YYYY-MM-DD.
ATTRIBUTE_44	PRICE	Price.

Staging the data using SQL*Loader

If you are bringing in a flexible data stream into Oracle Demand Planning via flat files, the data can be loaded into the staging table MSD_ST_CS_DATA using the SQL* Loader utility.

Following is a sample SQL*Loader control file, which can be used to upload data for any flexible data stream.

Control file stcsdata.ctl

```
LOAD DATA
INFILE stcsdata.csv
APPEND
INTO TABLE msd_st_cs_data
FIELDS TERMINATED BY "," OPTIONALLY ENCLOSED BY "\"
TRAILING NULLCOLS
(
  CS_DEFINITION_ID INTEGER EXTERNAL,
  CS_NAME CHAR "NVL( :CS_NAME, 'PRODUCTION')",
  ATTRIBUTE_1 CHAR,
  ATTRIBUTE_2 CHAR,
  ATTRIBUTE_3 CHAR,
  ATTRIBUTE_4 CHAR,
  ATTRIBUTE_5 CHAR,
  ATTRIBUTE_6 CHAR,
  ATTRIBUTE_7 CHAR,
  ATTRIBUTE_8 CHAR,
  ATTRIBUTE_9 CHAR,
  ATTRIBUTE_10 CHAR,
  ATTRIBUTE_11 CHAR,
  ATTRIBUTE_12 CHAR,
  ATTRIBUTE_13 CHAR,
  ATTRIBUTE_18 CHAR,
  ATTRIBUTE_19 CHAR,
  ATTRIBUTE_20 CHAR,
```



```
ATTRIBUTE_21 CHAR,  
ATTRIBUTE_22 CHAR,  
ATTRIBUTE_23 CHAR,  
ATTRIBUTE_24 CHAR,  
ATTRIBUTE_25 CHAR,  
ATTRIBUTE_26 CHAR,  
ATTRIBUTE_27 CHAR,  
ATTRIBUTE_28 CHAR,  
ATTRIBUTE_29 CHAR,  
ATTRIBUTE_30 CHAR,  
ATTRIBUTE_31 CHAR,  
ATTRIBUTE_32 CHAR,  
ATTRIBUTE_33 CHAR,  
ATTRIBUTE_34 CHAR,  
ATTRIBUTE_41 CHAR,  
ATTRIBUTE_42 CHAR,  
ATTRIBUTE_43 CHAR,  
ATTRIBUTE_44 CHAR,  
CS_ST_DATA_ID      SEQUENCE (MAX, 1)  
)
```

The following table shows a sample flat file format used by the Control File:

Column Position	Column Value
1	cs_definition_id
2	cs_name
3	instance
4	prd_level_id
5	prd_sr_level_value_pk
6	prd_level_value
7	prd_level_value_pk
8	geo_level_id
9	geo_sr_level_value_pk
10	geo_level_value
11	geo_level_value_pk
12	org_level_id
13	org_sr_level_value_pk

Column Position	Column Value
14	org_level_value
15	org_level_value_pk
16	rep_level_id
17	rep_sr_level_value_pk
18	rep_level_value
19	rep_level_value_pk
20	chn_level_id
21	chn_sr_level_value_pk
22	chn_level_value
23	chn_level_value_pk
24	ud1_level_id
25	ud1_sr_level_value_pk
26	ud1_level_value
27	ud1_level_value_pk
28	ud2_level_id
29	ud2_sr_level_value_pk
30	ud2_level_value
31	ud2_level_value_pk
32	time_level_id
33	quantity
34	amount
35	end_date
36	price

A sample flat file that follows the above format is shown following. The first row ending with the label price is a row of headings that is ignored by SQL*Loader. This flat file can be created in a spreadsheet by saving the spreadsheet in a comma-delimited (.CSV) format.

Sample flat file

cs_definition_id, cs_name, instance, prd_level_id, prd_sr_level_value_pk, prd_level_value, prd_level_value_pk, geo_level_id, geo_sr_level_value_pk, geo_level_value, geo_level_value_pk, org_level_id, org_sr_level_value_pk, org_level_value, org_level_value_pk, rep_level_id, rep_sr_level_value_pk, rep_level_value, rep_level_value_pk, chn_level_id, chn_sr_level_value_pk, chn_level_value, chn_level_value_pk, ud1_level_id, ud1_sr_level_value_pk, ud1_level_value, ud1_level_value_pk, ud2_level_id, ud2_sr_level_value_pk, ud2_level_value, ud2_level_value_pk, time_level_id, quantity, amount, end_date, price

121,GMTRIAL1,381,1,AS54888,,,,,,,,,,,,,,,,,,,,,9,3360,1308662.6,12/5/01,

To load the data in the flat file into Oracle Demand Planning via the flexible data stream staging table, run SQL*Loader as follows:

sqlldr [user/password@dbname](#) control = stcsdata.ctl

Pulling data from Staging Table to Fact Table

Run the pull program to pull data from staging table into the fact table. The pull program pulls valid data only. Erroneous records remain in MSD_ST_CS_DATA OR_DESC will have details of the error. This error detail is a text string, an example of which follows:

MSD_CS_DATALOAD_INVALID_LVLID: For ORG and PRD

MSD_CS_DATALOAD_INVALID_DIM: For GEO

MSD_CS_DATALOAD_INVALID_DATE_FORMAT

The different segments of this error detail mean the following:

- MSD_CS_DATALOAD_INVALID_LVLID: This record in MSD_ST_CS_DATA contains an unrecognized dimension level. For example, in the product dimension, the dimension level is not specified to be Product, Product Category, Product Family, or All Products.
- ORG,PRD: In this record, the dimensions that contain unrecognized levels are the Ship From Location and Product dimensions. The full list of dimension codes is as follows:

Dimension Code	Dimension Name
CHN	Sales Channel
GEO	Geography

Dimension Code	Dimension Name
ORG	Ship From Location (Organization)
PRD	Product
REP	Sales Representative
TIM	Time
UD1	User Defined Dimension 1
UD2	User Defined Dimension 2

- **MSD_CS_DATALOAD_INVALID_DIM:** This record in MSD_ST_CS_DATA contains one or more invalid level values. For example, in the Geography dimension, the information in the record with the value of ATTRIBUTE_6, GEO_LEVEL_ID leads us to expect level value that is a valid Country in the source instance. However, the value of ATTRIBUTE_7, GEO_SR_LEVEL_VALUE_PK in this record is not a country that has been set up in the source instance.
- **GEO:** In this record, the dimension that contains unrecognized level values is Geography.
- **MSD_CS_DATALOAD_INVALID_DATE_FORMAT:** The column ATTRIBUTE_43 (END_DATE) contains an invalid data format. The date format must be YYYY-MM-DD.

Collect Filter Condition

The Collect Filter Condition is an additional where clause that is applicable only to data streams that are based on information collected from an ERP source instance, which entails the creation of your own source view. To provide flexibility in what data are collected from a source instance, you can specify filter conditions on the Define Characteristics window (in Step 3). The syntax of the filter text is very similar to that of a SQL where clause, and is explained by means of the following examples.

Example 1 Filtering Data on the Basis of the Date Field

BOOKED_DATE BETWEEN '&&DATE:MSD_FROM_DATE' AND '&&DATE:MSD_TO_DATE'

This example filters the source data on the basis of the demand date as specified in the source view:

- `Booked_date` is a column in the Source View.
- `&&` is a tag that signifies the start of the parameter. It must be followed with the type of parameter. Supported types are DATE, NUMBER, and CHAR. The parameter type must be followed by a colon (:). Following the colon, you must specify the name of a SQL message.
- When you select Collections > Collect Data > Custom Data Stream from the Navigator (under the Demand Planning System Administrator responsibility), Oracle Demand Planning displays the SQL messages that you specify as parameter value prompts. Once you enter the requests parameter value(s), the value(s) will replace the parameter tags at runtime.

If you enter 01-JAN-2002 for `MSD_FROM_DATE` and 31-DEC-2002 for `MSD_TO_DATE`, this example will be translated at runtime as follows: `BOOKED_DATE` between 01-JAN-2002 and 31-DEC-2002.

Example 2 Filtering Data on the basis of Multiple Parameters

`DESIGNATOR = '&&CHAR:MSD_FCST_DESIGNATOR AND FORECAST_DATE
BETWEEN '&&DATE:MSD_FROM_DATE AND '&&DATE:MSD_TO_DATE`

- `DESIGNATOR` and `FORECAST_DATE` are columns in the source view of the definition.
- When you select Collections > Collect Data > Custom Data Stream from the Navigator (under the Demand Planning System Administrator responsibility), Oracle Demand Planning will prompt you for values for the forecast name (`DESIGNATOR`), forecast date lower bound (`MSD_FROM_DATE`) and forecast date upper bound (`MSD_TO_DATE`).
- If you enter 'PROD for `MSD_FCST_DESIGNATOR`, 01-JAN-2002 for `MSD_FROM_DATE` and 31-DEC-2002 for `MSD_TO_DATE`, this example will be translated at runtime into: `DESIGNATOR = PROD AND FORECAST_DATE BETWEEN 01-JAN-2002 and 31-DEC-2002`.

Impact of custom data streams on hierarchy and fact views

New Demand Planning Server views for Booking Data, Shipment Data, Manufacturing Forecast, and Sales Opportunities are created for the flexible data streams feature. These have different structures than the old views. Oracle Demand Planning Server no longer references the old views. The list of new Demand Planning Server views for flexible data streams is as follows:

Stream Name	Old View	New View
Booking Data	MSD_BOOKING_DATA_V	MSD_BOOKING_DATA_CS_V
Shipment Data	MSD_SHIPMENT_DATA_V	MSD_SHIPMENT_DATA_CS_V
Input Manufacturing Forecast	MSD_MFG_FCST_V	MSD_MFG_FCST_CS_V
Sales Opportunity	MSD_OPPORTUNITY_DATA_V	MSD_OPPORTUNITY_DATA_CS_V

If, before upgrading to when flexible data streams was introduced, you have customized an old planning server view to add filtering conditions, and the view still brings in data at the seeded lowest levels, you may simply customize in the same fashion the corresponding new planning server view. Examples of seeded lowest levels are Item, Ship to Location, and Organization. Alternatively, you may create a new flexible data stream to hold your data.

If you have customized a planning server view such that it brings in data at a level different than the seeded lowest level, you must create a new flexible data stream to hold your data. If you want to use multiple types of dates for the same data stream, you need to define one flexible data stream for each type of date. For example, Booked Date, Shipped Date, Promised Date, and Requested Date for the Booking History data stream. This is because the flexible data stream feature supports only one date type per data stream.

Data Collection

This section describes procedures for collecting and integrating data into the Demand Planning Server.

The section includes the following topics:

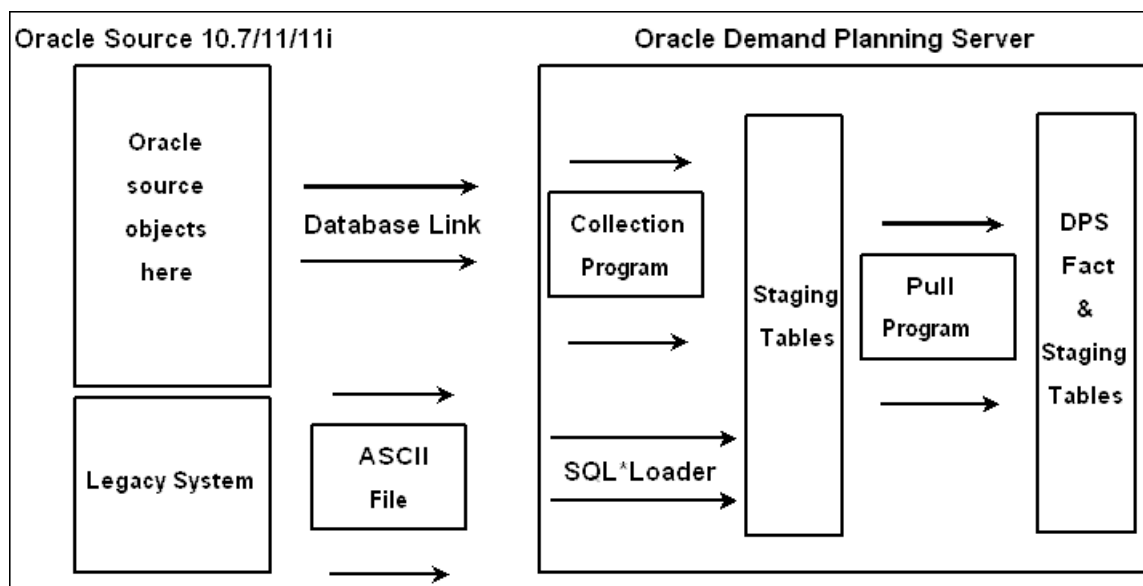
- [About Data Collection](#)
- [Procedure for Collecting Data](#)
- [Graphical Display of Hierarchies](#)
- [Pulling Data into Fact Tables](#)
- [Net Change](#)
- [Integrating Legacy Data](#)

About Data Collection

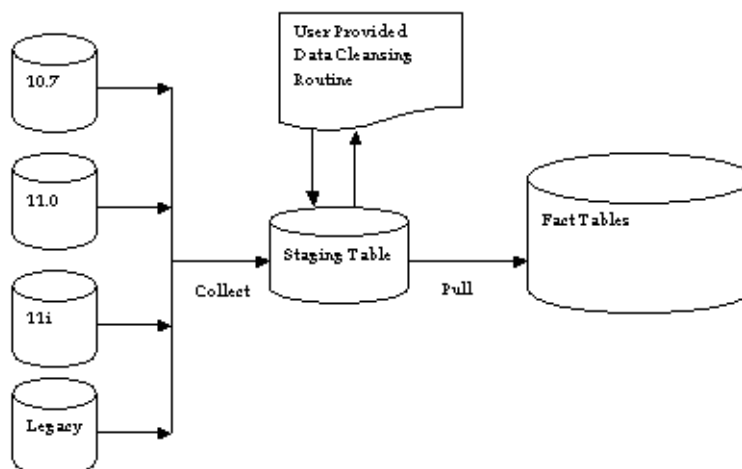
Data can be brought into Oracle Demand Planning through:

- Seeded data collection programs from the Oracle ERP (10.7, 11.0, 11i) system.
- Open interface staging tables via homegrown data loading programs.
- A SQL*Loader program that collects specified flat data files into Oracle Demand Planning staging tables. For details, see: [Integrating Legacy Data](#) on page 4-31.

Seeded data collection programs copy data streams from the data source to the Demand Planning server. If data source is other than Oracle Applications, then the data can be inserted into the Oracle Demand Planning Server staging tables using a SQL*Loader program. The following figure shows the data collection process:



If the data is collected from an Oracle source, it can be optionally moved into the Demand Planning Server staging tables for data cleansing and then moved into the Demand Planning Server fact tables, or inserted directly into the Demand Planning Server fact tables. The next figure illustrates the process.



The profile MSD: One Step Collection controls the number of data collection steps that the user should invoke to populate the data in to the fact tables. If the value of the profile is selected as No, a two-step collection process is used as seen in the diagram above. In the first step, collection programs take the data from a specified source instance in to the Staging Tables where the data can be consolidated and cleansed by the user if required. In the second step, the pull programs carry the entire data, regardless of source instance over to the fact tables from the staging tables. Data stored in the fact table is overwritten by newly collected data within specific date ranges. This process of pulling data from the staging table empties the staging table for the next cycle of data collection. Both sets of tables exist on the Planning Server itself.

However, if the value of the profile is selected as Yes, the collection programs take the data directly into the fact tables without requiring the user to invoke pull programs. Selecting Yes means that the collected data is suitable to be used in Oracle Demand Planning and does not require to be cleansed in the staging tables. One Step Collection is only an additional user convenience, but it internally works as two step collection. The pull programs are launched automatically to bring the entire data for all the instances from staging table in to the fact tables.

Procedure for Collecting Data

There are several types of data you can collect: Shipment Data, Booking Data, Order Backlog, Currency Conversion, UOM Conversion, Manufacturing Forecast, Sales Forecast, Level Values, Time Data, Pricing Data, Custom Data Stream, or BOM Collections.

Depending on what data you select, a set of parameters for collecting the data becomes available. You need to complete those fields to indicate how you want the data collected. The following sections contain the details on how to collect the various types of data.

To collect Shipment data or Booking data:

Shipment Data and Booking Data are normally used as the basis for statistical forecasting to predict future demand patterns. These are the historical sales data from the Oracle Order Management system for all the Models, Option Classes, and Options.

Shipment Data and Booking Data collection programs also collect pick-to-order items.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Shipment (or Booking) Data.
3. A Parameters window appears.

Complete the fields in the Parameters window.

Field	Function	Legal Values
Instance	The Instance where the data is to be moved to the staging tables in the Demand Planning Server.	Lookup Values
Date From (Optional)	The date from which to collect data.	DATE
Date To (Optional)	The date to which to collect data.	DATE

When a date range is specified in the parameters, the next time data is collected from the same instance, it overrides the previous data for the specified date range for that instance. Any data beyond the date range from the previous collection is added to the staging table. This is how incremental data is brought into the Demand Planning Server. The specified dates refer to the booked date for the booking data collection and the shipped date for the shipment data collection.

4. Select OK.
5. Select Submit.

Submitting the request starts the collection process from the source instance into the Demand Planning Server staging tables. The collection can be scheduled or can be set to execute immediately.

To collect Order Backlog data:

Oracle Demand Planning supports the collection of order backlog data from Oracle Order Management. Backlog refers to any sales order quantity that is currently booked, but has not yet been shipped or cancelled.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Order Backlog.

The Custom Stream Collection window appears.

Custom Stream Collection

Data Stream Name

Order Backlog

Source of Data

ERP

Collection Parameters

Collection Type

Collect

Instance

Complete Refresh

☒

Stream Designator

Scope

Date From

Date To

Restrict to Orders of Type

Include Orders on Hold

Single Step Collection

☒

Validate Data

☒

Submit

Cancel

3. In Collection Parameters, complete the following fields:

Field	Function	Legal Values
Collection Type	This field (view only) indicates the type of collection method, and is view only. When the type is Collect, the concurrent program collects data from the source to the destination table. When the type is Pull, the program moves data from the staging tables to the fact tables. To change the collection type, go to Collect/Pull Data in the navigation menu.	Collect

Field	Function	Legal Values
Single Step Collection	It appears as checked if you have specified Yes for the profile option MSD_ONE_STEP_COLLECTION. The single step collection means that you want to bring the flexible data directly in to the Oracle Demand Planning fact tables rather than bringing the data first in to the staging tables and in the second step, pulling the data in to the fact tables.	Check
Instance	Name of the source instance. This identifies which source instance to collect data.	Lookup Values
Complete Refresh	The previously collected data are deleted from the staging or fact tables, depending on the tables into which you brought the data.	Check
Validate Data	The data are always validated at the time of pulling into the fact tables. For details, see: To collect data into a flexible data stream from an ERP source instance : on page 3-18.	Check
Stream Designator	Name of the data collected at the time. This is specified by the user to identify the data collected during a collection process.	VARCHAR
Scope	<p>Indicates whether the collected data contains all the backlog sales orders, only the scheduled sales orders, or only the unscheduled sales orders.</p> <p>When set to All Orders, all the scheduled and unscheduled sales orders are collected.</p> <p>When set to Scheduled Orders Only, only the scheduled sales orders are collected.</p> <p>When set to Unscheduled Orders Only, only the unscheduled sales orders are collected.</p> <p>The backlog orders are collected based on their scheduled ship dates and ship from organizations.</p>	All Orders (default), Scheduled Orders Only, or Unscheduled Orders Only
Date From	This date is used as a start date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE

Field	Function	Legal Values
Date To	This date is used as an end date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE
Restrict to Orders of Type	Specify an Order Type, such as Revenue or Non-Revenue. The backlog for only the specified type of orders is collected. The field is blank by default, in which case all the orders are collected regardless of the order type.	VARCHAR
Includes Orders on Hold	Select Yes to bring sales orders, regardless of the hold status. Select No to exclude the orders on hold.	Yes or No (default)

To collect Currency Conversion or UOM Conversion data:

The Currency Conversion collection brings in the currency conversion rates from the general ledger rate table source data. In a multinational organization, demand planners may require the ability to view and analyze the forecast revenues in different currencies using the collected currency conversions. However, Oracle Demand Planning displays all the amounts (revenue) in one base currency selected in the profile options. Thus, the collected currency conversions are not used in the present release of Oracle Demand Planning.

The Unit of Measure Conversion collection brings in UOM conversions data from the selected source. This data helps to aggregate forecasts for items at all hierarchy levels within a dimension in a common unit.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Currency Conversion (or UOM Conversion) Data.
3. A Parameters window appears. For details, see: [To collect Shipment data or Booking data](#): on page 4-4.
4. Select OK.
5. Select Submit.

To collect Manufacturing Forecast data:

The manufacturing forecast is a useful comparison to the statistical forecast. In case of major discrepancies, this may lead to root cause analysis, and ultimately an enhanced forecast by the Demand Planner. If the entries in a manufacturing forecast/forecast set use more than one type of bucket (for example, day and week), all the entries are considered to be in the bucket of the first entry. In other words, multiple buckets are not supported in Oracle Demand Planning. If the manufacturing forecast is at the customer level, you must set up a new data stream using flexible data streams as the data is brought in to Oracle Demand Planning at the Ship to level.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Manufacturing Forecast Data.
3. A Parameters window appears.
4. Select OK.
5. Select Submit.

To collect Sales Forecast data from Oracle Sales Online to the Demand Planning Server:

Sales forecast numbers can be collected into Oracle Demand Planning from Oracle Sales Online, but only for the highest level sales groups. Users can allocate the data down to the lower levels using other data streams with data at the desired levels.

1. Choose the Oracle Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Sales Forecast. The Sales Forecast Collection window appears.

Sales Forecast Collection

Sales Forecast - Best Case

☒

Sales Forecast - Worst Case

☒

Sales Forecast - Probable Case

☒

Sales Forecast - Pipeline

☒

Sales Forecast - Weighted Pipeline

☒

Collection Parameters

Collection Type

Collect

Single Step Collection

☒

Instance

Complete Refresh

☒

Validate Data

☒

Stream Designator

Start Date

End Date

Forecast Category

Bucket Type

Source of Collection

Submit

Cancel

The following sales forecast data streams can be collected from this window: Sales forecast - best case, Sales forecast - worst case, Sales forecast - probable case, Sales forecast - pipeline, Sales forecast - weighted pipeline, Customer sales forecast, and Customer order forecast. Users need to select one or more data streams to collect the sales forecast amounts into Oracle Demand Planning. For details about each type of sales forecast, see: [Input Parameters](#) on page 7-12.

3. Complete the fields in the Sales Forecast Collection window as follows:

Field	Function	Legal Values
Collection Type	This (view only) field indicates the type of collection method. When the type is Collect, the concurrent program collects data from the source to the destination table. When the type is Pull, the program moves data from the staging tables to the fact tables. To change the collection type, go to Navigator > Collect/Pull Data > Sales Forecast.	Collect

Field	Function	Legal Values
Single Step Collection	It appears as checked if you have specified Yes for the profile, MSD_ONE_STEP_COLLECTION. The single step collection means that you want to bring the flexible data directly in to the Oracle Demand Planning fact tables rather than bringing the data first in to the staging tables and in the second step, pulling the data in to the fact tables.	Check
Instance	Name of the source instance. This identifies which source instance to collect data from.	Lookup Values
Stream Designator	Name of the data collected from the source instance at a time.	VARCHAR
Start Date	This date is used as a start date for data collection of sales forecast numbers.	DATE
End Date	This date is used as an end date for data collection of sales forecast numbers.	DATE
Forecast Category	It is an Oracle Sales Online feature by which an interest type can roll up to two or more forecast categories. In such situations, you should specify a forecast category to avoid double counting. Oracle Demand Planning will not provide a list of forecast category values, and you need to know and specify the exact forecast category. If this field is left blank, sales forecast numbers for all the forecast categories are brought over to Oracle Demand Planning.	VARCHAR
Bucket Type	Oracle Sales Online allows you to submit sales forecast numbers at several time levels such as, fiscal month and fiscal quarter. Typically, the business process will dictate the use of a bucket, however, you must select a bucket type from the list of fiscal calendar level values.	Fiscal Month, Fiscal Quarter, or Fiscal Year
Source of Collection	There are three types of data: Opportunity Worksheet: Sales forecasts for a customer summed across all the inventory organizations, products, sales channels, and sales representatives Product Category Worksheet: Sales forecasts for an interest type summed across all the inventory organizations, customers, sales channels, and sales representatives Forecast Worksheet (submitted forecasts): Sales forecasts summed across all the inventory organizations, products, customers, sales channels, and sales representatives.	Opportunity Worksheet, Product Category Worksheet, or Forecast Worksheet

4. Select Submit.

To collect Level Values data:

The Level Value collection brings in level values for each dimension (except for the time dimension that is collected separately) with its association between the level values of the parent-child relationship in the hierarchy. Level value data can be collected for the following:

- All level values
- Previously defined demand plans (Note that defining demand plans is discussed in a later chapter.)
- Specific dimensions
- Specific hierarchies within a dimension
- Specific levels within a dimension
- Three relationships: Item-Organization, Sales Representative-Operating unit, and Ship to location-Operating unit

This filtering mechanism allows for the collection of only the level values necessary for demand planning, thus reducing the processing burden. Often, the forecasts do not include all the Customers. In such cases it is not necessary to bring all the customer names into Oracle Demand Planning. The Customer data is generally very huge and any filtering by Customers improves the system performance. To achieve this, a profile option, MSD_CUSTOMER_ATTRIBUTE is available in the source instance.

1. Choose the Demand Planning System Administrator responsibility.
1. In the Navigator, select Collections > Collect from Oracle Systems > Level Values.
2. A Parameters window appears.



Complete the fields in the Parameters window.

Field	Function	Legal Values
Instance	The Instance where the data is to be moved to the staging tables in the Demand Planning Server.	Lookup Values
Collection Type	Type of collection choices are: All, Demand Plan, Dimension, Hierarchy, or Level.	All, Demand Plan, Dimension, Hierarchy, or Level
Collection Value	List of Data Collection names based on the Collection Type.	Lookup Values

3. Select OK.
4. Select Submit.

To collect Calendars (Time Data):

Oracle Demand Planning supports the collection of manufacturing and fiscal calendars via the collect time data functionality.

Time data collection brings in data for all the specified time hierarchy levels, such as manufacturing week. Each Time hierarchy (Manufacturing Calendar and Fiscal Calendar) is collected separately, and the demand is rolled up or down accordingly. For example, demand of a car model can be rolled from a daily forecast amount to monthly to quarterly to yearly in the Fiscal Calendar.

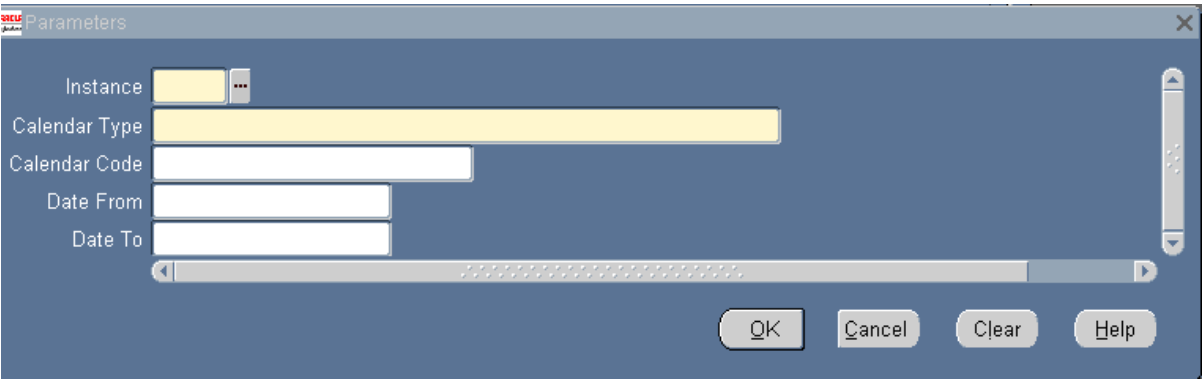
The appropriate selection of calendar type depends on the availability of source data in these calendars. The Gregorian calendar is built within Oracle Demand Planning while the manufacturing and fiscal calendars are collected from the source applications. The period types in the fiscal calendar should match the seeded Oracle Demand Planning levels (for example, month, quarter, and year) for the calendar to be usable in Oracle Demand Planning. You do not need to set up a new set of books or calendar but need to add the required fiscal periods from GL setups. For details of setting up fiscal (for example, Accounting) calendar, see: *Oracle General Ledger User Guide*.

If the existing time hierarchies (types of calendars) are not adequate, then load the calendars in a new time hierarchy called Composite Calendar. Composite calendars can be loaded via flat files. The composite calendars should be validated in Oracle Demand Planning to ensure that the various level values align properly.

Oracle Demand Planning does not support multiple instances. Users can inadvertently use two calendars of the same name. If multiple calendars of the same

name that belong to different instances appear in Oracle Demand Planning, Oracle Demand Planning does not differentiate among them.

- 1. Choose the Demand Planning System Administrator responsibility.
- 2. In the Navigator, select Collections > Collect from Oracle Systems > Time Data.
- 3. A Parameters window appears.



Complete the fields in the Parameters window.

Field	Function	Legal Values
Instance	The Instance from where the data is to be moved to the staging tables in the Demand Planning Server.	Lookup Values
Calendar Type	Two types of Calendars. When no manufacturing calendar is specified in the collections parameter, then all manufacturing calendars associated to the valid Demand Planning organizations are collected.	Fiscal Calendar or Manufacturing Calendar
Calendar Code	List of Calendar names based on the Calendar Type. If the user specifies a code, only the specified calendar is collected.	Lookup Values
Date From (Optional)	The start date of the calendar.	DATE
Date To (Optional)	The end date of the calendar.	DATE

- 4. Select OK.
- 5. Select Submit.

To collect Calendars associated to Organizations:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Time Data.
3. A Parameters window appears. To collect the calendars for all the enabled organizations, the user selects the Manufacturing Calendar as the Calendar Type and leaves the Calendar Code blank in the parameters window.
4. Select OK.
5. Select Submit.

This collection program retrieves and stores the Calendar-Organization association that is used to populate the seeded data stream, Workday Allocation Weights. For details about Workday Allocation Weights, see: [Lowest Time Levels for the demand plan](#) on page 7-5. The program ends in error if the organizations have not been enabled in Oracle Demand Planning.

To collect Pricing data:

The Pricing data collection is used to bring in prices lists. Once a price list and the source instance are selected, the price list is brought into Oracle Demand Planning on time and product dimensions. The item prices and their effective dates are collected from the source ERP applications.

You can edit the pricing data in the Oracle Demand Planning staging table to reflect prices at any dimension level, such as product category level in the product dimension or customer level in the Geography dimension. The specified price is applicable for all the child level values. In the same staging table, you can also specify the priority to manipulate price applicability. The higher priority, where 1 is higher than 2, prices are applied in case of a conflict. When the priorities are the same for conflicting prices, the prices are applied in the order in which they appear in the price list. For example, if the conflicting prices at item and product category levels appear in a price list, such that the price at the product category level appears later, this price will be applied last and override the price at the item level.

There is no user interface to do such editing, and the editing should be done by a technical user. Qualifiers, modifiers, attributes, rounding factors, pricing unit of measures, precedence, and other related functionalities of the Oracle pricing application are not supported in Oracle Demand Planning.

If you are using the Oracle Advanced Pricing application, Oracle Demand Planning will by default use only those price lists for which Source System is specified as Oracle Advanced Pricing. To use price lists pertaining to other source systems, you

need to specify the appropriate mapping from the Request Type MSD to the source system. For details on how to set the mappings, refer to the Oracle Advanced Pricing User's Guide.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Pricing Data.
3. A Parameters window appears.
4. Select OK.
5. Select Submit.

To collect Custom Stream data:

Custom Stream collection is used to collect data streams that are defined by you and are not seeded. For details, see: [Flexible Data Stream User Procedures](#) on page 3-3.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Custom Stream Collection Data.
3. A Parameters window appears. Select a data stream name. To complete, see:
 - [To collect Order Backlog data](#): on page 4-5.
 - [To collect Material Usage History for Unplanned Maintenance](#): on page 4-20.
 - [To collect Material Requirements for Scheduled Visits](#): on page 4-21.
 - [To collect Material Requirements for Scheduled Visits](#): on page 4-21.
 - [To collect Material Usage History for Planned Maintenance](#): on page 4-22.
4. Select OK.
5. Select Submit.

To collect BOM data:

BOM data is used for dependent demand forecasting of various optional components used in a product model. For details about dependent demand forecasting, see: [Forecasting for Dependent Demand](#) on page 26-10.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > BOM Collections.

The Planning Data Collection window appears.

Planning Data Collection

Run this Request...

Request Set

Demand Planning BOM Data Collection

Copy...

Program	Stage	Parameters	Language
<input checked="" type="checkbox"/> Demand Planning BOM Data Col	Demand Planning BOM		American English
<input type="checkbox"/> Demand Planning BOM Data Pul	Demand Planning BOM		American English
<input type="checkbox"/> Demand Planning BOM Data Pos	Demand Planning BOM		American English
<input type="checkbox"/>			
<input type="checkbox"/>			

Options...

At these Times...

As Soon As Possible

Schedule...

Help (A)

Submit

Cancel

Now, click in the Parameters field. You can indicate from where and how you want to the data collected.

The screenshot shows a 'Parameters' dialog box with the following fields and values:

- Instance: (empty)
- Number of Workers: 2
- Timeout (Minutes): 180
- Purge All Previously Collected Data: No
- Collection Method: Targeted Refresh

Buttons at the bottom: OK, Cancel, Clear, Help.

3. Complete the fields in the Parameters window:

Field	Function	Legal Values
Instance	The Instance where the data is to be moved to the Staging tables in the Demand Planning Server.	Lookup Values
Number of Workers	One or greater. This allows you to specify the number of workers for the data pull. Increase this number to increase the amount of computational resources to devoted to the data pull process.	NUMBER
Timeout (Minutes)	The maximum amount of time you would like to allocate to the data pull process. If this process has not completed within this amount of time, it will be terminated with an error.	NUMBER
Purge All Previously Collected Data	Setting this to Yes removes all data in the planning server associated with the selected source instance as the first step in the collections process. If you set this to Yes, the only allowable collection method is Complete Refresh. If you set this to No, the allowable collection methods are Targeted Replacement and Net Change.	Yes or No

Field	Function	Legal Values
Collection Method	<p>Whether Oracle Advanced Supply Chain Planning is installed with Oracle Demand Planning affects the options a System Administrator should select when performing Demand Planning BOM Collections.</p> <ul style="list-style-type: none"> ■ If Oracle Advanced Supply Chain Planning is installed and collections have been run, then the demand planning system administrator does not need to purge the previously collected data, and can simply perform net change refresh. ■ If Oracle Advanced Supply Chain Planning is not installed, then the demand planning system administrator would perform the collections with these options, except when the snapshots grow excessive and need to be purged. In this case, the demand planning system administrator can select the Purge all Previously Collected Data option and wipe out the data. All necessary demand planning data will be collected. <p>The demand planning system administrator should note that whenever Yes is set for Purge all Previously Collected Data, then Oracle Advanced Supply Chain Planning collections data will be wiped out and will need to be run again. This could render existing plans useless.</p> <p>The following collection methods exist:</p> <ul style="list-style-type: none"> ■ The Net Change Refresh method copies only incremental changes for items and BOMs to the planning server, and thus, is faster. ■ The Targeted Refresh method deletes the previously collected data pertaining only to items and BOM. 	Net Change Refresh, Targeted Refresh

4. Select OK.

5. Select Submit.

The Demand Planning BOM Data Collection program runs. This program is a two-step concurrent report set. In the first step, the program collects the BOM data from the source instance into the MSC_ST_BOM and MSC_ST_BOM_COMPONENTS tables in the staging area of the ASCP component.

In the second step, the Demand Planning BOM Data Pull program takes the data and populates the MSD BOM Data Model, if the MSD: Calculate Planning Percentages Profile Option is set to Yes, Exclude Option Classes, but include Components. For details about the MSD: Calculate Planning Percentages profile, see: [MSD: Calculate Planning Percentages](#) on page 26-17.

Since both the steps run automatically, you only need to select Submit once.

To collect Material Usage History for Unplanned Maintenance:

The material usage history - unplanned maintenance data stream is used to collect the historical material consumption associated with non-routine maintenance in Oracle Complex Material, Repair and Overhaul. In other words, this data stream collects the materials that are used historically at your facility for unplanned maintenance. This data stream is used in Oracle Demand Planning to forecast the material requirements anticipated for future non-routine maintenance.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Material Usage History - Unplanned Maintenance.

The Custom Stream Collection window appears.

Custom Stream Collection

Data Stream Name: **Material Usage History- Unplanned Maint**

Source of Data: **ERP**

Collection Parameters

Collection Type: **Collect** Single Step Collection: ☒

Instance:

Complete Refresh: ☒ Validate Data: ☒

Stream Designator:

Start Date:

End Date:

Submit and Schedule Submit Cancel

3. In this window, the Data Stream Name and Source of Data are automatically populated.

4. In the Collection Parameters section of the window, the Collection Type and checkboxes are automatically populated.
 - Select the Instance from the list of values.
 - Enter your desired historical material data collection Start and End Dates.
5. Select Submit. Or select Submit and Schedule.

To collect Material Requirements for Scheduled Visits:

The material requirements - scheduled visits data stream is used to collect the material tied to scheduled visits as forward looking firm demand. In other words, this data stream collects the scheduled visits with the associated place and time data that has been designated as firm demand. This data stream is used in Oracle Demand Planning as a reference forecast.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Material Requirements - Scheduled Visits.

The Custom Stream Collection window appears.

3. In this window, the Data Stream Name and Source of Data are automatically populated.
4. In the Collection Parameters section of the window, the Collection Type and checkboxes are automatically populated.
 - Select the Instance from the list of values.
 - Enter the desired Start and End Dates.
5. Select Submit. Or select Submit and Schedule.

To collect Material Requirements for Planned Maintenance:

The material requirements - planned maintenance data stream is used to collect all the material associated with a unit maintenance plan as a forecast data stream. The unit maintenance plan is the forecast of the required routine maintenance generated in Oracle Complex Maintenance, Repair and Overhaul. This data stream is used in Oracle Demand Planning as the forecast of service parts for the planned maintenance.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Material Requirements - Planned Maintenance.

The Custom Stream Collection window appears.

3. In this window, the Data Stream Name and Source of Data are automatically populated.
4. In the Collection Parameters section of the window, the Collection Type and checkboxes are automatically populated.
 - Select the Instance from the list of values.
 - Enter your desired Start and End Dates.
5. Select Submit. Or select Submit and Schedule.

To collect Material Usage History for Planned Maintenance:

The material usage history - planned maintenance data stream is used to collect the historical material consumption associated with routine maintenance in Oracle Complex Material, Repair and Overhaul. In other words, this data stream collects the materials that are used historically at your facility for planned maintenance.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Material Usage History - Planned Maintenance.

The Custom Stream Collection window appears. The data collection windows for all four CMRP streams are similar.

3. In this window, the Data Stream Name and Source of Data are automatically populated.
4. In the Collection Parameters section of the window, the Collection Type and checkboxes are automatically populated.
 - Select the Instance from the list of values.
 - Enter your desired historical material data collection Start and End Dates.
5. Select Submit. Or select Submit and Schedule.

To collect Service Parts Usage History:

The service parts usage history data stream is used to collect service parts consumption. For details on service parts data, service parts usage transactions in debriefs, and usage forecasting, see: [Forecasting for Service Parts](#) on page 26-46.

1. Choose the Demand Planning System Administrator responsibility.

2. In the Navigator, select Collections > Collect from Oracle Systems > Service Parts Usage History.

The Custom Stream Collection window appears.

Custom Stream Collection

Data Stream Name: **Service Parts Usage History**

Source of Data: **ERP**

Collection Parameters

Collection Type: **Collect** Single Step Collection: ☒

Instance:

Complete Refresh: ☒ Validate Data: ☒

Stream Designator:

Date From: Date To:

Geography Dimension Level: **Customer**

Source: **Field Service and Depot Repair**

Restrict to Install Base Trackable Items: **No**

Submit and Schedule Submit Cancel

3. In this window, the Data Stream Name and Source of Data are automatically populated.
4. In Collection Parameters, complete the following fields:

Field	Function	Legal Values
Collection Type	This field (view only) indicates the type of collection method, and is view only. When the type is Collect, the concurrent program collects data from the source to the destination table. When the type is Pull, the program moves data from the staging tables to the fact tables. To change the collection type, go to Collect/Pull Data in the navigation menu.	Collect
Single Step Collection	It appears as checked if you have specified Yes for the profile option MSD_ONE_STEP_COLLECTION. The single step collection means that you want to bring the flexible data directly in to the Oracle Demand Planning fact tables rather than bringing the data first in to the staging tables and in the second step, pulling the data in to the fact tables.	Check (default)
Instance	Name of the source instance. This identifies which source instance to collect data.	Lookup Values
Complete Refresh	The previously collected data are deleted from the staging or fact tables, depending on the tables into which you brought the data.	Check (default)
Validate Data	The data are always validated at the time of pulling into the fact tables.	Check (default)
Stream Designator	Name of the data collected at the time. This is specified by the user to identify the data collected during a collection process.	VARCHAR
Date From	This date is used as a start date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE
Date To	This date is used as an end date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE
Geography Dimension Level	Analysis at ship to, which are customer sites where product is installed, level in geography dimension is too detailed and performance intensive. You can select a higher level of customer, zone, or All Geography for data analysis and display in Oracle Demand Planning. The selected level becomes the allocation floor in geography dimension for service part history data stream. Data is available at the level higher than the selected level in hierarchy of the selected level.	Customer (default), Zone, and All Geography

Field	Function	Legal Values
Source	This is the application from where you are collecting the data. The Field Service value collects only field service usage transactions that are done via debrief process in Oracle Spares Management. The Depot Repair value collects the material requirements and job quantities for repair jobs. Repair jobs are non-standard discrete jobs created in work-in-progress based on a repair order in Oracle Depot Repair. Material requirements from JTF tasks are also collected.	Field service and Depot Repair (default), Field Service, Depot Repair
Restore to Install Base Trackable Items	Yes means that the usage history of only those service parts is collected for which the Install Base Tracking item attribute (service attribute group in item master) is enabled in Oracle Inventory.	Yes/No

5. Select Submit. Or select Submit and Schedule.

To collect Service Parts Returns History:

The service parts returns history data stream is used to collect the returned service parts. For details on service parts data, service parts usage transactions in debriefs, and usage forecasting, see: [Forecasting for Service Parts](#) on page 26-46.

Note: Service parts return history can be used in Oracle Demand Planning to create a forecast of service part returns. However, the return forecast cannot be used outside of Oracle Demand Planning. The forecast cannot be published to Oracle Advanced Supply Chain Planning or a source ERP application. Thus, currently, if you create a returns forecast in Oracle Demand Planning, it cannot be used outside of Oracle Demand Planning.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Service Parts Returns History.

The Custom Stream Collection window appears.

The Service Parts Returns History Custom Data Collection window has the same fields as the service parts usage history custom data collection window, except for the Source field. See the table above for details on how to complete these fields.

The screenshot shows the 'Custom Stream Collection' window. At the top, the title bar reads 'Custom Stream Collection'. Below the title bar, there are two input fields: 'Data Stream Name' with the value 'Service Parts Return History' and 'Source of Data' with the value 'ERP'. Below these fields is a section titled 'Collection Parameters' enclosed in a rounded rectangle. Inside this section, there are several settings: 'Collection Type' is set to 'Collect', 'Instance' is an empty field, 'Complete Refresh' is checked, 'Stream Designator' is an empty field, 'Date From' is an empty field, 'Date To' is an empty field, 'Geography Dimension Level' is set to 'Customer', and 'Restrict to Install Base Trackable Items' is set to 'No'. To the right of these settings, there are two checkboxes: 'Single Step Collection' which is checked, and 'Validate Data' which is also checked. At the bottom of the window, there are three buttons: 'Submit and Schedule', 'Submit', and 'Cancel'.

Data Stream Name	Service Parts Return History		
Source of Data	ERP		
Collection Parameters			
Collection Type	Collect	Single Step Collection	<input checked="" type="checkbox"/>
Instance			
Complete Refresh	<input checked="" type="checkbox"/>	Validate Data	<input checked="" type="checkbox"/>
Stream Designator			
Date From			
Date To			
Geography Dimension Level	Customer		
Restrict to Install Base Trackable Items	No		

Submit and Schedule Submit Cancel

3. Select Submit. Or select Submit and Schedule.

To collect Return History:

The return history data stream is used to collect the product returns.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > Return History.

The Custom Stream Collection window appears.

Custom Stream Collection

Data Stream Name

Return History

Source of Data

ERP

Collection Parameters

Collection Type

Collect

Instance

Complete Refresh

☒

Stream Designator

Date From

Date To

Include RMA Type

Single Step Collection

☒

Validate Data

☒

Submit and Schedule

Submit

Cancel

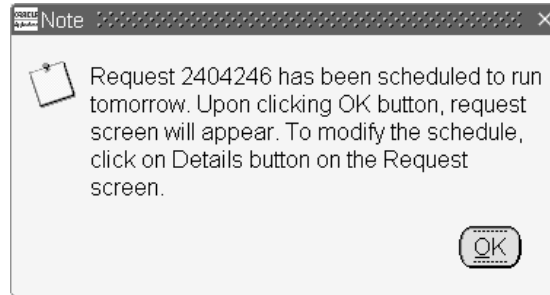
3. In Collection Parameters, complete the following fields:

Field	Function	Legal Values
Collection Type	This field (view only) indicates the type of collection method, and is view only. When the type is Collect, the concurrent program collects data from the source to the destination table. When the type is Pull, the program moves data from the staging tables to the fact tables. To change the collection type, go to Collect/Pull Data in the navigation menu.	Collect
Single Step Collection	It appears as checked if you have specified Yes for the profile option MSD_ONE_STEP_COLLECTION. The single step collection means that you want to bring the flexible data directly in to the Oracle Demand Planning fact tables rather than bringing the data first in to the staging tables and in the second step, pulling the data in to the fact tables.	Check (default)
Instance	Name of the source instance. This identifies which source instance to collect data.	Lookup Values
Complete Refresh	The previously collected data are deleted from the staging or fact tables, depending on the tables into which you brought the data.	Check (default)
Validate Data	The data are always validated at the time of pulling into the fact tables.	Check (default)
Date From	This date is used as a start date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE
Date To	This date is used as an end date for data collection from source. The backlog quantity is collected for the specified period. Users can specify both past and future dates. If the start and end dates are left blank, all the order backlog data is collected.	DATE
Include RMA Type	RMA (return material authorization) Type is a filter to restrict the collection of product returns to specific type of product returns such as 'advanced exchange' or 'repair and return'. By default, all the returns are collected.	Lookup Values

4. Select Submit. Or select Submit and Schedule.

Submit and Schedule

If you selected Submit and Schedule, then a Note with the schedule appears.



Select OK. Then the Requests window appears, which shows the status of the concurrent request.

Graphical Display of Hierarchies

It is important that the aggregation relationships for a specific level and its subordinate level in the hierarchy are properly established. Otherwise, inaccurate information is produced at the time of aggregation. For example, in a geographic area such as Asia-Pacific, if the countries are not correctly set up in the database, the Asia-Pacific level forecasts will not be accurate. Furthermore, due to dynamic business environment, relationships can change. This feature enables you to review and validate these level values within a dimension after the data collection. For example, if you want to find out the names of the product categories (product category hierarchy) within the product dimension, you can select the both the product dimension and the product category hierarchy from the menu, and then the system displays all the product category names from collected data on the window.

Hierarchy Level Values Viewer features include:

- Names of all level values for the selected hierarchy are displayed for each dimension.
- Level values and their associations can be modified to reflect business changes. For details, see: [Customizing Demand Planning hierarchies](#) on page 26-2.

To run the hierarchy viewer:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Dimension Values > Level Values.
3. Select the values for the Dimension, Hierarchy, and Level fields and select Find.

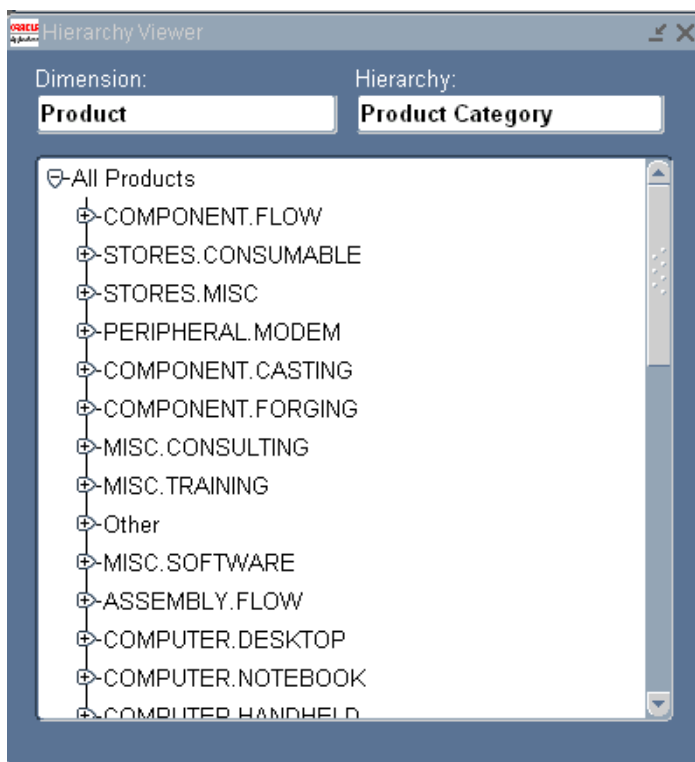
The Level Values window appears.

4. Select View Hierarchy.

The Hierarchy Viewer appears.

5. Choose the Dimension and Hierarchy from the list of the values in these fields.

The Hierarchy Viewer window appears.



Pulling Data into Fact Tables

The following pull programs, which correspond with the types of data you can collect, are available in Oracle Demand Planning: Shipment Data, Book Data, Order Backlog, Currency Conversion, UOM Conversion, Manufacturing Forecast, Sales Forecast, Level Values, Time Data, Pricing Data, and Custom Data Stream. For details about these types of data, see: [Procedure for Collecting Data](#) on page 4-4.

The Pull Level Value concurrent program has an Incremental Upload option that allows you to specify if you want to bring only new level values and associations. Level Values collection will not delete level values and associations that are not loaded in this collection. The one-step level values collection always happens in the Complete Refresh Mode. For technical details about the data pull, see: [Pulling data from Staging Table to Fact Table](#) on page 3-25.

Net Change

The data are collected into Oracle Demand Planning in a net change fashion. Net change refers to collection of only that data which have changed since the last collection.

For building new demand plans, the Demand Planning Engine downloads fact data. For rebuilding demand plans, the Demand Planning Engine uses two dynamic SQL queries to download new or modified Level Values from the level value fact table by comparing the last_refresh_num column with the demand plan build date. The level values contain the newly inserted and modified (since the previous Demand Plan build) fact data.

The Net Change Refresh method collects fact data, reduces the downloading of unnecessary data from Demand Planning Server to Demand Planning Engine, and improves the overall performance of Demand Plan build. The Net Change Refresh method works as follows: a Refresh Number is generated at the beginning of collection that is used to track which records were created or deleted by a collection. Data from staging is inserted into the fact table. Each row stores the LAST_REFRESH_NUM and CREATED_BY_REFRESH_NUM to represent which collection sequence created this row. The ACTION_FLAG column holds the last action performed on the record. Fact data is marked deleted for overlapping period. The LAST_REFRESH_NUM column tells the refresh number that deleted the row, and ACTION_FLAG is set to Delete.

Integrating Legacy Data

Oracle Demand Planning provides the ability to collect data from legacy, (non-Oracle) systems via flat files. This feature enables the integration of hybrid system data sources. You can use planning data in Oracle Demand Planning, even when the source transaction system is not Oracle Enterprise Resource Planning. The flat files, provided as templates, are flexible enough to load all the data needed to run a demand plan. The flat files can be stored on the file system of the Demand Planning server or on a local hard drive.

There are several key processes that utilize concurrent programs to complete the legacy integration process. First, data is collected from source legacy systems by specifying the data file names and locations, and importing those data files into the Oracle Demand Planning Server staging tables. The users can then choose to manually clean the data within Oracle Demand Planning. Lastly, through the Pull Data process, the staging table data is pulled into the Oracle Demand Planning server fact tables, from where the data is sent to the Oracle Demand Planning engine.

Types of data collected include mandatory setup and level values data, fact data for seeded data streams, and custom data for custom data streams. There are two options for data collection that are discussed next: loading data files into Oracle Demand Planning staging tables or loading data files using the Self Service Interface.

Creating Data Files (option 1)

In this option, you collect flat file data by creating data files. You map the Oracle Demand Planning staging table control files to the legacy tables. Then you create scripts to extract data from the legacy system in the format prescribed by the control files. Finally, extract the legacy data to the data files using created scripts.

Once the data files are created, you can load the data files into Oracle Demand Planning. You need to specify the location of the control and the data files. Then you will run the concurrent SQL loader program to load and preprocess the flat files.

Note that if the Level Value flat files contain records pertaining to level id of Item, Product category, Product Family, Organization, Ship-to-location, or Customer, the collections will error out. To insert the corresponding level values pertaining to these levels into DP staging tables, the following flat files should be used:

- Item and Product family from MSC System Items
- Product category from MSC Item Categories
- Organization and Customer from MSC Trading partner
- Ship-to-location from MSC Trading Partner Sites

To load data files into Oracle Demand Planning staging tables:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Legacy Systems > Collect Flat File Data.

The Planning Data Collection window opens.

Run this Request...

Request Set **DP Legacy Integration** Copy...

Program	Stage	Parameters	Language
Flat File Loader	Flat File Loader		American English
DP Pre-Processor	Pre-Process Monitor		American English

Options...

At these Times...

As Soon As Possible Schedule...

Help (A) Submit Cancel

3. In the Planning Data Collection window, select the Parameters field for the Flat File Loader program. Note that the Planning Data Collection window represents the concurrent request set, as detailed at the end of this section.
4. Specify the data file names.
5. Enter OK.
6. Select the Parameters field for the Flat File Loader or DP Pre-Processor program.

For the Flat File Loader program, a Parameters window opens.

The screenshot shows a dialog box titled "Parameters" with a close button (X) in the top right corner. The dialog contains a list of parameters, each with a text input field. The "Time Out Duration (min)" field is set to "1440". The "File Path Separator" field contains a forward slash "/". The "Control File's Directory" and "Data File's Directory" fields are empty. The "Total Number of Workers" field is set to "3". The remaining fields, all of which are empty, are: "File Name: Calendar", "File Name: Workday Patterns", "File Name: Shift Times", "File Name: Calendar Exceptions", "File Name: Shift Exceptions", "File Name: Demand Classes", "File Name: Trading Partners", "File Name: Trading Partner Sites", "File Name: Price List", "File Name: Category Sets", "File Name: Items", "File Name: Product Category", and "File Name: Bill of Material Headers". At the bottom right of the dialog are four buttons: "OK", "Cancel", "Clear", and "Help".

Parameter	Value
Time Out Duration (min)	1440
File Path Separator	/
Control File's Directory	
Data File's Directory	
Total Number of Workers	3
File Name: Calendar	
File Name: Workday Patterns	
File Name: Shift Times	
File Name: Calendar Exceptions	
File Name: Shift Exceptions	
File Name: Demand Classes	
File Name: Trading Partners	
File Name: Trading Partner Sites	
File Name: Price List	
File Name: Category Sets	
File Name: Items	
File Name: Product Category	
File Name: Bill of Material Headers	

For the DP Pre-Processor program, another Parameters window opens.

Parameter	Value
Instance	
Time Out Duration (min)	1440
Batch Size	1000
Number of Workers	3
Process Manufacturing Calendars	No
Process Demand Class	Yes
Process Trading Partners	Yes
Process Price List	Yes
Process Category Sets	Yes
Process Items	Yes
Process Product Categories	Yes
Process Bill of Materials	Yes
Process Units of Measure	Yes
Process UOM Conversions	Yes
Process Currency Conversions	Yes
Process Setup Parameters	Yes
Process Fiscal Calendar	Yes
Process Composite Calendar	Yes

Buttons: OK, Cancel, Clear, Help

Select Yes for the entities corresponding to the data files specified in the Flat File Loader program parameters.

The details of the legacy integration concurrent programs are as follows:

Concurrent Program	Description	Input/Output
Flat File Loader Program	Upload the data from flat file into the Oracle Demand Planning (and Oracle Advanced Supply Chain Planning) staging tables. It will have parameter to upload Item/Product Family, Trading Partner for Customer and Org, Trading Partner sites, Calendars, Booking data, Shipment data, Manufacturing forecast, Sales forecast, Sales Opportunity data, Currency conversions, UOM conversions, Level Values, Level Associations, Events, Event products, Price List, Item list price, and custom Data Stream.	Input: Flat files and Control File. Output: Records in staging tables from the data file.
Pre-Processor for Oracle Demand Planning	Pre-processing legacy data includes automatic generation of source primary keys IDs for the records in the staging tables, sequential data loading in the order required, and data validation. This is the main program for DP legacy integration. If the id exists in LID tables, for example, msc_local_id_xxx and msd_local_id_setup, then the program will use the same ids to populate the staging tables. Validates some primary foreign key and entity attributes.	Input: Staging table records, LID table records, and user input for processing entities. Output: Records in staging table with source pk, records in LID tables if it comes first time, and records in error table.

7. Enter OK.
8. Submit the concurrent request.

Creating data files using self service user interface (option 2)

For this option, you need to create data files by downloading the templates and specifying the data in the templates.

Next, you load data files into Oracle Demand Planning by specifying the location of control and data files.

To load data files using Self Service user interface:

1. Select the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Legacy Systems > Collect Flat File Data – Self Service.

The Self Service page appears.

3. If needed, select Download link to download the templates zip file.

4. Select Browse to select the data file to upload.
5. Submit the concurrent request for DP Purge Program.
6. Select Start Load Now to load the data file in Oracle Demand Planning.

ORACLE®
Supplier Collaboration

 **Information**

Information : Concurrent request submitted with request id 1497899

Load Data Files

To load a data file, select the file using Browse, then click Start Load Now.

.....

[Download](#) templates.

.....

File Name

Note: This file may take several minutes to load

For details about the legacy integration control file formats, see: *Oracle Advanced Planning and Scheduling Implementation and User's Guide*.

Data Validation

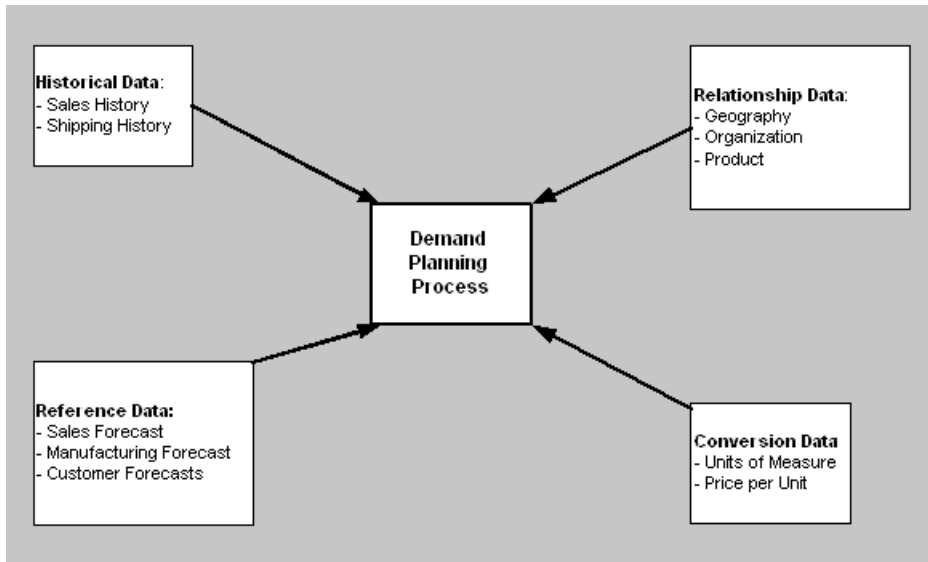
This section describes how to validate data in the Demand Planning Server.

The section includes the following topics:

- [About Data Validation](#)
- [Overview of Data Validation Programs](#)
- [Audit Fact](#)
- [Level Value Audit](#)
- [Setting Up the Audit Query](#)

About Data Validation

The demand planning process involves analysis of historical and forecast data from a number of sources.



Historical data is used to analyze the sales or shipment patterns in the past to predict the future demands, usually using a statistical technique. Demand planners then use reference data such as sales forecasts, customer forecasts, and manufacturing forecasts to compare, validate, and update the forecast based on the historical data. Relationship data allows demand planners to analyze data by various ways such as by geographical areas of sales, by organizations, and by product types to identify specific pattern and trends so that adjustments can be made to the forecast, and at the same time alert organizations involved in demand and supply management.

The data from all the sources need to be accurate, and also organized in proper way to provide the needed outputs such as reliable forecasts of future demands and appropriate alerts and exchange of information with demand and supply management.

Data from the sources can be corrupted due to many reasons including bad transactions, missing transactions, human errors, computational errors, and improper format. Therefore, it is very important that a validity check on the data is

performed to ensure the no errors are present in the data used by the demand planning process.

Overview of Data Validation Programs

Oracle Demand Planning provides tools to validate the various types of data needed for demand planning. There are two programs that can be used to validate the collected data:

- Audit Fact
- Level Value Audit

Audit Fact is used to validate fact data, such as:

- Shipping Data
- Booking Data
- Manufacturing Forecast
- Unit of Measurement (UOM) Data
- Pricing Data
- Custom Data Streams

Level Values Audit provides the tool to check that all the relationship data have been collected correctly.

Both programs check for validity and provide summary and detailed reports to the users. Oracle Demand Planning also provides a look-up or view program to review the rules used for each of the above fact and level value validation program. This is called Audit Statement and is described later in this section.

Audit Fact

Once data such as Shipping Data, Booking Data, Currency Conversion, UOM Conversion, Manufacturing Forecast, and Sales Opportunity have been collected from the source, the Audit Fact allows users to verify nonexistent dimension values in the fact data.

In Audit Fact, preseeded queries handle fact validation, such as correct item, item references in interclass unit of measure conversions, and item references in price list data. Whenever there is a discrepancy between a fact data and corresponding level value data, then a highlighted flag appears in the Audit Fact report. The audit

report presents the consolidated output of the auditing process reflecting the mismatched data. Audit Fact Data Report audits data for seeded as well as custom data streams, price lists, and unit of measure conversion data. It returns results in an output file.

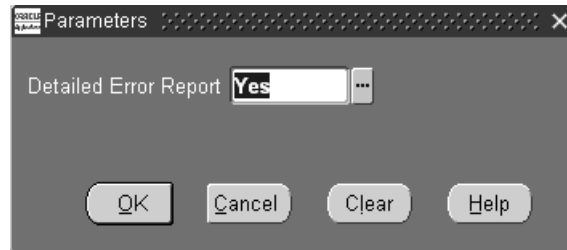
For example, the booking history data has an organization named ABC Org. for the Organization Dimension with a corresponding identifier of Primary Key 229. However, in the level values, there is no such value corresponding to Primary Key 229. The report highlights this fact. Primary Keys are system-generated keys used for identification and cross-referencing of data elements from different tables.

The Audit Fact report also shows a consolidated display of the erroneous data by data streams lists. The report lists the data records reflecting the non-existent level values.

To run Audit Fact:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Audit Fact.

The Parameters window appears on top of the Pull_Utility window.



3. You can select either Yes or No in the Detailed Error Report field. If you select No, you will get a summary report. To get a detailed error report, choose Yes, then select OK.

The Pull_Utility window appears with Fact Validation in the Name field and Yes in the Parameters field.

The screenshot shows a window titled "PULL_UTILITY" with a close button (X) in the top right corner. The window is divided into three main sections: "Run this Request...", "At these Times...", and "Upon Completion...".

- Run this Request...**: Contains three input fields: "Name" with the value "Fact Validation", "Parameters" with the value "Yes", and "Language" with the value "American English". To the right of the "Name" field is a "Copy..." button. To the right of the "Language" field is a "Languages..." button.
- At these Times...**: Contains one input field with the value "As Soon as Possible" and a "Schedule..." button to its right.
- Upon Completion...**: Contains a checked checkbox labeled "Save all Output Files". Below this are two input fields: "Notify" and "Print to" with the value "3". To the right of the "Notify" field is an "Options..." button.

At the bottom of the window are three buttons: "Help (B)", "Submit", and "Cancel".

4. Select Submit. A message appears confirming that the request was submitted. Please note the Request ID.
5. Select No to close the window.
6. Select View > Requests from the main window menu bar.
The Find Requests window appears.
7. Select Find.
The Requests status window appears.



- 8. Select Refresh Data if you need to see the request status under the Request ID.
- 9. Select View Output to see the report.

The report shows exception message for mismatches in values between collected booking history and levels values for the dimensions where the mismatch happened. It shows primary keys (identifies a data item in a table) in red for the missing level values for the dimensions. In the above case, the Product and Organization dimensions have mismatch. This is explained in the table below that shows a sample output report. For details, see: [Setting Up the Audit Query](#) on page 5-12.

ROWID	Instance	Item PK	Org PK	Channel PK	Sales Rep PK	Location PK	Qty
AAAda1AAfAAAHGqAAA	201	MMX332	0373829	INDIRECT	-777	1005	10

ROWID	Instance	Item PK	Org PK	Channel PK	Sales Rep PK	Location PK	Qty
AAAda1AAfAAAHGqAAB	201	MMX332	0373829	INDIRECT	-777	1005	10
AAAda1AAfAAAHGqAAC	201	MMX332	0373829	INDIRECT	-777	1005	10
AAAda1AAfAAAHGqAAd	201	MMX332	0373829	INDIRECT	-777	1005	10

The following table explains the function of each column in sample output report:

Column	Function
ROWID	System-generated ID for the row.
Instance	Name of the source instance.
Item PK	Primary Key of the item for which there is no corresponding collected level values. The program looked at the Primary Key MMX332 in the level value table and there was no value for Primary Key MMX332 for the Product dimension. In other words, there is a missing value for Product Dimension at Item Level in level value table.
Org PK	Primary Key of the Organization for which there is no corresponding value in the collected Organization Level value. This is flagged in red.

Other primary keys for the rest of the dimensions are also shown as a reference. Some examples of dimensions: Sales Channel, Sales Representative, and Organization. They indicate the primary keys that can be used to locate the records in the booking history table for these dimensions.

The program checks for mismatches between the tables where data is collected and the tables where level values are collected. For example, it checks shipping history table, price conversion table, and the Unit of Measure table. Then it flags for mismatches with corresponding level values.

The result of any mismatch does not prevent building demand plans. A demand plan with missing data just does not use the data, and produces incomplete results for demand planners.

As shown in the sample output report, the shipping history table does not have corresponding level values. To prevent this problem, you must check the values in the level value tables and fact tables, identify the root cause, and rectify the problem. The problem may have arisen due to many reasons, such as a change in an item number or an organization name change.

To validate loaded Composite Calendars:

The custom calendars loaded into Oracle Demand Planning are validated to ensure that the various level values align properly. Loading the calendars means bringing the level values for the levels: Day, Manufacturing Week, Fiscal Month, Fiscal Quarter, and Fiscal Year of time dimension. For example, the calendar should not have any month-spanning weeks. Calendars are validated with the level values auditing is functionality.

1. Logon with the Demand Planning System Administrator responsibility.
2. Select Dimension Values and Level Values.
3. Then select the Launch Level Values Audit button.
 - The levels are organization and day.
4. Logon on to the Demand Planning System Administrator responsibility.
5. Select Setup and Data Streams.
6. Choose Define Advanced. Use the seeded data stream Workday Allocation Weights, which verifies the proper alignment of the levels values in a calendar so that one level value belongs to only one parent level value. An example of level values is week to month.

Level Value Audit

This validation program is used to verify missing level values in the hierarchies. After the level value data collection, you can use this feature to verify whether there are any missing level values from level value collections. For example, for a geography dimension, you can verify whether the Ship To locations roll up to regions.

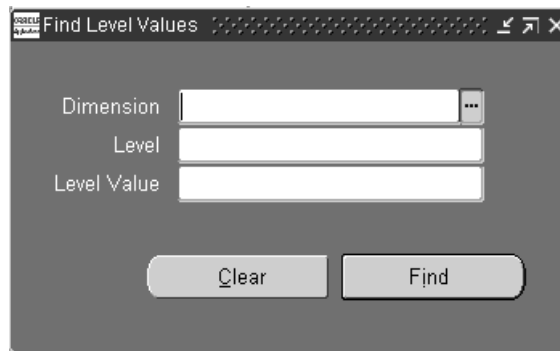
Level Value Audit enables you to:

- Verify that the collected hierarchy level values are accurate and there is no missing data for a particular hierarchy level.
- Display the inaccurate or missing level values.
- Clean up inaccurate records before forecasting.

To run the Level Value Audit:

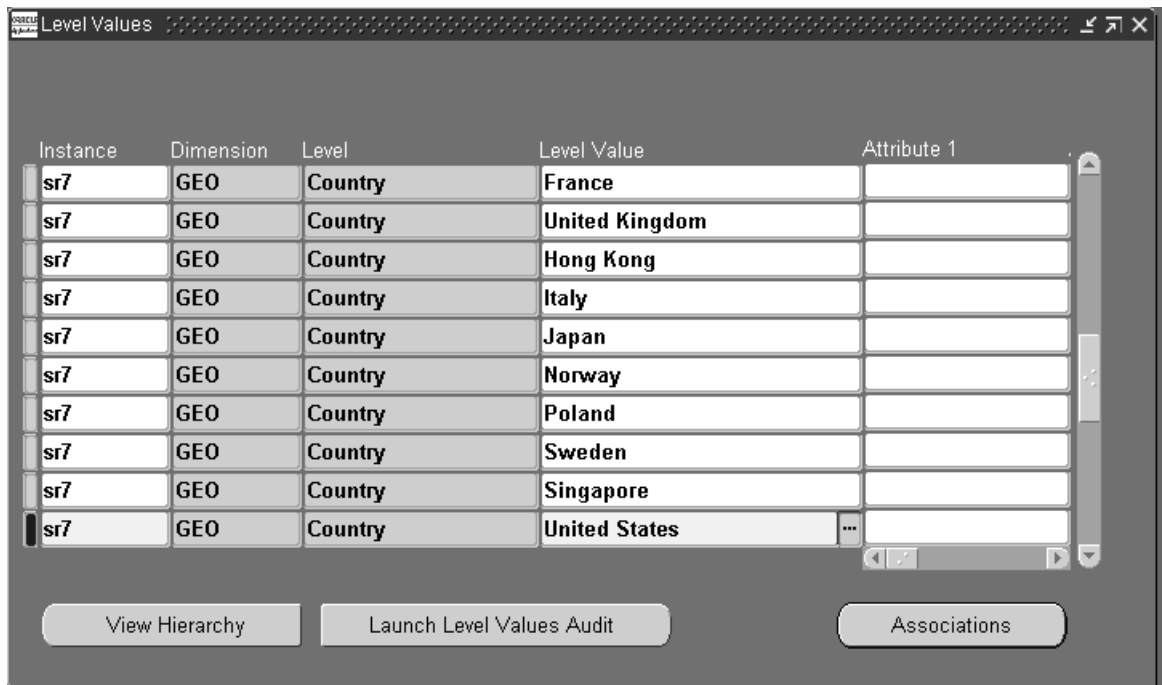
1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Dimension Values > Level Values.

The Find Level Values window appears.



The 'Find Level Values' dialog box contains three input fields: 'Dimension', 'Level', and 'Level Value'. Below these fields are two buttons: 'Clear' and 'Find'.

3. Select values for the Dimension and Level fields and select Find. The completed Level Values window appears.



The 'Level Values' window displays a table with the following data:

Instance	Dimension	Level	Level Value	Attribute 1
sr7	GEO	Country	France	
sr7	GEO	Country	United Kingdom	
sr7	GEO	Country	Hong Kong	
sr7	GEO	Country	Italy	
sr7	GEO	Country	Japan	
sr7	GEO	Country	Norway	
sr7	GEO	Country	Poland	
sr7	GEO	Country	Sweden	
sr7	GEO	Country	Singapore	
sr7	GEO	Country	United States	

At the bottom of the window are three buttons: 'View Hierarchy', 'Launch Level Values Audit', and 'Associations'.

The View Hierarchy button is described [Graphical Display of Hierarchies](#) on page 4-29.

Selecting Associations enables you to find a higher level value (parent) for a selected lower level value (child) for a dimension. For example, for the Geography dimension, if a country name such as United States is selected, it shows its corresponding area (or parent), which is North America.

4. Select Launch Level Values Audit.

A note appears, which indicates that the request has been accepted and being processed.

5. Select OK to close this window.
6. Select View > Requests from the main menu.
7. Select Find.

The Requests status window appears.

Request ID	Name	Parent	Phase	Status	Parameters
125817	Level Values Validation		Running	@@Normal	LEVEL_VALUES
1260274	Level Values Validation		Completed	Warning	LEVEL_VALUES
1260273	Level Values Validation		Completed	Warning	LEVEL_VALUES
1260203	Fact Validation		Completed	Warning	FACT_DATA, 1
1258170	Fact Validation		Completed	Warning	FACT_DATA, 1

8. Select View Output to see the report.

The following two tables are a sample report:

Checking for level values at aggregate levels that have no children...

Level Value	Level	Child Level
France	Region	Ship to Location
Test Group	Customer Class	Customer

Results in two errors.

Checking for parentless level values...

Level Value	Level	Parent Level
AS011062	Item	Product Category
PLT100	Item	Product Category
SEE102	Item	Product Category
SEE103	Item	Product Category
France	Region	Country

Results in five errors.

In the example output above, there are two situations of missing relationships displayed. One is childless parent and another is parentless child. For the parent France at the level Region there is no child record at the lower level Ship To Location. Similarly, in the second example, for child Item AS011062, there is no corresponding parent at Product Category level.

The above problem can happen due to the dynamic nature of a business. As business changes, hierarchical relationships may also change. For example, if a Product Category changes, but no one changes the relationship with the Items, this type of problem can occur.

If such a problem is detected, the result could be misleading in demand planning. For example, if there is a sales booking from a ship to location in France, Demand Plan does not detect the booking.

In order to prevent this problem, you need to find out root causes for the missing relations and ensure that problems are corrected in data source tables (for example, Relationship Tables) from where these relationships are collected in the demand planning.

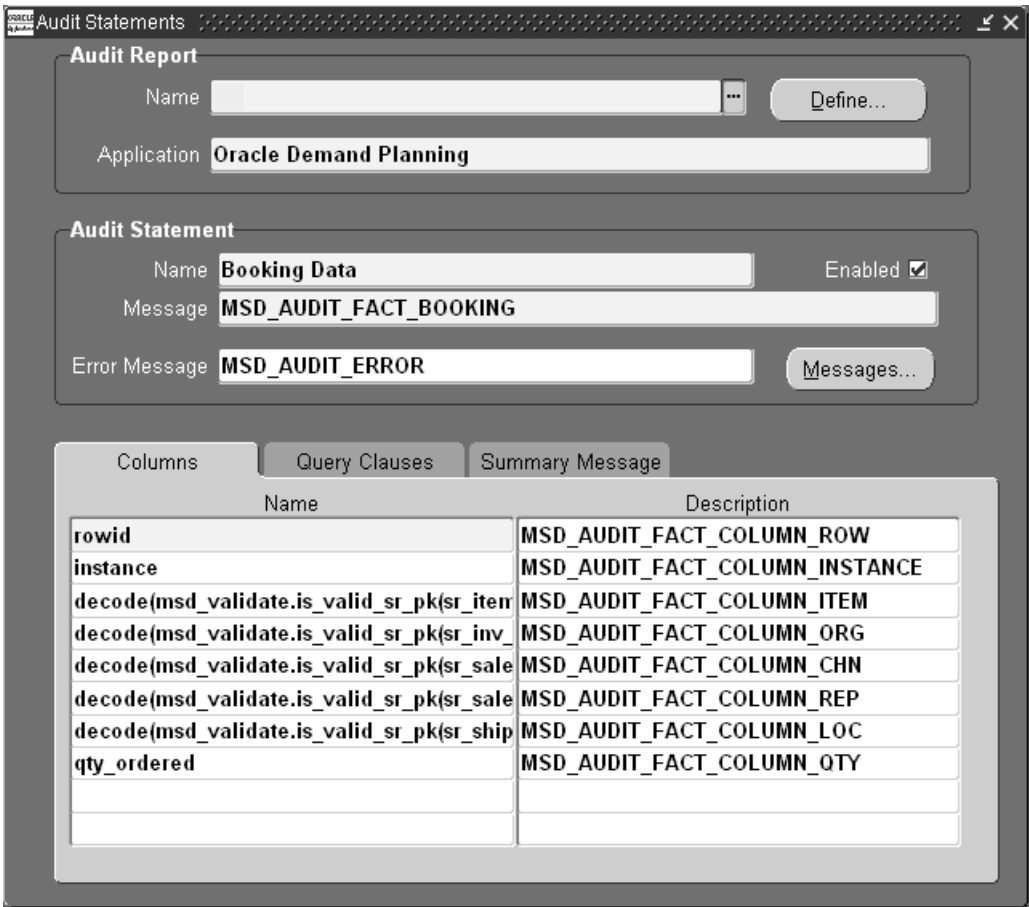
Setting Up the Audit Query

Sets of base queries have been seeded into the core application for both Audit Fact and Level Values Audit. You can review these query statements by following the directions below. Furthermore, implementation consultants, or users with limited SQL experience can add or modify this set of preseeded queries to provide custom detailed validation, or to format the output of existing audit statements.

To setup an Audit Query:

1. Choose the Demand Planning System Administrator responsibility.

- 2. In the Navigator, select Setup > Audit Statement.
- 3. From the menu bar select View > Find while the cursor is on the Name area.
A list of predefined audits appears.
- 4. Choose any of the Audit Statements. For example, Booking Data.
The Audit Statements window appears with the list of audits.



The following table lists the names of the fields, their functions, and legal values that appear in this window:

Field	Function	Legal Values
(Audit Report) Name	User-defined name of the audit report.	List of Values
Define... button	Brings up FND form which lets you modify, create, or delete audit report.	Not applicable
(Audit Statement) Name	System-provided name of a preseeded audit statement.	Not applicable
Enabled check box	Indicates whether to execute the Audit Statement.	Checked or unchecked
Message	Gives the FND message that is output before the statement is run.	Not applicable
Error Message	Name of an error message that is displayed when the audit statement query retrieves any errors.	Not applicable
Messages... button	Allows you to define the specific error text that is displayed in the error message above. If the special token &COUNT has been included in this error text, it displays as the number of errors retrieved.	Not applicable
Columns tab: Name column	The Columns tab lists the columns of the query. Name is the actual column name or SQL expressions.	Not applicable
Columns tab: Description column	This field is optional. It refers to FND messages that are written as column headers in the report's output.	Not applicable

5. If you want to change the FROM and WHERE clauses of your SQL query, select the Query Clauses tab.
6. If you want to define a Summary Message for the fact validation or level value validation, select the Summary Messages tab.

Use the information in the following table to fill out the fields in this tab:

Field	Function
Show only summary message in output check box	When you run Validate Fact or Validate Level values, you have a choice of whether to display a detailed report or a summary report. Use this check box to display one or the other. To display a summary report, check this box. To display a detailed report, do not check this box.
Summary Message	Enter the name of the Message. This text can contain a number of user-defined token (variable) values.
Token Column	Enter the name of the token in the message.
Value Column	Enter the SQL code that will define the value of the token.

This section describes how to define and manage events in the Demand Planning Server.

The section includes the following topics:

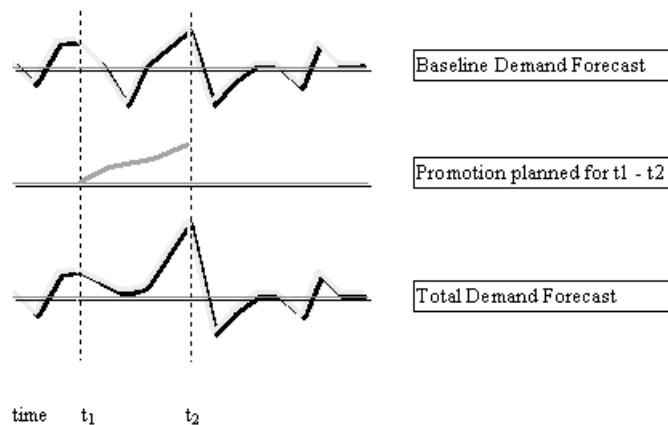
- [About Events](#)
- [Business Applications](#)
- [Promotions](#)
- [New Product Introductions and Cannibalization](#)
- [Product Phase Outs](#)
- [Events Calendar](#)

About Events

This section provides a detailed discussion on how to define and manage events. Any occurrence that is expected to impact the sales or demand is termed as events here. Some different types of events are; promotions, new product introductions, cannibalization, phasing out products, store openings and closings, new features and changes in existing product, introduction of products to the new markets.

Any business needs to plan ahead for all these events and analyze their potential effect on future demand. The outcome of such an analysis may be in the form of a lift or modification factor. The positive modification factor would indicate increased sales while a negative modification factor would indicate cannibalization or reduced sales. For example, 10% reduction in the retail price of product A may result in a 15% lift in its sales but a 3% reduction in sales for product B.

Oracle Demand Planning has a user interface to define such events and their impacts on future sales that can vary by product, time, and market. The events so planned and defined are considered for calculating a demand forecast as shown in the figure below.



Supported event types

- Promotions and other events: events for those existing products for which some history data is available to generate a baseline forecast and for which the impact of an event can be defined in terms of modification factors for base demand and price. Some such events are: price reductions to clear the inventory, advertising

campaigns, a new product introduced by the competition, and a Christmas week sales promotion.

- New product introductions and cannibalization: events for those existing or new products for which history data is not available but which are expected to sell, similar to some existing products with known sales history or forecast. The baseline forecast is generated on the basis of available data and can be modified by applying suitable modification factors. Some such events are: new product introductions or product introduction in new markets.
- Product phase outs: events for products nearing the end of life when the sales of those products is expected to become flat or reduce at some rate to zero and the impact of event can be defined in terms of modification factors. Some such events are: removing a product from a certain market, product declared unsafe, or product replaced by the next generation.

Event modeling capability

It is possible to specify all the items that the event affects and the time period for which the event is effective. The expected increase or decrease in demand and price for each event can also be specified. Any such impact of an event could be multiplicative, additive, or subtractive. The user is able to enter the absolute values or the change in value. For example, if the event is a promotion or introduction of a product, the impact could be in the form of a increase by percentage modification factor. However, such an event, like reduced sales, may lead to cannibalization or phase out of other products, for which the impact could be a decrease by percentage modification factor.

Different modifications factors can be specified for different time periods. For example, it is possible to specify percentage increase in demand by 10% and 20% for two different time periods within the effective period of a promotion.

Event impacts can also vary by region, market, and sales channel. To model this requirement, different modification factors can be defined for any dimension, such as geography and sales channel, supported by Oracle Demand Planning. Within the dimension, different modifications can also be specified for various levels, for example: region, country, and ship-to-location for the geography dimension. It is common to see a marketing campaign that does well in one market and not well in another. Such situations can be handled by specifying a increase in sales by 10% for western region and a decrease in sales by 400 for the eastern region and the direct sales channel.

Simulation capability

After the events have been completely defined, they can be associated with a scenario. Multiple events can be associated with a scenario and multiple scenarios are allowed to be associated with an event. This feature provides unlimited what-if events analysis capability. It may be recalled here that multiple scenarios can be defined within a demand plan in the demand planning server. For example, the optimistic forecast scenario may include promotions with higher estimate of increase in sales or lower estimate of reduction in price. The events associated with a scenario are applied on top of the base forecast for that scenario.

Conflict resolution

If there is a conflict when a product is covered by two events, there exists precedence logic to resolve it. Alternative events can be accurately modeled by assigning priority at the time of associating an event with the scenario. This obviates the need for multiple definitions of the same event just to change the priority. The priority determines the order in which the events are applied.

Business Applications

To increase the sales, clear excess inventory, expand existing markets or build new ones, improve margins, match the competition, or improve investor or company morale, events are planned by most companies. Because the company may be offering many similar products, increases in the sales of one product may cannibalize (reduce) the sales of other similar product. Introducing a new product may also reduce the sale of another similar spatial variety and may lead to end-of-life phasing out of an existing product. Such events and their impacts, different for different dimensions, can be defined in the Demand Planning Server at Events and Product Introductions under Demand Planning System Administration responsibility in the navigator window.

Sample business application

A company has two models, 00FLMA and 00FLMB, in the light motor car segment. It decides to introduce a new model 00FLMF on 1 June 2001. Hereinafter, these models are respectively called A, B, and F for simplicity. F is expected to sell 20% more during 2001 than what model A would have sold. The demand for A is expected to decrease by 50% due to introduction of F. The company also decides to reduce the price of model B by 5% starting 1 April 2001 only in the United States, which is expected to increase the sale of B in the United States by 10% for first two

months but only 5% afterwards due to introduction of F. The company expects to phase out model A during the year 2002 as follows:

- United States only from 01/01/2002 to 03/31/2002 by 25%.
- All geography from 04/01/2002 to 06/30/2002 by 25% and afterwards to death at the end of the year 2002.

Procedure for defining events

Oracle Demand Planning supports global events as well as personal events. Global events are defined by the Demand Planning Administrator, and are available to all the demand planners. Global events are universal in scope that is they may cover events across planners' demand scope. Personal events are defined and used by demand planners within each planner's own demand scope. For details, see: [Events](#) on page 9-10.

The following procedure describes how you would define global events in the Demand Planning Server for the sample business application.

To define events:

1. Choose the Demand Planning Administrator responsibility.
2. In the Navigator, select Events and Product Introductions > Promotions and Other Events.

Promotions and Other Events

Name

00FLM_newF_outA_promo

Type

Mandatory Promotion

Description

Apr- Dec' 01 campaign

Priority

1

Product Details

Product Level	Product	Start Date	End Date
Item	00FLMB	01-APR-2001	31-DEC-2001

Details

3. Select Details.
- The Details window appears.

From Date	To Date	Qty Modification Type	Qty Modification Value
01-APR-2001	31-MAY-2001	Increase by Percentage	10
01-JUN-2001	31-DEC-2001	Increase by Percentage	5

4. Complete the fields in the Details window as follows:

Field	Value
From Date	First Row: 01-APR-2001. Second Row: 01-JUN-2001.
To Date	First Row: 31-MAY-2001. Second Row: 31-DEC-2001.
Qty. Modification Type	Both Rows: Increase by Percentage.
Qty. Modification Value	First Row: 10. Second Row: 5.

5. Price modification of 5% for this scenario can be specified if users scroll to the right and:
- Select Decrease by Percentage as the Price Modification Type for both the rows.
 - Enter 5 as the Price Modification Value for both the rows.
6. Select the Geography tab.

7. Select the following geography values:

- Geography column, first row is Country.
- Geography Value column, first row is United States.
- Geography column, second row is Country.
- Geography Value column, second row is United States.

At this point, you have modeled the following part of the scenario:

The existing forecast for B (from 1 April 2001 to 31 December 2001) in the United States is increased by 10% during 1 April 2001 to 31 May 2001 and by 5% during 1 June 2001 to 31 December 2001. The revenue forecast for B in the United States during the period from 1 April 2001 to 31 December 2001 decreases by 5%.

8. In the Navigator, select Events and Product Introduction > New Product Introductions and Cannibalization.

The New Product Introduction window appears.

New Product Introduction

Name00FLM_newF

TypeSupercession

DescriptionApr- Dec' 01 campaign

Product Details

Product Level	Product	Start Date	End Date
Item	00FLMF	01-JUN-2001	31-DEC-2001

Cannibalized Products

Base Products

Details

9. Complete the fields in the New Product Introduction window as follows:

Field	Value
Name	NPI New
Description	Apr to Dec Campaign
Type	Supersession
Forecast Basis	Individual histories of base products
Product Level	Item
Product	KS-LEG MODEL (STEEL)
Start Date	-
End Date	-

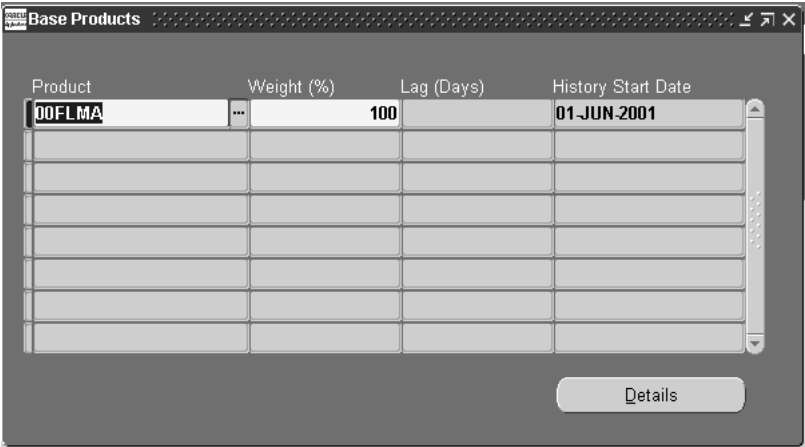
10. Select the Details tab.
- The Details window appears.

From Date	To Date	Qty Modification Type	Qty Modification Value
01-JUN-2001	31-DEC-2001	Increase by Percentage	20

11. Complete the fields in the Details window as follows:

Field	Values
From Date	01-JUN-2001
To Date	31-DEC-2001
Qty Modification Type	Increase by Percentage
Qty Modification Value	20

12. Close the Details window.
- The New Product Information window reappears.
13. Select Base Product.
- The Base Products window appears.



14. Complete the fields in the Base Products window as follows:

Field	Value
Product	KS-ROUND-TABLE-TOP
Weight	100
History Start Date	01-JUN-2001
History End Date	-

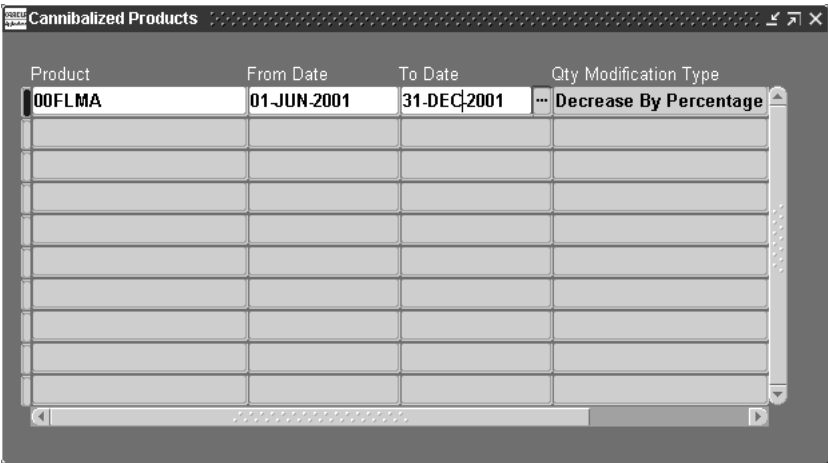
Though not required for this scenario, details for base products can also be entered. Also, any number of base products with varying weights (total should be 100) can be used to model the forecast of new product. Weight% for a base product determines the fraction of its forecast that is used as the forecast of the new product.

15. Close the Base Products window.

The New Product Information window reappears.

16. Select Cannibalized Products.

The Cannibalized Products window appears.



17. Complete the fields in the Cannibalized Products window as follows:

Field	Value
Product	KS-FANCYTABLE TOP MODEL
From Date	01-JUN-2001
To Date	31-DEC-2001
Qty Modification Type	Decrease by Percentage
Qty Modification Value	50

At this point, you have modeled the following part of the scenario:

The existing forecast for A from 1 June, 2002 to 31 December, 2002 is increased by 20% and is considered as the forecast for model F during the same period. On the other hand, the same existing forecast for model A is decreased by 50% and is considered as the new forecast for A.

- 1. In the Navigator, select Events and Product Introductions > Product Phase Out. The Product Phase Out window appears.

Product Phase Out

Name: 00FLM_outA

Description: 00FLMA phase out in 2002

Product Details

Product Level	Product	Start Date	End Date
Item	00FLMA	01-JAN-2002	31-DEC-2002

Details

2. Complete the fields in the Product Phase Out window as follows:

Field	Value
Name	00FLM_outA
Description	00FLMAphase out in 2002
Product Level	Item
Product	00FLMA
Start Date	01-JAN-2002
End Date	31-DEC-2002

If you want to start with the reduced forecast on 31 December, 2002 due to cannibalization (in step 17), the Start Date should be entered here as 31 December, 2002.

3. Select Details.

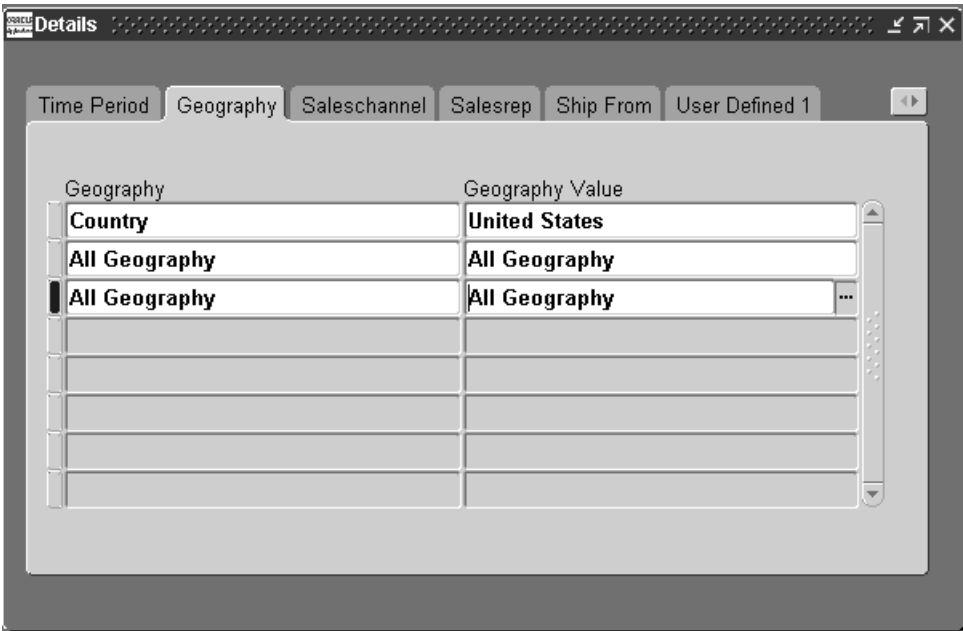
The Details window appears.

- 4. Complete the fields in the Details window as follows:

Field	Values
From Date	First Row: 01-JAN-2002
Second Row: 31-MAR-2002	Third Row: 30-JUN-2002
To Date	First Row: 31-MAR-2002
Second Row: 30-JUN-2002	Third Row: 31-DEC-2002
Qty Modification Type	All three rows: Decrease by Percentage
Qty Modification Value	First Row: 25
Second Row: 25	Third Row: 100

- 5. Click the Geography tab.

The Details window for Geography appears.



- 6. Complete the fields in the Details window as follows:

Field	Value
Geography	First Row is Country. Second Row is All Geography. Third Row is All Geography.
Geography Value	First Row is United States. Second Row is All Geography. Third Row is All Geography.

At this point, you have modeled the following part of the scenario:

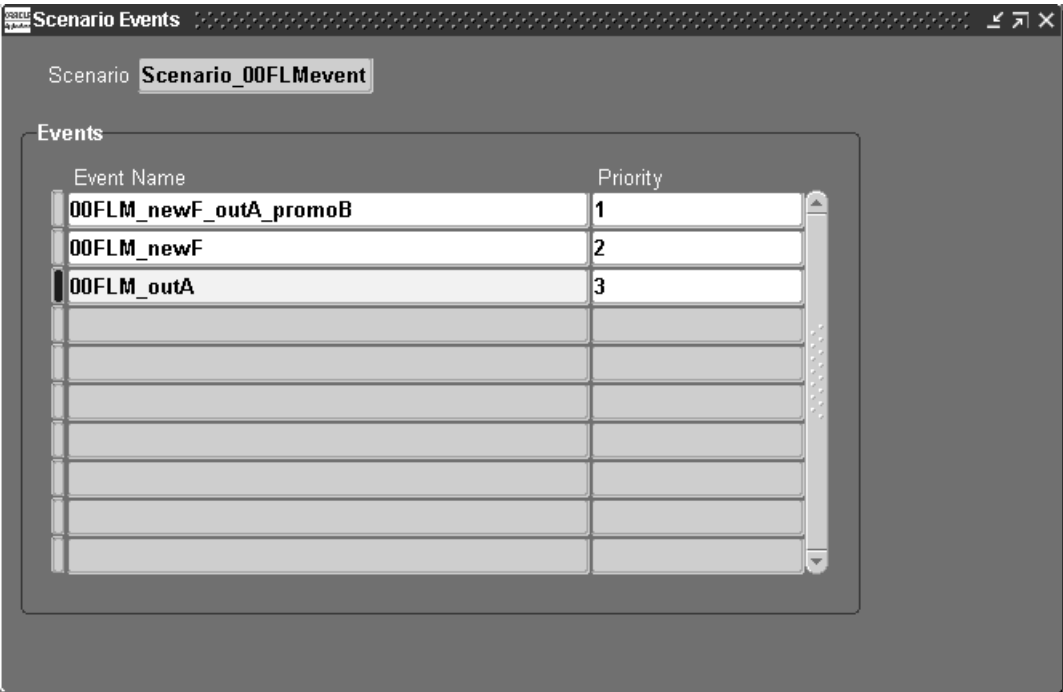
For United States: The forecast for A linearly decreases by 25% on 31 March 2002 from its value on 1 January 2002 and then by another 25% on 30 June 2002 from its decreased value on 31 March 2002. It reduces to zero on 31 December 2002 from the reduced value on 30 June 2002.

For all geography except United States: The forecast for A remains unchanged for 1 January 2002 to 31 March 2002, and then linearly decreases by 25% on 30 June 2002 from its value on 31 March 2002. It reduces to zero on 31 December 2002 from the reduced value on 30 June 2002.

7. Events can be associated to either demand plans or scenarios.

To associate events to demand plans, use the events tab on the demand plans form so that the events are available for all forecast scenarios.

To associate events to scenarios, follow the instructions in [Procedure to define a Demand Plan](#) on page 7-2. Stop after performing the first step in [Scenarios](#) on page 7-23. At the end of that step, select Events. The Scenario Events window appears.



8. Associate the three defined events; promotion (in steps 2 through step 7), new product introduction (in steps 7 through 17), and product phase out (in steps 17 through 23) to a scenario and specify priority for each association as shown in the following table:

Field	Value
Scenario	Default value
Event Name	Select the event name
Priority	Enter the priority number

Priority indicates the order in which the events are applied. Within the same priority, the events are applied in the order of their creation in the system and thus the event priority should always be specified. When the corresponding demand plan is used to generate the forecasts in the Demand Planning Engine, these events would be included in the event forecast.

Promotions

Mandatory and optional promotions

There are two types of promotions that can be defined (in step 1) in the Events section: mandatory and optional.

Note: Throughout Promotions, all references to steps refer to the steps in Events.

Mandatory promotion means that it is applied regardless of whether another promotion has been applied, while the optional promotion is applied when a mandatory promotion for the same item has not been applied. In addition to this, a priority can also be specified to resolve any conflicts between the two promotions of the same type. However, this priority is overridden by the priority specified at the time of associating a promotion to a scenario (in step 8). Two or more promotions can also be specified in one window, in which case the priority or the promotion type is the same for both promotions. In this situation, the promotions are applied in the order they are defined.

For example, if two mandatory promotions are defined during the same time period, first one at all product level with 10% modification factor and second for item A with 20% modification factor, these promotions would be applied successively. The result would be a lift of 10% for all products except for item A, which would have a 20% lift on top of the 10% lift.

Types of modifications

Multiple time periods with varying modifications can be defined for any promotion as shown in steps 3 and 5. For each time period and quantity modification, one price modification type and value can be selected.

The quantity modification types are:

- Increase by percentage, decrease by percentage, increase by quantity, decrease by quantity, and absolute.

The price modification types are:

- Increase by percentage, decrease by percentage, increase by quantity, decrease by quantity, and absolute.

Details of promotions

While all other events can be defined for a product, the promotions can also be specified at other levels in the product dimension; product category and product family. For each promotion, at least one detailed entry needs to be made under Details as shown (in steps 3 and 5). This includes the time period (for example, From Date and To Date), type of modifications for quantity as well as price, and corresponding modification values. Various dimension levels and values can also be entered for each detail as indicated (in step 3). The values for the From Date and To Date (in steps 3 and 5) are defaulted from the Start Date and End Date on the main form (in step 1). The user can modify these values.

New Product Introductions and Cannibalization

Life cycle and supersession based new product introductions

The information about the existing products is used for generating forecasts for new products, as there are no historical data to use as a starting point. The existing products used in the context of modeling a new product introduction are referred to as base products. Any new product introduction can be modeled in two distinct ways (in steps 7 and 8). These are:

- **Life Cycle:** refers to situations when the new product is expected to follow the demand patterns of some existing products. The historical sales data of one or more existing products during specified time periods is considered as the forecast for the new product with some specified time difference.
- **Supersession:** refers to the replacement of the existing product(s) by a new product. There are two methods for modeling supersessions depending on whether the new sales data (as the sales come in) of the new product should or should not be used for forecasting purposes until the new product is matured:
 1. **Based on individual histories of base products:** The forecasts of existing products are created on the basis of their individual historical sales data, modified by specified percentages, and added by specified weights to create the forecast of new product.
 2. **Based on combined histories of new and base products:** The historical sales data of the existing products during the specified time periods is transferred to the new products and then the forecast for the new products is created on the basis of combined history of new and existing products.

Types of modification

Multiple time periods with varying modifications can be defined for any new product introduction (in steps 10 and 10). There are no price modifications allowed for new product introduction events. The quantity modification types are: increase by percentage, and decrease by percentage.

Details of new product introductions

For each new product introduction event, at least one detailed entry needs to be made. This includes the time period, for example, From Date and To Date, type of modifications for quantity only, and corresponding modification values. The values for the From Date and To Date (in steps 10 and 11) are defaulted from the Start Date and End Date on the main form (in steps 7 and 8). The user can modify these values. Various dimension levels and values can also be entered for each detail. If no qualifications are specified, the event applies to all levels.

Service part supersessions can be modeled using new products. The New Product Introduction events can be used to enable service part supersessions in Oracle Demand Planning. You use combined histories of new and superseded parts to create forecast for the new parts.

For example, you can have the supersession of part A by part B for two consecutive planning cycles.

The forecast of the new part B is based on the combined history of part A and B. Assume that part B supersedes part A with effect from 1 Aug 03 as a service part of Itch equipment company. Part A is immediately phased out with no forecast for part A after 31 Jul 03. Also, assume that no Qty Modification Type/ Value is specified.

For Planning Cycle 1, on 1 Aug 03

Original histories (before applying the event):

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	May 03	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03
Electrode A	10	15	12			
Electrode B	NA	NA	NA			

Logic in applying the event:

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	May 03	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03
Electrode A	10	15	12	0	0	0
Electrode B	10	15	12	16	13	17

Actual data and display after applying event:

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	May 03	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03
Electrode A	10	15	12	0	0	0
Electrode B	NA	NA	NA	16	13	17

For Planning Cycle 2, on 1 Sep 03

Original histories (before applying the event):

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03	Nov 03
Electrode A	15	12	5			
Electrode B	NA	NA	10			

Logic in applying the event:

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03	Nov 03
Electrode A	15	12	5	0	0	0
Electrode B	15	12	15	12	16	13

Actual data and display after applying event:

Service Part	Booking History	Booking History	Booking History	Forecast	Forecast	Forecast
	Jun 03	Jul 03	Aug 03	Sep 03	Oct 03	Nov 03
Electrode A	15	12	5	0	0	0
Electrode B	NA	NA	10	12	16	13

You can automatically update the event on the basis of supersession item relationship, which is defined in Oracle Inventory and collected into Oracle Demand Planning during level values collection. The user can effect changes as necessary, including changing items and specifying dates or modifications.

From the Demand Planning System Administrator responsibility, select Events and Product Introductions > New Product Introductions and Cannibalization. The New Product Introduction screen appears.

New Product Introduction

Name: **Service Part** Type: **Supersession**

Description: **New Product Introduction** Forecast Basis: **Combined histories of new**

☐ Update event on the basis of supersession item relationships **Update**

☒ Automatically update upon new level values collection

Product Details

Product Level	Product	Start Date	End Date

Cannibalized Products **Base Products** **Details**

Complete the New Product Introduction window. If the Start Date is not specified, then the New Product Introduction event will be applied from the horizon start date of the forecast measure to which the event is associated. If the End Date is not specified, then the New Product Introduction event will be applied until the horizon end date of the forecast measure to which the event is associated.

For a supersession type New Product Introduction event, the Forecast Basis is enabled. The list of values are Combined histories of new and base products and Individual histories of base products.

- Selecting Individual histories of base products enables supersession where the forecasts of base products are created on the basis of their individual histories, modified by specified percentages, and added by specified weights to create the forecast of new product.
- Selecting Combined histories of new and base products is a new functionality allows the transfer of the history of base products to the new product. This means that the history during the historical dates of the base products is

transferred to the new products, and the forecast for the new products is created for the New Product Introduction Start and End Dates on the basis of combined history of new and base products.

For a supersession type New Product Introduction event, when you select the Update button, the update event (on the basis of supersession item relationship) is generated using supersede item relationships. The item relationships are defined in Oracle Inventory and collected into Oracle Demand Planning during level value collection. The level value data collection and pull programs collect the supersede item relationship.

Rerunning the Update event process will refresh the event on the basis of current status (in other words, as of last collection of level values) of item relationships and the changes, if any, after the previous run will be lost.

For a supersession type New Product Introduction event, the Automatically update upon new level values collection checkbox is used to automatically update the event with new or changed item relationships when level values are collected afresh in the subsequent planning cycles. Checking this box makes all the columns non-editable for the event. This means that item relationships then only be changed in the source applications only.

Details of base products

For example, it is possible to use historical data of a base product for any region to model a new product that is being introduced only in a certain region.

Additional dimension information for any base product can be entered under the Base Product Details. For each base product, a different level can be selected for any of the six dimensions and two user-defined dimensions. If more than one base products are used, the relative weight, such as 30% of the forecast for base product A and 70% for B, for each base product can be specified. If no details are specified for the base products, all their available history/forecast for all dimensions is used as basis for the new product introduction.

Service part supersessions can be modeled using base products. When you select Base Products button, the Base Product window appears.

Base Products

Product	Weight (%)	History Start Date	History End Date

Details

To complete the Base Products window, you can specify any percentage of Weights for base products.

If the History Start Date field is left blank, the history start date to of the forecast measure to which the event is associated is used. For supersession type New Product Introduction events, this means that the history of the base products from the History Start Date are used to create the forecast for the new product.

If the History End Date field is left blank, the history end date of the forecast measure to which the event is associated is used. The History End Date indicates that the history of the base products until the History End Date is used to create the forecast for the new product. Specifying the history end date allows you to use New Product Introduction event definition as the basis of history periods for the new product and ignore the forecast measure's history periods. This prevents reduction in the forecast of the new product when the base product is phased out or cannibalized.

The base product's forecast will not considered the History Start and End dates and is created based on the history periods of the forecast measure to which the event is associated.

Details of cannibalized products

Introduction of a new product may reduce sales cannibalization of some existing products (in steps 16 and 17). Any number of products for which the sales will be reduced due to the respective new product introduction can be selected under Cannibalized Products. Time period and quantity modification can be defined for each cannibalized product. There are two modification types:

1. **Decrease by Percentage:** The specified Qty Modification Value is applied as a percentage of the cannibalized product's forecast.
2. **Decrease by Percentage of New Product:** The specified Qty Modification Value is applied as a percentage of the new product's forecast.

Service part supersessions can be modeled using cannibalized products.

To create base product's forecast based on event's history dates, cannibalization needs to be specified to drive the base product's demand by percentage of new product. To do this, complete the Cannibalized Products window.

When you select Cannibalized Products button, the Cannibalized Products window appears.

Product	From Date	To Date	Qty Modification Type

Complete the Cannibalized Products window. If the From Date column is not specified, cannibalization is applied from the horizon start date of the forecast measure to which the event is associated. The To Date column indicates the forecast end date and the cannibalization end date. Thus, the forecast for the cannibalized product is created only until this date and the forecast after this date will be zero. If To Date column is not specified, cannibalization is applied until the horizon end date of the forecast measure to which the event is associated.

The Qty Modification Type column has two possible values:

- Selecting Decrease by Percentage creates the forecast based on product's own history and decreases the forecast by the percentage specified in Qty Modification Value field. Thus, the specified Qty Modification Value is applied as a percentage of the cannibalized product's forecast.
- Selecting Decrease by Percentage of New Product also applies the specified Qty Modification Value as a percentage of the new product's forecast.

Product Phase Outs

Linear and nonlinear phase outs

Sales promotion or a new product introduction may not only reduce the sale of another similar spatial product but may also lead to end-of-life phasing out of an existing product. Phasing out products is a conscious decision on the part of an organization. Product phase out can be linear or nonlinear. Nonlinear phase out essentially means phase out with multiple gradients and is achieved by defining multiple time periods with varying modification factors. This was shown in steps 3 and 4. If multiple time periods with varying modification factors are not defined, the forecast is linearly reduced to zero at the end of the specified phase out period.

Types of modification

Multiple time periods with varying modifications can be defined for any phase out (in steps 3 and 4). There is no price modification allowed for a new product introduction event. The quantity modification types are decrease by percentage and decrease by quantity.

Details of product phase outs

Defining product phase outs is similar to defining promotions and new product introductions and can be accomplished from Product Phase Out in the main

navigator window. Additional information for the phase out is entered under Details as shown (in steps 3, 4, and 6). This includes the time period type of modifications for quantity only, and corresponding modification values. The values for the From Date and To Date (in steps 3 and 4) are defaulted from the Start Date and End Date on the main form (in steps 17 and 2). The user can modify these values. If no details are entered, the forecast for the product from the start date will be linearly reduced to zero at the end date. Various dimension levels and values can also be entered for each time period and modification detail. If no qualifications are specified, the event applies to all levels. If there is no entry to completely phase out the product, a warning is given to the user suggesting the necessity to enter detail whereby Modification Type is set to decrease by percentage and Modification Value is set to 100. For example, in the scenario described in the earlier section, if the following details are entered (in steps 3 through 6):

- United State: 1 January 2002 to 31 March 2002 decrease by 25%
- All geography: 31 March 2002 to 30 June 2002 decrease by 25%

Then, everything remains the same except that after 30 June 2002 the forecast flattens out; that is, its value remains unchanged until 31 December 2002.

No separate set up is required for events. However, some validations are performed by the system as under:

- Date validation: the From Date and To Date values on the details form should be between the Start Date and End Date on the main form.
- Increase by Percentage: if this has been selected as the modification type, the value should be zero or greater.
- Decrease by Percentage: if this has been selected as the modification type, the value should be between zero and 100.

Events Calendar

Demand Planners and the Demand Plan Manager can view the details of the events impacting the forecast. For example, if three events affect the demand forecast of a product, the final forecast numbers show only the overall impact of the events. However, the demand planner needs to know the details of these three events that have changed the overall forecast numbers.

The Events Calendar addresses this need for better analysis of the forecast by presenting the events in the form of a simple calendar. For details about the events calendar, see: [Using the Events Calendar](#) on page 18-18.

Applying events at aggregate time levels

The events are specified at the day level. For example, a promotion with 10% volume lift is planned for Item-A during the period from 1-Jan-2002 to 17-Jan-2002. The results would be different when the same event is applied at the day level and at an aggregate level.

Applying events at aggregate time levels means applying events to the forecast or any other data stream for which the lowest time level is higher than a day and the data are not even allocated to the data level. For details on how to specify lowest time levels for a demand plan, see: [Lowest Time Levels for the demand plan](#) on page 7-5. Since the events are independent of the demand plan definition, the dates cannot be restricted during the event definition process. To apply events at aggregate time levels, weighted average lift factors are used. The weighted average would be by the days in the aggregate bucket.

Example

The following sales forecast at the all geography, all sales channels, and all organizations levels is used as the baseline forecast:

	1/27/02	1/28/02	1/29/02	1/30/02	1/31/02	2/01/02	2/02/02
Item A	100	200	100	200	300	100	100

The daily forecast numbers are aggregated to a weekly forecast of 1100, assuming an additive aggregation for Item A.

Assume that the Lowest Time Level as an aggregation bucket is selected as the Week for a manufacturing calendar and Month for the Gregorian calendar.

In this case, the seven days of the week will be truncated to two days, 31 Jan 02 and 2 Feb 02 so that the daily forecast numbers can be properly aggregated to the week of 1/27/02 as well as to the months of January and February 2002. For details, see: [Lowest Time Levels for the demand plan](#) on page 7-5.

Assume that following promotion at the all geography, all sales channels, and all organizations levels is applicable for Item A during this week. The following events are independently applied on this forecast:

Start Date	End Date	Modification type	Modification factor
1/27/02	1/28/02	Increase by percent	10
1/29/02	2/02/02	Absolute	50

The weighted average lift factors for the truncated day 31-Jan-02 are:

$$\text{Percent lift} = 2 * 10/5 = 4\%$$

$$\text{Absolute lift} = 3 * 50 = 150$$

$$\text{Forecast, 31 Jan 02} = 900 * 0.04 + 150 + 900 = 1086$$

The weighted average lift factors for the truncated day 02-Feb-02 are:

$$\text{Percent lift} = 0$$

$$\text{Absolute lift} = 2 * 50 = 100$$

$$\text{Forecast, 02 Feb 02} = 200 + 100 = 300$$

The total weekly forecast will now become 1386. Had the promotion been applied to the daily forecast numbers, the weekly forecast would have been:

$$(100 * 0.10 + 200 * 0.10 + 250 + 1100) = 1380$$

Defining a Demand Plan

This section describes how to define a demand plan in the Demand Planning Server.

The section includes the following topics:

- [About defining a Demand Plan](#)
- [Procedure to define a Demand Plan](#)
- [Input Parameters](#)
- [Scenarios](#)
- [Events](#)
- [Price lists](#)
- [Options](#)
- [Scope](#)
- [Validate plan](#)

About defining a Demand Plan

A demand plan is a group of parameters that defines both the inputs and outputs of the demand planning process as well as the dimensional levels along which the demand analysis is to occur.

Though each Demand Plan is defined for an organization, it is global and is not owned by that organization.

You can associate up to four User Dimensions with a Demand Plan. The remaining Demand Planning Dimensions can be collapsed into other User Dimensions. Although you cannot view more than four User Dimensions at one time, this collapsing allows you to toggle between them. For details about defining user dimensions, see: [Flexible Data Stream User Procedures](#) on page 3-3.

There may be situations where different units of measure exist for items within the same product family. This makes it extremely difficult to determine what the forecast should be at an aggregate level when there is no common unit of measure. The Base UOM field provides a method to change the units for all items within a higher level of aggregation to a common unit of measure as determined by the Demand Planning Administrator.

Procedure to define a Demand Plan

Each tab in the Demand Plans window will be discussed.

Dimensions

To define the demand plan dimensions and header level information:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Demand Plans.
3. If you have not previously indicated, then choose an organization.

The Demand Plans window appears.

Demand Plans (TST.M1)

Name: **adatst**
 Description: **adatst**
 Base UOM: **Ea**
 Status: **Valid**
☐ Calculate Dependent Demand

Lowest Time Levels
 Gregorian:
 Manufacturing: **Manufacturing Week**
 Fiscal: **Fiscal Month**
 Composite:

Dimensions | Input Parameters | Scenarios | Events | Price Lists | Express Setup | Options

Dimension	User Dimension
Sales Channel	Geography
Geography	Geography
Ship from Location	Ship from Location
Product	Product
Sales Representative	Geography
Time	Time

[DP Hierarchies](#)

[Copy To](#) [Validate Plan](#)

Use this window to define a Demand Plan. The bottom region of this form is used for collapsing the various demand planning dimensions to the user dimensions associated with this Demand Plan.

In this example, the name and description of the Demand Plan is M1-ODP-PLAN1. The base unit of measure is each. The lowest time level is day for the Gregorian and Manufacturing calendar types. Six demand planning dimensions are being collapsed into four user dimensions: sales channel, geography, and sales representative are being collapsed into the geography user dimension. Note that the other user dimensions product and time must always be included in a Demand Plan, and should not be collapsed with any other dimension.

If you want to calculate dependent demand based on organization specific model bills in a demand plan, it is mandatory to have a Ship From Location dimension in the demand plan, and no other dimension should be collapsed with it.

4. Complete the fields in the Demand Plans window as follows:

Field	Function	Legal Values
Name	Demand plan name	VARCHAR2(30)
Description	Detailed description for the demand plan	VARCHAR2(240)
Base UOM	The Demand Plan UOM is the unit of measure used for aggregating at higher levels above the item level in the product dimension. This field is not required, however, demand plan validation will fail if the UOM is not defined.	VARCHAR2(3)
Status	Shows the Demand Plan status. For details, see: Validate plan on page 7-34.	Invalid or valid
Calculate Dependent Demand	<p>If this is checked, it activates dependent demand forecast explosion process for a demand plan. This is a plan level control. Also, this is used to enable global forecasting.</p> <p>If this is not checked, then model bills of material, planning percentages, and dependent sales histories are not used by the Oracle Demand Planning Engine for that demand plan.</p> <p>For details, see: Planning Percentages on page 26-15.</p>	Checked or unchecked (default)
Explode Demand Using	<p>If you choose Organization Specific Bill of Material, the demand plan is created for an organization specific forecast, and Demand Planning uses the organization specific model bills.</p> <p>If you choose Global Bills of Material, you enable global forecasting. The system uses generic model bills from the item validation organization, and the forecast is exploded using organization's associated Item Validation Organization. Oracle Demand Planning calculates dependent demand (explode forecast) based on the global model bills of material. Calculating dependent demand based on global model bills is optional.</p>	Organization Specific Bill of Material (Default Value) or Global Bills of Material

Field	Function	Legal Values
Lowest Time Levels: Gregorian, Manufacturing, Fiscal, Composite	Shows the lowest level of time you want to track for the four available calendar types. For details, see: Lowest Time Levels for the demand plan on page 7-5.	Lookup Values: Gregorian: Year, Quarter, Month, and Day. Manufacturing: Period, Week, and Day. Fiscal: Year, Quarter, Month, and Day. Composite: Year, Quarter, Month, Week, and Day.
Dimension (tabbed region)	The Dimensions associated with this Demand Plan.	Lookup Values
User Dimension (tabbed region)	The collapsed Dimensions available for the Demand Plan.	Lookup Values

Lowest Time Levels for the demand plan

There are three types of seeded calendars available in Oracle Demand Planning: manufacturing, fiscal, and Gregorian. You can define your own Oracle Demand Planning specific custom calendar by using composite calendars. User defined composite calendars allow you to align weeks to months so that your manufacturing and fiscal reporting needs can be met by one calendar.

The Composite Calendar can be loaded in a time hierarchy via flat files. Loading the calendars means bringing the level values for the levels, such as Day, Manufacturing Week, Fiscal Month, Fiscal Quarter, and Fiscal Year, of time dimension.

The user can select one time bucket per calendar type for a demand plan as the lowest time level.

All the calendar types for which a lowest time level has been specified are used in Oracle Demand Planning . However, using more number of calendars in demand planning effects performance.

To select one time bucket per calendar type for a Demand Plan:

The List of values includes the time levels pertaining to the respective calendar type and not used. The default value is Day for the Gregorian calendar, and not used for all the other calendars.

1. Logon to the Demand Planning System Administrator responsibility.

2. In the Navigator, select Demand Plans.

The Demand Plans window appears.

3. Select the calendar type. Select Manufacturing Week for the Manufacturing calendar. Select Fiscal Month for the Fiscal calendar.

If you select day for any of the calendars, the lowest time level for all the other calendar types should also be day.

The Output Period Type, which is the bucket at which the Demand Planning Engine would upload the forecasts to the Demand Planning Server, for any demand plan scenario cannot be lower than the lowest time level selected for the demand plan. The list of values for Output Period Type is restricted to the calendar types for which the lowest time level has been selected.

Note: The Calendar selected here must be used for all scenarios created for this Demand Plan.

The demand planning input parameters are aggregated to the selected lowest time levels.

For example, assume that the input parameter, Booking History is available at the Day level and you select manufacturing week and fiscal month to be the lowest levels in the demand plan:

The manufacturing calendar time hierarchy will be displayed in the Demand Planning Engine as:

Manufacturing Week - Manufacturing Period - Year

The fiscal calendar time hierarchy will be displayed in the Demand Planning Engine as:

Fiscal Month - Fiscal Quarter - Fiscal Year

Booking History data will be displayed at the lowest time levels: Manufacturing Week of Manufacturing Calendar, and Fiscal Month of Fiscal Calendar and at all the higher levels in the time hierarchies.

When lowest time levels are higher than day and multiple time hierarchies (calendars) are included in a demand plan, it calls for a dynamic data translation. Only those days are made part of the time dimension, which are the end dates of an aggregate bucket period. Data at a time level that is lower than an aggregate bucket

level is moved to the end date of the aggregate bucket level. This leads to a minimal number of days at the lowest level. The user does not see the day level.

Data translation from one time hierarchy to another becomes a matter of aggregation and allocation. When only one calendar type is selected for a demand plan, all the data is translated to a single day. The leftover days will not be visible to the user and will be programmatically hidden.

Example 1

Assume that the following numbers are available in the Demand Planning Server. Also, assume the following levels: All products, All Geography, and All Organization. Booking History appears as:

Date	Quantity	Date	Quantity	Date	Quantity
30-Dec	200	11-Jan	200	23-Jan	200
31-Dec	300	12-Jan	200	24-Jan	200
1-Jan	200	13-Jan	200	25-Jan	200
2-Jan	300	14-Jan	200	26-Jan	200
3-Jan	300	15-Jan	200	27-Jan	200
4-Jan	100	16-Jan	200	28-Jan	200
5-Jan	200	17-Jan	200	29-Jan	200
6-Jan	200	18-Jan	200	30-Jan	200
7-Jan	200	19-Jan	200	31-Jan	200
8-Jan	200	20-Jan	200	1-Feb	200
9-Jan	200	21-Jan	200	2-Feb	100
10-Jan	200	22-Jan	200		

Assume that the lowest time level is selected as Fiscal Month for the Fiscal calendar type and Manufacturing Week for the Manufacturing calendar type. Also assume the definitions of the lowest time levels are:

Manufacturing Weeks (Manufacturing Calendar)	Fiscal Month (Fiscal Calendar)
Week N-1 (30 Dec 01-5 Jan 02)	Dec (1 Dec 01 - 31 Dec 01)
Week N (6-12 Jan 02)	Jan (1 Jan 02 - 31 Jan 02)

Manufacturing Weeks (Manufacturing Calendar)	Fiscal Month (Fiscal Calendar)
Week N+1 (13-19 Jan 02)	Feb (1 Feb 02 - 28 Feb 02)
Week N+2 (20-26 Jan 02)	
Week N+3 (27 Jan-02 Feb 02)	

In this scenario, the following days will be left and all other days will be removed:

Days left in the system	Quantity (assuming Sum aggregation method)
31 Dec 01	500
5 Jan 02	1100
12 Jan 02	1400
19 Jan 02	1400
26 Jan 02	1400
31 Jan 02	1000
02 Feb 02	300

The data will be displayed in monthly buckets of the fiscal calendar:

Fiscal Months (Fiscal Calendar)	Monthly Numbers
Dec 01	500
Jan 02	6300
Feb 02	300

The data will be displayed in weekly buckets of the manufacturing calendar:

Manufacturing Weeks (Manufacturing Calendar)	Weekly Numbers (adding daily quantities)
Week N-1 (30 Dec 01-5 Jan 02)	1600
Week N (6-12 Jan 02)	1400
Week N+1 (13-19 Jan 02)	1400
Week N+2 (20-26 Jan 02)	1400

Manufacturing Weeks (Manufacturing Calendar)	Weekly Numbers (adding daily quantities)
Week N+3 (27 Jan-02 Feb 02)	1300

Example 2

Now assume that the Jan 02 number (6300) is changed by the planner to 12600. This change will be reflected as:

Days left in the system	Quantity (assuming Sum aggregation method)
31 Dec 01	500
5 Jan 02	$12600 * 1100 / 6300 = 2200$
12 Jan 02	$12600 * 1400 / 6300 = 2800$
19 Jan 02	$12600 * 1400 / 6300 = 2800$
26 Jan 02	$12600 * 1400 / 6300 = 2800$
31 Jan 02	$12600 * 1000 / 6300 = 2000$
02 Feb 02	300

The data will be displayed as weekly buckets of the manufacturing calendar:

Manufacturing Weeks (Manufacturing Calendar)	Weekly Numbers (adding daily quantities)
Week N-1 (30 Dec 01-5 Jan 02)	2700
Week N (6-12 Jan 02)	2800
Week N+1 (13-19 Jan 02)	2800
Week N+2 (20-26 Jan 02)	2800
Week N+3 (27 Jan-02 Feb 02)	2300

The user may specify different aggregation and allocation methods for different data streams. The aggregation method will be respected when aggregating data to a higher time bucket.

Example 3

In the example above, if the aggregation method had been Average the data for the truncated days would have been:

Days left in the system	Quantity (assuming Average aggregation method)
31 Dec 01	250
5 Jan 02	220
12 Jan 02	200
19 Jan 02	200
26 Jan 02	200
31 Jan 02	200
02 Feb 02	150

In the case of a chaotic data stream or when aggregation or allocation is not allowed, the data will not be aggregated or allocated. The data from the plan level lowest time bucket upwards would be displayed. If all the data in a chaotic data stream are in buckets lower than the lowest time levels, this would result in the loss of all the data for that stream.

Note: For two calendars that are of the same type, the lowest level would be shared. It is a requirement that the lowest level be identical for calendars of the same type.

Now, the next step is to associate hierarchies with each dimension in the demand plan. At least one hierarchy needs to be assigned for each of the dimensions. For example, for the Product dimension, you can choose the Product Family hierarchy or the Product Category hierarchy or both.

Hierarchies

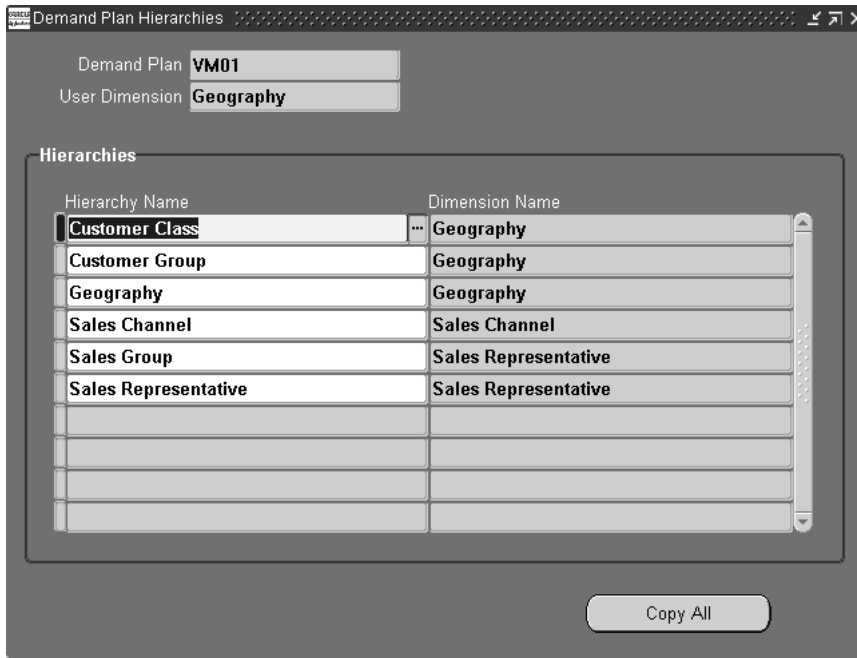
To define Demand Plan hierarchies:

1. Choose the Demand Plan System Administrator responsibility.
2. In the Navigator, choose Demand Plans.

The Demand Plan window appears.

3. Select DP Hierarchies.

The Demand Plan Hierarchies window appears.



4. Select hierarchy names for the dimension. Use this window to associate hierarchies with a Demand Plan. You can select only the hierarchies that belong to the demand planning dimensions that are collapsed into the user dimensions for this Demand Plan.

In this example, hierarchy names are being associated with the geography user dimension for the Demand Plan.

5. Complete the fields in the Demand Plan Hierarchies window as follows:

Field	Function	Legal Values
Demand Plan	Demand Plan Name.	VARCHAR2(30).
User Dimension	The User Dimension defined from the Demand Planning Dimensions for the Demand Plan.	From selected dimension in the Oracle Demand Planning window.
Hierarchy Name	Name of the Hierarchy.	List of Values.
Dimension Name	Demand Planning Dimension associated with the Hierarchy Name.	Populated automatically.

The time hierarchies (calendar types) for the demand plan are restricted by the selection of lowest time levels. Multiple calendars can be selected for each calendar type for which the lowest time level is not: Not Used. The system validation ensures that the definition of the lowest time level is same for all the selected calendars of the same type. For example, if the lowest time level for the manufacturing calendar type is Manufacturing Week, two calendars for the San Jose Organization and the Seattle Organization are selected as time hierarchies, and week 1 in San Jose Organization calendar is 1 Jan 02 to 7 Jan 02, then week 1 in Seattle Organization calendar should be from 1 Jan 02 to 7 Jan 02.

In Oracle Demand Planning, every enabled organization can have its own calendar. You can select to allocate data by workday patterns in the organization’s calendar. You can use the Workday Allocation Weights data stream to store daily allocation weights based on workday patterns of organizations. For details, see: [Input Parameters](#) on page 7-12 and [To collect Calendars associated to Organizations:](#) on page 4-15.

Input Parameters

Input Parameters determine the data that will be imported into Demand Planning Engine for creating and analyzing forecasts. Multiple inputs can be specified and used in different scenarios. The following input parameters are preseeded data streams:

Input Parameter	Description
Manufacturing forecast	<p>This data stream allows you to use the manufacturing forecast as a reference forecast for comparing to your statistical forecast. If a manufacturing forecast has been defined in the source in weekly buckets for a date range, the data is expanded to all the weeks in that date range by expanding the single row of data into multiple rows.</p> <p>This stream has its allocation set to Stream Dimension Levels. If you want to change the allocation floor to the lowest dimension level to allocate the data to a level lower than the data read-in levels, you should specify some other data stream as a basis for allocation.</p>
Booking history - booked items	This data stream captures the sales history of items, which were actually booked (by substitution or directly). For details, see: <i>Oracle Advanced Planning and Scheduling Implementation and User's Guide</i> .
Booking history	This data stream allows planners to capture the actual historical demand of items that were originally requested by the customer, regardless of whether they were substituted with another end item.
Shipment history - shipped items	This data stream captures the sales history of items, which were actually shipped. For details, see: <i>Oracle Advanced Planning and Scheduling Implementation and User's Guide</i> .
Shipment history	This data stream allows planners to capture the actual historical demand of items that were originally requested by the customer, regardless of whether they were substituted with another end item.
Sales opportunities	This data stream shows the sales opportunity data. For details, see: Using Sales Forecasts and Opportunities on page 26-36.
Constrained forecast	<p>In conjunction with supply plan, this data stream allow users to compare a unconstrained forecast to a constrained forecast. The constrained forecast represents a total picture of the satisfied demand, including sales orders that represent the portion of predicted demand that has already been realized, the consumed forecast that has been constrained, and the constrained estimate of shipments.</p> <p>The demand forecasts generated in Oracle Demand Planning are unconstrained, meaning the capacity constraints are not considered. The unconstrained demand forecasts are sent to Oracle Advanced Supply Chain Planning from where the resulting supply plan, constrained by material and resource availability, are sent back to Oracle Demand Planning for comparison. The comparative analysis feature enables planners to plan promotions and allocate demand across multiple organizations.</p> <p>To use this parameter, Oracle Demand Planning users must have access to Oracle Advanced Supply Chain Planning because the constrained forecasts are created there. Also, this data stream has its allocation set to Stream Dimension Levels. If you want to change the allocation floor to the lowest dimension level, you should specify some other data stream as a basis for allocation. For details, see: <i>Oracle Advanced Planning and Scheduling Implementation and User's Guide</i>.</p>

Input Parameter	Description
Supply plan	In conjunction with constrained forecast, this data stream allows users to compare a unconstrained forecast to a supply plan. The supply plan represents the planned production to be compared to the forecast or planned demand. For details, see the description of the Constrained Forecast data stream (above).
Sales forecast - best case	This data stream provides a summary sales forecast. The best case sales forecast considers all the sales opportunities as 100% likely to close. For details, see: <i>Oracle Sales Online User's Guide</i> and Using Sales Forecasts and Opportunities on page 26-36.
Sales forecast - worst case	This data stream provides a summary sales forecast. The worst case sales forecast considers only the closed opportunities. For details, see: <i>Oracle Sales Online User's Guide</i> and Using Sales Forecasts and Opportunities on page 26-36.
Sales forecast - probable case	This data stream provides a summary sales forecast. The probable case sales forecast is a weighted calculation based on the open opportunities and their win probability. For details, see: <i>Oracle Sales Online User's Guide</i> and Using Sales Forecasts and Opportunities on page 26-36.
Sales forecast - pipeline	This data stream provides an aggregated total opportunity forecast using Sales Opportunity data collected into Oracle Demand Planning from Oracle Sales Online. The pipeline is the sum of all line items for an opportunity. For details, see: <i>Oracle Sales Online User's Guide</i> and Using Sales Forecasts and Opportunities on page 26-36.
Sales forecast - weighted pipeline	This data stream provides an aggregated opportunity forecast using Sales Opportunity data collected into Oracle Demand Planning from Oracle Sales Online. The weighted pipeline is the sum of the line items multiplied by the win probabilities. For details, see: <i>Oracle Sales Online User's Guide</i> and Using Sales Forecasts and Opportunities on page 26-36.
Sales forecast from customers	This data stream enables collaborative demand planning. The customer's sales forecasts are brought into Oracle Demand Planning via Oracle Collaborative Planning. Then the sales forecasts are compared to the Oracle Demand Planning forecasts to arrive at the final forecasts calculations that are used in planning operations. For details, see: <i>Oracle Collaborative Planning Online Help</i> .
Order forecast from customers	This data stream enables collaborative demand planning. The customer's order forecasts are brought into Oracle Demand Planning via Oracle Collaborative Planning. Then the order forecasts are compared to the Oracle Demand Planning forecasts to arrive at the final forecasts calculations that are used in planning operations. For details, see: <i>Oracle Collaborative Planning Online Help</i> .
Input scenarios	This data stream allows you to use the previous period forecasts from the same or different demand plan. It has its allocation set to Stream Dimension Levels. If you want to change the allocation floor to the lowest dimension level to allocate the data to levels lower than the data read-in levels, you should specify some other data stream as a basis for allocation.

Input Parameter	Description
Workday Allocation Weights	This data stream is used to specify different daily allocation weights for different organizations based on their workday patterns. The appropriate allocation weights are automatically populated in this data stream on the basis of the manufacturing calendars associated to the different organizations enabled in Oracle Demand Planning. For details, see: Lowest Time Levels for the demand plan on page 7-5.
Order Backlog	This data stream brings in backlog sales order amount and quantity data at the various dimension levels. The orders can be collected in an additive manner from Oracle Order Management. For details, see: To collect Order Backlog data : on page 4-5.
Material Requirements - Planned Maintenance	This data stream collects the material demand for routine maintenance from a unit maintenance plan in Oracle Complex Maintenance, Repair, and Overhaul. For details, see: To collect Material Requirements for Planned Maintenance : on page 4-21.
Material Requirements - Scheduled Visits	This data stream provides information on materials needed for a scheduled maintenance visit. For details, see: To collect Material Requirements for Scheduled Visits : on page 4-21.
Material Usage History - Planned Maintenance	This data stream collects historical material consumption associated with routine maintenance, and is used as a reference for comparisons. For details, see: To collect Material Usage History for Planned Maintenance : on page 4-22.
Material Usage History - Unplanned Maintenance	This data stream collects historical consumption of unplanned material associated with non-routine maintenance, and is used to forecast the material requirements for future non-routine maintenance. For details, see: To collect Material Usage History for Unplanned Maintenance : on page 4-20.
Service Parts - Return History	This data stream collects return history on defective service parts. For details, see: To collect Service Parts Returns History : on page 4-25.
Service Parts - Usage History	This data stream collects the consumption history of service parts from Oracle Field Service. For details, see: To collect Material Usage History for Planned Maintenance : on page 4-22.
Return History	This data stream collects model return histories. For details, see: To collect Return History : on page 4-26.

In addition, users can define any custom data stream and use it as an input parameter. For details, see: [About Flexible Data Streams](#) on page 3-2.

The following table specifies the dimension levels at which the data is read-in for each seeded data stream. Some dimension levels in some of the data streams are kept flexible in which case the data can be read-in at any one dimension level.

To view this information, go to Setup > Data Streams > Defined - Advanced > Define Dimension and Levels window.

Seeded Data Stream	Dimension	Level
Manufacturing forecast	Geography Product Sales Channel Ship from Location Time	Ship To Location Item Sales Channel Organization Flexible
Booking history - booked items	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day
Booking history - requested items	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day
Shipment history - shipped items	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day
Shipment history - requested items	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day

Seeded Data Stream	Dimension	Level
Sales opportunities	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day
Constrained forecast	Geography Product Ship from Location Time	Customer Item Organization Day
Supply plan	Geography Product Ship from Location Time	All Geography Item Organization Day
Sales forecast - best case	Geography Product Sales Channel Sales Representative Ship from Location Time	Flexible Flexible All Sales Channel All Sales Rep All Organization Flexible
Sales forecast - worst case	Geography Product Sales Channel Sales Representative Ship from Location Time	Flexible Flexible All Sales Channel All Sales Rep All Organization Flexible

Seeded Data Stream	Dimension	Level
Sales forecast - probable case	Geography Product Sales Channel Sales Representative Ship from Location Time	Flexible Flexible All Sales Channel All Sales Rep All Organization Flexible
Sales forecast - pipeline	Geography Product Sales Channel Sales Representative Ship from Location Time	Flexible Flexible All Sales Channel All Sales Rep All Organization Flexible
Sales forecast - weighted pipeline	Geography Product Sales Channel Sales Representative Ship from Location Time	Flexible Flexible All Sales Channel All Sales Rep All Organization Flexible
Customer sales forecast	Geography Product Ship from Location Time	Ship To Item Organization Day
Customer order forecast	Geography Product Ship from Location Time	Ship To Item Organization Day

Seeded Data Stream	Dimension	Level
Input scenarios	Geography Product Sales Channel Sales Representative Ship from Location Time	Scenario output level Scenario output level Scenario output level Scenario output level Scenario output level Scenario output level
Workday Allocation Weights	Ship from Location Time	Organization Day
Order Backlog	Geography Product Sales Channel Sales Representative Ship from Location Time	Ship To Location Item Sales Channel Sales Rep Organization Day
Material Requirements - Planned Maintenance	Product Ship from Location Time	Item All Organizations Day
Material Requirements - Scheduled Visits	Product Ship from Location Time	Item Organization Day
Material Usage History - Planned Maintenance	Product Ship from Location Time	Item Organization Day
Material Usage History - Unplanned Maintenance	Product Ship from Location Time	Item Organization Day
Service Parts - Return History	Product	Item
Service Parts - Usage History	Product	Item

Seeded Data Stream	Dimension	Level
Return History	Product	Item
	Sales Channel	Sales Channel
	Sales Representative	Sales Rep
	Ship from Location	Organization
	Time	Day

To define Input Parameters:

- 1. Choose the Demand Planning System Administrator responsibility.
- 2. In the Navigator, choose Demand Plans.
The Demand Plans window appears.
- 3. In the Demand Plans window, select the Input Parameters tab.
The Input Parameters window appears. You can specify a historical or future date range depending on the type of input parameter that needs to be uploaded into Demand Planning Engine.

Demand Plans (TST-M1)

Name: **adatst**
 Description: **adatst**
 Base UOM: **Ea**
 Status: **Invalid**
☐ Calculate Dependent Demand

Lowest Time Levels
 Gregorian:
 Manufacturing: **Manufacturing Week**
 Fiscal: **Fiscal Month**
 Composite:

Dimensions | **Input Parameters** | Scenarios | Events | Price Lists | Express Setup | Options

Type	Name	Forecast by	Start Date	End Date
Booking History - Booked		Booked Date	01-SEP-2002	31-DEC-2002

Copy To **Validate Plan**

4. Complete the fields in the Input Parameters window as follows:

Field	Function	Legal Values
Type	Type of Input Parameter.	List of Values show all the preseeded and custom data streams.
Name	Name of the input parameter. For example, forecast name for the input manufacturing forecast, or the forecast name for the input scenario.	VARCHAR2(240).

Field	Function	Legal Values
Forecast by	If there are multiple dates in the input parameter, select which one should be used. This is especially relevant for Booking History and Shipment History input parameters.	All types of dates available for an input parameter. For example, Booking History has four dates: 1. Booked Date, 2. Shipped Date, 3. Requested Date, and 4. Promised Date.
Start Date	Start Date for the Input Parameter.	DATE.
End Date	End Date for the Input Parameter.	DATE.
Input Demand Plan Name	Applicable for input scenarios only when a forecast from some other demand plan is fed to this demand plan.	The value that appears is based on what you select for the parameter name.
Input Scenario Name	Applicable for input scenarios only when a forecast based on some other scenario is fed to this demand plan.	The value that appears is based on what you select for the parameter name.
Quantity Used	If there are multiple quantities in the input parameter, select which one should be used. This is especially relevant for the input manufacturing forecast.	The list of values for the input manufacturing forecast are: 1. Original Quantity and 2. Current Quantity.
Amount Used	If there are multiple amounts in the input parameter, select which one should be used.	If an input parameter has several amounts, all the values show up in the list of values. No seeded data stream has multiple amounts.
Forecast Used	This is specific only to the Input Scenario Name. This field is not used any more, and all the forecasts are treated as an Overridden forecast.	Lookup Values: 1 = Overridden Forecast and 2 = Baseline Forecast.
View Name	This is an optional field for all the Input Parameters you can use to write your own view to filter and group the fact data so that only the relevant information is uploaded into the Demand Planning Engine. However, the View Name that you enter must have view structure similar to MSD_CS_DATA_V column. For details about the list of columns for MSD_CS_DATA_V, see: Control file stcsdata.ctl . on page 3-22.	VARCHAR2(30). For custom fact views, the format should be similar to CS_DATA_V.
Allocation / Aggregation Stream Type, Name, and Period	These three fields are used to specify some other data stream as a basis of aggregation or allocation of data for the input parameter. Period is applicable for Average Weights allocation function.	If the input parameter has been so specified as to base the allocation and aggregation values on another data stream, all the data streams show up in the list of values. For details, see: About Flexible Data Streams on page 3-2.

Field	Function	Legal Values
Exclude from Rolling Cycle	<p>Differentiates static from dynamic input parameters. Dynamic input parameters refer to those data streams, which roll forward every cycle. Static input parameters refer to those data streams, which do not change from one cycle to another in a prespecified manner.</p> <p>If checked, the demand plan dates are not be rolled forward for the corresponding input parameter and scenario based on the selected input parameter.</p> <p>If not checked and the "Roll demand plan dates forward to the next cycle" concurrent program is run, the following happens:</p> <ul style="list-style-type: none">■ Start and End date for input parameters are rolled forward by the specified number of periods.■ History and horizon dates for the corresponding scenarios are rolled forward by the specified number of periods. <p>The demand plan and scenario names are retained, and only the forecast name (input scenarios is switched) is changed to the latest forecast version. For details, see: Automating the Planning Cycle on page 8-16.</p>	Checked or unchecked (default)

5. Save the demand plan.

Scenarios

Scenarios represent forecasts with a set of forecasting assumptions, such as 5% economic growth, a certain set of new product introductions, or the implementation of a promotion campaign. A Demand Plan can contain multiple scenarios for what-if simulations.

The output level of the scenario should reflect the level of detail required by the customer of your forecast.

To define Demand Plan scenarios:

1. Choose the Demand Plan System Administrator responsibility.

2. In the Navigator, choose Demand Plans.
The Demand Plans window appears.
3. In the Demand Plans window, select the Scenarios tab.
The Demand Plan Scenarios window appears.

Demand Plans (TST:M1)

Name: **adatst**

Description: **adatst**

Base UOM: **Ea**

Status: **Invalid**

☐ Calculate Dependent Demand

Lowest Time Levels

Gregorian:

Manufacturing: **Manufacturing Week**

Fiscal: **Fiscal Month**

Composite:

Dimensions | Input Parameters | **Scenarios** | Events | Price Lists | Express Setup | Options

Name	Description	Forecast Based on	Forecast Period Type	Output Per
s2_BookingHistory	Booking History for s2	Booking History - Bo	Booked Date	Day

Events | Output Levels

Copy To | Validate Plan

Use this window to define scenarios for a Demand Plan. Specify the following:

- A scenario name,
- The time level at which the forecast needs to be published back from Demand Planning Engine to the Planning Server,
- The forecast horizon that is the time frame in which the forecast for this scenario needs to be generated,

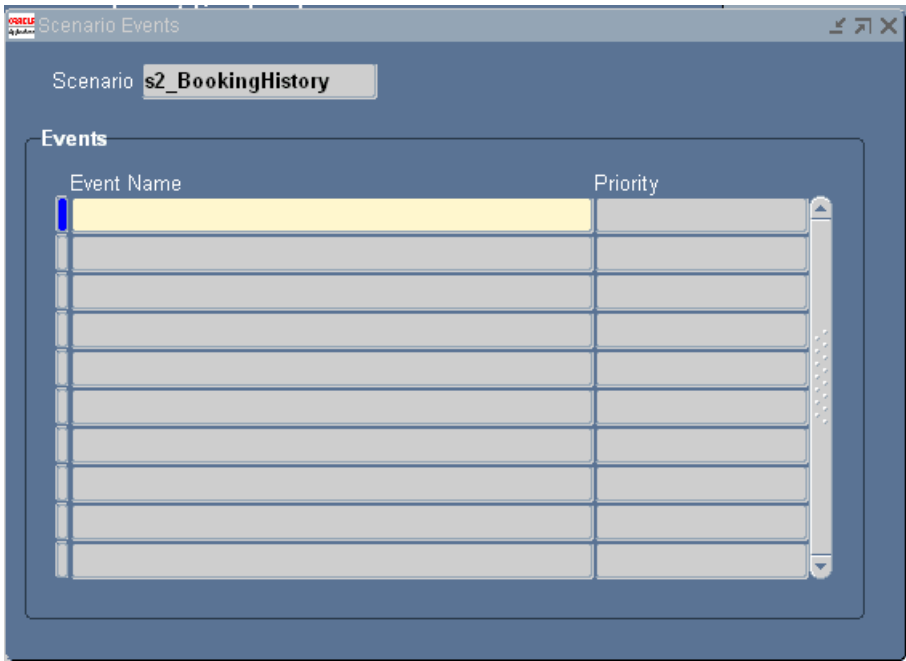
- Information about the type of history to be used for generating the forecast, and
- The type of accuracy measure to be published with the forecast for this scenario from the Demand Planning Engine to the Demand Planning Server.

4. Complete the fields in the Scenarios window as follows:

Field	Function	Legal Values
Name	Scenario Name.	VARCHAR2(30).
Description	Detailed Description for the Scenario.	VARCHAR2(240).
Forecast Based On	The input parameter used to generate the forecast for this Scenario.	All the input parameters that have been defined earlier show up as list of values.
Forecast Period Type	This is the date used to generate the forecast for this Scenario.	View only. This shows the date type selected for the input parameter selected in the Forecast Based On field.
Output Period Type	The Time Level at which the Scenario will be published back from the Planning Engine to the Server.	Lookup Values, depending on the demand plan calendars and the lowest time levels.
History Start Date	The Start Date of the historical data used for forecasting.	DATE.
History End Date	The End Date of the historical data used for forecasting.	DATE.
Horizon Start	The Start Date for the forecast for this Scenario.	DATE.
Horizon End	The End Date for the forecast for this Scenario.	DATE.
Price List	Any one price list can be selected for a scenario. You can simulate future revenue on the basis of different price lists.	All the price lists that were brought into Oracle Demand Planning appear in the list of values.
Accuracy Measure	Choose between two calculations of forecast accuracy. The calculations are displayed at the level where the forecast is generated in the Demand Planning Engine.	Lookup Values: MAD = mean absolute deviation, MAPE = mean absolute percentage error, and none.
Consume in Supply Plan	Select if the forecast should be consumed in Oracle Advanced Supply Chain Planning.	Unchecked or checked (default).

Field	Function	Legal Values
Publish	If checked, this option indicates that the scenario will be published back to the planning server.	Unchecked or checked (default). The demand plan is accordingly validated later.
Enable	If checked, this option indicates that the scenario will be visible to Demand Planning Engine.	Unchecked or checked (default). This must be checked to see the forecast for this scenario in the Demand Planning Engine.

5. Open the Scenario Events window by selecting Events from the Demand Plan Scenario window.

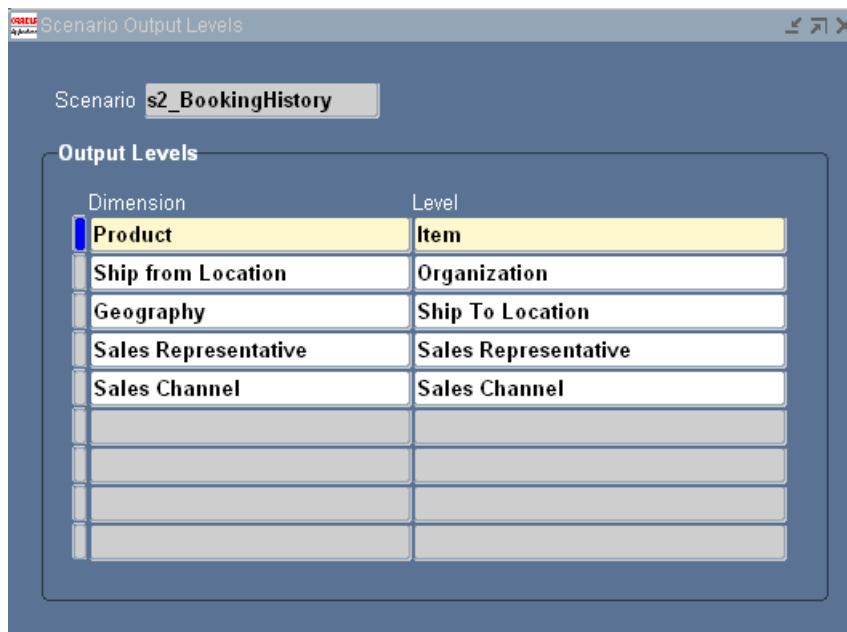


6. Complete the fields in the Scenario Events window as follows:

Field	Function	Legal Values
Scenario	Scenario Name	Lookup Values. This changes depending on what you selected in the Demand Plan Scenarios window.
Event Name	Demand Planning Event	Lookup Values.
Priority	User assigned	Number

- Open the Scenario Output Levels window by selecting Output Levels from the Demand Plan Scenario window.

Use this window to define the various levels in the Demand Planning Dimensions at which the forecast for this scenario is to be published from Demand Planning Engine to the Planning Server, except for the time dimension.



Level Item in the Product Dimension, Level Organization in the Ship from Location Dimension, Level Region in the Geography Dimension, and Level Sales Channel in the Sales Channel Dimension will be the level of detail published back to the Planning Server for Scenario 1.

8. Complete the fields in the Scenario Output Levels window as follows:

Field	Function	Legal Values
Scenario	Scenario Name	Lookup Values. This changes depending on what you selected in the Demand Plan Scenarios window.
Dimension	Demand Planning Dimension	Lookup Values.
Level	The Level associated to the Demand Planning Dimension at which the Scenario will be published back from the Planning Engine to the Server.	Lookup Values.

A scenario will be available to Oracle Advanced Supply Chain Planning only if Output Levels are as follows:

Dimension	Mandatory	Dimension Levels
Time	Yes	Day, Manufacturing Week, or Manufacturing Period
Product	Yes	Item or Product Family
Ship From Location	Yes, for Organization	Specific forecasts
Organization	No, for Global Forecasts	Organization or All organization, if included in demand plan
Geography	No	Ship To Location, Customer, Customer Zone, Zone, or All Geography, if include in demand plan

Events

Events, such as promotions, new product introductions, and product phase outs can be defined in the Demand Planning Server. For details, see: [About Events](#) on page 6-2. The events so defined can be associated with a demand plan in two ways:

- From Events in the Demand Plan window, Scenarios tab. The events associated in this manner are applied to the forecast of the corresponding scenario. For details, see: [Events](#) on page 7-28.
- From the Events tab on the Demand Plan Window. The events so associated to a demand plan are not applicable for a specific forecast scenario but appear as independent entities in Demand Planning Engine. A Demand Planning Administrator, Demand Planner, or Demand Plan Manager working in the

Demand Planning Engine may later apply one or more of these events to any measure.

To associate events with Demand Plans:

1. Choose the Demand Plan System Administrator responsibility.

2. In the Navigator, select Demand Plans.

The Demand Plans window appears.

3. In the Demand Plans window, select the Events tab.

The Events window appears.

Demand Plans (TST.M1)

Name:

Description:

Base UOM:

Status:

☐ Calculate Dependent Demand

Lowest Time Levels

Gregorian:

Manufacturing:

Fiscal:

Composite:

Dimensions | Input Parameters | Scenarios | **Events** | Price Lists | Express Setup | Options

Event Name

DPS Phaseout 1
DPS Promo 5

4. Select any number of events.

Price lists

Price lists are defined in the source instance and are brought over to the Demand Planning Server using the collection programs that are provided in Oracle Demand Planning. These price lists can be associated to a demand plan in two ways:

- In the Price List field from the Scenarios tab by selecting from a list of the available price lists. The price list so associated is applied to the forecast of the corresponding scenario.
- From the Price Lists tab on the Demand Plan Window. The price lists so associated to a demand plan are not applicable for a specific forecast scenario but appear as independent entities in Demand Planning Engine. The Demand Planning Administrator on the Demand Planning Engine side may later apply any one of these price lists to any forecast.

To associate price lists with a Demand Plan:

1. Choose the Demand Plan System Administrator responsibility.
2. In the Navigator, select Demand Plans.
The Demand Plans window appears.
3. In the Demand Plans window, choose the Price Lists tab.
The Price lists window appears.

Oracle Demand Plans (TST:M1)

Name: **adatst**
 Description: **adatst**
 Base UOM: **Ea**
 Status: **Invalid**
☐ Calculate Dependent Demand

Lowest Time Levels
 Gregorian:
 Manufacturing: **Manufacturing Week**
 Fiscal: **Fiscal Month**
 Composite:

Dimensions | Input Parameters | Scenarios | Events | **Price Lists** | Express Setup | Options

Price List Name

Formula Price List
Corporate

4. Select any number of price lists.

Options

Both quantity and amount forecast data can be uploaded from Oracle Demand Planning to the planning server for use by other Oracle applications. Oracle Demand Planning provides a threshold rounding value that can be defined in the demand plan definition form Options tab. The Demand Planning Engine does not writeback any forecast values that fall below the threshold rounding value.

You also specify the number of decimal places that you want the data to be rounded off to during the upload process.

Your specifications serve as the default display formatting settings in the Demand Planning Engine. By default, the system sets the threshold value to be 0.5 and the decimal round off factor to be 6 decimal places.

For details about display formatting, see:[Editing Measures](#) on page 17-40.

To specify Rounding Control parameters:

- 1. Choose the Demand Plan System Administrator responsibility.
- 2. In the Navigator, choose Demand Plans.
The Demand Plans window appears.
- 3. In the Demand Plans window, select the Options tab.
The Options window appears.

Demand Plans (TST.M1)

Name: **adatst**
Description: **adatst**
Base UOM: **Ea**
Status: **Invalid**
☐ Calculate Dependent Demand

Lowest Time Levels
Gregorian:
Manufacturing: **Manufacturing Week**
Fiscal: **Fiscal Month**
Composite:

Dimensions | Input Parameters | Scenarios | Events | Price Lists | Express Setup | **Options**

EAD Name: **ExpSrv634_patch1**
Express Port: **olapsun17.us.oracle.com:9999**
Code Location: **/d2/patchi/olap/odp100/service**
Shared DB Prefix: **ADATST**
Shared DB Location: **/d3/plans/adatst**
OWA Virtual Path: **owa-bin/xsoowaroas_apsqa115**
Express Connect String: **server=ora_ro_tcp:olapsun17.us.oracle.com[12296]/si=0/st=1/ct=0/sv=**

4. Complete the following in the Output Precision section:
 - From Apply the threshold to drop-down, select Quantity or Amount.
 - In Do not publish numbers below the threshold field, enter the threshold value.
 - Enter the decimal places value in the Quantity and/or Amount fields of the Number of decimal places to round outputs to.
5. Complete the following in the Rounding Rule section:
 - In the Cumulate fractional quantities within a product dimension level field, select the product dimension level within which the fractional quantities will be cumulated for rounding rule for the demand plan. The dropdown list of values varies depending on the product hierarchies included in the demand plan.

Scope

You can specify the scope of a demand plan by restricting by the line of business. The demand plan is scoped by a level value in the ship from location dimension or product dimension. The levels and level values that available for selection are independent of the product or organization dimensions/hierarchies included in the demand plan.

You can also specify the scope of a demand plan by restricting to items based on the data stream. The demand plan is scoped by items in a data stream. The data streams that available for selection are not limited to those which are included as demand plan input parameters.

For details about lines of business specific demand plans, see: [Line of Business Specific Demand Plans](#) on page 26-52.

To specify demand scope:

1. Choose the Demand Plan System Administrator responsibility.
2. In the Navigator, choose Demand Plans.
The Demand Plans window appears.
3. In the Demand Plans window, select the Scope tab.
The Scope window appears.

Demand Plans (TST:M1)

Name

M1-ODP-PLAN1

Description

Demand Plan 1

Base UOM

Ea

Status

Invalid

☐ Calculate Dependent Demand

Explode Demand Using

Lowest Time Levels

Gregorian

Day

Manufacturing

Fiscal

Composite

Dimensions

Input Parameters

Scenarios

Events

Price Lists

Options

Scope

Level

Level Value

Restrict by Line of Business

Product Family

Stream

Designator

Restrict to Items Based on Stream

Copy To

Validate Plan

Validate plan

You must validate a Demand Plan to ensure that it has been correctly defined. The plan validation process looks at the Dimensions, Hierarchies, Output levels, and other information that you have specified for the Demand Plan. Of special interest is the validation for the output levels, which are the levels at which the forecasts are uploaded to the Demand Planning Server from Demand Planning Engine. If the Publishable check box has been checked (inferring that the forecasts will ultimately be published back to the source instance) on the Input Parameters tab in the Demand Plans window, the validation process ensures the output levels to be:

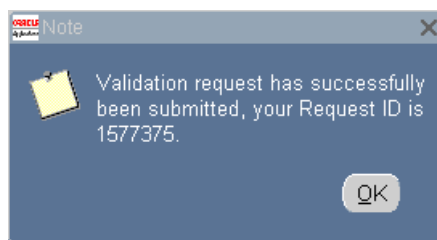
7-34 Oracle Demand Planning Implementation and User's Guide

- Day for the Time Dimension, if Gregorian or Fiscal Calendars are used in Oracle Demand Planning. This restriction does not apply to the Manufacturing Calendar, for which all the levels are allowed.
- Organization for the Ship From Location Dimension.
- Product or Product Family for the Product Dimension.

However, if the Publishable check box is not checked, the validation process only ensures that the output levels have been defined for all the Demand Plan Dimensions. It is suggested to revalidate the demand plans after collecting fresh data.

To validate a Demand Plan:

1. Choose the Demand Plan System Administrator responsibility.
2. In the Navigator, select Demand Plans.
The Demand Plans window appears.
3. In the Demand Plans window, select Validate Plan.
A concurrent request is submitted.



The concurrent request outcome can be checked as described in [About Data Validation](#) on page 5-2.

Demand Planning Administration

This section describes how to build a new demand plan, run the stages of the Demand Planning forecasting cycle, renew the forecasting cycle, and purge the data in the Demand Planning Server.

The section includes the following topics:

- [Building a New Demand Plan](#)
- [About the Stages in the Planning Cycle](#)
- [Downloading Data from the Planning Server \(Stage 1\)](#)
- [Populating Measures \(Stage 2\)](#)
- [Distributing to Planners \(Stage 3\)](#)
- [Collecting Data from Planners \(Stage 4\)](#)
- [Uploading Measures to the Planning Server \(Stage 5\)](#)
- [Automating the Planning Cycle](#)
- [Viewing the Batch Log](#)
- [Publishing Forecast Data Back to the Source](#)
- [Renewing the Forecasting Cycle](#)

Building a New Demand Plan

Once a demand plan has been defined in the Demand Planning Server, you build the demand plan in the Demand Planning Engine.

Building a new demand plan means:

- The Demand Planning shared Express databases are created.
- Data for dimensions and measures specified in the Planning Server is downloaded from the Demand Planning Server database to the shared database.

To build a new demand plan:

1. Log into Oracle Demand Planning.
2. Select the Demand Planning System Administrator responsibility.
3. In the Navigator, select Demand Plan Administration. A list of demand plans appears.
4. Select the demand plan that you want to work with, scroll to the bottom of the page, and click Start Demand Planning. The Connect to Planning Server page appears.
5. Provide the following login information:
 - a. In the User ID box, enter your ID for the Oracle Application Objects Library (AOL) schema.
 - b. In the Password box, enter your password for the Oracle Application Objects Library (AOL) schema.
 - c. In the Connect String box, enter the connection string.

The connection string is an alias that accesses the required connection information in the `tnsnames.ora` file for the current Oracle Home. This connection information enables Demand Planning to locate and access the Oracle database instance.

Note: For more information, see your system administrator.

6. Click the Login button.

Result: All of the information that you entered in the Connect to Planning Server page is stored in Express Server so that you do not have to enter it again.

The Demand Planning databases are built and a download of data from the Demand Planning Server to these databases is initiated. A message appears on the screen to inform you that the download is taking place.

You will receive a notification when the download is complete. When you next access the Demand Planning Administrator page, the status for Download Data from Planning Server will be set to COMPLETE.

About the Stages in the Planning Cycle

Once a demand plan has been built, you use Demand Plan Administration to run the following stages in the planning cycle:

- **Download Data from Planning Server (Stage 1):** For an existing demand plan, downloads data from the Demand Planning Server to the shared database. You can run a full download or a quick download.
- **Populate Measures (Stage 2):** Calculates measures in the shared database.
- **Distribute to Planners (Stage 3):** Distributes data in the shared database to authorized individuals who log in with the Demand Planner responsibility. You can distribute all data or a subset of data.
- **Collect Data from Planners (Stage 4):** Collects and consolidates the forecasts that planners have submitted to the shared database.
- **Upload Measures to Planning Server (Stage 5):** Transfers data from the shared database to the Demand Planning Server.

If you maintain multiple demand plans, you can run stages concurrently.

Note: If any of these processes fail while its status is perceived as running, the system detects the failure to complete. The failed process is stopped and the system is automatically set back to the last successfully completed process. You can resume the failed process without any technical intervention. There is no change in setups or user procedure and you are not required to do anything for this to take effect.

Demand Plan Administration interface for running stages in the planning cycle

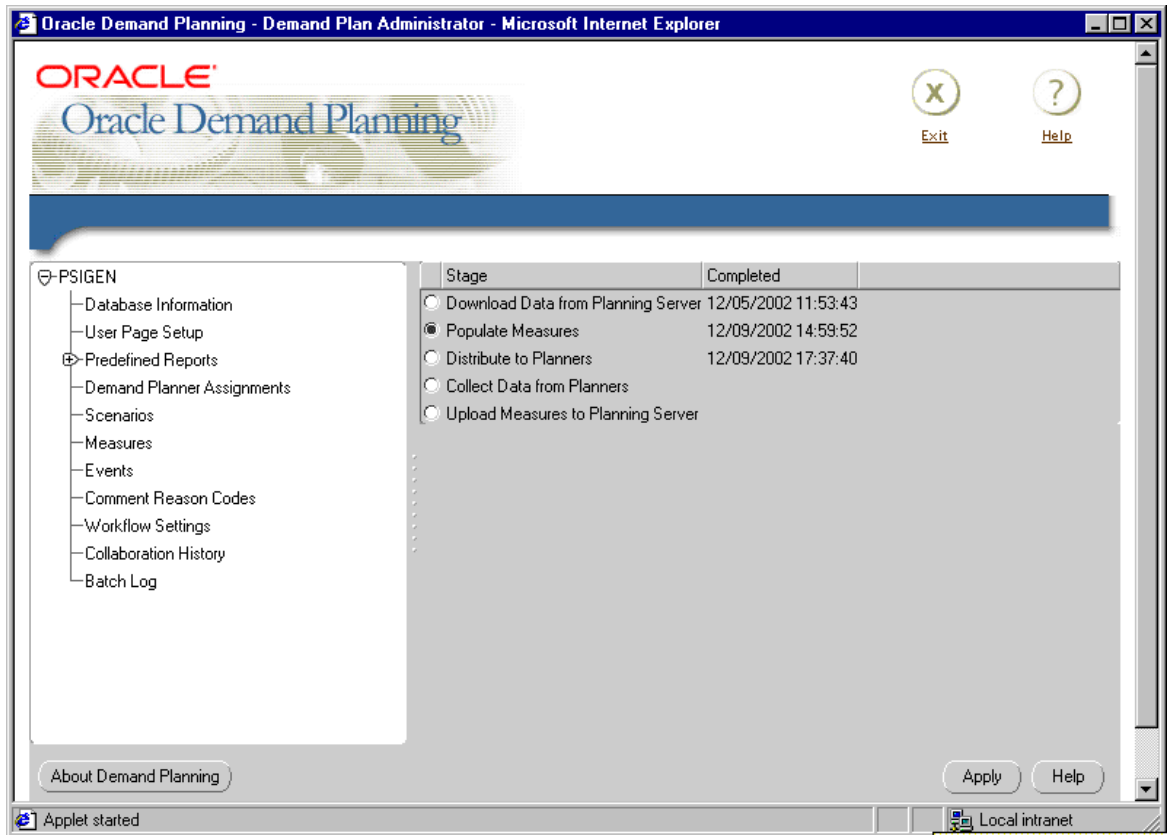
The Demand Planning Administrator page is the interface for running the stages of the planning cycle.

To access the Demand Planning Administrator page:

1. Log into Oracle Demand Planning.
2. Select the Demand Planning System Administrator responsibility,
3. In the Navigator, choose Demand Plan Administration. A list of demand plans appears.
4. Select the demand plan that you want to work with, scroll to the bottom of the page, and choose Start Demand Planning. The Demand Planning Administrator page for the plan opens.

Example 4 Demand Planning Administrator page

The following example shows the Demand Planning Administrator page for the “PSIGEN” demand plan.



Getting help

To view information that is specific to the current page, choose the Help button at the bottom of the page.

To access the full Oracle Demand Planning online Help system for Demand Plan Administration, choose the large Help (?) button at the top of the page.

You can use your browser's print function to print Help topics.

To close an open Help window, choose the Exit (X) button at the top of the page. You will be returned to the current function.

Getting version and system information

To access version and system information, choose About Demand Planning at the bottom left of the page.

Downloading Data from the Planning Server (Stage 1)

After a demand plan has been built, you run the Download Data from Planning Server stage to initiate a new planning cycle. The download stage transfers data from the Demand Planning Server to the shared database in the Demand Planning Engine. You can choose to download all input parameters, or you can limit the download to specific parameters. You can also specify whether to download only new and modified information, or to replace the information in the shared database with current information from the Demand Planning Server.

Note: During the download process, demand plans that have all four calendars will have slow performance.

To run Download Data from Planning Server:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose the demand plan name. A list of the stages in the planning cycle appears in the right frame.
3. In the Stage column, choose Download Data from Planning Server.
4. In the Download Method box, choose the method that you want to use to download data from the Demand Planning Server to the shared database:
 - Full: Downloads all information. Use this method when you know that there have been changes in the Demand Planning Server that extend beyond fact data. For example, you would run a full download to get the most recent prices, events, level values, and so forth.
 - Quick: Downloads all or selected fact data from the Demand Planning Server. Use this method for routine downloads or when one or more streams have updated fact data needed for this cycle.

Note: When you run a full download, planners' personal databases are not preserved.

5. If you chose Quick in Step 4, select the input parameters to download:
 - To include an input parameter in the download, check its Download box.
 - To exclude an input parameter from the download, clear its Download box.
6. In the Refresh Mode box, choose the method that you want to use to refresh data when it is downloaded from the Demand Planning Server:
 - Update: Downloads only new and modified information (incremental refresh based on net change). Use this method for routine downloads.
 - Complete Refresh: Replaces the information in the shared database with the most current information from the Demand Planning Server. For a quick download, use this method when you want to discard and refresh it with the version from the Demand Planning Server. For a full download, use this method when you know that there have been major changes to data in the Demand Planning Server and you want to replace the data in the shared database with the new data.
7. Choose Apply. The task is submitted to Oracle Workflow. The Status column indicates when the stage is complete. For details about the associated Workflow process, see: [Stage 1 Workflow process: Download data from Planning Server](#) on page B-4.

Tip: You can use the Batch Log to view processing details. For details, see: [Batch Log](#) on page 9-41.

If you automate the planning cycle

If you use a concurrent request program to automate the stages in the planning cycle, you need only run the Download Data from Planning Server stage for the initial planning cycle. Thereafter, it will automatically run a full download. For details about automating the planning cycle, see: [Automating the Planning Cycle](#) on page 8-16.

After downloading data from the Demand Planning Server

After data has been downloaded from the Demand Planning Server to the shared database in the Demand Planning Engine, you can set up or modify the

environment for planners and the Demand Plan Manager. You can perform the following tasks:

- Create and edit measures. Measures are variables that enable planners and the Demand Plan Manager to forecast data, analyze data, manipulate data, share data, and submit and upload final forecasts. The Demand Planning Server is the source of input parameters which are downloaded to the shared database and displayed as measures. You can create additional measures. You can also edit measures, delete measures, and specify which measures should be rebuilt in the next planning cycle. For details about using Demand Plan Administration to work with measures, see: [Measures](#) on page 9-3.
- Create and maintain events. Events are occurrences such as promotions, product introductions, and product phase outs that are expected to impact sales or demand for a product. Planners and the Demand Plan Manager can apply events to forecasts and model their effect on demand. The Demand Planning Server is the source of global events that are downloaded to the shared database. You can create additional events. You can also edit events and delete events. For details about using Demand Plan Administration to work with events, see: [Events](#) on page 9-10.
- Set or change the default measure for scenarios in the demand plan. Planners will see the default measure when they submit their final forecasts for a scenario. The default measure will also be displayed as a measure property. For details about using Demand Plan Administration to set or change the default measure for a scenario, see: [Scenarios](#) on page 9-23.
- Set or modify comment reason codes. Planners and the Demand Plan Manager use these codes to enter comments when modifying data in worksheets. You can create new codes, edit codes, and delete codes. For details about using Demand Plan Administration to work with comment codes, see: [Comment Reason Codes](#) on page 9-26.
- Specify how the application code will be accessed by users' browsers. Also, specify optional text for the Welcome screen. For details about using Demand Plan Administration to perform these functions, see: [User Page Setup](#) on page 9-29.
- Set defaults for predefined reports and select the predefined reports for planners and the Demand Plan Manager. Predefined reports are documents that enable users to conduct structured business analyses along a specific dimension and to estimate the accuracy of forecasts. For details about using Demand Plan Administration to work with predefined reports, see: [Predefined Reports](#) on page 9-31.

Modifying Demand Planning Server settings following a download

Once data has been downloaded from the Demand Planning Server to the shared database, your ability to change the settings for the plan in the Demand Planning Server is limited as follows:

- You cannot change the set of dimensions in the plan. You cannot add dimensions, delete dimensions, or change the mapping between dimensions and user dimensions. The download will not complete.
- You cannot add or modify hierarchies in such a way that new levels would be added to the plan. If you do this, then the download will not complete. However, you can add new hierarchies and modify hierarchies if they consist of levels that are already included in the plan.
- If you delete a calendar from a plan, the download process will ignore the deletion and display a warning.
- You cannot change the lowest level setting for an existing calendar. The download will not complete.
- You cannot change the definition of an existing calendar. The download will not complete.
- If you delete a time range, the download will ignore the deletion.
- If you delete planning percentages and data from Bills of Material, the download will ignore the deletion.
- Do not modify the allocation floor of an existing input parameter. This may result in strange data behavior.
- If you change the composite group for an input parameter, the download will ignore the change and display a warning.

Populating Measures (Stage 2)

Run the Populate Measures stage to calculate measures and run forecasts in the shared database. Populate Measures calculates input parameters that have been downloaded from the Demand Planning Server. The process also calculates measures that have been added to the shared database since the last time that measures were populated.

You must run the Populate Measures stage for the initial planning cycle. Thereafter, you can run it on an "as needed" basis. For example, you might use it to update the shared database after running a "quick" download on an input parameter such as

Booking History if the shared database included a "Forecast of Booking History" measure based on Booking History. In this case, populating measures would cause the forecast to reflect the changed data in the newly downloaded base measure.

To run Populate Measures:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose the demand plan name. A list of the stages in the planning cycle appears in the right frame.
3. In the Stage column, choose Populate Measures.
4. Choose Apply. The task is submitted to Oracle Workflow. The Status column indicates when the stage is complete. For details about the associated Workflow process, see: [Stage 2 Workflow process: Populate Measures](#) on page B-5.

Tip: You can use the Batch Log to view processing details. For details, see: [Batch Log](#) on page 9-41.

If you automate the planning cycle

If you use a concurrent request program to automate the stages in the planning cycle, you need only run the Populate Measures stage for the initial planning cycle. Thereafter it will run automatically. For details about automating the planning cycle, see: [Automating the Planning Cycle](#) on page 8-16.

After you populate measures

If this is the initial cycle for this plan, define planner assignments after you populate measures. Planner assignments determine the dimension value combinations (measures and dimension values) that each planner is responsible for forecasting, as well as the dimension values that each planner sees.

For details about using Demand Plan Administration to work with assignments, see: [Planner Assignments](#) on page 9-14.

Distributing to Planners (Stage 3)

Run the Distribute to Planners stage to distribute data in the shared database to planners' personal databases. The process distributes measures that have been calculated in the shared database as well as any measure definitions that have been created or updated by the Demand Plan Manager since the last time that a distribution was run. You can choose to distribute all data or you can limit the distribution to selected measures.

Note: If this is the first time that you are running this stage for the plan, ensure that you have defined measures, defined events, set up assignments, and performed other administrative tasks before you begin. If this is an update, ensure that modifications such as adding or changing planner assignments are complete.

To run Distribute to Planners:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose the demand plan name. A list of stages in the planning cycle appears in the right frame.
3. In the Stage column, choose Distribute to Planners.
4. Specify the distribution method that you want to use:
 - Full: Distributes all available information in the shared database to planners' personal databases. A full distribution includes metadata, price lists, all events, Demand Planning Server settings, and all assigned measures. Use this method the first time that you run a distribution.
 - Quick: Distributes selected measure definitions and data and new or modified event definitions that are associated with these measures. Use this method for routine distributions.

Note: Quick distribution will only be successful for planners who have existing assignment databases. For example, if you want to distribute data for two planner assignments (A and B) and assignment A already has a planner database from a previous distribution but assignment B does not, quick distribution will take place only for planner A. The planner database for planner B will only be created when you run a full distribution.

5. If you chose Quick, select the measures to distribute:
 - To include a measure in the distribution, check its Distribute box.
 - To exclude a measure from the distribution, clear its Distribute box.

Note: The Distribute box is disabled for formula measures. If the stored measure on which a formula measure is based is marked for distribution, then the formula measure will be automatically distributed.

6. Choose Apply. The task is submitted to Oracle Workflow. The Status column indicates when the stage is complete. For details about Workflow processing, see: [Stage 3 Workflow process: Distribute to planners](#) on page B-6.

Tip: You can use the Batch Log to view processing details. For details, see: [Batch Log](#) on page 9-41.

If you automate the planning cycle

If you use a concurrent request program to automate the stages in the planning cycle, you need only run the Distribute to Planners stage for the initial planning cycle. Thereafter, it will automatically run a full distribution. For details about automating the stages of the planning cycle, see: [Automating the Planning Cycle](#) on page 8-16.

After distributing to planners

Individual demand planners create and edit forecasts and perform what-if simulations. Alerts that have been defined by the Planning Manager or by demand planners monitor forecast accuracy. If planner assignments have been set up for collaborative planning, users can share data updates.

For details, see the following topics:

[Using Worksheets](#)

[Using the Planning Percentages Worksheet](#)

[Using Ad Hoc Reports](#)

[Using Ad Hoc Graphs](#)

[Using Predefined Reports](#)

[Sharing Data](#)

[Working with Alerts and Notifications.](#)

Once a demand planner is satisfied with his or her forecasts, he or she submits the forecasts for consolidation in the shared database. For details about submitting forecasts, see: [Selecting Measures to Submit or Upload](#) on page 17-1.

Collecting Data from Planners (Stage 4)

As planners submit their final forecasts, the data is marked for inclusion in the shared database. Run the Collect Data from Planners stage to collect and consolidate planners' data submissions. The process collects the submitted forecasts and rolls them up to obtain the final consolidated forecast. You can also view the status of submissions by assignment.

Note: If a planner has not yet submitted a forecast for a scenario, then Oracle Demand Planning uses the default measure for the scenario as the value for the planner's submission *if* a default measure for the scenario has been set. If no default measure has been set for the scenario, then the data collected from a planner who has not submitted data will be NA for that scenario. For details about setting the default measure for a scenario, see: [Setting a default measure for a scenario](#) on page 9-25.

Within the Collect Data function, you have the following options:

- You can set a data collection deadline date. This establishes a final date on which data that has been submitted by planners will be collected and consolidated in the shared database. You can also set a parameter to generate reminder messages to planners.

Workflow will run an iterative process to collect submissions up until the date that you specify. If you select the reminder messaging option, Workflow will generate reminder messages.

- If a collection process is running, you can terminate the collection.
Workflow will run a final process to collect available submissions and consolidate the data.

- You can collect available data immediately.

Workflow will run a process, distinct from the process that runs collections, to collect available submissions and consolidate the data. If a collection process is currently running, it will continue.

For details about how Workflow accomplishes these processes, see: [Stage 4 Workflow process: Collect data from planners](#) on page B-8.

To run collect Data from Planners:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose the demand plan name. A list of stages in the planning cycle appears in the right frame.
3. In the Stage column, choose Collect Data from Planners.
4. To view the status of planners' forecast submissions, scroll down to view the Assignment status box. The box displays the assignment name, user ID, and submission status for each scenario in the demand plan.
5. To specify a date on which to end data collection, proceed as follows:
 - a. In the Date to end data collection period box, click the arrow in the box and select a collection deadline date. This establishes the final date for collecting submissions from planners.
 - b. If you want the system to notify planners who have not yet submitted data as the collection deadline approaches, check Enable reminder messaging and enter a number in the Days in advance of collection end to begin reminder messaging box. The number specifies the number of days before the date on which data collection ends that Workflow will begin to send out reminder messages to planners.
6. To collect and consolidate submissions and cancel a collection process that is currently running, choose End collection period.

Note: This option is only available when a collection process is running.

7. To collect and consolidate submissions and continue the collection process, choose Collect available submissions now.
8. Choose Apply. The task is submitted to Oracle Workflow. The Status column indicates when the stage is complete. For details about the associated Workflow process, see: [Stage 4 Workflow process: Collect data from planners](#) on page B-8.

Tip: You can use the Batch Log to view processing details. For details, see: [Batch Log](#) on page 3-41.

If you automate the planning cycle

If you use a concurrent request program to automate the stages in the planning cycle, you need only run the Collect Data from Planners stage for the initial planning cycle. Thereafter, it will run automatically. For details about automating the planning cycle, see: [Automating the Planning Cycle](#) on page 8-16.

After collecting data from planners

At this point the Demand Plan Manager may choose to review the overall forecast and make revisions. He or she can use the same techniques as the planners to view, analyze, and edit data. If the consolidated submission measure does not contain the data that the manager wants to transfer to the shared database, he or she can edit the data or select an alternate measure to upload.

Uploading Measures to the Planning Server (Stage 5)

After the Demand Plan Manager has reviewed and approved the consolidated forecasts, run Upload Measures to Planning Server to transfer data from the shared database to the Demand Planning Server.

Note: The Demand Plan Manager has the option to perform the upload when he or she selects measures to upload for scenarios in the demand plan. If the manager has run the upload, then this stage will be marked as complete.

Once measures have been uploaded to the Demand Planning Server, the data can be published back to the source Oracle Applications transaction system and used by

Oracle Advanced Supply Chain Planning (ASCP) and Oracle Inventory Optimization (IO).

To run Upload Measures to Planning Server:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose the demand plan name. A list of stages appears in the right frame.
3. In the Stage column, choose Upload Measures to Planning Server.
4. Choose Apply. The task is submitted to Oracle Workflow. The Status column indicates when the stage is complete. For details about the associated Workflow process, see: [Stage 5 Workflow process: Uploading measures to the Planning Server](#) on page B-13.

Tip: You can use the Batch Log to view processing details. For details, see: [Batch Log](#) on page 3-41.

If you automate the planning cycle

If you use a concurrent request program to automate the stages in the planning cycle, you need only run Upload Measures to Planning Server stage for the initial planning cycle. Thereafter, it will run automatically. For details about automating the planning cycle, see: [Automating the Planning Cycle](#) on page 8-16.

Tip: You can use the Batch Log to view detailed status information.

Automating the Planning Cycle

If your site has a predictable planning cycle, you might want to consider automating batch processing. This is particularly useful for businesses that have a consistent demand planning cycles where the cycles repeat after fixed intervals and a new rolling forecast is created every cycle.

A concurrent program, predefined as a request in the Demand Planning Server, enables you to automate processing through a program that runs a master Workflow process. Note that midcycle collections can also be performed as needed.

You can schedule the first three planning cycle activities (Download Data from the Planning Server, Populate Measures, Distribute Data to Planners) as a sequence to occur periodically at specific times. The workflow process waits there for a user specified interval before running the Collect Data from Planners stage.

You can also specify the number of days to wait before running the Upload to Planning Server stage. This gives the Demand Plan Manager a preset time period in which to review forecasts that have been submitted to the shared database. When this time period has elapsed, Workflow uploads the data to the Demand Planning Server.

Note that the automated program runs a full distribution and a full download. If you want to run quick downloads and quick distributions, you can do so between cycles.

Important: Before automating batch processing, ensure that you manually run all batches at least one time. The initial run of each batch sets the default parameters for the concurrent program.

Example 5 Automating the planning cycle

For example, you could specify the master workflow program to run every 30 days with wait period of 5 days. In this case, the following would occur:

- Day 1: Run processes 1, 2, and 3 in sequence, where process 2 is run after process 1 is complete.
- Wait for 5 days.
- Day 6: This is the deadline for demand planners to submit the final forecast numbers. Run process 4 to collect from demand planners.
- Wait for five days while the Demand Plan Manager reviews planners' data. Then in sequence, run process 5.
- Day 31: Run process 1, 2, and 3.

Customizing automated processing

The concurrent program that automates batch processing includes basic functionality. An individual who has knowledge of Oracle Workflow and PL*SQL can customize the program to adapt to specific site requirements.

Running the request to automate the planning cycle

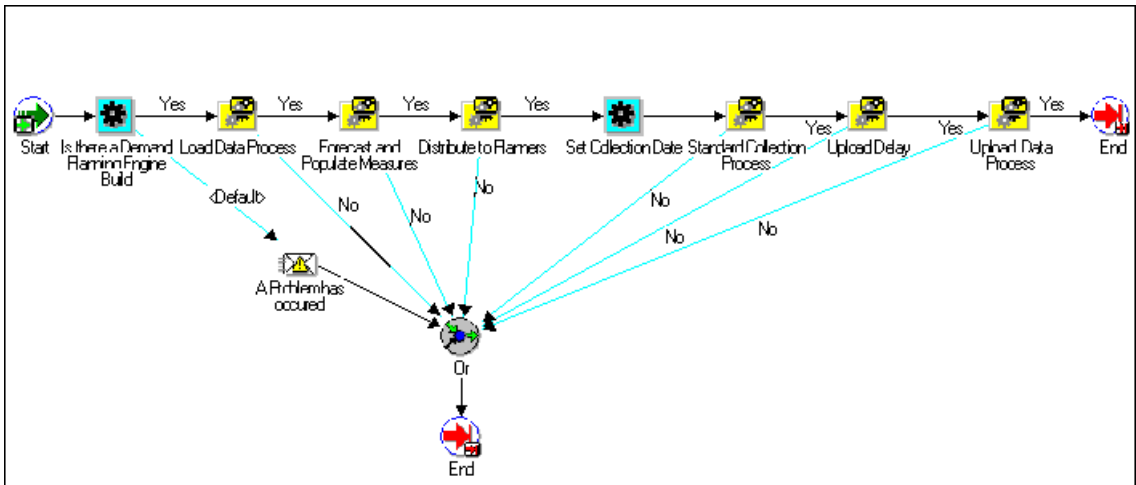
The concurrent program that automates the planning cycle prompts for the demand plan name, the number of days to run the collection, and the number of days to wait after data is consolidated in the shared database before uploading the data to the Demand Planning Server.

To run the request to automate the planning cycle:

1. Log into Oracle Demand Planning with the Demand Planning System Administrator responsibility.
2. In the Navigator, select Other > Requests.
3. In the Find Requests window, select Submit a New Request.
4. Select Run a Single Request.
5. In the Name list of values field, select Demand Planning Engine Master Workflow Process.
6. In the Parameters window, provide the following parameters for the request:
 - Demand Plan Name: the name that was assigned when the plan was built.
 - Number of days to run the collection period: the number of days following the run of the Collect Data from Planners batch that data will be consolidated in the shared database.
 - Number of days to delay upload: the number of days following the run of the Collect Data From Planners batch that the data will be uploaded to the Demand Planning Server.
7. Choose Submit to run the request.

Viewing the Workflow Process List

After you run the concurrent program, you can access the workflow process list in Oracle Workflow and see a visual depiction of the process.



Rolling demand plan dates forward

User can use the existing demand plan definition to start the next forecast cycle by rolling the demand plan dates forward to next cycle. Once the request set is launched with the appropriate parameters, the Roll demand plan dates forward concurrent program implements the required changes in the original plan definition, and the Validate Rolled Demand Plan concurrent program validates the demand plan definition.

To roll demand plan dates forward to the next forecast cycle:

1. Log into Oracle Demand Planning with the Demand Planning System Administrator responsibility.
2. In the Navigator, select Other > Requests.
3. In the Find Requests window, select Submit a New Request.
4. Select Request Set in the Submit a New Request window.
5. In the Submit Request Set window, select the LOV in the Request Set field. Roll demand plan dates forward to next cycle populates into the field.

Submit Request Set

Run this Request...

Request Set **Roll demand plan dates forward to next cycle** Copy...

Program	Stage	Parameters	Language
Demand Plan Rolling Process	Demand Plan Rolling P		American English
Demand Plan Validation Process	Demand Plan Validatio		American English

Options...

At these Times...

As Soon As Possible Schedule...

Help (A) Submit Cancel

6. Click in the Parameters field of the Demand Plan Rolling Process program.

Parameters

Demand Plan Name ...

Roll dates forward by period **Gregorian Month**

Roll dates forward by number of periods

OK Cancel Clear Help

Complete the following fields:

Name	Description
Demand Plan Name	Select at least one demand plan from the LOV of valid demand plans.
Roll dates forward by period	select either Day (default) or Gregorian Month. The demand plan dates are rolled forward based on the type of period (bucket) selected here.
Roll dates forward by number of periods	Enter a number from 1 to 999. The start and end dates for input parameters, scenario history period, and scenario horizon are rolled forward by the specified number of periods. For example, if 31 days are specified, 1-Jan-2002 will become 1-Feb-2002 and 1-Feb-2002 will become 4-Mar-2002. If 1month is specified, 1-Feb-2002 will become 1-Mar 2002.

7. Select OK. Now the Roll demand plan dates forward to the next cycle concurrent program rolls the dates forward.

For details on how the dates are rolled when the Exclude from Rolling Cycle check box is not checked, see: [Input Parameters](#) on page 7-12.

Note: You must validate the demand plan after the dates have changed. The Roll demand plan dates forward to the next cycle program errors out if the dates rolled forward are not valid dates for the calendars included in the demand plan.

Viewing the Batch Log

The Batch Log displays detailed date and time information about the status of activities in the demand planning cycle. The log displays automatically while a batch process is running. You can also view the log on an ad hoc basis.

To view the batch log:

1. Log into Oracle Demand Planning with the Demand Planning System Administrator responsibility.
2. In the Navigator, select Batch Log.
3. Scroll through the log to view activity detail.
4. To exit, select another item in the navigation list or close the page.

Example 1 Batch Log

The following illustration shows an example of events recorded in a typical batch log.

```
*****
05/18/2002-19:37:19 -> Begin Downloading Data from Planning Server.
05/18/2002-19:37:20 -> Generating Express metadata structures.
05/18/2002-19:37:21 -> Connecting to Planning Server.
05/18/2002-19:37:22 -> Loading specified Demand Plan information.
05/18/2002-19:37:25 -> Loading Dimension information.
05/18/2002-19:37:25 -> Loading Hierarchy and Level information.
05/18/2002-19:37:28 -> Generating DP Dimension metadata.
05/18/2002-19:37:28 -> Generating the Gregorian Time hierarchy within Express.
05/18/2002-19:37:28 -> Generating DP Hierarchy and Level metadata.
05/18/2002-19:37:29 -> Processing Attributes.
05/18/2002-19:37:29 -> Loading Time dimension values.
05/18/2002-19:37:44 -> Loading dimension values.
05/18/2002-19:39:09 -> Verify that all dimensions have values.
05/18/2002-19:39:09 -> Setting backend hierarchy information.
05/18/2002-19:39:17 -> Loading Input Parameters and Scenarios.
05/18/2002-19:39:24 -> Loading Item Unit of Measure information.
05/18/2002-19:39:31 -> Loading events.
05/18/2002-19:39:35 -> Loading data for specified Input Parameters.
05/18/2002-19:39:35 -> Loading data for the following Input Parameter: INTEGRATION.
05/18/2002-19:39:40 -> Loading Unit of Measure conversion information.
05/18/2002-19:39:45 -> Calculating conversion coefficients for Product dimension.
05/18/2002-19:40:06 -> Loading variable Product pricing information.
05/18/2002-19:40:09 -> Converting for Express Objects.
05/18/2002-19:40:11 -> Converting for OSA.
05/18/2002-19:42:04 -> Synchronizing variable names.
05/18/2002-19:42:05 -> Creating required worksheet objects.
05/18/2002-19:42:05 -> Creating required Workflow objects in the Master database.
05/18/2002-19:42:07 -> Allocating the historical data.
05/18/2002-19:42:07 ->      INTEGRATION
05/18/2002-19:42:18 -> Aggregating the historical data.
05/18/2002-19:42:35 -> Setting DP system flags.
05/18/2002-19:42:36 -> Disconnecting from Planning Server.
05/18/2002-19:43:00 -> Completed Downloading Data from Planning Server.
*****

*****
05/18/2002-19:46:06 -> Begin Populating Measures.
05/18/2002-19:46:06 -> Confirming database attach logic.
05/18/2002-19:46:08 -> Calling driver for Measure population.
05/18/2002-19:46:08 -> Populating Measures according to Measure definitions.
```



```
05/18/2002-19:46:09 -> Performing forecast calculations for the following measur
e: Forecast of INTEGRATION.
05/18/2002-19:46:23 -> Completed Populating Measures.
*****

*****
05/18/2002-19:47:44 -> Begin Distributing Data to Planners.
05/18/2002-19:50:16 -> Building personal database A1.
05/18/2002-20:00:03 -> Build of personal database A1 was successful.
05/18/2002-20:00:24 -> Creating Submissions Measures.
05/18/2002-20:00:28 -> Performing measure copy for the following measure:
Submissions, Roger_fr1 (18-MAY-2002).
05/18/2002-20:00:41 -> Completed Distributing Data to Planners.
*****

*****
05/18/2002-20:10:40 -> Collect Available Data Submissions was requested and is
initiating a collect and consolidate.
05/18/2002-20:10:40 -> Begin Collecting Data from Planners.
05/18/2002-20:10:41 -> Collecting submitted data into DATA database.
05/18/2002-20:11:27 -> Consolidating the collected data.
05/18/2002-20:11:40 -> Completed Collecting Data from Planners.
*****

*****
05/18/2002-20:21:14 -> Begin Uploading Scenarios to Planning Server.
05/18/2002-20:21:14 -> Simultaneous upload programs: 10
05/18/2002-20:21:15 -> Not writing back numbers less than 0.5000000000000000
05/18/2002-20:21:15 -> Rounding off numbers after 2 decimal places
-----
05/18/2002-20:21:21 -> Scenario ID: Roger_fr1
05/18/2002-20:21:22 -> Dimension value counts:
05/18/2002-20:21:22 -> TIM: 59 values at level DY
05/18/2002-20:21:22 -> Writing back TIM at level DY.
05/18/2002-20:21:22 -> GEO: 2 values at level 15
05/18/2002-20:21:22 -> Writing back GEO at level 15.
05/18/2002-20:21:22 -> ORG: 2 values at level 7
05/18/2002-20:21:22 -> Writing back ORG at level 7.
05/18/2002-20:21:23 -> PRD: 4 values at level 1
05/18/2002-20:21:23 -> Writing back PRD at level 1.
05/18/2002-20:21:23 -> DP.CMP: 16 values in composite at writeback levels
05/18/2002-20:21:23 -> Writing dimensions: TIM, GEO, ORG, PRD.
05/18/2002-20:22:57 -> Roger_fr1: Number of lines written to table: 857.
05/18/2002-20:22:57 -> Roger_fr1: Number of lines skipped for zero amounts: 0.
05/18/2002-20:22:57 -> Roger_fr1: Number of lines skipped below threshold amount
```


: 87.

05/18/2002-20:22:59 -> Completed Uploading Scenarios to Planning Server.

Publishing Forecast Data Back to the Source

Once the forecast data reaches the Demand Planning Server, it may be published back to the source Oracle Applications transaction system, where then it can optionally be loaded into a Master Demand Schedule for the purpose of consuming it against available sales orders.

Publishing of forecasts back to the source is optional because Oracle Demand Planning scenarios can be directly read by Oracle Advanced Supply Chain Planning as independent demand. Consumption of forecasts is done directly inside Oracle Advanced Supply Chain Planning.

Note: In order for an Oracle Demand Planning scenario to be published back to the source as a forecast, its output level in the Product dimension as defined in the demand plan, must be in the Product or Product Family levels. Its output level in the Ship From location dimension must be in the Organization level. The Time dimension could be in any level (for example, day, manufacturing week, manufacturing period) for the manufacturing calendar, while it should be in the day level for the fiscal or Gregorian calendar. The Geography dimension should be in the Ship to Location, Customer, or All geography levels.

To publish forecast data from the Planning Server to an Oracle Applications source instance:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Publish Forecast. The Publish Forecast window appears.

Field	Function	Legal Value
Forecast	The forecast name on the source. If this already exists, the existing forecast entries in the source will be overridden. If it does not already exist, it will be created.	List of values from across the link (source instance).
Forecast Set	The forecast set name on the source. If this already exists, the existing forecast entries in the source will be overridden. If it does not already exist, it will be created.	List of values from across the link (source instance).
Demand Class	This is optional. The demand class to which you would like to publish the forecast.	List of values from across the link (source instance).
Level	Select a demand planning level that maps to the demand class selected in the previous field.	List of values.
Value	Value for the level specified in the previous field.	List of values.
Customer	The customer for which you would like to publish the forecast. If publishing to a customer level forecast set, select the name of a customer.	List of values.
Location	The customer ship to site for which you would like to publish the forecast. If publishing to a ship to level forecast set, select the name of a customer (previous field) as well as the location.	List of values.
Use System Forecast	Check this if you want to use the baseline forecast. This field is not used any more.	Check or uncheck

4. Select Publish Forecast.

Only one scenario with one demand plan can be published at a time.

Note: If the demand class, customer or location fields are populated, only the elements from the scenario with demand class, customer and location dimension values matching the populated values will be published into the designated forecast.

Renewing the Forecasting Cycle

After one cycle is complete, the Demand Planning Server holds the following data:

- Data from the previous collection and pull
- Demand plans from previous cycle

Any data collected or imported will override the data in the tables for the date range the data was collected. Incremental data can be imported if a nonoverlapping

different date range is specified. This is something that the Demand Planning System Administrator needs to consider before importing the next set of data. The issue is whether to add the last period incremental data from the source to the data already existing or refresh it completely.

Collecting data for the next forecast cycle

If additional data needs to be collected for Oracle Demand Planning, follow the procedure described in [About Data Collection](#) on page 4-2.

Once data is collected and pulled into the fact tables, the Demand Planning System Administrator can either define a new demand plan or choose to use the previously defined demand plans. Also, it is possible to copy a demand plan with a new name, modify it, and use it for the next forecasting cycle.

To copy a demand plan:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Demand Plans.
3. Select the name of the demand plan to be copied. The Demand Plans window for the demand plan you selected appears.
4. Select Copy To from the Demand Plans window.

The Copy To window appears.

5. Enter a name for the new demand plan. All data fields are copied automatically from the demand plan you selected.
6. Select OK.

Modifying a demand plan for the next forecast cycle

Following are modifications that would make a demand plan suitable for a subsequent cycle in a planning process that involves rolling forecasts. You make these modifications in the Demand Plan window:

- In the Input Parameters tab, roll the end and possibly start dates of booking and shipping histories forward by one forecasting period.
- In the Scenarios tab, roll the history start, history end, horizon start and horizon end dates for all scenarios forward by one forecasting period.

For more information, see: [About defining a Demand Plan](#) on page 7-2.

Scenario persistence

A scenario is a statement of forecast horizon and basis. The basis consists of the bookings and shipments. The statistical forecast so generated gets the name of the respective scenario. The capability for scenarios to be persistent allows the forecasts to be usable from one planning cycle to another despite the changes in the underlying data between the cycles.

Example 1

Planning cycle 1; September 2002 has the following features:

- It is a statistical forecast generated for a scenario based on shipments.
- The forecast numbers for the customer sites are aggregated to the distribution centers that cater to the respective sites.
- Demand planners finalize the forecast which is used for operations planning.

Planning cycle 2; October 2002 has the following features:

- This is a new statistical forecast generated for the same scenario based on to date shipments, taken afresh from the order management or from the sales and distribution system.
- In between the cycles, the aggregation hierarchies have changed. Some customer sites do not exist any more and some other sites are now catered to by different distribution centers.
- The Cycle 1 forecast is required in order to compare with the Cycle 2 forecast.

Retaining old level values

After the data is collected from the source instance to the planning instance, the level values and the aggregation hierarchies have changed in the source instance. For example, the level value item A has an aggregation hierarchy where item A is rolled up to product category B. When the data is collected again, the old level values are retained in the Demand Planning Server.

Persistent forecast scenarios

A previous cycle forecast can be used again in the next forecasting cycle for comparison despite the change in the underlying data. Even with in the same planning cycle, the aggregation hierarchies may change after generating the forecast in Oracle Demand Planning but before using the forecast for supply chain planning. However, demand planning scenarios which serve as independent demands can still be used for operations planning within the same cycle or later despite the changes in the underlying data. There is no change in setups or user procedures and the user is not required to do anything for this feature to take effect.

Limitations to scenario persistence

There are two limitations to scenario persistence:

- You cannot delete all the old data.
- The new data must be collected from the same source instance.

Purging data

As recent data is brought in to Oracle Demand Planning, the old data accumulates with time, and some of this accumulated data is not used any more. For example, if you use only the latest forecasts from your customers, the previous forecasts are redundant.

Oracle Demand Planning allows users to purge data, such as redundant data, for the preseeded as well as custom data streams. You can selectively delete unwanted data from a user interface for any specified time period.

Selective deletion of data

As fact and dimension data accumulates for an installation of the Demand Planning Server, you can purge unwanted data by selecting the fact data elements for deletion within an instance, such as bookings or shipments. This means that it is possible to delete shipment, booking, and manufacturing forecast data while keeping the remaining data for that instance intact.

Some examples of selective purging of data are:

- Purge all the data for the years 1996 and 1997.
- Purge shipment data for the year 1999.
- Purge a specific price list.
- Purge a specific planning percentage, rather than just the corresponding scenario data.
- Purging a demand plan definition.

Note: If you purge the dimension level values in demand planning, you must reload/recollect all the data streams (fact data) and should rebuild the demand plan.

To purge data from the Demand Planning fact table:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Other > Purge Fact Data.
3. The Parameters window opens up on top of the Purge Fact Data window.

The screenshot shows the 'Parameters' dialog box with the following fields and values:

Field	Value
Instance	[Dropdown menu]
From Date	[Text field]
To Date	[Text field]
Shipment Data	No
Booking Data	No
Manufacturing Forecast	No
Forecast Designator	[Text field]
Sales Opportunity	No
Sales Forecast	No
Custom Data	No
Data Stream Name	[Text field]
Stream Designator	[Text field]
Currency Data	No
UOM Data	No
Time Data	No
Calendar	[Text field]
Pricing Data	No

Buttons at the bottom: OK, Cancel, Clear, Help.

4. Complete the following Parameters:

- In the Instance field, select the instance from which you want to delete the data.
- Specify the From Date and To Date using the format DD-MON-YYYY.
- For the rest of the fields, select either Yes or No. Please note that for Manufacturing Forecast, Time Data, and Pricing Data, if you select Yes, you can supply a subqualifier which are Forecast Designator, Calendar, and Price List, respectively. If you do not supply a subqualifier, all the data is deleted.
- If you select Yes for Custom Data, you can supply two subqualifiers: data stream name and stream designator.

- If you select Yes for Scenario Entries, you can supply three subqualifiers: Demand Plan, Scenario, and Revision in this order. This means that Scenario qualifies a Demand Plan with multiple Scenarios for a Demand Plan, and the Revision qualifies a Scenario with multiple Forecast revisions for a Scenario. If you do not supply a subqualifier at any level, all the data is deleted. For example, if you select Yes for Scenario Entries, but do not specify a Demand Plan, all the scenarios entries (forecasts) for all the demand plans will be purged. Since scenarios are instance independent, scenarios for all the other instances will also be deleted in addition to the scenarios of the specified instance.

Scenarios are instance independent. Thus, deleting scenario is not instance specific. If you delete a scenario or all scenarios when a specific instance has been specified, data for all the instances will be deleted.

5. Select OK.
6. Select Submit.

To purge data from the Demand Planning staging tables:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Purge Interface Tables.

Note: The interface tables are synonymous with staging tables.

3. The Parameters window appears.



Complete the following:

- Select the Instance Code from the LOV. This is the instance where the data is to be purged.

- Indicate Yes or No for Delete Rejected Records Only.
4. Select OK.

The Collection Utility window appears.

Collection Utility

Run this Request...

Name: **DP Purge Program**

Parameters: **v11**

Language: **American English**

Buttons: Copy..., Languages...

At these Times...

As Soon as Possible

Button: Schedule...

Upon Completion...

☒ Save all Output Files

Notify:

Print to: **adsprinter**

Button: Options...

Buttons: Help (H), Submit, Cancel

5. Submit the concurrent request for Oracle Demand Planning Purge Program.

Purging demand plans

Demand plans that are no longer in active use should be purged. This saves disk space in two places:

- In the Oracle Express data repository, which stores demand plan data in a form that allows it to be flexibly manipulated via Online Analytical Processing techniques.
- In the Demand Planning Server, which holds the demand entries that make up the output scenarios associated with a demand plan.

You can purge a demand plan definition and the associated Express data and output scenario data at the same time or you can purge just the Oracle Express data associated with a demand plan, while retaining the demand plan definition and the output scenario data. You might do the latter if you can use the existing demand plan definition, possibly with minor modifications, for future demand planning activities. You would then save the effort of redefining an entire demand plan from scratch.

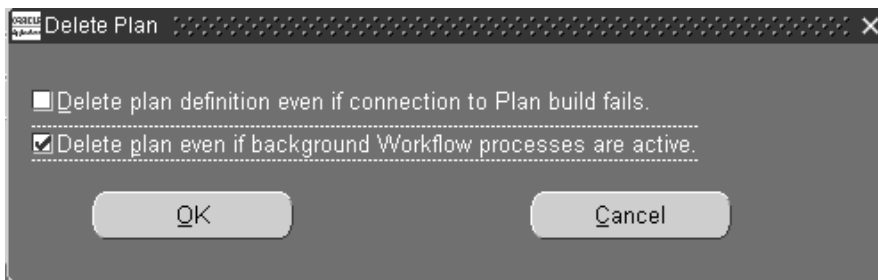
To purge a demand plan definition:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Demand Plans.
3. In the Find Demand Plan window, choose the demand plan to be purged.
4. From the Edit menu toolbar, select Delete.

A warning message appears.

5. Select Yes.

The Delete Plan window appears.



The Delete plan even if background Workflow processes are active check box causes Oracle Demand Planning to delete the demand plan definition and the associated data in the Express repository, even if the Oracle Demand Planning forecasting cycle is currently in process and uploading the consensus forecast to the Demand Planning Server has not yet occurred. Do not check this box if, in this situation, you want the demand plan purge process to exit without deleting any demand plan data whatsoever.

If you have built a cube for the plan definition, then the plan definition will only be deleted if the cube is purged successfully. If you have not built a cube for the plan definition, then the plan definition will be deleted.

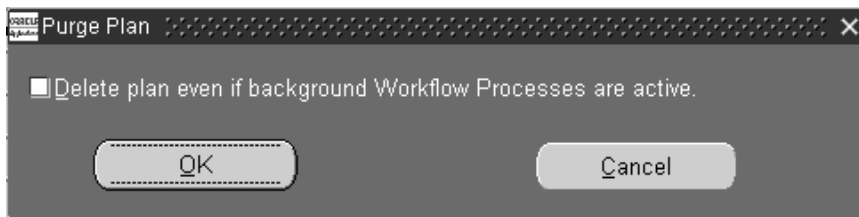
6. Select OK.

This launches a concurrent request to purge the demand plan and the associated Oracle Express data and output scenario data.

To purge the Express data associated with a demand plan:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Demand Plans.
3. In the Find Demand Plan window, choose the demand plan to be purged.
4. From the Tools menu toolbar, select Purge Plan.

The Purge Plan window appears.



If you select Delete plan even if background Workflow processes are active, Oracle Demand Planning deletes the associated data in the Oracle Express repository even if the Oracle Demand Planning forecasting cycle is currently in process and uploading the consensus forecast to the Demand Planning Server has not yet occurred. Uncheck this check box if in this situation you would like the demand plan purge process to exit without deleting any demand plan data.

5. Select OK.

This launches a concurrent request to purge the Oracle Express data associated with the demand plan, but leaves the demand plan definition and associated output scenario data intact.

Note: To delete specific output scenarios associated with a demand plan, use the procedure in [Selective deletion of data](#) on page 8-29.

Demand Plan Administration: Setting Up the User Environment

This section describes how to use Demand Plan Administration to set up and maintain the environment for planners and the Demand Plan Manager.

The section includes the following topics:

- [About Setting Up the User Environment](#)
- [Measures](#)
- [Events](#)
- [Planner Assignments](#)
- [Scenarios](#)
- [Comment Reason Codes](#)
- [User Page Setup](#)
- [Predefined Reports](#)
- [Database Information](#)
- [Workflow Settings](#)
- [Batch Log](#)
- [Collaboration History](#)

About Setting Up the User Environment

You use Demand Planning Administration to set up and maintain the environment for demand planners and the Demand Plan Manager. This includes the following functions:

- **Measures** — Define and maintain shared measures (including forecasts) for planners and the Demand Plan Manager.
- **Events** — Define and maintain factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand.
- **Planner Assignments** — Set up and maintain planner assignments. Assignments determine the dimension value combinations (measures and dimension values) that will be visible to planners and the values that each planner is responsible for forecasting.
- **Maintaining Database Information** — If Express databases have been moved or renamed, update the Express database information in the shared database.
- **User Page Setup** — Specify how the Demand Planning code will be accessed by users' browsers. Also specify optional text for the Welcome screen.
- **Predefined Reports** — Set defaults for predefined reports and select the predefined reports for planners and the Demand Plan Manager.
- **Scenarios** — Set or change the default measure association for each scenario in the demand plan. Planners see this default when they submit a forecast for a scenario.
- **Comment Reason Codes** — Set or modify comment reason codes in the shared database. Planners and the Demand Plan Manager use these codes to enter comments when they modify data in worksheets.
- **Workflow Settings** — Set or change the number of Workflow engines to use when the Workflow background engines run Demand Planning deferred activities.
- **Batch Log** — View detailed status information about stages in the forecast cycle that have run for the demand plan.
- **Collaboration History** — View a history of actions related to sharing data between users.

Getting help

To view information that is specific to the current function, choose the Help button at the bottom of the page.

To access the full Oracle Demand Planning online Help system for Demand Plan Administration, choose the large Help (?) button at the top of the page.

You can use your browser's print function to print Help topics.

To close an open Help window, choose the Exit (X) button at the top of the page. You will be returned to the current function.

Accessing version and system information

To access version and system information, choose **About Demand Planning** at the bottom left of the page to access version and system information.

Measures

Input parameters such as Booking History and Customer Forecast are associated with a demand plan in the Demand Planning Server. Custom data streams might also be associated with the plan. When data is downloaded from the Demand Planning Server these inputs are read into the shared database where they are stored as *measures*.

You can use Demand Plan Administration to view input parameters. You can also use them as a basis to define new measures (including forecasts), edit measures, delete measures, and specify which measures should be rebuilt in the next planning cycle.

When the Populate Measures stage runs, measures are populated in the shared database where they are available to the Demand Plan Manager. When a distribution runs, the shared measures become available to planners whose assignments include the measures. All assigned measures will be available to planners when a full distribution runs; only selected measures will be available when a quick distribution runs. Planners and the Demand Plan Manager use measures when they analyze data and select final forecasts to submit or upload. They can also use them as a basis for creating their own measures.

Interface for maintaining measures as a Demand Plan Administrator

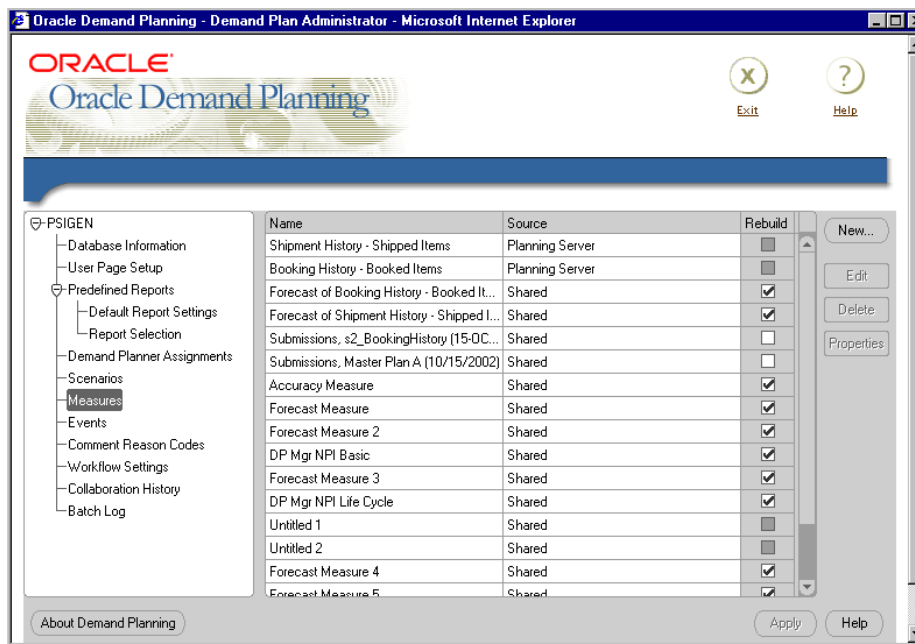
Use the main Demand Planning Administrator page to access the page for maintaining measures.

To access the Demand Plan Administrator page for maintaining measures:

1. Log into Oracle Demand Planning as a Demand Planning System Administrator.
2. In the Navigator, choose **Demand Plan Administration**.
Result: A list of demand plans appears.
3. Select the plan that you want to work with, scroll to the bottom of the page, and choose **Start Demand Planning**.
Result: The Demand Planning Administrator page for the plan opens.
4. Choose **Measures** in the navigation list.

Example: Demand Plan Administrator page for maintaining measures

The following illustration shows the Demand Plan Administrator page that you use to maintain measures.



Creating measures in Demand Plan Administration

You can define two types of measures: *stored* measures and *formula* measures.

A stored measure is a variable for which calculations and properties are permanently stored in the database. A formula measure calculates values on the fly and is not stored in the database. For more information, see ["Types of Measures" on page 17-2](#).

To create a measure:

1. Access the Demand Plan Administrator page for maintaining measures.

Result: Current measures and their source (Planning Server or Shared) are displayed in the grid.

2. Choose **New**.

Result: The Create Measure dialog box opens.

3. Select the measure type: **Stored** or **Formula**.

Result: If you chose **Stored**, the Measure Wizard opens. If you chose **Formula**, the New Formula Measure dialog box opens.

4. Define the measure as described in the following sections:

["Creating Forecast Measures" on page 17-2](#), start at Step 4

["Creating Simple Copy Measures" on page 17-16](#), start at Step 4

["Creating Complex Copy Measures" on page 17-24](#), start at Step 4

["Creating Accuracy Measures" on page 17-33](#), start at Step 4

["Creating Formula Measures" on page 17-37](#), start at Step 4

Editing measures in Demand Plan Administration

When you want to change some aspect of a measure, you can edit the measure definition.

When the Populate Measure stage runs, modified measures are populated in the shared database where they are available to the Demand Plan Manager. When the Distribute to Planners stage runs, the modified measures become available to planners whose assignments include the measure. All assigned measures will be available to planners when a full distribution runs; only selected measures will be available when a quick distribution runs.

To edit a measure:

1. Access the Demand Plan Administrator page for maintaining measures.
Result: Current measures and their source (Planning Server or Shared) are displayed in the grid.
2. Highlight the measure that you want to modify and choose **Edit**.
Result: If you are editing a stored measure, a tabbed page opens. If you are editing a formula measure, the Edit Formula Measure dialog box opens.
3. To edit a stored measure use the tabs, the **Next** button, and the **Back** button to move through the measure definition to make your changes. You can also change the measure name.

Note: If the measure is a stored accuracy measure or a measure from the Planning Server, you can only edit the measure name, specify the numeric format, and change the property that determines whether data for the measure will be editable in worksheets.

Choose **Finish** to save the measure.

4. To edit a formula measure, use the Edit Formula Measure dialog box to modify the formula. You can also change the measure name.

Choose **OK** to save the measure.

Rebuilding measures in Demand Plan Administration

When you start a new planning cycle, measure definitions from the previous cycle are maintained in the shared database. A Rebuild option for each stored measure enables you to indicate whether the measure will be recalculated based on current data in the Demand Planning Server the next time that the Populate Measure stage runs. When you define a new stored measure, the Rebuild option is checked by default.

Note: You cannot explicitly rebuild a formula measure. However, if the stored measure on which the formula measure is based is rebuilt, then the dependent measures will also be rebuilt.

To understand the effect of rebuilding a measure, consider the case in which you define and distribute a measure that copies regions of data from two measures: History for Q1 and Forecast for Q2. At the start of the next planning cycle the download process reloads your measure.

- If you rebuild this measure, then the measure will be recalculated using updated data from the measures on which the copy is based.
- If you do not rebuild the measure, then the measure will not be recalculated. The values for the previous cycle will persist through the next cycle.

To change the Rebuild option for a stored measure:

1. Access the Demand Planning Administrator page for maintaining measures.
Result: Current measures and their source (Planning Server or Shared) are displayed in the grid.
2. Identify the measure for which you want to change the Rebuild setting and take one of the following actions:
 - To recalculate the measure in the new cycle using the updated data, check the **Rebuild** box.
 - To maintain the data values calculated for the previous cycle, clear the Rebuild box.
3. Choose **Apply** to save the current settings.

Viewing measure information in Demand Plan Administration

You can view information about measures.

For a Planning Server measure, the following properties are displayed:

- Name — *Measure name*
- Transformation — None
- Source — Planning Server
- Type — Quantity, Amount, or Quantity and Amount

- Aggregate — Yes or No
- Allocate — Yes or No
- Editable — Yes or No
- Price List — None
- Events — None
- Lowest Allocation Levels — For each dimension, specifies the lowest level of each dimension to which data will be allocated

For a stored measure that is a forecast or a copy of one or more measures, the following properties are displayed:

- Name — *Measure name*
- Transformation — Method used to create the measure; for example: Forecast
- Source — Shared
- Type — Quantity, Amount, or Quantity and Amount
- Aggregate — Yes or No
- Allocate — Yes or No
- Editable — Yes or No
- Price List — *Price list name* or None
- Events — *Event names* or None
- Lowest Allocation Levels — For each dimension, the lowest level to which data will be allocated (depends on the data stream on which the forecast or copy is based)

For a stored accuracy measure, the following properties are displayed:

- Name — Measure name
- Transformation Method — Accuracy
- Source — Shared
- Accuracy Measure Type — Type of accuracy measure, for example, Mean Absolute Percentage Error (MAPE)
- Base Measure — Base measure for accuracy calculation
- Comparison Measure — Comparison measure for accuracy calculation

- Editable — Yes or No

For a formula measure, the following properties are displayed:

- Name — Long name for the measure
- Transformation — Formula
- Source — Shared

To view information about a measure:

1. Access the Demand Planning Administrator page for maintaining measures.
Result: Current measures and their source (Planning Server or Shared) are displayed in the grid.
2. Highlight the measure for which you want to view information and choose **Properties**.
Result: Measure information is displayed.
3. Choose **OK** to exit.

Deleting measures in Demand Plan Administration

When you no longer want users to have access to a measure, you can delete the measure definition.

The Demand Plan Manager will lose access to the measure the next time that he or she logs in to Oracle Demand Planning. Planners will lose access to the measure the next time that the Demand Plan Administrator runs a full distribution.

Important: Before you delete a measure, ensure that your user community does not maintain saved objects that reference the measure. Failure to do so can cause warning messages and errors to occur when users work with reports, graphs, worksheets, or alerts that contain the deleted measure.

To delete a measure:

1. Access the Demand Plan Administrator page for maintaining measures.
Result: Current measures and their source (Planning Server or Shared) are displayed in the grid.

2. Highlight the measure that you want to delete and choose **Delete**.

Result: You are prompted to confirm the deletion.

3. Choose **OK** to delete the measure.

Events

Events are factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand.

Global events may be associated with scenarios and demand plans in the Demand Planning Server. When data is downloaded from the Planning Server, these events are read into the shared database. You can use Demand Plan Administration to view global events. You can also define new events, edit events, delete events, and apply event factors to measures.

When the Populate Measures stage runs, events are populated in the shared database where they are available to the Demand Plan Manager. When a distribution runs, events become available to planners. All events will be available when a full distribution runs; only events associated with distributed measures will be available when a quick distribution runs. Planners and the Demand Plan Manager can apply the events to measures and use them as a model for creating their own events.

Interface for maintaining events in Demand Plan Administration

Use the main Demand Planning Administrator page to access the page for maintaining events.

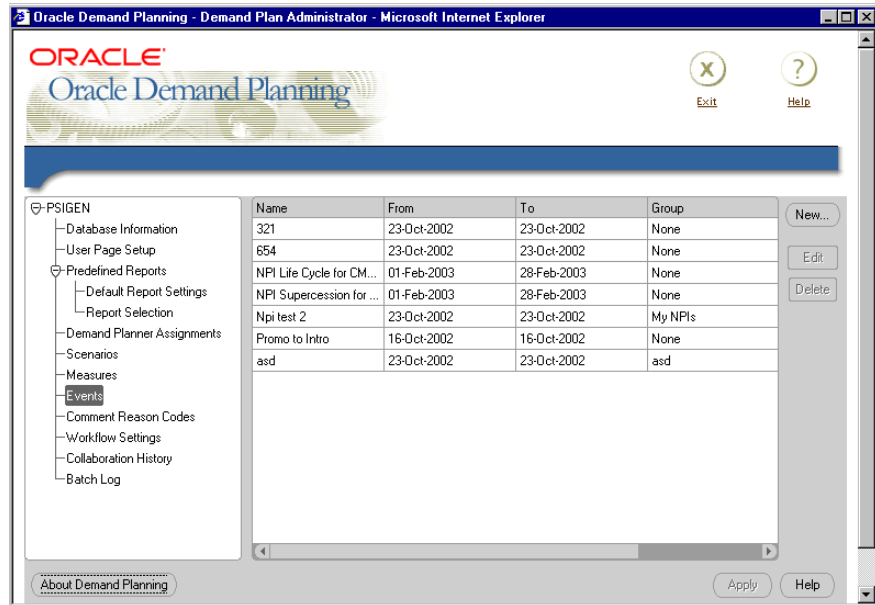
To access the Demand Plan Administrator page for maintaining events:

1. Log into Oracle Demand Planning as a Demand Planning System Administrator.
2. In the Navigator, choose **Demand Plan Administration**.
Result: A list of demand plans appears.
3. Select the demand plan that you want to work with, scroll to the bottom of the page, and choose **Start Demand Planning**.
Result: The Demand Planning Administrator page for the plan opens.
4. Choose **Events** in the navigation list.

The Demand Planning Administrator page for maintaining events opens.

Example: Demand Plan Administrator page for maintaining events

The following example shows the Demand Plan Administrator page that you use to maintain events.



Creating events in Demand Plan Administration

You can define three types of events: *promotions*, *product introductions*, and *product phase outs*.

- A promotion is an event that is expected to impact demand for an existing product.
- A product introduction is an event for a product that does not have any historical or forecast data, but for which you anticipate that sales will be similar to some product or products that have a known history or forecast.
- A product phase out is an event for an existing product for which sales are expected to become flat or be reduced to zero.

To create an event:

1. Access the Demand Plan Administrator page for maintaining events.
Result: Existing events and their source (Planning Server or Shared) are displayed in the grid.
2. Choose **New**.
Result: The Event Wizard -- Name page opens.
3. Define the event as described in the following sections:
"Creating Promotion Events" on page 18-2, start at Step 3
"Creating Product Introduction Events" on page 18-7, start at Step 3
"Creating Product Phase out Events" on page 18-13, start at Step 3

Modifying events in Demand Plan Administration

When you want to change some aspect of an event, you can edit the event. When the Distribute to Planners stage runs, modified events become available to planners. All event modifications will be available when a full distribution runs; only modified events that are associated with distributed measures will be available when a quick distribution runs.

To modify an event:

1. Access the Demand Plan Administrator page for maintaining events.
Result: Existing events and their source (Planning Server or Shared) are displayed in the grid.
2. Highlight the event that you want to modify and choose **Edit**.
Result: A tabbed page opens.
3. Use the tabs, the **Next** button, and the **Back** button to move through the event definition and make the desired changes. You can also change the event name.

Note: You cannot change the event type.

4. Choose **Finish** to save the event.

Deleting events in Demand Plan Administration

When you no longer want users to have access to an event, you can delete the event.

The Demand Plan Manager will lose access to the event the next time that he or she logs in to Oracle Demand Planning. Planners will lose access to the event the next time that a full distribution runs.

Important: Before you delete an event, ensure that your user community does not maintain measures that reference the event.

To delete an event:

1. Access the Demand Plan Administrator page for maintaining events.

Result: Existing events and their source (Planning Server or Shared) are displayed in the grid.

2. Highlight the event that you want to delete and choose **Delete**.

Result: You are prompted to confirm the deletion.

3. Choose **OK** to delete the event.

Applying events to measures in Demand Plan Administration

As you define a measure, you have the option to apply one or more events, event groups, or a combination of events and event groups to the measure.

If you apply an event to a measure *before* a distribution runs, the distributed measure will include the event factor.

If you apply an event after a distribution runs, the measure will not include the event factor until the measure is repopulated. Similarly, if you modify an event that has been applied to a measure *after* distribution, the modification will not take effect until the measure is repopulated.

For information about the effect of events on measures, see "Effect of Events on Measures" on page A-7.

Planner Assignments

Planner assignments determine the dimension value combinations (measures and dimension values) that each planner can forecast and view. In a collaborative planning environment, assignments also establish the areas in which planners can collaborate.

When you run a distribution, the data slices defined by assignments are created in planners' personal databases. A full distribution distributes all data. A quick distribution distributes updates to selected measures.

Note: When you choose values for planner assignments, you select measures as well as values from the other dimensions. If you want to define new measures or edit measures, do so before you set up assignments. For information about working with measures, see [“Measures” on page 9-3](#). For information about distributions, see [“Distributing to Planners \(Stage 3\)” on page 8-11](#).

Users can collaborate on assignments

You can set up assignments so that planners are responsible for forecasting specific slices of the data, but yet can view the work of planners who are forecasting other values. You establish areas of collaboration by setting *view scopes* and *assignment scopes*. The view scope includes all of the combinations (measures and dimension values) that will be visible in the planner's personal database. The assignment scope includes all of the combinations (measures and dimension values) that the planner is responsible for forecasting and submitting to the shared database. As planners modify their forecasts, they can use collaboration tools to share updated values in their assignment scopes with the Demand Plan Manager and with other planners who have the values in their view scopes.

For example, you might set up assignments so that Planner A is responsible for forecasting one set of products, but can view data (and shared updates to that data) for another set of products, for which Planner B is responsible. Planner B can view Planner A's data (and shared updates to that data) but can only submit forecasts for products in his or her assignment scope. This example is a simple one; in reality, you can set up assignment scopes and view scopes to support your business needs.

Important: If planners will be collaborating, ensure that you inform them about the extent of their scopes. Although a planner will be able to view and modify data that is in his or her view scope, only the data in the assignment scope will be submitted to the shared database and shared with other planners.

Cautions to observe when dependent demand is enabled

Do not break out planner assignments by geography and assign identical product sets. Planning percentages are not dimensioned by Geography; that is, they are not calculated based on the geographic level values. If planner assignments are broken out by geography, then every planner will be modifying the global planning percentages.

Also take dependent demand into account when setting up assignment scopes and view scopes in a collaborative environment. Planners who share items that are related through dependent demand should be able to view each other's items (view scope), but should only be able to submit data for their own items (assignment scope). If a planner is responsible for options while another is responsible for its parent model, the parent model should be in the view scope of the first planner and in the edit scope of the second planner.

Interface for working with planner assignments as a Demand Plan Administrator

Use the main Demand Planning Administrator page to access the page for maintaining planner assignments.

To access the Demand Plan Administrator page for maintaining planner assignments:

1. Log into Oracle Demand Planning as a Demand Planning System Administrator.
2. In the Navigator, choose **Demand Plan Administration**.
Result: A list of demand plans appears.
3. Select the demand plan that you want to work with, scroll to the bottom of the page, and choose **Start Demand Planning**.

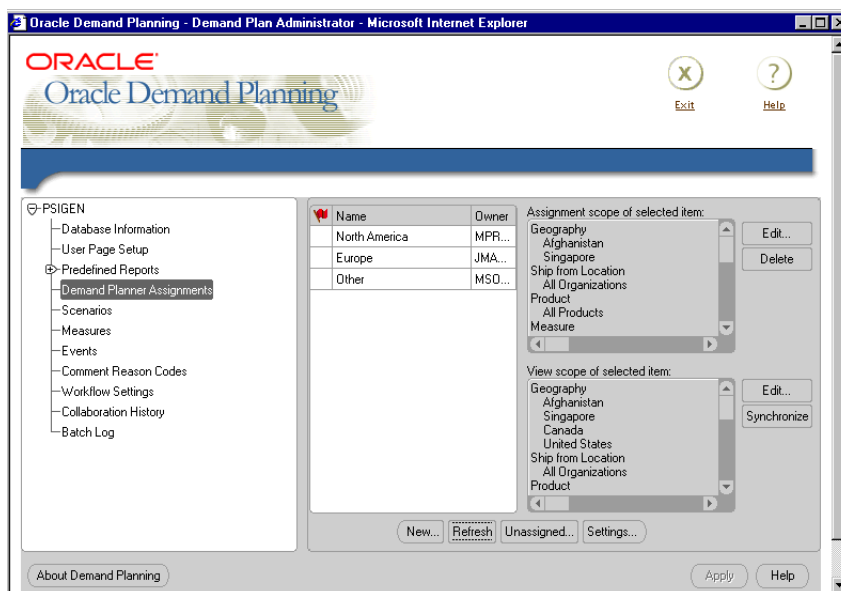
Result: The Demand Planning Administrator page for the plan opens.

4. Choose **Demand Planner Assignments** in the navigation list.

The page for maintaining planner assignments opens.

Example: Demand Plan Administrator page for maintaining planner assignments

The following illustration shows the page that you use to maintain planner assignments.



Setting levels for assignments

Before you assign data to individual planners, you must specify the default level at which assignments for *all* planners will be created in each dimension other than Time and Measure. For example, if you specify the State level for the Geography dimension, then all assignments will be some set of available states. Planners will have access to all data below the specified level. If an assignment consists of multiple values, then planners will also have access to data above the specified level.

Before setting levels for assignments, use the Demand Plan Administration> Measures> Properties option to view the lowest allocation level for each measure that you intend to include in planners' assignments. If you set the default

assignment level below the allocation floor for a dimension, then the measure will not be distributed to planners.

Important: Ensure that you set levels *before* you create planner assignments. If you change the level setting for a dimension after you assign data to planners, then you will have to re-enter all assignments.

To specify levels for planner assignments:

1. Access the Demand Planning Administrator page for maintaining planner assignments.

2. Choose **Settings**.

Result: The System Settings dialog box opens. Each of the dimensions in your database, other than Time and Measure, is present in the dialog box.

3. In each dimension box, select a level.

You can select the level that currently appears in the box for each dimension or you can click the arrow in each box to display a list of levels and select a level from the list.

4. When you have selected a level for each dimension, choose **OK**.

Creating assignments

When you create an assignment you choose values for the planner's *assignment scope* and *view scope*. The view scope includes all of the dimension value combinations (measures and dimension values) that will be visible in the planner's personal database. The assignment scope includes all of the dimension value combinations that the planner is responsible for forecasting and submitting to the shared database.

A planner can have more than one assignment.

To create an assignment:

1. Access the Demand Planning Administrator page for maintaining planner assignments.

2. Choose **New**.

Result: A new assignment row appears in the grid. The Name column displays an entry called "Untitled Assignment." Your Oracle user ID appears in the Owner column.

3. In the Name column for the new assignment, enter a name up to 70 characters long.
4. In the Owner column for the new assignment, select the user ID of the planner who will have the assignment.
5. To select values for the planner's assignment scope (the values that this planner will forecast and submit to the shared database), choose the **Edit** button next to the Assignment scope of selected item box.

Result: The Select Data dialog box opens. The Available box lists values for a dimension in your database.

Note: It is not *mandatory* to select values for the assignment scope. For example, if you want an individual to be able to review but not submit data, then you can select values for the view scope, but leave the assignment scope empty.

- a. Choose values for the current dimension by moving values between the Available box and Selected box until the Selected box displays the values that you want to keep for the current dimension.

For information about selecting values, see

["Techniques for selecting values from a list" on page 22-4.](#)

Note: You must select one or more values for this dimension before you can select values for another dimension.

- b. In the Select Values for box, choose another dimension and repeat the previous step.

- c. Repeat Steps a and b until you have selected values for *all* dimensions. You must select measures as well as values for the other dimensions.
- d. Choose **OK** to save the current selections. The **OK** button is enabled only if the assignment scope includes selections for *each* dimension including Measure.

Note: For Measure, you can select stored measures, forecast measures, and input parameters from the Demand Planning Server. If you do not want users to collaborate on a measure, do not include that measure in assignment scopes. For example, you might exclude input parameters from planners' assignment scopes, but make them available in planners' view scopes.

Result: You are returned to the page for maintaining planner assignments.

A red flag to the left of an assignment indicates that the assignment scope includes one or more dimension value combinations that are in the assignment scope for another owner.

- 6. To select values for the planner's view scope (the values that this planner will view), in the View scope of selected assignment box proceed as follows:
 - a. If you want to make the values in the planner's view scope identical to the values in his or her assignment scope, choose **Synchronize** (this is the default for a new assignment).
 - b. To choose values for the planner's view scope that are not identical to those in the user's assignment scope, choose the **Edit** button next to the View scope of selected item box.

Result: The Select Data dialog box opens. The Available box lists values for a dimension in your database.

- c. Choose values for the current dimension by moving values between the Available box and Selected box until the Selected box displays the values that you want to keep for the current dimension.

For information about selecting values, see "[Techniques for selecting values from a list](#)" on page 22-4.

- d. To change the values for another dimension, repeat Steps c and d.

Tip: You might save time by initially synchronizing the view scope with the assignment scope. Then add and remove values as desired.

- e. Choose **OK** to save the current selections. The **OK** button is enabled only if the view scope includes selections for *each* dimension including Measure.

Editing assignments

Edit an assignment when you want to change dimension values, including measures, that are currently in a planner's assignment scope or view scope. For example, you might edit assignments when you want to give planners access to a new measure that has been created by the Demand Plan Manager.

Edits take effect when a distribution runs. A full distribution distributes all changes. A quick distribution distributes modifications to measures that have been selected for distribution.

To edit an assignment:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. To change the values in a planner's assignment scope (the values that this planner will forecast and submit to the shared database), choose the assignment that you want to change and then choose the **Edit** button next to the Scope of assignment box.

The Select Data dialog box opens, showing the current selections for the assignment scope for each dimension including Measure. Proceed as follows:

- a. In the Select values for box, choose the dimension for which you want to modify values.
- b. Choose values for the dimension by moving values between the Available box and Selected box until the Selected box displays the values that you want to keep for the current dimension.
- c. To change the values for another dimension, repeat Steps 2a and 2b.
- d. Choose **OK** to save the current selections.

Note: If you add new values to the assignment scope, the same values will automatically appear in the view scope. You can then decide whether to keep or remove them.

3. To change the values in a planner's view scope (the values that this planner will view), choose the assignment that you want to modify.
 - a. If you want to make the values in the planner's view scope identical to the values in his or her assignment scope, choose **Synchronize**.
 - b. To choose values for the planner's view scope that are not identical to those in the user's assignment scope, choose the **Edit** button next to the View scope of selected item box.

Result: The Select Data dialog box opens.

- c. In the Select Values for box, select a dimension for which you want to change value selections.
- d. Choose values for the current dimension by moving values between the Available box and Selected box until the Selected box displays the values that you want to keep for the current dimension.

For information about selecting values, see "[Techniques for selecting values from a list](#)" on page 22-4.
- e. To change the values for another dimension, repeat Steps c and d.
- f. Choose **OK** to save the current selections. The **OK** button is enabled only if the view scope includes selections for *each* dimension including Measure.

Changing assignment names

You can give a new name to an assignment. The change takes effect immediately. A distribution is not required.

To change the name of an assignment:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. Identify the assignment whose name you want to change.
3. In the Name column, enter a new name, up to 70 characters long.

Changing assignment owners

As the result of staff changes or re-assignments, you might want to enable a user to access an assignment that is currently associated with another owner. The change takes effect immediately. A distribution is not required.

To change the owner of an assignment:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. Identify the assignment whose owner you want to change.
3. In the Owner column, select the user ID for the planner who will have this assignment.

Viewing unassigned data

You can view data values that have not yet been assigned to any planner's view scope.

To view unassigned data:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. Choose **Unassigned**.

Result: The Unassigned Data Slices dialog box opens, displaying data slices that have not been associated with any planner's view scope.

Checking assignments for overlapping values

As you create assignments, you can identify check to see if there are planners who have dimension value combinations in their assignment scopes that overlap with values that have been assigned to other planners.

Note: Overlapping values are technically allowed, but are not recommended as sound business practice. This is because data values that are submitted to the shared database by one planner will be overwritten by another planner's data for those values where their assignment scopes intersect.

To check for overlapping values in assignments:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. Choose **Refresh**.

Result: A red flag appears in the column next to any assignment for which the assignment scope includes value combinations (dimension values and measures) which are the same as the values in another user's assignment scope.

Deleting assignments

You can delete a planner's assignment. The planner who is associated with the assignment immediately loses access to the data slice.

To delete an assignment:

1. Access the Demand Planning Administrator page for maintaining planner assignments.
2. Highlight the assignment that you want to delete.
3. Choose **Delete**.

Scenarios

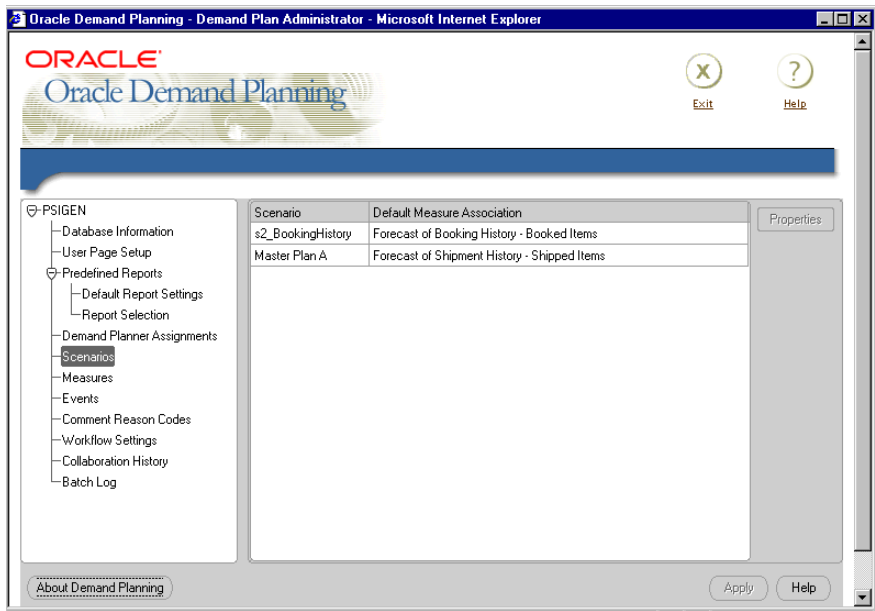
A *scenario* is a repository for maintaining, archiving, and viewing the final forecasts for a demand plan. Scenarios are defined for a demand plan in the Demand Planning Server. For example, if your organization requires an optimistic, a pessimistic, and a realistic forecast, these might be set up as scenarios in the demand plan definition.

If an input parameter such as a history, a previous forecast, or a custom data stream has been associated with a scenario in the Demand Planning Server, this association is downloaded to the shared database when the Download from Planning Server stage runs. Planners will see the parameter as the default measure when they submit data for the scenario. You can use the Scenarios function to change the default measure that planners see when they submit data for a scenario, or to set a default if there is no default. You can also view the properties of a scenario.

Note: If a planner has not submitted a measure for a scenario when the Collect Data from Planners stage runs, Oracle Demand Planning uses the default measure as the measure to submit to the shared database. If there is no default measure (the default is set to "None"), then data collected for the planner will be NA.

Example: Demand Plan Administrator page for working with scenarios

The following illustration shows the page that you use to set or change the default measure for a scenario and view scenario properties.



Setting a default measure for a scenario

Set a default measure for a scenario when you want planners to see a specific default when they submit data for that scenario.

To set the default measure for a scenario:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Scenarios**.

Result: The page for working with scenarios opens. The Scenarios/Default Measure Association grid displays a row for each scenario in the demand plan. The Default Measure Association column shows the current default measure for each scenario in the demand plan. If there is no default measure for a scenario, the Default Measure Association is set to "None."

3. Double-click the Default Measure Association column for the scenario for which you want to set a default measure.

Result: A list of available measures appears.

4. Select a measure from the list.

Result: The measure that you selected is now displayed as the default measure for the scenario.

5. Choose **Apply** to save the current settings.

Viewing scenario properties

You can view the following information about the properties that have been associated with a scenario in the Demand Planning Server:

- Name
- Horizon Range
- Accuracy Measure Type
- Upload Measure (if measure has been uploaded)
- Output levels for each dimension

To view scenario properties:

1. Access the Demand Planning Administrator page.
2. In the navigation list on the Demand Planning Administrator page, choose **Scenarios**.

Result: The page for working with scenarios opens. The grid displays a row for each scenario in the demand plan.

3. Select the row for the scenario whose information you want to view and choose **Properties**.

Alternatively, you can double-click the Scenarios column.

Result: Scenario properties are displayed.

4. Choose **OK** to exit.

Comment Reason Codes

As planners and the Demand Plan Manager adjust forecast data in worksheets, they can enter free text to describe modifications that they have made to a cell or group of cells. Each text entry must be associated with a comment reason code, which categorizes the reason for the modification. Use the Comment Reason Codes function to set up and maintain these codes in the shared database.

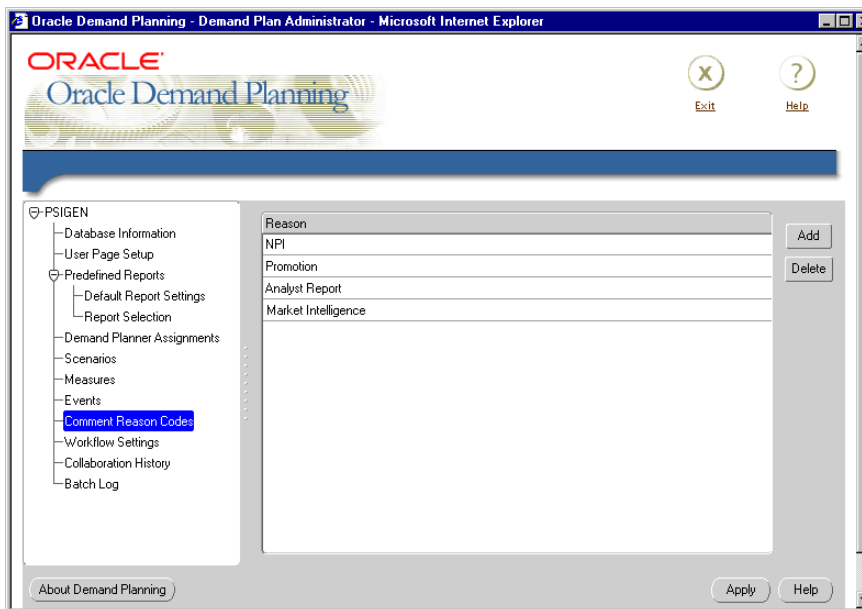
Important: Users will only be able to enter comments if you have defined comment reason codes. If you expect to implement commenting, you must define comment codes before distributing data.

Comments persist in Oracle Demand Planning across planning cycles when the following conditions are met:

- The measure that includes the comment is submitted for a scenario by the planner and the submission measure is not deleted.
- The comment is at the same level as the output level specified for the scenario in the Planning Server Plan Definition form.

Example: Demand Plan Administrator page for maintaining comment reason codes

The following illustration shows the page that you use to view, define, edit, and delete comment reason codes.



Defining a comment reason code

Define a comment reason code when you want to provide a designation that planners and the Demand Plan Manager can use to annotate data modifications in a worksheet.

To define a comment reason code:

1. Access the Demand Planning Administrator page.
2. In the navigation list on the Demand Planning Administrator page, choose **Comment Reason Codes**.

Result: The page for maintaining comment reason codes opens, displaying current codes.

3. Choose **Add**.

Result: A blank row appears in the Reason area.

4. In the blank row, type the text for the code. The text can be up to 70 characters long.
5. Choose **Apply** to save the current settings.

Modifying a comment reason code

Modify a comment reason code when you want to change a code that planners and the Demand Plan Manager use to annotate data modifications in a worksheet.

To modify a comment reason code:

1. Access the Demand Planning Administrator page.
2. In the navigation list on the Demand Planning Administrator page, choose **Comment Reason Codes**.

Result: The page for maintaining comment reason codes opens, displaying current codes.

3. Select the row for the code that you want to edit and modify the text. The text can be up to 70 characters long
4. Choose **Apply** to save the current settings.

Deleting a comment reason code

Delete a comment reason code when you no longer want planners and the Demand Plan Manager to use the code.

To delete a comment reason code:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Comment Reason Codes**.

Result: The page for maintaining comment reason code opens, displaying current codes.

3. Select the code that you want to delete and choose **Delete**.

Result: The code is immediately deleted. You are not prompted to confirm the action.

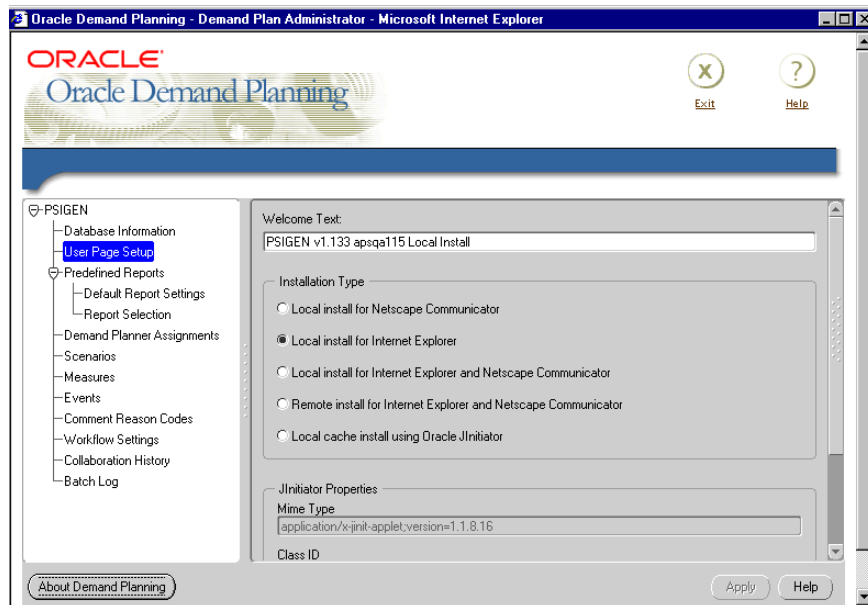
User Page Setup

The User Page Setup function enables you to customize the following aspects of the user interface for planners and the Demand Plan Manager:

- Specify optional custom text for the Welcome screen that planners and the Demand Plan Manager see when they open a session.
- Specify how planners and the Demand Plan Manager will access Java classes when they run the application (this is referred to as “installation type”).

Example: Demand Plan Administrator page for user page setup

The following example shows the page that you use to customize text and installation type for planners and the Demand Plan Manager.



Specifying custom text for the Welcome screen

The Demand Planning Welcome screen displays default welcome text. You can specify an additional, custom message. Planners and the Demand Plan Manager will see your text under the default text when they open a new Oracle Demand Planning Session.

To specify custom text for the Welcome screen:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **User Page Setup**.
Result: The page for setting up the Demand Planner user page opens.
3. In the Welcome Text box, enter custom text.
4. Choose **Apply** to save the current settings.

Selecting an Installation type

By default, a new installation is set up to run Oracle Demand Planning under Oracle JInitiator. JInitiator is implemented as a plug-in (for Netscape Navigator) or as an ActiveX object (for Microsoft Internet Explorer) and replaces the default JVM provided by the browser. If users' PCs do not meet the memory requirement for the currently installed version of JInitiator or if you do not want users to run under JInitiator, you can select an option that will enable them to access Java classes remotely or install Java classes on the PC the first time that they log into Oracle Demand Planning.

Important: If you expect that visually impaired individuals will be using a screen reader such as JAWS to access Oracle Demand Planning, choose the JInitiator (**Local cache install using Oracle JInitiator**) option. Note that using JAWS also requires that the profile "Self Service Accessibility Features" in Oracle Self Service Applications be set to YES.

To select an installation type:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **User Page Setup**.
Result: The page for setting up the user page opens.

3. In the Installation Type box, select one of the following installation options:
 - **Local install for Netscape Communicator** — Netscape users will install Java foundation classes on the PC the first time that they log into Oracle Demand Planning. Internet Explorer users will download Java foundation classes to the PC each time that they log into Oracle Demand Planning.
 - **Local install for Internet Explorer** — Internet Explorer users will install Java foundation classes on the PC the first time that they log into Oracle Demand Planning. Netscape users will download Java foundation classes to the PC each time that they log into Oracle Demand Planning.
 - **Local install for Internet Explorer and Netscape Communicator** — Internet Explorer and Netscape users will install Java foundation classes on the PC the first time that they log into Oracle Demand Planning.
 - **Remote install for Internet Explorer and Netscape Communicator** — Internet Explorer and Netscape users will download Java foundation classes to the PC each time that they log into Oracle Demand Planning.
 - **Local cache install using Oracle Jinitiator** — Users will run Demand Planning under the installed version of JInitiator. The Mime Type, Class ID, Executable Path, and Code Base boxes display default properties for the installed version of Jinitiator.
4. Choose **Apply** to save the current settings.

Predefined Reports

Predefined reports are documents that enable users to conduct structured business analyses along a specific dimension. Two special Forecast reports enable users to evaluate the accuracy of their forecasts.

Use the Predefined Reports function to specify the settings for predefined reports and select the reports that you want to make available to your user community.

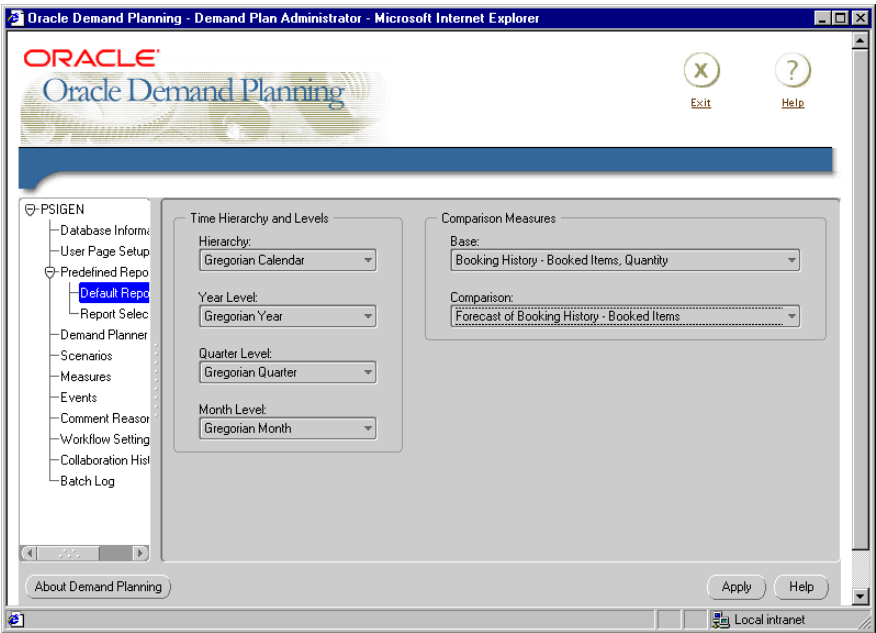
You perform two functions to set up predefined reports:

- Specify default hierarchy, measure, and dimension settings. These settings determine the defaults that appear in each predefined report.
- From among all of the predefined report types that the application provides, select the reports that will be available to your users. *All* users will have access to these reports.

Important: You must specify default settings before you select reports. If you reverse the order, the predefined reports will not function properly.

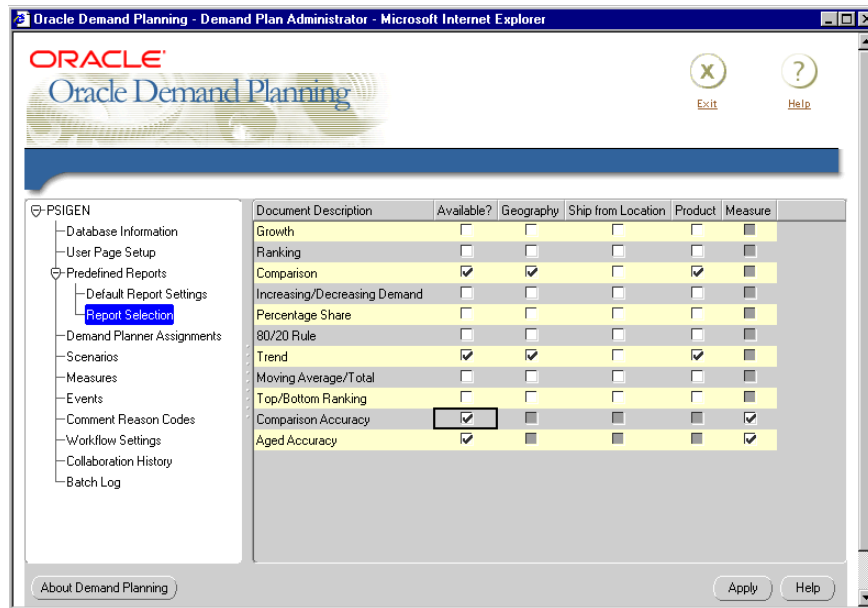
Example: Demand Plan Administrator page for specifying default settings for predefined reports

The following example shows the page for specifying default settings for predefined reports.



Example: Demand Plan Administrator page for selecting predefined reports

The following example shows the page for selecting predefined reports.



Specifying default settings for predefined reports

Specify default report settings to establish the defaults that planners and the Demand Plan Manager will initially see for predefined reports.

To specify default settings for predefined reports:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Predefined Reports**.
3. From the submenu, choose **Default Report Settings**.

Result: The page for setting defaults for predefined report opens, displaying current default settings.

4. In the Hierarchy box, select the time hierarchy that you want to use.

Note: If the demand plan has a single Time hierarchy, then you cannot select a hierarchy.

5. In the Year Level, Quarter Level, and Month Level boxes, use the arrows to select the time levels that you want to use.

You can select Year, Quarter, and Month, or, if your Time hierarchy is not structured precisely in terms of these levels, you can select three levels in descending order, such as Quarter, Month, and Week.

6. In the Base box, select the *base measure* for all predefined reports. This is the default measure that will be displayed when a document focuses on a single measure.
7. In the Comparison box, select the *comparison measure*. This is the default comparison measure that will be displayed when a document compares two measures.
8. Choose **Apply** to save the current settings.

Selecting predefined reports

Selecting predefined reports determines the set of documents that will be available to planners and the Demand Plan Manager, and specifies the dimensions for which each document will be generated.

Note: The documents that you select will be available to *all* of your users. You cannot select specific documents for individual users.

To select predefined reports:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Predefined Reports**.
3. From the submenu, choose **Report Selection**.

Result: The page for selecting predefined reports opens. The list displays all document types.

4. Check the box in the Available column beside each document that you want to select. For more information about available documents, see "[Types of predefined reports](#)" on page 9-35.
5. For each document that you select, specify the dimension or dimensions for which you want to generate the document by checking the box where a report and dimension coincide.
6. Choose **Apply** to save the current settings.

Note: Some documents, because of the nature of the information that they are set up to display, are generated with default values. For these documents, you cannot select the dimensions on which you want to base these reports.

Types of predefined reports

Following is a list of the predefined reports that you can select for your user community. The documents are grouped according to the name of the folder in which they appear in the navigation list when a user logs in with the responsibility of Demand Planner or Demand Plan Manager.

- **Comparison folder**

Comparison document — Compares two dimension values for specified time periods. The comparison is based on a specified measure. The analysis shows difference and percentage difference.

Percentage Share document — Compares a dimension value to its aggregate for specified time periods. The comparison is based on a specified measure. The analysis shows percentage share.

- **Distribution folder**

Increasing/Decreasing Demand document — Identifies dimension values for which activity has increased or decreased by a specified percentage between two time periods. Activity is based on average values for a specified measure. The analysis shows difference and percentage difference.

- **Exception folder**

80/20 Rule document — Display dimension values that show a specified percentage of activity within specified time periods, such as the top 20% of the products that drive 80% of the value (often identified as Category A products in ABC classification). Activity is based on a specified measure. The analysis shows cumulative percentage.

- **Forecast folder**

Comparison Accuracy document — Compares two measures for specified time periods and quantifies the difference and percent difference between them. Includes statistics for MAD, MAPE, RSME, S.D, AV, C.V.

Aged Accuracy document — Quantifies the accuracy of a specific measure over a specified lag or lead time range. Includes statistics for Minimum., Maximum, MAD, AV, and MAPE.

For more information and examples of Forecast documents, see "[Comparison Accuracy Document](#)" on page 16-3 and "[Aged Accuracy Document](#)" on page 16-6.

- **Growth folder**

Growth document — Shows the difference in a dimension value's performance between two time periods. Performance is based on a specified measure. The analysis shows amount change and percentage change.

- **Ranking folder**

Ranking document — Ranks dimension values in terms of performance during specified time periods. Performance is based on a specified measure. The analysis shows the share of total.

Top/Bottom document — Ranks a specified number of top or bottom dimension values for two time periods in terms of performance. Performance is based on a specified measure. The analysis shows difference and percentage difference.

- **Trend folder**

- **Moving Average/Total document** — Shows moving averages and totals for specified dimension values over a series of time periods. The averages and totals are based on a specified measure.

- **Trend document** — Shows performance trends within a specified time range for specified dimension values. Performance is based on a specified measure.

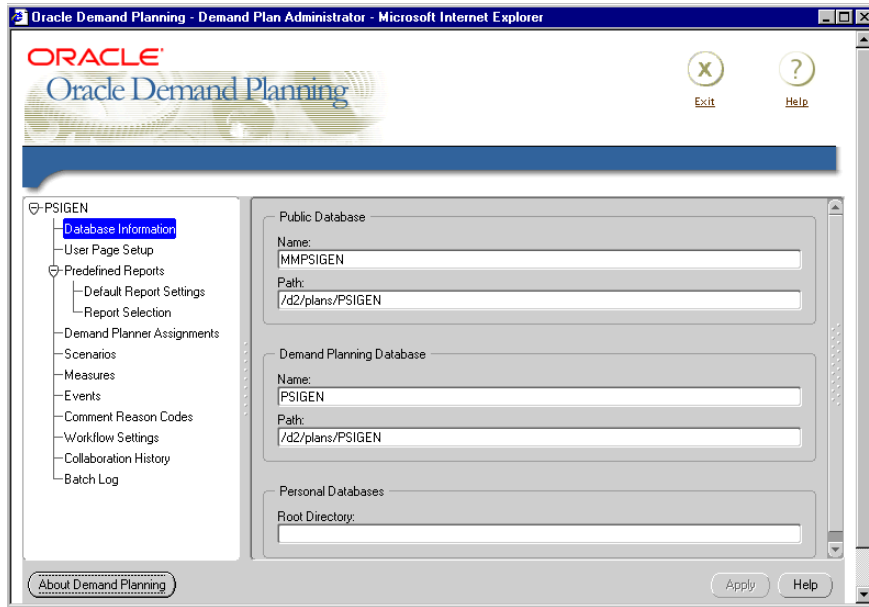
Database Information

As part of the demand plan setup process, database names and pathing for the Oracle Express databases related to a demand plan are specified in the Demand Planning Server. If an Express database name or path is changed after the initial setup, use the Database Information function to modify Express database information.

Important: The configuration settings established in the Demand Planning Server for the Demand Planning databases are stored in a database referred to as the “Master database.” If the physical location of the Master database changes, the Demand Planning System Administrator must update the information for Shared DB Location in the Oracle Applications Planning Server Express Setup form; otherwise, configuration information for the Demand Planning databases will not be found. For information about Express database setup, refer to the *Oracle Demand Planning Installation and Configuration Guide*.

Example: Working with database information

The following illustration shows the page for viewing and editing Express database information in the shared database.



Modifying database information

You can modify the name and location of an Express database in the shared database if an Express database name or path has been changed in the Demand Planning Server.

To modify database information:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Database Information**.

Result: The page for modifying Express database information opens.

3. You can change settings for the following Express databases:
 - **Public Database** — Contains public objects such as predefined reports that are available to all users. You can edit the database name and path. The path must be a fully qualified path on the same server as the default path. If you are running on Windows NT, you can specify a UNC path.
 - **Demand Planning Database** — Stores components and structures for the demand plan. You can edit the database name and path. The path must be a fully qualified path on the same server as the default path. If you are running on Windows NT, you can specify a UNC path.
 - **Personal Databases Root Directory** — Contains personal objects saved by individual users. All personal databases are under a single root directory. You can edit the database path. The path must be a fully qualified path on the same server as the default path. If you are running on Windows NT, you can specify a UNC path.
4. Choose **Apply** to save the current settings.

Workflow Settings

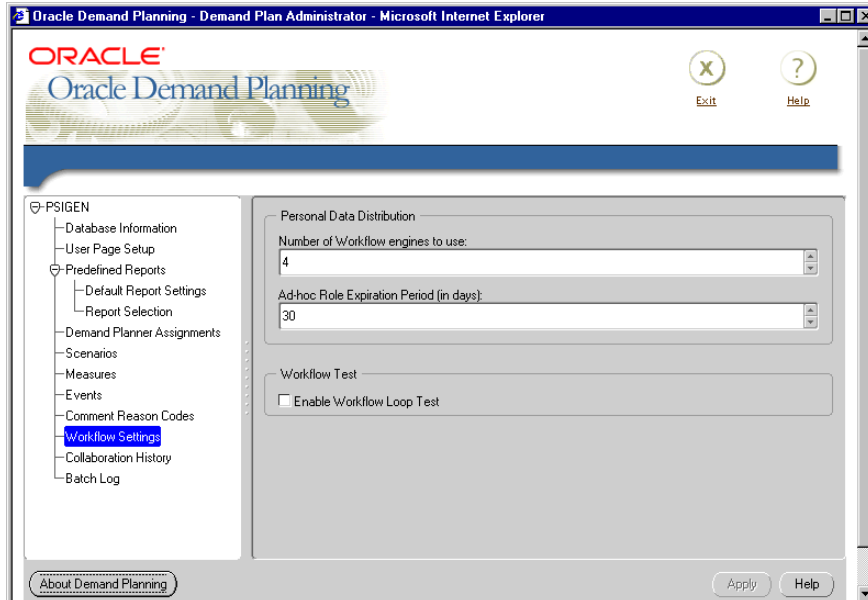
Oracle Demand Planning uses Oracle Workflow to manage the stages of the planning cycle that are composed of deferred activities. When the Distribute to Planners stage runs, Oracle Demand Planning's default behavior is to sequentially process each planners' assignment. Depending on your site's environment and implementation of the software, it may be efficient to process more than one assignment distribution concurrently.

Use the Workflow Settings function to specify the number of Workflow background engines to use when Workflow opens a connection to Express Server to build the personal database for planner assignments. You can also use Workflow Settings to test the connection to Oracle Workflow and specify the minimum number of days that the system will retain alert and batch notifications in the Workflow worklist.

For information about the role of Workflow in Oracle Demand Planning, see ["How Demand Planning Uses Oracle Workflow" on page B-1](#).

Example: Demand Plan Administrator page for maintaining Workflow settings

The following example shows the page that you use to maintain Workflow settings.



Maintaining Workflow settings

You can modify Workflow settings by changing the number of background engines to run when building planners' assignments, modifying the minimum number of days that the system will retain alert and workflow notifications, and indicating whether you want to test the Workflow configuration each time that data is downloaded from the Demand Planning Server.

To maintain Workflow settings:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Workflow Settings**.
Result: The page for maintaining Workflow settings opens.
3. The Number of Workflow engines to use box displays a numeric value. The value specifies the number of secondary Workflow engines that will run when Workflow opens Express Server sessions to build planners' personal databases,

which are based on their assignments. To change the value, type a new number or click the arrow next to the box and scroll to the number that you want to use.

The default for a new installation is 1. If you retain this value, the system starts a Workflow process that starts a single Express session and builds the assignments sequentially. If you select a larger value, Workflow starts the specified number of secondary processes, each of which opens an Express Server session and builds one or more assignments concurrently. The default value will work in all circumstances. However, building personal databases is a resource-intensive process. If there are many assignments and you have a lot of Express engine power, you might want to select a larger value. Oracle Corporation recommends that you consider the resources provided by your Express configuration.

4. The Ad-Hoc Role Expiration Period (in days) box, specifies the minimum number of days that you want the system to retain alert and workflow notifications in the Workflow worklist.

You can type a new number, or you can click the arrow next to the box to scroll to the number that you want.

5. If you want to test the Workflow configuration each time you download data from the Demand Planning Server, in the Workflow Test box, check the **Enable Workflow Loop Test** box. For more information about the Workflow test loop and associated error messages, see the *Oracle Demand Planning Installation and Configuration Guide*.

Note: The Workflow test runs automatically the first time that data is downloaded from the Demand Planning Server. You might only need to run it again if you suspect that there is a problem.

6. Choose **Apply** to save the current settings.

Batch Log

The Batch Log displays detailed date and time information about the status of the batch processes in the planning cycle. The log documents the stages involved in building a new plan, downloading data from the Demand Planning Server, populating measures, distributing to planners, collecting data from planners, and uploading data to the Demand Planning Server. The log displays automatically while a stage is running. You can also view the log on an ad hoc basis.

To view the batch log:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Batch Log**.
Result: The frame for viewing the batch log opens.
3. Scroll through the log to view activity detail.
4. To exit, select another item in the navigation list or close the page.

Collaboration History

The Collaboration History log enables you to view and sort information about actions that are related to data sharing.

The Collaboration History log includes the following information:

- Action — The action that occurred.
 - Send — The measure was sent.
 - Receive — The measure was received.
 - Download — The measure was downloaded from the Demand Planning Server.
 - Distribution — The measure was distributed.
- Measure — The measure affected by the action.
- Timestamp — The date on which the action occurred.
- Assignment — For an action initiated by a planner, this is the name of the planner's assignment. For an action initiated by the Demand Plan Manager, this is always "Planning Manager"; for an action initiated by the Demand Planning System Administrator, this is always "Administrator."
- User — For an action initiated by a planner or Demand Plan Manager, this is the user ID of the user who initiated the action. For an administrator, this is always "Demand Plan Administrator."

To view collaboration history:

1. Access the Demand Planning Administrator page.
2. In the navigation list, choose **Collaboration History**.

To sort collaboration history:

Note: By default, collaboration history is sorted by date.

With the Collaboration History page open, choose the label of the column by which you want to sort the information. For example, to sort by assignment name, choose the Assignment column label.

To clear collaboration history:

With the Collaboration History page open, choose **Clear All History**.

Example: Demand Plan Administration view of collaboration history

The following illustration shows an example of the Collaboration History page.

PRG-Planning Studio

Database Information

User Page Setup

Predefined Reports

Demand Plan Administration

Scenarios

Measures

Commitment Reason Codes

Workday Settings

Collaboration History

Batch Load

Message	Action	Assignment	User	Date
Customer Forecast	Send	Forecast Planner	JANET.BEP	2006/09/09 04:42
Customer Forecast	Receive	Southwest Planner	JANET.BEP	2006/09/09 06:17
Customer Forecast	Receive	Planning Manager	JANET.BEP	2006/09/09 09:14
Forecast of Booking	Send	Southwest Planner	JANET.BEP	2006/09/09 10:47
Forecast of Booking	Receive	Forecast Planner	JANET.BEP	2006/09/09 11:24
Forecast of Booking	Send	Forecast Planner	JANET.BEP	2006/09/09 13:40
Forecast of Booking	Receive	Southwest Planner	JANET.BEP	2006/09/09 14:00
Booking History	Download	Assignment	JANET.BEP	2006/09/10 09:01
Booking History	Send	Planning Manager	JANET.BEP	2006/09/10 11:25
Booking History	Receive	Forecast Planner	JANET.BEP	2006/09/10 13:00
Booking History	Receive	Forecast Planner	JANET.BEP	2006/09/10 14:17

Clear All History

Apply

Help

Environment for Planners and Demand Plan Manager

This section describes how to access, navigate, and exit Oracle Demand Planning when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [Logging In as a Planner or Demand Plan Manager](#)
- [Navigation List](#)
- [Notifications List](#)
- [Document Workspace](#)
- [Activity Log](#)
- [Getting Help](#)
- [Exiting Demand Planning](#)

Logging In as a Planner or Demand Plan Manager

When you log in with the Demand Planner or Demand Plan Manager responsibility, you access the Demand Planning page.

To log into Oracle Demand Planning as a planner or Demand Plan Manager:

1. In your Web browser, enter the URL for Oracle Applications. Your system administrator should provide this information.

Result: The Oracle Applications login window opens.

2. Enter your user name and password and choose **Connect**.

Result: If you have multiple user responsibilities, a list of responsibilities appears.

3. Select a responsibility: **Demand Planner** or **Demand Plan Manager**.

Result: If there is more than one demand plan, a list of plans appears.

4. Select the plan that you want to work with, scroll to the bottom of the page and choose **Start Demand Planning**.

Result: The Demand Planning page for the plan opens.

Login tips

Following are some guidelines for logging in:

- Ensure that cookies are enabled for your browser.
- If the system prompts you to download files to your machine for local storage, accept the files. This will enable the browser to load Web files only once.
- If you encounter errors, try clearing your browser's cache and restarting the browser.
- Bookmark your start page for easy access.
- Maximize your browser window. This ensures that the application will run at full size.
- Change settings for optimum screen resolution.
- If you will be using a language other than English, ensure that your browser is set to that language.

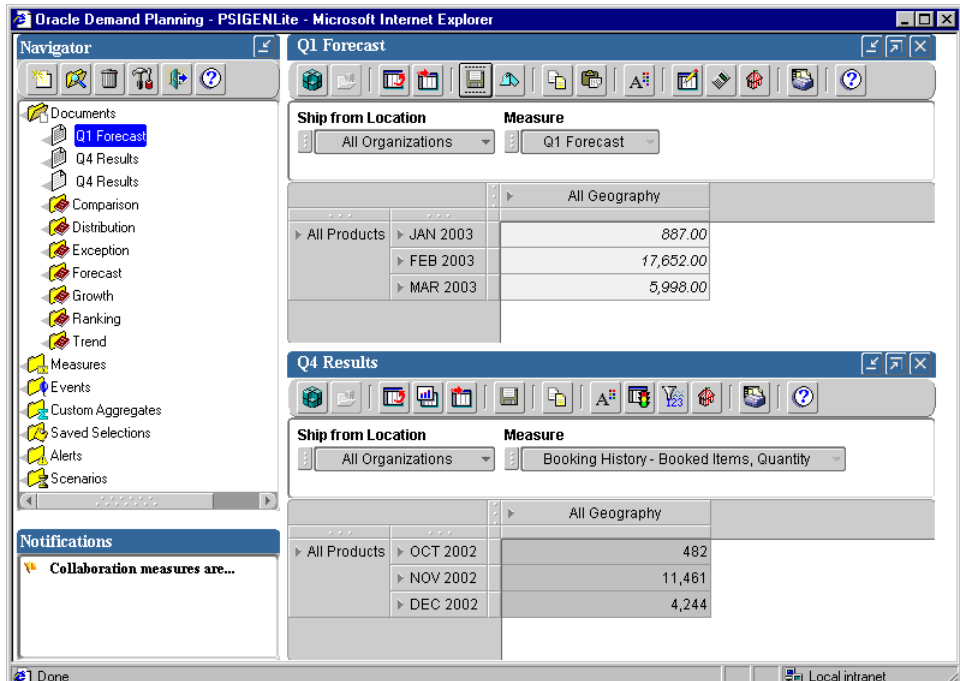
- Sessions have a maximum idle time that is set by an administrator. Your session will terminate automatically if it is idle for this time period.

Interface for Demand Planner and Demand Plan Manager

The Demand Planning page is the interface for planners and the Demand Plan Manager. The page is comprised of two frames: the document workspace in the right frame and the navigation list and Notifications list in the left frame.

Example: Demand Planning page

The following illustration shows the Demand Planning page.

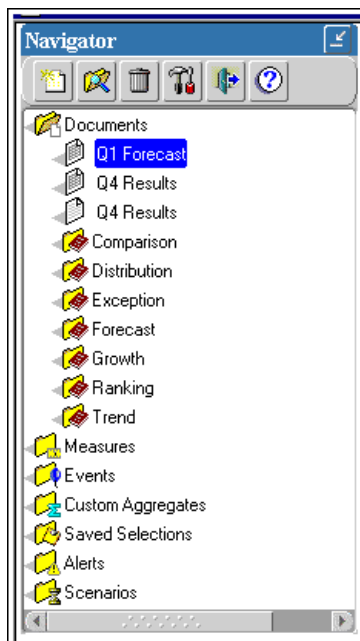


Navigation List

The navigation list, located in the upper left of the Demand Planning page, enables you to work with Demand Planning *objects* such as documents, measures, custom aggregates, saved selections, alerts, and scenarios.





Example: Navigation list



The following illustration shows a portion of a sample navigation list.



Navigation tools





The navigation toolbar appears at the top of the navigation list. The toolbar buttons enable you to perform functions described in the following table.










Button	Description	Function
	New	Create a new document (ad hoc report, ad hoc graph, worksheet), or other object (measure, custom aggregate, saved selection, document folder, alert).
	Find	Search for an object by name.
	Delete	Delete a document (ad hoc report, ad hoc graph, worksheet) or other object (measure, custom aggregate, saved selection, document folder, alert).
	Tools	<p>Displays a menu which includes the following functions:</p> <ul style="list-style-type: none"> ■ Import Data — Import data from a flat file into an editable measure. ■ Activity Log — View activities for your assignment or role. ■ Submit Measure — Select a measure to submit to the shared database for a scenario (only planners see this function). ■ Select Upload Measure — Select a measure to upload to the Demand Planning Server for a scenario (only the Demand Plan Manager sees this function). ■ Collaborate — Access collaborative functions for sending and receiving measures and viewing collaboration history. ■ Events Calendar — View information about events that are associated with the demand plan. ■ Planning Percentage Worksheet — Open a worksheet that enables you to view and edit dependent demand and planning percentages. (This option only appears if dependent demand has been enabled in the Demand Planning Server and the fact tables hold parent-child dependency relationships from the Bill of Materials.)


Button	Description	Function
	Exit	Exit the application.
	Help	Display online Help for planners and the Demand Plan Manager





Navigation list objects

The following table illustrates the objects that might appear in your navigation list. The table also lists the menu options that appear when you right-click an object.

Object	Description	Right-click commands
	Documents folder	New Report New Graph New Worksheet Paste New Folder Find Documents
	User-defined folder	Rename Delete Paste Find Documents Properties
	Ad hoc report	Open Rename Delete Cut Copy Properties
	Ad hoc graph	Open Rename Delete Cut Copy Properties

Object	Description	Right-click commands
	Worksheet	Open Rename Delete Cut Copy Paste Properties
	Folder for predefined reports	Find Documents Properties
	Predefined report (set up by the Demand Planning Administrator)	Open Properties
	Measures folder	New Measure Find Measures
	Shared stored measure	Edit Rename Delete Properties
	Shared stored accuracy measure	Edit Rename Delete Properties
	Shared formula measure	Edit Rename Delete Properties
	Personal stored measure (only planners see this object)	Edit Rename Delete Properties
	Personal accuracy measure (only planners see this object)	Edit Rename Delete Properties

Object	Description	Right-click commands
	Personal formula measure (only planners see this object)	Edit Rename Delete Properties
	Events folder	New Find
	Events group folder	Rename Delete Find Properties
	Event	Edit Rename Delete Properties
	Custom Aggregates folder	New Custom Aggregate Find Custom Aggregates
	Custom Aggregates <i>dimension</i> folder	New Custom Aggregate Find Custom Aggregates
	Custom aggregate	Edit Rename Delete Properties
	Saved Selection folder	New Saved Selection Find Saved Selection
	Saved Selection <i>dimension</i> folder	New Saved Selection Find Saved Selections
	Saved selection	Edit Rename Delete Properties

Object	Description	Right-click commands
	Alerts folder	New Alert Find Alerts
	Alert	Edit Disable/Enable Run Rename Delete Properties
	Scenarios folder	Find
	Scenario	Properties

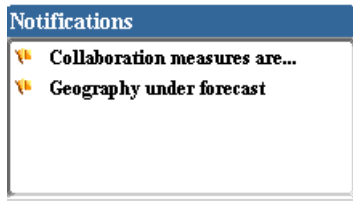
Notifications List

The Notifications list displays messages that have been generated by Oracle Workflow. You might see two types of notifications:

- When there is an alert for your attention, a notification concerning the alert is displayed in the notifications list. For information about alerts, see ["Working with Alerts and Notifications" on page 25-1](#).
- If another planner or the Demand Plan Manager has sent data that is within the scope of your assignment, a notification that collaboration measures are ready to receive is displayed in the notifications list. For information about receiving measures, see ["Receiving Measures" on page 23-8](#).

Example: Notifications list

The following illustration shows the Notifications list.



Document Workspace

The Document Workspace displays open documents.

Oracle Demand Planning enables you to work with the following types of documents:

- Worksheets — Display data in tabular format and enable you to modify data for editable measures. For information about worksheets, see ["Using Worksheets" on page 11-1](#).
- Planning Percentages Worksheets — For systems that are set up to calculate dependent demand, display planning percentages for products, models, and options and enable you to modify the data. For information about using Planning Percentage Worksheets, see ["Using the Planning Percentages Worksheet" on page 12-1](#).
- Ad hoc reports — Display data in tabular format. For information about ad hoc reports, see ["Using Ad Hoc Reports" on page 14-1](#).
- Ad hoc graphs — Display data in graphical format. For information about ad hoc graphs, see ["Using Ad Hoc Graphs" on page 15-1](#).
- Predefined reports — “Packaged” documents, set up by the Demand Plan Administrator, that run predefined analyses including evaluations of forecast accuracy. For information about predefined reports, see ["Using Predefined Reports" on page 16-1](#).

Document toolbars

When you create a new document or open an ad hoc report, graph, worksheet or predefined report, a set of buttons is displayed on a toolbar at the top of the document. These tools enable you to perform functions that are specific to the document type. For more information about the toolbar for a specific document type, see the following sections:

- "Toolbar for worksheets" on page 11-3
- "Toolbar for Planning Percentages worksheet" on page 12-4
- "Toolbar for ad hoc reports" on page 14-3
- "Toolbar for ad hoc graphs" on page 15-4
- "Toolbar for predefined reports" on page 16-3

How documents are displayed

When you open a document or create a new document, it is displayed in the document workspace. You can view a single document, or you can view a worksheet *and* another type of document at the same time. For example, you can view a worksheet and a report or a worksheet and a Planning Percentages worksheet. When you view two documents simultaneously, the worksheet always occupies the topmost position.

You can change the view by adjusting the horizontal and vertical aspects of the document workspace.

Adjusting the vertical workspace when two documents share the workspace

You can adjust the vertical aspect of a shared document workspace as follows:

- To enlarge one of the documents, choose the *Maximize* button at the top of that document.



The document expands and overlays the other document.

- To minimize a document, choose the *Minimize* button at the top of that document.



The other document overlays the minimized document.

- To restore the dual document view, choose the *Restore* button at the top of the minimized document.



Adjusting the horizontal workspace

You can adjust the horizontal aspect of the document workspace as follows:

- To expand the workspace, choose the *Minimize* button at the top of the navigation list.



The navigation list and the Notifications list are minimized. The current document or documents expand horizontally.

- To restore the default workspace, choose the restore button at the top of the navigation list.



The navigation list and Notifications list become visible. The current document or documents return to their default width.

Example: Two documents in workspace

The following illustration shows the Demand Planning page. In this example, a worksheet and an ad hoc report share the document workspace. The navigation list and the Notifications list are visible.

Navigator

- Documents
 - Q1 Forecast
 - Q4 Results
 - Q4 Results
 - Comparison
 - Exception
 - Forecast
 - Growth
 - Ranking
 - Trend
- Measures
- Events
- Custom Aggregates
- Saved Selections
- Alerts
- Scenarios

Notifications

Collaboration measures are...

Q1 Forecast

Ship from Location: All Organizations | Measure: Q1 Forecast

		All Geography
All Products	JAN 2003	887.00
	FEB 2003	17,652.00
	MAR 2003	5,998.00

Q4 Results

Ship from Location: All Organizations | Measure: Booking History - Booked Items, Quantity

		All Geography
All Products	OCT 2002	482
	NOV 2002	11,461
	DEC 2002	4,244

Done | Local intranet

Example: Single document in expanded workspace

The following illustration shows the Demand Planning page. In the example a single document, in this case a worksheet, occupies the entire horizontal and vertical workspace. The navigation list and the Notifications list are minimized.

		All Geography	United States	Canada
▼ 2001	▼ All Products	49.72	26.61	3.21
	▶ MISC.MISC	17.17	9.09	1.04
	▶ ASSEMBLY.FINAL	14.84	7.54	0.93
	▶ Other	15.41	7.68	1.24
▶ Qtr 1 2001	▼ All Products	16.56	8.86	1.07
	▶ MISC.MISC	5.72	3.03	0.34
	▶ ASSEMBLY.FINAL	4.94	2.51	0.31
	▶ Other	5.13	2.56	0.41
▶ Qtr 2 2001	▼ All Products	33.16	17.75	2.14
	▶ MISC.MISC	11.45	6.06	0.69
	▶ ASSEMBLY.FINAL	9.90	5.03	0.62
	▶ Other	10.28	5.12	0.83

Activity Log

The activity log enables you to view a list of your activities for your assignment or role. The Activity log documents the following actions:

- Logging in and out
- Recalculating data
- Saving documents
- Submitting or uploading measures

- Creating comments
- Creating measures

Viewing the activity log

You can view the Activity log at any time.

To view the Activity log:

1. Access the Demand Planning page as a planner or Demand Plan Manager.
2. On the navigation list toolbar, choose the **Tools** button.

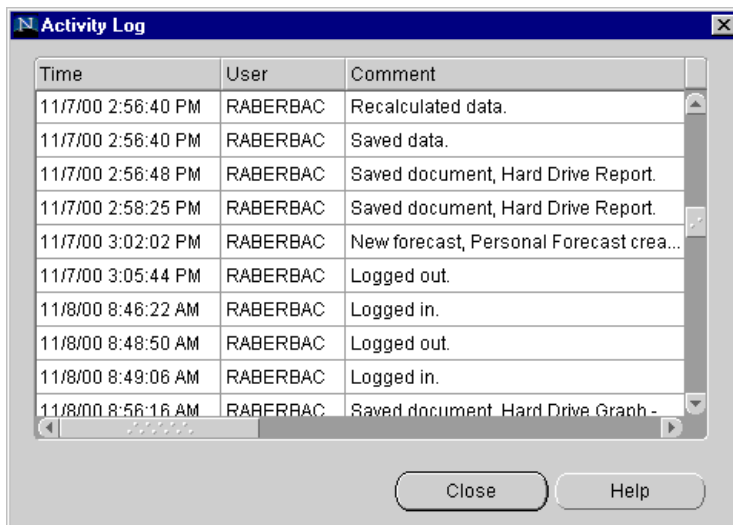


3. From the submenu, choose **Activity Log**.

Result: The Activity log opens.

Example: Activity log

The following illustration shows an activity log. In this example, the log is sorted by time.



Getting Help

To view information that is page-specific, choose the **Help** button at the bottom of the page.

You can also access online help for Oracle Demand Planning from the Demand Planning page and view version and system information.

To access online Help from the Demand Planning page:

1. Choose the **Help** button, located on the navigation toolbar.



Result: A menu appears.

2. Choose **Demand Planning Help**.
3. To print Help, use your browser's print function.
4. To exit Help, close the Help window.

To access version and system information from the Demand Planning page:

1. Click the **Help** button, located on the navigation toolbar.



Result: A menu appears.

2. Choose **About Demand Planning**.

Result: The application name, release, and build number are displayed.

3. Choose **System Information**.

Result: The application name, release, and build number are displayed.

4. To save system information to a text file, choose Save As and specify the file name and path.
5. To exit, choose **OK**.

Exiting Demand Planning

When your work is complete, you can exit Oracle Demand Planning. Exiting terminates the application. If you have modified a document or other object, you will be prompted to save it.

To exit Oracle Demand Planning:

Choose the **Close** button on the navigation toolbar.



Alternatively, you can use the browser's close button (X), located in the upper right corner of the screen. This exits the application and closes the browser.

Using Worksheets















This section describes how to use worksheets when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- About Worksheets
- Creating Worksheets
- Opening Worksheets
- Selecting Data for Worksheets
- Arranging and Viewing Data in Worksheets
- Viewing Events for Measures in Worksheets
- Modifying Data in Worksheets
- Formatting Worksheets
- Printing Worksheets
- Saving Worksheets
- Exporting Data from Worksheets
- Closing Worksheets
- Renaming Worksheets
- Viewing Worksheet Properties
- Deleting Worksheets

Example: Worksheet

Document 1






























Measure **Ship from Location**

	Canada				
	JAN 2001	FEB 2001	MAR 2001	APR 2001	MAY 2001
AS65102 (Ea)	4867564	5566666	5445557	6543445	7777777
AS65103 (Ea)	3986732	6664589	4448903	555566	5567554
AS72111 (Ea)	3456789	6646777	333378	7983245	5988777
AS18947 (Ea)	39485764	9876665	7658766	5678955	5557873
AS54888 (Ea)	4867664	56746587	5555555	4444778	7458908
AS92689 (Ea)	4555098	4566663	5570995	234567	3459976

Toolbar for worksheets

The Document toolbar appears at the top of an open worksheet. The toolbar buttons enable you to perform the functions that are listed in the following table.

Button	Description	Function
	Select Data	Select values from a list and access various data selection tools. Also sort selections.
	Apply Saved Selection	Replace the current values in the worksheet with a saved selection of values.
	Change Layout	Change the layout of the worksheet.
	Export	Export data and labels from the worksheet to a comma delimited (.csv), tab delimited (.txt), or Excel 2000+ (*.htm) file.
	Save As	Save the worksheet and its current data.
	Reset Data	Reset unsaved data in the worksheet to a previous status.
	Copy	Copy selected data and labels from the worksheet to the Windows clipboard. Also copy to a measure or product.
	Paste	Paste data from the Windows clipboard into the worksheet.

Button	Description	Function
	Format Document	Specify a title, subtitle, and footnote for the worksheet. Also apply formatting such as row and column sizing and font and display specifications.
	Modify Selected Data	Use a variety of techniques to change data values in selected worksheet cells. You can also protect cells from future edits and enter comments documenting your modifications.
	Recalculate	Recalculate the data in the worksheet.
	Events Calendar	View a calendar that displays information about events associated with the demand plan.
	Print	Print the worksheet.
	Help	Display online Help for planners and the Demand Plan Manager.

Creating Worksheets

You can base a worksheet on the default worksheet document. You can also use any saved document as the starting point for a new worksheet.

A new worksheet initially reflects the document on which the worksheet is based. You can customize the worksheet so that it displays exactly the data that you want to work with. You can also select layout and format options.

To create a worksheet:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Worksheet**.

Alternatively, you can click the right mouse button on **Documents** in the navigation list and choose **New Worksheet** from the popup menu.

3. Choose one of the following:
 - **Use default** — Creates a worksheet that is based on the default worksheet document.
 - **Based on** — Creates a worksheet that is based on a selected document.

If there are no saved documents, then you do not have these options. The worksheet will automatically be based on the default worksheet document. For information about setting the default, see ["Saving Worksheets" on page 11-37](#).

4. Choose **OK** to create the worksheet.

Result: The worksheet is displayed in the workspace. A generic name, such as "Document 1" appears above the document body.

Opening Worksheets

Saved worksheets are displayed as objects in the navigation list, located in the left frame of your browser. Depending on how a worksheet was saved, it might appear in the main Documents folder or in a folder that you created.

To open a worksheet:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the worksheet that you want to open.

Note: To search for a worksheet in the navigation list, click the right mouse button on the main Documents folder or a specific document folder, choose **Find Documents**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the document object.

Alternatively, you can click the right mouse button on the document object and choose **Open** from the popup menu.

Selecting Data for Worksheets

When you create a new worksheet, the data reflects selections for the document on which the worksheet is based. When you open a saved worksheet, the data reflects selections that were in effect when the document was saved.

You can select *measures* and *dimension values* so that the worksheet displays exactly the data that you want to work with.

- A *measure* represents a variable which is a placeholder for storing data values for all levels of all dimensions. For example Booking History, Shipment History, and Q1 Forecast might be measures in your database.
- A *dimension* is a database object that organizes and indexes the data, similar to a key in a relational database. For example, if you have data with values for various time periods, then the data has a Time dimension; that is, it is organized by time.
- *Dimension values* are the elements that make up a dimension. For example, a Time dimension might include values for years, quarters, months, and weeks. You can select any or all of the values that are available within a dimension, including custom aggregates and saved selections that you have defined

To select data for a worksheet:

1. With the worksheet open in the workspace, choose the **Select Data** button on the Document toolbar.



Result: A list of the dimensions in your database appears. The list includes Measure.

2. Choose a dimension for which you want to select values.

Result: The Select Data dialog box opens. The dimension that you chose is displayed in the Select Values for box.

3. Choose values for the current dimension.

For information about data selection tools and techniques, see ["Selecting Data" on page 22-1](#).

4. To select values for another dimension, in the Select Values for box choose the dimension and repeat Step 3.
5. Repeat Steps 3 and 4 until the worksheet includes the values that you want to work with.

Applying custom aggregates and saved selections to a worksheet

In addition to using a selection list or selection tools to select data values for a worksheet, you can change the data that is displayed in the worksheet by applying saved selections and custom aggregates to the open document. For more information, see the following topics:

["Defining Custom Aggregates" on page 19-2](#)

["Applying Custom Aggregates to Open Documents" on page 19-5](#)

["Defining Saved Selections" on page 20-2](#)

["Applying Saved Selections to Open Documents" on page 20-7](#)

If expected rows do not display

It is possible that a row that you expect to see might not appear if NA rows are suppressed in the worksheet. For example, assume that you position Time on the row edge of the worksheet, and select three Time values: October, November, and December. If NA row suppression is turned on and there is no data for December, then the worksheet will display rows for October and November, but no row for December.

If you think that NA or zero rows are being suppressed and you want to view these rows, you can use a format option to show the rows. For more information, see ["Formatting general worksheet elements" on page 11-26](#).

Arranging and Viewing Data in Worksheets

You can change a worksheet so that you can view the data in the way that you want. The following options are available:

- You can change the layout by rearranging the dimensions on the page.
- You can drill through aggregate values to expose component values.
- You can page through the worksheet to view data for dimensions in the page position.
- You can change the size of columns or rows to enhance your view of the data.

Changing the layout of a worksheet

You can use the Change Layout button on the Document toolbar to change the layout of a worksheet. Alternatively, you can change the layout manually by dragging and dropping dimension tiles.

To use the Change Layout button to change the layout of a worksheet:

1. With the worksheet open in the workspace, choose the **Change Layout** button on the Document toolbar.



Result: The Layout box displays the current positions of the dimensions on the page. Dimensions for which data displays as separate pages are shown in the Page position. Dimensions for which data goes across the page are shown in the

row position. Dimensions for which data goes down the page are shown in the column position.

2. You can click a dimension and drop it on another location or drag it to a new location.

Result: The dimension moves as follows:

- If you drag a dimension near another dimension and the dimension turns gray, this indicates that the two dimensions will exchange (swap) positions.
 - If you drag a dimension and a black bar appears, this indicates that the dimension will be moved to the position.
3. You can also use the controls at the top of the page to manipulate dimension positions as follows:
 - a. In the left box, select an action.
 - * Choose **Move** to move a dimension to another position.
 - * Choose **Swap** to exchange the position of one dimension with another dimension.
 - b. In the center box, select the dimension on which to perform the move or exchange.
 - c. If you chose **Move** in Step 2a, use the right box to select the target location for the move.

If you chose **Swap** in Step 2a, use the right box to select the dimension or edge for the exchange.
 - d. Choose **Go** to update the display in the Layout box to reflect the current status in the boxes.
 4. When the Layout box displays the desired settings for the dimensions, choose **OK**.

Result: The Change Layout dialog box closes. The elements in the document are moved to the locations that you specified.

To use drag and drop to change the worksheet layout:

1. Click a row, column, or page selector. These selectors are located beside the row, column, and page labels and appear similar to a stoplight, as shown following.



2. Drop the selection on another location or drag it to a new location.

Result: The dimension moves with the selector as follows:

- If you drag a dimension near another dimension and the dimension turns gray, this indicates that the two dimensions will exchange (swap) positions.
- If you drag a dimension and a black bar appears, this indicates that the dimension will be placed on the edge.

Drilling through levels of data in a worksheet

If a worksheet includes hierarchical dimension values and the drilling option has been turned on for the document, you can view data at various levels by drilling within aggregate dimension values. For example, if the worksheet displays a geography that includes lower level values, you can “drill down” and expand the display to show component geographies. You can then “drill up” to collapse the display.

You can drill a dimension value that is in the row or column position if a drill arrow appears to the left of the dimension value name. The arrow shape changes, depending on whether you can expand or collapse the value:

- Right pointing arrow — Located beside a value that displays a total while the values that contribute to that total are not visible. Clicking this arrow enables you to drill down, causing the document to display the lower level values.
- Down pointing arrow — Located beside a value that displays a total while the values that contribute to that total are visible beneath it. Clicking this arrow enables you to drill up, causing the document to display only the total value.

A format option enables you to turn drilling on or off in a worksheet. For more information, see ["Formatting general worksheet elements" on page 11-26](#).

Paging through a worksheet

Worksheet data is displayed one page at a time. You can use the page controls at the top of the document to page through a worksheet and display pages other than the one that is currently in view. For example, the current page might show data for Total Product, but you can use the page control to select another product from the list and see its data.

Adjusting columns and rows in a worksheet

You can change the size of rows and columns in a worksheet so that the information is easier to read. You can use drag and drop to adjust column and row sizes. You can also use a format option. For more information about adjusting columns and rows, see ["Sizing rows and columns in a worksheet"](#) on page 11-28.

Viewing Events for Measures in Worksheets

An *event* is an occurrence such as a promotion, new product introduction, or product phaseout that is expected to impact demand for a product. When you define a stored measure, you can associate one or more events with that measure. Events might also be linked to stored measures in the shared database. Thus, your ad hoc report might include measures that have associations with events.

While you are using a worksheet you can access an Events Calendar which provides information about the events that are associated with the demand plan.

To view events that are associated with a measure:

Note: The following procedure describes how to use the Events Calendar to view information about a measure. For more information about events, see ["Working with Events"](#) on page 18-1. For more information about the Events Calendar, see ["Using the Events Calendar"](#) on page 18-18.

1. With the document open in the workspace, choose the **Events Calendar** tool on the Document toolbar.



Result: The Events Calendar opens. The Month tab displays events for the current month. The right frame displays all events that are linked to the demand plan.

2. Choose the **Filter Events by Measure** button.



Result: The Choose a Measure dialog box opens. The list displays all measures that have been defined for the demand plan.

3. Select a measure from the list and choose **OK**.

Result: The right panel now displays only those events that have been linked to the selected measure. The measure name appears at the bottom of the frame.

4. To view more information about the event, double-click it.

Result: The Event Wizard opens, where you can view (and optionally edit) the event definition.

5. You can move through the calendar to view the event time period. Choose **Next** to advance the month display and **Previous** to go back a month. Choose the **Year** tab to view events by year.
6. Choose **OK** to exit the Events calendar.

Modifying Data in Worksheets

You can modify editable (read/write) data values in a worksheet. If your responsibility is Demand Planner, saving the worksheet saves the data in your personal database. If your responsibility is Demand Plan Manager, saving the worksheet saves the data in the shared database. If you do not save the worksheet, then your edits will not be saved.

What data can you modify?

In order for data to be editable, the measure that contains the data must be a stored measure that includes the "Editable" property as part of its definition.

Tip: If you want to edit data for a measure that is not currently editable, you can modify the measure definition and set the Editable property to "yes." Or you can create a copy of the measure and make the copy editable.

Note that you cannot edit data for a formula measure. Data for a formula measure is automatically updated when you edit the measure on which the formula is based.

If Oracle Demand Planning is set up to support dependent demand, you can view measures for dependent demand and total demand in the worksheet. However, you cannot edit data for these measures. To view product models and options and modify dependent demand and planning percentages, use the Planning Percentages worksheet. To access the Planning Percentages Worksheet, click the right mouse button in a worksheet cell and choose **Planning Percentages Worksheet** from the popup menu. The Planning Percentages Worksheet opens below the standard worksheet. For more information, see "[Using the Planning Percentages Worksheet](#)" on page 12-1.

Display formats indicate status

Display formats enable you to identify non-editable cells, editable cells, cells that have been modified, as well as cells that have been locked or commented in the worksheet. A setting that is specific to each worksheet enables you to turn the color and font indicators off and on.

When all display formats are turned on, data in worksheet cells appears as follows:

- Non-editable (read-only) cells — dark gray background
- Editable cells — pale gray background
- Modified cells — blue font
- Locked cells — red background
- Commented cells — bold font

Usually, you will want to have display formats turned on to highlight your modifications. However, there might be circumstances in which you want to turn off one or more formats. For more information about turning display formats off or on, see the "[Specifying display formats for a worksheet](#)" on page 11-30.

Note: Turning a display format off or on does not affect any data modifications that you have made in the worksheet; it merely changes the appearance of the modified cells.

Working with NA or zero data

You can modify editable data cells in which the current value is NA or 0 (zero). However, if you are editing high level data, a warning might appear because allocating the values down will impact system resources.

Note: NA or zero rows might not initially display in a worksheet. You can use a format option to make them visible. For more information, see "[Formatting general worksheet elements](#)" on [page 11-26](#).

Editing data

You can edit the value in a single cell of the worksheet. You can also use block edit tools to increase data values, decrease data values, or fill in data values for a group of cells. In order to save your edits, you must save the worksheet.

Requirements for editing data on the cell level are as follows:

- Cells must be editable and unlocked.
- If you select multiple cells, the cells must be at the same level. For example, you can increase data for Boston and San Francisco but not for Boston and California

Note: If you enter, fill, increase, or decrease a cell by a numeric value and the value has more decimal digits than the numbers that are currently displayed in the worksheet, the edited value will be rounded to the nearest decimal place.

To edit the value in a single cell:

1. With the document open in the workspace, click in the cell that contains the value that you want to change.
2. Type in the new value.

To increase data values in one or more cells:

1. With the document open in the workspace, select the cell or cells that contain the values that you want to increase.
 - Use CTRL+click to select cells that are on the same level but are not contiguous.
 - To select all cells in a column, click the highlighter under the column label. The cells that you select must be at the same level; otherwise the edit will fail.
 - To select all cells in a row, click the highlighter next to the row label. The cells that you select must be at the same level; otherwise the edit will fail.
2. Click the right mouse button or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Increase** from the popup menu.

Result: The Modify Data dialog box opens.
4. In the **Increase by** box, enter the value by which you want to increase the data.
5. If the increase value is a percentage, select **Percent**.
6. Choose **OK** to apply the modification.

To decrease data values in one or more cells:

1. With the document open in the workspace, select the cell or cells that contain the data values that you want to decrease.
 - Use CTRL+click to select cells that are on the same level but are not contiguous.
 - To select all cells in a column, click the highlighter under the column label. The cells that you select must be at the same level; otherwise the edit will fail.
 - To select all cells in a row, click the highlighter next to the row label. The cells that you select must be at the same level; otherwise the edit will fail.

2. Click the right mouse button or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Decrease** from the popup menu.

Result: The Modify Data dialog box opens.

4. In the Decrease by box, enter the value by which you want to decrease the data.
5. If the decrease value is a percentage, select **Percent**.
6. Choose **OK** to apply the modification.

To fill data in one or more cells:

1. With the document open in the workspace, select the cell or cells in which you want to replace data values.
 - Use CTRL+click to select cells that are on the same level but are not contiguous.
 - To select all cells in a column, click the highlighter under the column label. The cells that you select must be at the same level; otherwise the edit will fail.
 - To select all cells in a row, click the highlighter next to the row label. The cells that you select must be at the same level; otherwise the edit will fail.
2. Click the right mouse button or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Fill** from the popup menu.

Result: The Modify Data dialog box opens.

4. In the **Fill with** box, enter the value with which you want to fill the cells.
5. Choose **OK** to apply the modification.

Forecasting data

You can run a statistical forecast for data in one or more cells. You specify the statistical forecasting method to use, enter the forecast time period, and select the historical measure on which to base the forecast. In order to save your edits, you must save the worksheet.

Requirements for running a statistical forecast are as follows:

- The cell or cells should contain data for a forecast measure.
- The cell or cells must be editable and unlocked.
- If you select multiple cells, the cells must be at the same level. For example, you can forecast data for Boston and San Francisco but not for Boston and California.

To run a statistical forecast for data in one or more cells:

1. With the document open in the workspace, select the cell or cells that you want to forecast.
 - Use CTRL+click to select cells that are on the same level but are not contiguous.
 - To select all cells in a column, click the highlighter under the column label. The cells that you select must be at the same level; otherwise the edit will fail.
 - To select all cells in a row, click the highlighter next to the row label. The cells that you select must be at the same level; otherwise the edit will fail.
2. Click the right mouse button or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Statistical Forecast** from the popup menu.
Result: The Statistical Forecast Measure dialog box opens.

4. Make the Forecast Method tab active and proceed as follows:
 - a. In the Method box, select a forecasting method. **For information about forecast methods, see "Forecast Methods" on page A-2.**
 - b. For certain forecasting methods, you can set values that indicate the weight to give to recent changes in Mean Value, Trend, and Seasonality. **For more information about these parameters, see "Advanced statistical parameters" on page A-3.**
5. Make the Time Range tab active. The information that you provide specifies the time range in the historical measure to consider when calculating the forecast. Proceed as follows:
 - a. In the Start date box, select a start date for the historical time range.
 - b. In the End date box, select an end date for the historical time range.
 - c. In the Historical Measure box, select the measure on which to base the forecast.
6. Choose **OK** to forecast data in the selected cells.

Copying and pasting data

You can copy and paste data in a worksheet as follows:

- You can copy data to the Windows clipboard. You can choose to copy data that has been stripped of special formats such as thousands separators, currency signs, and percent symbols, or you can include these formats. You can also specify that the copy include row and column labels.
- You can paste data from the clipboard into another cell or cells in the worksheet.
- You can copy data from one measure to another measure.
- You can copy data from one product to another product. This can be useful when you want to quickly provide information for a new product.

In order to save your edits, you must save the worksheet.

Note: Copying to a measure or product replaces the values in the target measure or product with new values. The copy process also applies the allocation percentages from the source measure or product to the target cells. Pasting values replaces the values in the target cells with new values. The target cells maintain their current allocation percentages.

Requirements for copying and pasting data are as follows:

- If you are copying multiple cells, the cells must be contiguous.
- If you are pasting data that you have copied to the Windows clipboard or if you are copying data to a measure or product, the following requirements apply:
 - The target region must be editable and unlocked.
 - The target region must be at a single level. For example, you can paste data into cells that contain data for Massachusetts and California, but not into cells that contain data for Massachusetts and Boston.
 - The target region must have the same unit of measure (quantity or amount) as the source.

To copy data from a worksheet to the Windows clipboard:

1. With the document open in the workspace, select the cell or cells that you want to copy.
 - To select all cells in a column, click the highlighter under the column label.
 - To select all cells in a row, click the highlighter next to the row label.
2. Choose the **Copy** button on the Document toolbar.



Alternatively, you can click the right mouse button and view a popup menu.

3. Choose a copy option:

- **Copy Data to Clipboard** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols.
- **Copy Special** — Displays a submenu from which you can select one of the following:
 - * **Copy Data with Labels** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols. Also copies the row and column labels associated with the data.
 - * **Copy Number Formatted Data** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols.
 - * **Copy Number Formatted Data with Labels** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols. Also copies the row and column labels associated with the data.
 - * **Copy Row Labels** — Copies the row labels that are associated with the selected cells. Does not copy the actual data.
 - * **Copy Column Labels** — Copies the column labels that are associated with the selected cells. Does not copy the actual data.

To paste data from the Windows clipboard into a worksheet:

1. With the document open in the workspace, select the cell or block of cells into which you want to paste data.

Important: The range of cells that you select must exactly match the range of cells that was copied to the clipboard. If the paste range does not match the copy range, then the system will not paste the data.

2. Choose the **Paste** button on the Document toolbar.



Alternatively, you can click the right mouse button and choose **Paste** from the popup menu.

To copy data to a measure:

1. With the document open in the workspace, select the cell or cells that contain the data that you want to copy.
2. Click the right mouse button or choose the **Copy** button on the Document toolbar.



3. Choose **Copy To Measure** from the popup menu.

Result: The Target Measure dialog box opens.

4. From the list of measures, select the measure to which you want to copy the data and choose **OK**.

To copy data to a product:

1. With the document open in the workspace, select the cell or cells that you want to copy.
2. Click the right mouse button or choose the **Copy** button on the Document toolbar.



3. Choose **Copy To Product** from the popup menu.

Result: The Target Product dialog box opens.

4. From the list of products, select the product to which you want to copy the data and choose **OK**.

Locking and unlocking cells

You can lock one or more cells so that the data values in the cells cannot be edited. Locking protects the value in the cell as well as the values in all cells that are its children. For example, locking a cell for Massachusetts also protects the data for

Boston. Recalculation ignores locked cells and their children and proportionately spreads data to other values.

Note: If your Demand Planning system is set up for collaboration among planners, it is possible for a locked cell to be modified if a measure is received that affects the cell. Unless absolutely required, you should avoid locking cells in the view scope or their aggregate levels in shared measures.

You can remove cell protection by unlocking locked cells.

In order to retain the locked or unlocked status of a cell, you must save the worksheet.

Requirements for locking and unlocking cells are as follows:

- In order to lock a cell, the cell must be editable.
- In order to unlock a cell, the cell must be locked.

To lock a cell:

1. With the document open in the workspace, select the cell or cells that contain the data that you want to protect.

Use CTRL+click to select cells that are not contiguous.

2. Click the right mouse button, or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Lock Cell** from the popup menu.

To unlock a cell:

1. With the document open in the workspace, select the cell or cells that you want to unlock.

Use CTRL+click to select cells that are not contiguous.

2. Click the right mouse button, or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Unlock Cell** from the popup menu.

Using comments to document modifications

As you modify data, you can document your changes by entering one or more comments. Comments are free text that you associate with predefined reason codes. In order to retain your comments, you must save the worksheet.

Requirements for entering comments are as follows:

- The cell or cells must be editable and unlocked.
- If you select multiple cells, all of the cells must be at a single level. For example, you can enter a comment for San Francisco and Boston, but not for Boston and California.

To enter a comment:

1. With the document open in the workspace, select the cell or cells for which you want to enter a comment.

Use CTRL+Click to select cells that are not contiguous but are at the same level.

2. Click the right mouse button, or choose the **Modify Selected Data** button on the Document toolbar.



3. Choose **Comments** from the popup menu.

Result: The Comments dialog box opens.

4. In the Reason box, select a reason code for the comment.
5. In the New Comment box, enter text for the comment. You can enter up to 300 characters.
6. Choose **Add** to add the comment.

7. To enter another comment for the same cells, repeat Steps 4 through 6. You can use the same reason code or you can select an alternate code.
8. Choose **OK** to return to the worksheet.

Deleting comments

You can delete a comment immediately after you enter it, but you cannot delete a comment once you have entered another comment or exited the dialog box. However, if you have not yet saved the worksheet, you can use the Reset Data function. Resetting data will remove the comment, along with other changes that have been made.

Comments in copied measures

If you copy a measure, comment that have been entered at all levels will be included in the copy.

Recalculating data

Recalculation computes current data values and spreads changes to appropriate cells in a worksheet. Recalculation is automatically triggered when you perform one of the following actions:

- Save the worksheet.
- Lock or unlock cells.
- Change levels while editing data.
- Increase data, decrease data, fill cells, paste data into cells, or generate a statistical forecast.

When data is recalculated following a change in a value at the lowest level, the data is aggregated up through all parent nodes. For example, if Boston is at the lowest level and you increase a data value for Boston and the data is recalculated, then Eastern Massachusetts, and Massachusetts will reflect the increase.

When data is recalculated following a change at a higher level, data is allocated down to the lower levels, based on the allocation rule specified for the measure, and then aggregated upward. For example, if you increase a data value for Eastern Massachusetts and the data is recalculated, then Boston and other values that are children of Eastern Massachusetts as well as all parent nodes will reflect the increase.

Recalculation ignores locked cells and their children and proportionately spreads data to other values.

Note: If a price list has been specified for the demand plan in the Demand Planning Server and a value for quantity is changed, the system recalculates the related amount. Similarly, if a value for amount is changed, the system recalculates the related quantity.

Usually, recalculation occurs in the background. However, you can recalculate data manually as you work.

To recalculate data manually:

Choose the **Recalculate** button on the Document toolbar.



Resetting data

If you have made changes to a worksheet and you decide not to keep the changes, you can reset the data in the worksheet. You can roll back the values to the most recent modification. Alternatively, you can roll back the values to the last Save action.

Important: You can only reset data *before* you save the worksheet. You cannot reset data that has been saved.

To reset data:

1. Choose the **Reset Data** button on the Document toolbar.



2. Choose a reset option:
 - **Reset Data to Last Recalculation** — Resets the data to the results just after the last recalculation.

- **Reset Data to Last Save** — Resets the data to the last time that the data was saved, regardless of the number of modifications that have been made.

Formatting Worksheets

You can change the appearance of data in a worksheet. The following types of format options are available:

- **General** — Specify parameters for displaying indented levels, horizontal and vertical gridlines, and rows that contain NA (unavailable) and zero data. Also specify how to handle formatting conflicts and drilling.
- **Font** — Specify fonts for data and labels; also specify alignment for data in the body of the worksheet.
- **Autosizing** — Specify sizing options for rows and columns.
- **Display** — Specify how to display editable cells, non-editable cells, modified cells, locked cells, and cells that contain comments.
- **Titles** — Specify text, font, alignment, and color information for a title, subtitle, and footnote.
- **Format Rows and Columns** — Specify how numbers will be displayed in selected rows and columns

Formatting general worksheet elements

You can set parameters that specify how to display levels of data, gridlines, and rows that contain NA (unavailable) and zero data. You can also specify how to handle formatting conflicts and drilling.

To specify general formats for a worksheet:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. The General tab displays the current settings for worksheet elements. You can change one or more of the following settings:
 - **View Rows** — Specify whether to show all rows or suppress rows with zero values, NA values, or both NA and zero values.
 - **Formatting Precedence (low to high)** — Specify the precedence order for formatting when row, column, and page conflicts occur. For example, if you use the Format Selected Rows and Columns option and choose purple as the text color for a row and then choose yellow as the text color for a column that intersects with the row, the setting for Formatting Precedence determines which color will display for the intersecting cell.
 - **NA Spell** — Enter a character or character string to represent NA data (up to 31 characters).
 - **Indent by Level** — For dimensions that have a hierarchical structure, specify whether to indent rows by level and enter the number of indent characters to use.
 - **Horizontal Grid Lines** — Specify whether to show or hide horizontal grid lines.
 - **Vertical Grid Lines** — Specify whether to show or hide vertical grid lines.
 - **Enable Drilling** — For dimensions that have a hierarchical structure, specify whether you can drill down to lower levels.
4. Choose **OK** to apply your selections.

Formatting fonts and text alignment for a worksheet

You can select font, font size, and text alignment for a worksheet. Font settings will be applied to both the data *and* the labels in the worksheet. Alignment settings will be applied only to the data.

To select fonts and alignment for a worksheet:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. Select the **Font** tab.
4. The Font tab displays the current settings for font name, font size, and alignment. You can change one or more of these selections as follows:
 - Use the Font box to select the font name.
 - Use the Size box to select the font size.
 - In the Alignment box, select an alignment option for data values.
5. Choose **OK** to apply your selections.

Sizing rows and columns in a worksheet

You can change the size of rows and columns in a worksheet so that the information is easier to read. You can use a format option to change row or column size. You can also change column or row size manually.

To use a format option to set row and column size:

1. With the document open in the workspace, choose the **Format Document** tool on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. Select the **Autosizing** tab.
4. The Row Sizing box displays the current setting for row size. You can choose one of the following options:
 - **Autosizing by Label** — Automatically sizes the rows based on the height and width of the row labels.
 - **Equal Sizing** — Sizes rows based on a height and width that you specify. The row height is determined by multiplying the font size of the label by the value that you enter.
 - **None** — Removes automatic or equal sizing from the rows.

5. The Column Sizing box displays the current setting for column size. You can choose one of the following options:
 - **Autosizing** — Automatically sizes the columns on the current page based on your selection. You can choose one of the following options:
 - * **by Label** — Sizes the columns according to the size of the individual column labels.
 - * **by Data** — Sizes the columns according to the size of the data each column contains.
 - * **by Largest Data or Label** — Sizes the columns to the larger of either the individual column labels or the data contained in each column.
 - **Equal Widths by Average Character** — Sizes columns based on a width that you specify.
 - **None** — Removes automatic or equal sizing from the columns.
6. Choose **OK** to apply your selections.

To manually size a row or column in a worksheet:

1. With the document open in the workspace, position the cursor on the border of the label of the row or column whose size you want to change.
2. When the cursor changes to a double arrow, click and move the border.

Result: If the current setting for row or column sizing is an Autosize option or None, each instance of the dimension value in the selected row or column will change size while the other rows or columns will retain their current size. If the current setting for column or row sizing is Equal, all of the columns or rows will change size.

To reapply autosizing to columns or rows in a worksheet:

1. Choose the **Format Document** button on the Document toolbar.



Alternatively, you can click the right mouse button in the document.

2. Choose one of the following options from the popup menu:

- **Reapply Autosizing** — Applies default autosizing to rows and columns. Does not override manual resizing (drag and drop).
- **Reapply Autosizing to All** — Applies default autosizing to rows and columns. Overrides manual resizing (drag and drop).

Note: If Equal sizing or None has been selected for rows and columns, the options for reapplying autosizing will not appear when you click the right mouse button. If Autosizing has been selected for either column or row, the options to reapply autosizing will appear when you click the right mouse button, but will only apply to the dimension position (column or row) that has autosizing turned on.

Specifying display formats for a worksheet

You can specify whether special display formats will apply to read-only cells and to cells that have been modified, locked, or associated with a comment in a worksheet.

Usually, you will want to have display formats turned on so that you can easily identify the status of specific cells. However, if you have made many edits, your view of the data might become obscured. For example, if almost all of the cells in a worksheet are displayed in blue as a result of data modifications, blue will lose its meaning as an indicator of change. When this happens, you might want to turn off the Data Change Flags option (the format display option that denotes how modified data is displayed). You can use this option to remove display formats from cells that have been edited, filled, increased, decreased, or pasted into.

Note: Turning a display format off or on does not affect any edits that you have made in the worksheet; it merely changes the appearance of modified cells.

To turn a display format off or on:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar



and choose **Format Document** from the submenu.

Result: The Format Document dialog box opens. The General tab is active.

2. Select the **Display** tab.
3. Check the display options that you want to view in this worksheet and clear those that you do not want to view. Options are as follows:
 - **Locked Cells** — Specifies whether cells that have been locked will have a special display format. When this option is on, cells that have been locked will be displayed on a red background.
 - **Commented Cells** — Specifies whether cells that contain comments will have a special display format. When this option is on, cells into which a comment has been entered will be displayed in a bold font.
 - **Data Change Flags** — Specifies whether cells that contain modified data will have a special display format. When this option is on, data in cells that have been edited, forecasted, pasted into, increased, decreased, or filled will be displayed in a blue font.
 - **Background Colors** — Specifies whether non-editable (read-only) and editable cells will have special display formats. When this option is on, data in non-editable cells will be displayed on a dark gray background; data in editable cells will be displayed on a pale gray background.
4. Choose **OK** to apply the current settings.

Note: If multiple formats overlap (for example, a cell is both locked and commented), one format takes precedence.

Specifying a title, subtitle, and footnote for a worksheet

You can add a title, subtitle, and footnote to a worksheet and specify whether each of these elements will display in the current document.

To specify a title, subtitle, or footnote for a worksheet:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. Select the **Titles** tab.
4. In the Select Title Type box, choose a text element (**Title**, **Subtitle**, or **Footnote**) and proceed as follows:
 - a. In the Font Properties box, select font properties (name, size, style, color, background color) for the text.
 - b. In the Alignment box, select an alignment option for the text.
 - c. In the Display Options box, choose **Show** to display the text element in the current document.
 - d. In the Text box, enter the text for the title, subtitle, or footnote (498 characters maximum).
5. Repeat Step 4 for each text element that you want to include.
6. Choose **OK** to apply your selections.

Applying numeric formats to selected rows and columns

You can apply unique number formats to selected rows and columns in an open worksheet.

To format numeric values in selected rows or columns in a worksheet:

1. With the document open in the workspace, select the rows or columns in which you want to format numbers.
 - To select a column, click the highlighter under the column label. Use SHIFT+click or CTRL+click to select more than one column.
 - To select a row, click the highlighter next to the row label. Use SHIFT+click or CTRL+click to select more than one row.
2. Choose the **Format Document** button on the Document toolbar.



Alternatively, you can click the right mouse button in the document.

3. Choose **Format Rows and Columns** from the popup menu.

Result: The Format Rows and Columns dialog box opens.

4. The Number tab displays the current settings for numeric values. You can change the following settings:
 - **Decimal Digits** — Specifies the number of decimal places to display.
 - **Use Thousands Separator** — Indicates whether to display (or suppress) the thousands separator.
 - **Positive Values** — Specifies the format for positive numbers (Available if you do not choose the Currency/Percent option).
 - **Display Leading Zero** — Indicates whether to display (or suppress) leading zeros.
 - **Negative Values** — Specifies the format for negative numbers (Available if you do not choose the Currency/Percent option).
 - **Apply Currency/Percent** — Activates currency/percent format options:
 - * Symbol — Symbol for dollars, yen, pounds, francs, or percent.
 - * Positive Values — Format for positive values.
 - * Negative Values — Format for negative values.
 - **Scale Values Down By** — Specifies scaling for large numbers.

As you make formatting choices, the Samples box in the lower left corner of the Format Number dialog box shows the effect that your choices will have on the data.
5. Choose **OK** to apply your selections.

Clearing row and column formatting

You can clear numeric formats that have been applied to selected rows and columns. You can clear formats from selected rows and columns or you can clear formats from all rows and columns.

To clear selected row and column formats:

1. With the worksheet open in the workspace, select the rows or columns from which you want to remove formatting.
 - To select a column, click the highlighter under the column label. Use SHIFT+click or CTRL+click to select more than one column.
 - To select a row, click the highlighter next to the row label. Use SHIFT+click or CTRL+click to select more than one row.

2. Choose the **Format Document** button on the Document toolbar.



Alternatively, you can click the right mouse button in the document.

3. Choose **Clear Selected Row and Column Formatting** from the popup menu.

To clear all row and column formats:

1. With the worksheet open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Clear All Row and Column Formatting** from the popup menu.

Printing Worksheets

You can print an open worksheet and specify settings that determine how the printed pages will look. When you save the worksheet, Oracle Demand Planning saves the print settings for order, scaling, and page setup.

You can also print one or more saved worksheets and other documents directly from the navigation list. Note that when you print multiple documents, you do not have the same options that are available when you print an open worksheet. For example, when you print an open worksheet, you can specify the pages to print (all or current). When you print multiple documents from the navigation list, Oracle Demand Planning prints all pages of the selected documents.

To print an open worksheet:

1. With the document open in the workspace, choose the **Print** button on the Document toolbar.



Result: The Print dialog box for your browser opens.

2. You can change the print defaults for the browser. For example, you can specify new values for printer and number of copies.
3. Choose **OK** to continue.

Result: The Print dialog box for Oracle Demand Planning opens.

4. In the Print box, specify the pages that you want to print. You can choose one of the following options:
 - **Current Page of Data** — Prints the current page of data as indicated by the page label.
 - **All *n* Pages of Data** — Prints all pages of data, beginning at the first logical page, regardless of the current page settings.

Note: If you choose to print all pages, the system prints *all* data for *all* dimension values that are in the page position in the document. Depending on the number of dimensions that are in status in the page position, printing all pages might result in many pages of output.

5. In the Order box, you can specify the order in which to print the pages. You can choose one of the following options:
 - **Across then down** — Prints as many rows and columns as will fit on a physical page, then moves across the columns (until all are printed) and then down the rows (until all are printed).
 - **Down then across** — Prints as many rows and columns as will fit on a physical page, then moves down the rows (until all are printed) and then across the columns (until all are printed).

6. In the Scaling box, you can specify how to scale the document. You can choose one of the following options:
 - **Adjust to** — Scales each logical page by a percentage that you select. The output will span the number of physical pages that are necessary to meet the specified percentage.
 - **Fit to** — Scales each logical page to span the width and height of the number of pages that you select.
7. To indicate how you want the printed pages to look, choose **Page Setup**. This opens the Page Setup dialog box, where you can perform the following operations:
 - Specify optional header text (up to 100 characters) for the printed page.
 - Specify an optional footer for the printed page.
 - Specify whether row, column, and page labels will be repeated on each printed page.
 - Specify whether a title, subtitle, and footnote will appear on the printed pages.
 - Specify margin settings for the printed pages.
8. If you want to preview the pages before printing them, choose **Preview**.
9. Choose **OK** to print the document.

To print multiple documents from the navigation list:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to print.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.
4. Repeat Step 3 for each document that you want to print.
5. After you make your final selection, click the right mouse button and choose **Print** from the popup menu.

Saving Worksheets

You can save a worksheet for use at another time. When you save a worksheet, Oracle Demand Planning performs the following functions:

- Recalculates the data.
- Saves the data.
- Saves the worksheet with the current data selections, formatting, layout and level of detail. If cells have been modified, locked, or commented, this is also saved.

If your responsibility is Demand Planner, saving a worksheet saves the data in your personal database. If your responsibility is Demand Plan Manager, saving a worksheet commits the data to the shared database.

You have the following options when you save a worksheet:

- You can save the document. The saved worksheet appears as an object in the main Documents folder in the navigation list.
- You can save the document in a folder that you have previously created. The saved worksheet appears as an object in the specified folder in the navigation list. For information about folders, see ["Working with Document Folders" on page 21-1](#).
- You can save the worksheet as the default worksheet document. When you create a new worksheet that is based on the default, the new worksheet will have the measure and dimension value selections, layout, and format characteristics of the default.

Tip: Before you save a worksheet as the default, you might want to remove distinctive format elements such as a title.

To save a worksheet:

1. With the document open in the workspace, choose the **Save As** button on the Document toolbar.



The Save As dialog box opens. If you are saving a new document, a generic name, such as "Document 1," appears in the Save Document As box. If you are saving modifications to an existing document, its name appears in the Save Document As box.

2. Specify the name for the worksheet that you are saving as follows:
 - If you are saving a new worksheet, type a name for it in the Save Document As box. The name can be up to 70 characters long.
 - If you are saving an existing worksheet under a new name, replace the name in the Save Document As box with the new name. The name can be up to 70 characters long.
 - If you want to give the worksheet the name of an another saved document (overwrite a document), choose the Save As box and select a name from the list of saved documents.

If you are saving an existing worksheet under its current name, or if you intend to save the document as the default worksheet, do nothing with the information in the Save Document As box.

3. Do one of the following:
 - In the Into Folder box, select the folder into which you want to save the worksheet.

To save the worksheet into the main Documents folder, select **(none)** in the Into Folder box.

or
 - If you want to save the worksheet as your default worksheet document, so that its structure will appear whenever you create a new worksheet, select the **Save As Default** option.
4. Choose **OK** to save the document.

Result: The Save As dialog box closes. The worksheet is again visible in the workspace. If you saved the worksheet into a folder, then the document object appears within that folder in the navigation list.

Exporting Data from Worksheets

You can export dimension labels and data values from a worksheet to files that can be used in Microsoft Excel and other applications. You can select one of three export format options (CSV, TXT, or HTM for Excel 2000+), and export data from all pages or from a specific page.

Note: If a worksheet contains many pages of data, you might have difficulty opening the file in certain applications. To avoid this situation, modify the data selections to reduce the number of values before creating the exporting file.

To export data from a worksheet:

1. With the worksheet open in the workspace, choose the **Export** button on the Document toolbar.



Result: The Export dialog box opens.

2. In the Export box, choose the pages to include in the export file. You can select one of the following options:
 - **Current Page** — Exports data from the current page as indicated by the page label.
 - **All *n* Pages** — Exports all pages of data, beginning at the first logical page, regardless of the current page settings.
3. In the As Type box, select the format for the export file:
 - **Comma delimited (*.csv)** — Exports the data in Comma Separated Value format, in which labels and data values are separated by commas.
 - **Tab delimited (*.txt)** — Exports the data in text file format, in which labels and data values are separated by tabs.
 - **Excel 2000+ (*.htm)** — Exports the data in a format that can be read by a browser and opened in Excel version 2000 and version 2002, also known as XP.

4. In the Options box, you can choose the following options for the export file:
 - **Include Number Formatting** — For a CSV or TXT export, check this option to export the data with the current setting for number formats. Do not check this option if you want to export unformatted numeric data. Note that an HTM export automatically includes number formats.
 - **Repeat Group Labels** — Check this option to repeat outer labels for columns and rows of inner, nested dimensions. Do not check this option if you want the export file to display labels as they appear in the screen display.

Include Title, Subtitle, Footnote — Check this option to include the title, subtitle, and footnote of the document in the export file. Do not check this option if you want to exclude these elements.
 - **Create One Sheet per Page** — For a multi-page HTM export, check this option to export the data from each logical page to a separate Excel worksheet. Do not check this option if you want to export the data from all pages to a single Excel worksheet. For more information, see "[About Excel 2000+ output files](#)" on page 11-41.
5. Choose **OK** to continue.

Result: If you chose CSV or TXT format, the File Download dialog box opens. If you chose HTM format, the Export to HTML/Excel 2000+ dialog box opens.
6. For a CSV or TXT export, proceed as follows:
 - a. In the File Download box, choose **Save this file to disk**.

Result: The Save As dialog box opens.
 - b. In the Save in box, select the output directory for the file.
 - c. In the File name box, enter a name for the file.
 - d. Choose **OK** to export the file.
7. For an HTM export, proceed as follows:
 - a. In the Save in box, select the output directory for the file.
 - b. In the File name box, enter a name for the file.
 - c. Choose **OK** to export the file.

About Excel 2000+ output files

When you export to a single worksheet in Excel 2000+ (*.htm) format, Oracle Demand Planning generates a single HTML file in the directory that you specify.

When you export to a multi-page file in Excel 2000+ format and indicate that you want to create one sheet per page, Oracle Demand Planning generates an HTML table of contents file plus a number of other files in the directory that you specified. Use the table of contents file to access the individual worksheets.

Closing Worksheets

When you have finished working in a worksheet, you can close it. If you have modified the worksheet but did not save it, you will be prompted to specify whether you want to save the document.

To close a worksheet:

Choose the *Close* button, located in the upper right corner of the document.



Renaming Worksheets

You can give a new name to a saved worksheet. If the document is in more than one folder, it will be renamed in all folders.

To rename a worksheet:

1. In the navigation list, identify the worksheet that you want to rename.

Tip: To search for a worksheet, click the right mouse button on the main Documents folder or a specific document folder, choose **Find Documents**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. Click the right mouse button on the document object and choose **Rename** from the popup menu.
3. Enter the new name. The name can be up to 70 characters long.

Viewing Worksheet Properties

You can view the following properties of a saved worksheet:

- Name — Document name
- Date — Date created
- Modified — Date modified
- Class — Shared (from the shared database) or Personal (user-defined)
- Applied saved selections — If a saved selection has been applied, the name of the saved selection

To view worksheet properties:

1. In the navigation list, identify the worksheet whose properties you want to view.

Tip: To search for a worksheet, click the right mouse button on the main Documents folder or a specific document folder, choose **Find Documents**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. Click the right mouse button on the document object and choose **Properties** from the popup menu.

Deleting Worksheets

When you no longer need a saved worksheet, you can delete it. If the document exists in another folder, that version will not be deleted.

You can delete an individual worksheet. You can also delete a worksheet as one of multiple documents.

To delete a single worksheet:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the worksheet that you want to delete.

Tip: To search for a worksheet, click the right mouse button on the main Documents folder or a specific document folder, choose **Find Documents**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Choose the worksheet and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the document object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

To delete multiple documents:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to delete.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat the previous step for each document that you want to delete.
5. After you make your final selection, click the right mouse button and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Using the Planning Percentages Worksheet

This section describes how to use the Planning Percentages worksheet when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- About the Planning Percentages Worksheet
- Calculating Dependent Demand for Input Parameters
- Opening the Planning Percentages Worksheet
- Setting up the Planning Percentages Worksheet
- Display and Calculations in the Planning Percentages Worksheet
- Modifying Data in the Planning Percentages Worksheet
- Averaging Existing Percentages to Forecasting Levels
- Changing the Layout to Enhance Analysis
- Calculating Dependent and Total Revenues
- Copying Planning Percentages
- Repopulating Planning Percentage Objects
- Displaying Parent and Child Values in the Worksheet
- Saving Data in the Planning Percentages Worksheet
- Printing the Planning Percentages Worksheet
- Exporting Data from the Planning Percentage Worksheet
- Closing the Planning Percentages Worksheet

About the Planning Percentages Worksheet

The Planning Percentages worksheet enables you to view and edit data for *dependent demand* and *planning percentages* of options. Dependent demand describes the relationship between the demand for models and their optional components. The planning percentages are the attach rates, or ratios of options to model demand.

When you work as a planner and select a final forecast to submit to the shared database, the planning percentages currently associated with the measure are automatically collected when the data collection stage runs. When you work as a Demand Plan Manager and select a forecast to upload to the Demand Planning Server, the planning percentages associated with the forecast are automatically uploaded when the upload stage runs. Once uploaded, the planning percentages can be written back to Oracle Advanced Supply Chain Planning (ASCP).

Example: Planning Percentages worksheet

The following illustration shows an example of a Planning Percentages worksheet. The data for independent demand, planning percentages, dependent demand, and total demand (independent + dependent demand) is based on the model product which, in this example, is GMXY77 (ea).

Planning Percentages Worksheet				
Time	Ship from Location	Geography		
07-AUG-2003	Seattle Manufacturing123	AT&T Universal Card:1005		
	Forecast of Booking History - Booked Items	Forecast of Booking History - Booked Items, Dependent Demand	Forecast of Booking History - History - Booked Items, Total Demand	Forecast of Booking History - Booked Items, Planning Percentage
GMXY777 (Ea)	112.31		112.31	
GMXBoard (Ea)		204.49		80.00%
CM28287 (Ea)		613.48		300.00%
SB34701 (Ea)		0.00		0.00%
SB32982 (Ea)		408.99		200.00%
CM10450 (Ea)				

Differences between the Planning Percentages worksheet and a standard worksheet

Following are some differences between the Planning Percentages worksheet and a standard worksheet:

- The standard worksheet is typically used with four dimensions: Time, Product, Geography, and Organization. The Planning Percentage worksheet is not dependent on Geography; the planning percentages show the relationships between item level products for the lowest level organizations and time.
- A standard worksheet displays data based on hierarchies that have been established for the dimensions in the Demand Planning Server. The Planning Percentages worksheet displays data in terms of model > option dependencies based on model bills of material.
- In a standard worksheet, you have the ability to change the layout by rearranging dimension values on the page, row, and column edges. The edges of the Planning Percentages worksheet are static; you cannot rotate or drag dimensions.
- When you save a standard worksheet, you name it and save the layout and dimension value selections. When you save the Planning Percentages worksheet, you save the data. The most recently saved layout will appear when you next open the Planning Percentages worksheet from the Tools menu on the navigation toolbar.

Calculating Dependent Demand for Input Parameters

This topic describes the conditions under which independent demand in an input parameter can be exploded to calculate dependent demand. Parameters must be set in both Demand Planning Server (DPS) and in Demand Planning Engine (DPE).

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Opening the Planning Percentages Worksheet

There are two methods for opening the Planning Percentages worksheet:

- You can open the worksheet from the Tools menu on the navigation toolbar. The Planning Percentages Worksheet opens in the full vertical document workspace.

If the Planning Percentage worksheet has been previously saved, the format reflects the saved layout.

- You can open the Planning Percentages worksheet from a cell in a standard worksheet. The Planning Percentages Worksheet opens below the standard worksheet. Values for Product, Ship from Location, Geography, and Time are based on the cell from which you invoked the Planning Percentages worksheet.

To open the Planning Percentage worksheet from the Tools menu:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **Tools** button,



3. Choose **Planning Percentages Worksheet**.

To open the Planning Percentages worksheet from a standard worksheet:


1. With a worksheet open in the workspace, click the right mouse button in any cell in the document.








Result: A menu of options appears.

2. Choose **Planning Percentages Worksheet**.

Toolbar for Planning Percentages worksheet

The Document toolbar appears at the top of an open Planning Percentages worksheet. The toolbar buttons enable you to perform the functions that are listed in the following table.

Button	Description	Function
	Select Data	Select dimension values and measures including planning percentages.

Button	Description	Function
	Export	Export data and labels from the worksheet to a comma delimited (.csv), tab delimited (.txt), or Excel 2000+ (*.htm) file.
	Save	Save the data in the worksheet.
	Add Parent	Select the immediate parents (models or option classes) to which an option is associated.
	Recalculate	Recalculate the data in the worksheet.
	Reset Data	Reset unsaved data to a previous status.
	Print	Print the worksheet.
	Help	Display online Help for planners and the Demand Plan Manager.

Setting up the Planning Percentages Worksheet

You set up the Planning Percentages worksheet so that it displays the models and options that you want to work with. Proceed as follows:

- Populate the worksheet by selecting the product on which you want to focus. Also choose values for the other dimensions, including Measure.
- Size the columns so that you can view the data.

- Drill to view product dependencies (children).
- Add parents.

Selecting data for the Planning Percentages worksheet

Following are considerations for selecting data for the Planning Percentages worksheet:

- For Measure: Ensure that the worksheet includes the measure on which you want to focus (for example, Forecast of Booking History). Also choose the related Dependent Demand measure (for example, Forecast of Booking History, Dependent Demand), the related Total Demand measure (for example, Forecast of Booking History, Total Demand) and the associated planning percentage object for the measure (for example, Forecast of Booking History, Planning Percentage). For a forecast, you might also want to choose measures for history and dependent history to see how the planning percentages were calculated. Again for a forecast, you might want to include another planning percentage object for comparison purposes. For example, you might compare forecasted planning percentages with the existing planning percentages.
- For Product: Choose product at the item level.
- For Time: If you want to be able to edit data for dependent demand and planning percentages, take care when selecting time values. If you are using the existing planning percentage or a copy of the existing planning percentage, then select Time at the lowest level. This is either the Day level or the lowest level for every calendar used by the plan. If you are using a planning percentage based on forecasting or averaging dependent history, select the time level at which the forecast or average was generated. For example, if you want to view dependencies for planning percentages generated by forecasting at the monthly level, then you would choose monthly values within the time range for the forecast.
- For Ship-to location: You view and select Ship-to-location values at the Organization level.
- You cannot choose previously saved selections, custom aggregates, or formula measures. Although these are valid in other documents, they cannot be selected in the Planning Percentages worksheet.

To select data for the Planning Percentages worksheet:

1. With the worksheet open in the workspace, choose the **Select Data** button on the Document toolbar.



Result: A list of the dimensions in your database appears. The list includes Measure.

2. Choose a dimension for which you want to select values.

Result: The Select Data dialog box opens. The dimension that you chose is displayed in the Select Values for box.

Choose values for the current dimension, noting the special considerations for Planning Percentage worksheet selections that are listed at the beginning of this section.

3. To select values for another dimension, in the Select Values for box choose the dimension and repeat Step 2.
4. Repeat Steps 2 and 3 until the worksheet includes the values that you want to work with.

Sizing rows and columns in the Planning Percentages worksheet

You can adjust the size of rows or columns in the Planning Percentages worksheet.

To size a row or column in a worksheet:

1. With the document open in the workspace, position the cursor on the border of the label of the row or column whose size you want to change.
2. When the cursor changes to a double arrow, click and move the border.

Drilling in the Planning Percentages worksheet

You can drill the root product in the worksheet. This enables you to view data for options that have a dependent relationship to the root as defined in the Bills of Material.

To drill a product:

With the worksheet open in the workspace, click the arrow next to the item that you want to drill.

- Right pointing arrow — Located next to an item that has dependencies, but the values are not currently visible. Click this arrow to drill down and expose the dependent values.
- Down pointing arrow — Located next to an item for which you see dependencies. Click this arrow to drill up and hide the list of dependent values.

Note: A product with no arrow indicates that there are no dependent values.

Adding parent values to the Planning Percentages worksheet

You can expose parent values for the root product in the worksheet. This enables you to view data for products on which options are dependent, based on model>options relationships defined in the Bills of Material.

To add parent values:

1. With the worksheet open in the workspace, choose a product label and choose the **Add Parent** tool.



Result: The Dimension Value Selector opens, displaying the parent models for the selected product. If there are no parents, then the list is empty.

2. Choose one or more values from the list.

Display and Calculations in the Planning Percentages Worksheet

The method that Oracle Demand Planning uses to calculate planning percentages depends on the selection that was made when the measure to which the planning percentage refers was created.

- If the planning percentage object was created by averaging dependent history, then planning percentages are calculated by dividing the history of each option by the history of the model.

- If the planning percentage object was created by forecasting dependent history, then planning percentages are calculated by dividing the forecast of each option as generated independently based on the history of the option, by the forecast of the model based on the history of the model.
- If the planning percentage object was created by choosing the existing planning percentage object from the Planning Server or by copying and renaming the existing planning percent object, then the planning percentages reflect the numbers from the Bills of Materials. No calculations are applied.

Dependent demand for an item is calculated by multiplying its planning percentage by independent demand.

For information about generating planning percentages when creating a measure, see the following sections:

"Creating Forecast Measures" on page 17-4, Step 10c

"Creating Simple Copy Measures" on page 17-16, Step 8c

"Creating Complex Copy Measures" on page 17-24, Step 10c

Modifying Data in the Planning Percentages Worksheet

In the Planning Percentages worksheet, you can modify editable values for independent demand, planning percentages, and dependent demand. Note that if you edit data for a planning percentage object that has been associated with more than one measure, your edits will impact all measures to which the planning percentage object refers. In order for values to be editable, the measure for which you are viewing planning percentages and dependent demand must include the "Editable" property as part of its definition

Planning percentages are not dimensioned by Geography dimension, that is they are not calculated based on the geographic level values. Therefore, if you modify the planning percentages at a level other than the topmost level (All Geography) in Geography dimension, the planning percentages will be modified globally. For example, changing planning percentages for a country or a region will change the planning percentages for all the countries or regions respectively.

Situations in which cells are not editable when you expect them to be might result from the following:

- A cell represents a product/organization relationship that is not included in the Bills of Materials.
- A cell for independent demand has been previously locked.

Modifying calculated planning percentages

Calculated planning percentages (created by forecasting or averaging dependent history) are displayed at the forecasting level and at the lowest demand plan level. However, they are only editable at the forecasting level. For example, if the calculated planning percentages are 50% for January (forecasting level is month), 50% will be displayed for all the days in January (assuming that the lowest demand plan level is day).

Effectivity dates are not respected for calculated planning percentages. The calculations are solely based on the sales history and are calculated at the forecasting levels, which will always be higher than the day level. Since planning percentages are not allocated or aggregated, it is not possible to respect the bills' effectivity when calculating these planning percentages. Thus for calculated planning percentages, data will appear even when a bill is not effective for a certain period. However, during that period the corresponding numbers will be grayed out.

Display formats indicate status

Display formats enable you to identify non-editable cells, editable cells, cells that have been modified, as well as cells that have been locked or commented.

Data in worksheet cells appears as follows:

- Non-editable (read-only) cells — dark gray background
- Editable cells — pale gray background
- Modified cells — blue font
- Locked cells — red background
- Commented cells — bold font

Impact of editing data in the Planning Percentage worksheet

When you edit data in the Planning Percentages worksheet, results are as follows:

- Editing independent demand affects the values for total demand and dependent demand. Planning percentages remain the same.
- Editing a planning percentage affects the value for dependent demand. Independent demand and total demand remain the same.
- Editing dependent demand affects the planning percentage for the same child/parent.

Techniques for editing data in the Planning Percentages worksheet

You can use the following techniques to edit data in editable cells:

- Change the value in an individual cell.
- Paste data values into a cell or range of cells.

You can also enter comments that describe the changes that you have made and lock or protect data for independent demand.

Editing cells

You can edit values in editable, unlocked cells.

If you have edited one cell and want to edit the value of a cell on a different level, you must recalculate the data before you can proceed.

To edit a cell:

1. With the document open in the workspace, click the cell that contains the value that you want to change.
2. Type in the new value.

Note: If you enter a numeric value with more decimal digits than the numbers that are currently displayed in the worksheet, the edited value will be rounded to the nearest decimal place.

Copying and pasting data

You can copy data from a single cell or from contiguous cells in the Planning Percentages worksheet to the Windows clipboard.

You can paste data from the Windows clipboard into a single cell or contiguous cells. The cells must be editable and unlocked.

To copy data from the worksheet to the Windows clipboard:

1. With the document open in the workspace, select the cell or cells that you want to copy.
 - To select all cells in a column, click the highlighter under the column label.
 - To select all cells in a row, click the highlighter next to the row label.

2. Click the right mouse button and select **Copy Data to Clipboard** from the popup menu.

To paste data from the Windows clipboard into the worksheet:

1. With the document open in the workspace, select the cell or block of cells into which you want to paste data.

Important: The range of cells that you select must exactly match the range of cells that was copied to the clipboard. If the paste range does not match the copy range, then the system will not paste the data.

2. Click the right mouse button and select **Paste** from the popup menu.

Locking and unlocking cells

You can lock cells that contain data for independent demand. When you lock a cell, its values cannot be edited.

You can remove cell protection by unlocking the cell.

To lock a cell:

1. With the document open in the workspace, select the cell or cells that contain the data that you want to protect.

Use CTRL+click to select cells that are not contiguous.

2. Click the right mouse button and choose **Lock Cell** from the popup menu.

To unlock a cell:

1. With the document open in the workspace, select the cell that you want to unlock.

Use CTRL+click to select cells that are not contiguous.

2. Click the right mouse button and choose **Unlock Cell** from the popup menu.

Using comments to document modifications

As you modify data values, you can document your changes by entering one or more comments. Comments are free text that you associate with predefined reason codes.

Commenting a cell for dependent demand also enters the comment into the related cell for planning percentage. Similarly, commenting a cell for planning percentages also enters the comment for the related dependent demand.

To enter a comment:

1. With the document open in the workspace, select the cell or cells for which you want to enter a comment.

Use CTRL+Click to select cells that are not contiguous.

2. Click the right mouse button, and choose **Comments** from the popup menu.

Result: The Comments dialog box opens.

3. In the Reason box, select a reason code for the comment.
4. In the New Comment box, enter text for the comment. You can enter up to 300 characters.
5. Choose **Add** to add the comment.
6. To enter another comment for the same cells, repeat Steps 2 through 5. You can use the same reason code or you can select an alternate code.
7. Choose **OK** to return to the worksheet.

Deleting comments

You can delete a comment immediately after you enter it, but you cannot delete a comment once you have entered another comment or exited the dialog box.

However, if you have not yet saved the worksheet, you can use the Reset Data function. Resetting data will remove the comment, along with other changes that have been made.

Recalculating data

Recalculation updates data values and spreads changes to appropriate cells by allocating and aggregating data. Recalculation is automatically triggered when you save the Planning Percentages worksheet. You can also recalculate data manually.

To recalculate data:

With the worksheet open in the workspace, choose the **Recalculate** button on the Document toolbar.



Resetting data

If you have made changes to a Planning Percentages worksheet and you decide not to retain those changes, you can reset the data in the worksheet. You can roll back the values to the most recent modification. Alternatively, you can roll back the values to the last Save action.

Important: You can only reset data *before* you save. You cannot reset data that has been saved.

To reset data:

1. With the worksheet open in the worksheet, choose the **Reset Data** button on the Document toolbar.



2. Choose a reset option:

- **Reset Data to Last Recalculation** — Resets the data to the results just after the last recalculation.
- **Reset Data to Last Save** — Resets the data to the last time that the data was saved, regardless of the number of modifications that have been made.

Averaging Existing Percentages to Forecasting Levels

This topic explains how planners can copy existing planning percentages and average the values at an aggregate time level. For every value at the specified level of time, the planning percentage values of all Day descendants are averaged. The resulting value is assigned both to the Day descendants and the parent value. The planning percentage is then editable at the time level at which it was averaged. Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Changing the Layout to Enhance Analysis

You can drag and drop dimensions in the Planning Percentages worksheet in the same way as in a regular Demand Planning worksheet or ad hoc report. You can also use the Change Layout dialog box to rotate dimensions.

The default view contains the Time dimension on the vertical edge after the Product dimension in such a way that planners can look at the planning percentages across selected time values. Because time and geography can be rotated to the row or column edge, the Planning Percentage worksheet can display multiple levels of a dimension simultaneously. The worksheet enables planners to see trends in planning percentages, enhancing their understanding of the underlying business situation.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Calculating Dependent and Total Revenues

Demand Planning calculates dependent and total amounts, meaning that dependent and total variables have associated amount variables. You can use the Extended Analysis step of the Measure Wizard to specify whether you want to calculate amounts for independent demand, or calculate amounts for both independent and dependent demands.

Total amounts (revenues) are calculated by adding the model's independent demand, multiplied by the model's base price, to the option's dependent demand multiplied by the option's price.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Copying Planning Percentages

When you are working in the Measure Wizard, you can copy an existing planning percentage to be used with a forecast measure you are creating or editing. You choose the planning percentage as one of choices in the **Properties** step of the wizard.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Repopulating Planning Percentage Objects

When you are working in the Measure Wizard, you can reuse a planning percentage object that you have created and populated. In the **Properties** page of the Measure Wizard, if you choose to create a new planning percentage and insert the name of an existing planning percentage into the text box, the result will be a repopulation of the existing planning percentage using the selected planning percentage options.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Displaying Parent and Child Values in the Worksheet

You use a toolbar button, **Add Parents**, to display the parents of values. Each independent demand is a product with dependencies. In the planning percentage worksheet, the Select Data dialog box enables you to view a product as a dependent of some roots, but not others. The **Add Parents** button is displayed only in the toolbar of a Planning Percentages worksheet.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Saving Data in the Planning Percentages Worksheet

You can save the Planning Percentages worksheet. When you save the worksheet, Oracle Demand Planning performs the following functions:

- Recalculates the data.
- Saves the data.
- Saves the current worksheet layout. This layout will appear when you next open the Planning Percentages worksheet from the Tools menu on the navigation toolbar.

If your responsibility is Demand Planner, saving the worksheet saves the data in your personal database. If your responsibility is Demand Plan Manager, saving the worksheet saves the data in the shared database.

To save the Planning Percentages worksheet:

With the document open in the workspace, choose the **Save** button on the Document toolbar.



Printing the Planning Percentages Worksheet

You can print an open Planning Percentages worksheet and specify settings that determine how the printed pages will look.

To print an open Planning Percentages worksheet:

1. With the document open in the workspace, choose the **Print** button on the Document toolbar.



Result: The Print dialog box for your browser opens.

2. You can change the print defaults for the browser. For example, you can specify new values for printer and number of copies.

3. Choose **OK** to continue.

Result: The Print dialog box for Oracle Demand Planning opens.

4. In the Print box, specify the pages that you want to print. You can choose one of the following options:
 - **Current Page of Data** — Prints the current page of data as indicated by the page label.
 - **All *n* Pages of Data** — Prints all pages of data, beginning at the first logical page, regardless of the current page settings.

Note: If you choose to print all pages, the system prints *all* data for *all* dimension values that are in the page position in the document. Depending on the number of dimensions that are in status in the page position, printing all pages might result in many pages of output.

5. In the Order box, you can specify the order in which to print the pages. You can choose one of the following options:
 - **Across then down** — Prints as many rows and columns as will fit on a physical page, then moves across the columns (until all are printed) and then down the rows (until all are printed).
 - **Down then across** — Prints as many rows and columns as will fit on a physical page, then moves down the rows (until all are printed) and then across the columns (until all are printed).
6. In the Scaling box, you can specify how to scale the document. You can choose one of the following options:
 - **Adjust to** — Scales each logical page by a percentage that you select. The output will span the number of physical pages that are necessary to meet the specified percentage.
 - **Fit to** — Scales each logical page to span the width and height of the number of pages that you select.

7. To indicate how you want the printed pages to look, choose **Page Setup**. This opens the Page Setup dialog box, where you can perform the following operations:
 - Specify optional header text (up to 100 characters) for the printed page.
 - Specify an optional footer for the printed page.
 - Specify whether row, column, and page labels will be repeated on each printed page.
 - Specify whether a title, subtitle, and footnote will appear on the printed pages.
 - Specify margin settings for the printed pages.
8. If you want to preview the pages before printing them, choose **Preview**.
9. Choose **OK** to print the worksheet.

Exporting Data from the Planning Percentage Worksheet

You can export dimension labels and data values from a Planning Percentage worksheet to files that can be used in Microsoft Excel and other applications. You can select one of three export format options (CSV, TXT, or HTM for Excel 2000+), and export data from all pages or from a specific page.

Note: If a worksheet contains many pages of data, you might have difficulty opening the file in certain applications. To avoid this situation, modify the data selections to reduce the number of values before creating the exporting file.

To export data from a worksheet:

1. With the worksheet open in the workspace, choose the **Export** button on the Document toolbar.



Result: The Export dialog box opens.

2. In the Export box, choose the pages to include in the export file. You can select one of the following options:
 - **Current Page** — Exports data from the current page as indicated by the page label.
 - **All *n* Pages** — Exports all pages of data, beginning at the first logical page, regardless of the current page settings.
 3. In the As Type box, select the format for the export file:
 - **Comma delimited (*.csv)** — Exports the data in Comma Separated Value format, in which labels and data values are separated by commas.
 - **Tab delimited (*.txt)** — Exports the data in text file format, in which labels and data values are separated by tabs.
 - **Excel 2000+ (*.htm)** — Exports the data in a format that can be read by a browser and opened in Excel version 2000 and version 2002, also known as XP.
 4. In the Options box, you can choose the following options for the export file:
 - **Include Number Formatting** — For a CSV or TXT export, check this option to export the data with the current setting for number formats. Do not check this option if you want to export unformatted numeric data. Note that an HTM export automatically includes number formats.
 - **Repeat Group Labels** — Check this option to repeat outer labels for columns and rows of inner, nested dimensions. Do not check this option if you want the export file to display labels as they appear in the screen display.

Include Title, Subtitle, Footnote — Check this option to include the title, subtitle, and footnote of the document in the export file. Do not check this option if you want to exclude these elements.
 - **Create One Sheet per Page** — For a multi-page HTM export, check this option to export the data from each logical page to a separate Excel worksheet. Do not check this option if you want to export the data from all pages to a single Excel worksheet.
 5. Choose **OK** to continue.
- Result: If you chose CSV or TXT format, the File Download dialog box opens. If you chose HTM format, the Export to HTML/Excel 2000+ dialog box opens.

6. For a CSV or TXT export, proceed as follows:
 - a. In the File Download box, choose **Save this file to disk**.
Result: The Save As dialog box appears.
 - b. In the Save in box, select the output directory for the file.
 - c. In the File name box, enter a name for the file.
 - d. Choose **OK** to export the file.
7. For an HTM export, proceed as follows:
 - a. In the Save in box, select the output directory for the file.
 - b. In the File name box, enter a name for the file.
 - c. Choose **OK** to export the file.

About Excel 2000+ output files

When you export to a single worksheet in Excel 2000+ (*.htm) format, Oracle Demand Planning generates a single HTML file in the directory that you specify.

When you export to a multi-page file in Excel 2000+ format and indicate that you want to create one sheet per page, Oracle Demand Planning generates an HTML table of contents file plus a number of other files in the directory that you specified. Use the table of contents file to access the individual worksheets.

Closing the Planning Percentages Worksheet

When you have finished working in a Planning Percentages worksheet, you can close it. If you have modified but not yet saved the data, you will be prompted to specify whether you want to save.

To close the Planning Percentages worksheet:

Choose the *Close* button, located in the upper right corner of the document.



Preserving Forecast Adjustments

This chapter contains the following topics:

- Persistent Forecast Adjustments
- Why Preserve Forecast Adjustments?
- Designating Data as Cycle Persistent
- Standard Versus Persistent Locks
- Cycle-Persistent Locks and the Planning Process
- Copying Data and Locks to Another Measure
- Accessing Advanced Locking Functionality
- Making Your Data Cycle-Persistent
- Applying Persistent Locks in Worksheets
- Removing Persistent Locks in Worksheets
- Using Standard Locks in Your Worksheets
- Resolving Locking Conflicts
- Preserving Locked Data for Submission to the Planning Manager
- Applying Previous Adjustments to New Planning Cycles
- Distributing Adjusted Forecasts with Cycle-Persistent Data

Persistent Forecast Adjustments

Demand Planners can lock adjustments made to a forecast, submit the forecast, and have their adjustments saved and reapplied during the next cycle. The process relies on persistent locks to carry the adjustments to the next planning cycle and beyond.

The ability to specify data as being cycle-persistent is supported and enhanced by advanced locking functionality in Oracle Demand Planning. The use of advanced locking to create cycle-persistent data makes the forecasting process faster and more efficient in many business situations.

Advanced Locking is accessed via the **Tools** icon or via the worksheet through the right-click menu.

Why Preserve Forecast Adjustments?

Demand Planners and managers want to be able to override a generated forecast for one or more planning cycles with known demand when customers have known sales volume, when there are promotions with known volume amount, or when special products have known volume amounts. There may also be occasions when the business knowledge and experience of the planner or manager dictates that a forecast's modifications should be preserved from cycle to cycle.

Designating Data as Cycle Persistent

Planners and managers, while adjusting forecasts before submission, apply persistent locks to particular sets of data. Without cycle-persistent locks, after submission, the known demand adjustments are lost when the new forecast is generated for the next planning cycle.

With cycle-persistent locks, the data adjustments, locks, and comments are transferred to the shared database. The individual forecast Submission measure retains the locked values in the planning database even if the Planning Manager feels it is necessary to override the locked data in the consolidated measure. In the next planning cycle, the System Administrator can reapply the previous cycle's preserved adjustments from the consolidated Submission measure to the new baseline forecast for a scenario.

Note: A planner who adds persistent locks to a measure shared with the Planning Manager should copy the data, locks and comments to a personal copy of the measure in order to preserve the adjustments.

Standard Versus Persistent Locks

Standard locks are set in a worksheet to prevent the values in locked cells from being affected when data is recalculated. You can lock single cells or blocks of cells and attach comments to them. Protecting the value in a cell also protects the child values.

Persistent locks are set in the worksheet to protect values from being affected when data is recalculated. They also enable the data to span planning cycles -- the modified values, locks, and comments are transferred to the shared database.

A cycle-persistent lock is a lock on a measure tuple (set of interconnected dimension values). Setting the lock simultaneously accomplishes the following tasks:

- It prevents the designated dimension values from being overwritten by worksheet operations during a planning cycle.
- It prevents the values from being overwritten after the measure has been submitted into the shared database.
- It prevents the values from being overwritten even after the measure is integrated into the forecast of a scenario during the next forecast cycle.

Persistent and standard locks behave identically in the planner database. However, during the submission process, persistent locks and comments are submitted, while standard locks are not.

Cycle-Persistent Locks and the Planning Process

The following list of events demonstrates the role of the *preserve forecast adjustments* feature in the overall demand planning process.

1. The System Administrator distributes the baseline forecast.
2. Planners recreate or modify the forecast and apply cycle-persistent locks to their modifications.

3. The Planner submits the modified forecast. Persistent locks and comments associated with the submitted measure are automatically submitted. The Planning Manager can make additional adjustments.
4. Adjustments are applied to the shared database.
5. The System Administrator creates the statistical baseline forecast for the next cycle and checks the Apply persistent locks and adjustments from Previous cycle for Scenario option in the Measure Wizard Properties tab. The persistently locked adjustments are applied.
6. The forecasts are distributed.
7. Demand Planners receive the adjusted forecasts with their preserved adjustments and make modifications for the new data from the current cycle
8. The modified forecast is submitted.

Copying Data and Locks to Another Measure

Demand planners may copy persistent data and locks from one measure to another. This can become necessary during a planning cycle when a quick distribution is performed. Normal behavior during a quick distribution is that the lock states revert to those that were extant when the measure was initially distributed.

A demand planner might preserve modifications to a measure by copying the cycle-persistent data, with its locks and comments, into a temporary measure. The data, locks, and comments can then be reapplied to the original measure when it has been redistributed.

For example:

1. The measure "Booking History Forecast" is distributed by the System Administrator.
2. The planner makes adjustments and modifications to his personal copy of the scenario default measure, "Booking History Forecast," and sets cycle-persistent locks on specific dimension values.
3. The planning manager notifies demand planners that a "quick distribution" is imminent. If the quick distribution includes the measure on which the planner has put locks, it will overwrite the planner's private copy.
4. The planner creates a new temporary measure and specifies that the new measure should include cycle-persistent data (with its locks and comments) from the measure "Booking History Forecast."

5. The quick distribution occurs. Any updated values in "Booking History Forecast" are overwritten, and any modifications to cycle-persistent locks are lost.
6. To restore his locks and data, the planner edits the properties of the measure "Booking History Forecast," and specifies that any cycle-persistent data should be included from the temporary measure.
7. The data, locks, and comments are copied into "Booking History Forecast."

Procedure: Creating a Temporary Measure to Preserve Cycle-Persistent Locks

1. On the Navigation toolbar, click the **New** button.
2. From the command menu, choose **New Measure**.
3. From the submenu, choose **Stored Measure**.
4. Demand Planning displays the Measure Wizard.
5. In the **Choose Method** step, name the measure by entering a name in the text box below the **Specify a name for your new measure** label.
6. Choose the **Copy measure** option button and go to the next step ("Step 2 of 8: Copy Measure").
7. In the box below the **What measure do you want to copy your data from?** label, select, from the drop-down list, the name of the measure containing the persistent locks.
8. Use the **Next** button to navigate to the **Properties** step.
9. To ensure that the cycle-persistent locks are transferred to the target measure, check the box labeled **Make the measure editable in worksheets**.
10. Check the box labeled **Apply persistent locks and adjustments from**.
11. Choose the **Selected Measure** option, and select the name of the name of the measure containing the persistent locks from the drop-down list.
12. Make sure that the **Overwrite existing locked data in the target measure** box is checked.
13. Navigate through the remaining steps of the wizard and create your measure.

Procedure: Restoring Data, Locks, and Comments After a Quick Distribution

1. The temporary measure that you created and saved is listed in the Navigation List in the *Measure* folder or some subfolder within it.
2. Select the name of the temporary measure and right-click.
3. From the popup menu, choose **Edit**.
4. Demand Planning enables you to access the re-entrant Measure Wizard for the temporary measure. The re-entrant wizard has all steps as tabs on a single dialog box.
5. Choose the **Copy measure** tab and make sure that you select, from the drop-down list, the name of the temporary measure in the **What measure do you want to copy your data from?** box.
6. Use the **Next** button to navigate to the **Properties** step.
7. Check the box labeled **Apply persistent locks and adjustments from**.
8. Choose the **Selected Measure** option, and select the name of the name of the temporary measure containing the persistent locks from the drop-down list.
9. Make sure that the **Overwrite existing locked data in the target measure** box is checked.
10. Navigate through the remaining steps of the wizard and choose **Finish**.
11. You have restored the data, locks, and comments in the measure that was overwritten by the quick distribution.

Accessing Advanced Locking Functionality

There are three ways for a Demand Planner or Planning Manager to access locking functionality in Demand Planning worksheets. These are described below.

1. You can access the *Advanced Locking* dialog box from the Navigation toolbar, by way of the **Tools** menu. This is the method that offers the most efficient method of locking large numbers of values because it enables you to use the Selector tools.
2. You can use the **Modify Selected Data** menu, available from the worksheet toolbar.
3. You can modify and lock small numbers of cells in the worksheet by selecting them manually and using the commands on the right-click popup menu.

Description of the Advanced Locking Dialog Box

The *Advanced Locking* dialog box, **shown below**, enables you to accomplish cell locking in a more efficient manner by using the *Select Data* dialog box and its full set of tools. You can do the following:

- Set standard locks.
- Set persistent locks.
- Assign comments and reason codes to selected values.

Advanced Locking

Action

☒ Apply Standard Locks to Selected Dimension Values

☐ Apply Persistent Locks to Selected Dimension Values

☐ Remove Locks from Selected Dimension Values

☐ Remove Locks from All Dimension Values of Selected Measures

Measure	Values Selected	Values Affected
Measure	1	1
Geography	3	7
Ship from Location	4	6
Product	3	6
Time	1	30

Total cells to be affected: 7560

Locking dimension values at a higher level of a hierarchy will result in the locking of the children of those dimension values.

☒ Add Comment to Selected Cells

Reason Code:

Comment:

OK Cancel Help

Making Your Data Cycle-Persistent

There are two major steps to using cycle-persistent data.

1. You apply persistent locks, in the *Advanced Locking* dialog box, to the measure to be submitted.
2. You submit the measure with persistent locks.

During the next planning cycle, the cycle-persistent data, with its locks and associated comments, will be applied by the System Administrator and distributed as part of your assignment.

Applying Persistent Locks in Worksheets

The procedures that follow describe how to apply persistent locks in several ways.

Procedure: Applying Persistent Locks with Advanced Locking

1. From the Navigation toolbar, click the **Tools** icon.
2. From the **Tools** menu, select **Advanced Locking**.
Demand Planning displays the *Advanced Locking* dialog box.
3. In the Action frame choose **Apply Persistent Locks to Selected Dimension Values**.
4. In the **Dimension Value Selections** frame, choose the dimension values you intend to lock. You can double-click in the **Values Selected** column for any dimension to access the *Select Data* dialog box, or you can choose **Edit** at the right of the frame.

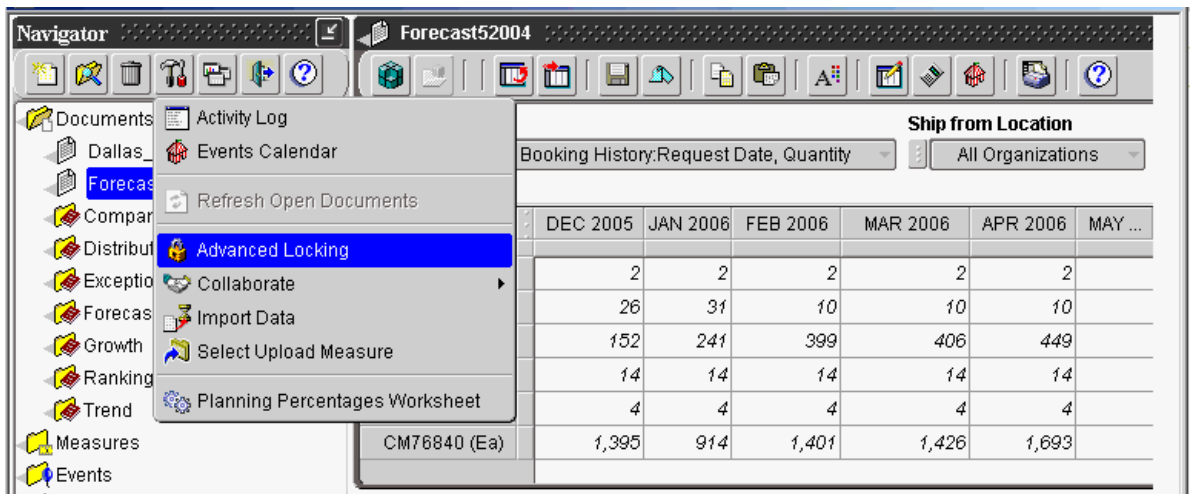
Note: When you use the *Select Data* dialog box from the *Advanced Locking* dialog box, you will NOT (as a planner) see values that are above your assignment level. You see values at the planning value and below.

5. Once you are in the *Select Data* dialog box, you must select one or more values from every dimension that you can access in the **Select values for** box. Because each dimension in the plan is dimensioned by all the other dimensions, you must create a "data cube" or "tuple" before you can lock specific values. Until you do this, the **OK** button in the *Select Data* dialog box is not enabled.

The *Measure* dimension will only include lockable stored measures, not their quantity and amount submeasures. You also cannot use advanced locking on formula measures, accuracy measures, and planning percentages and dependent demand.

6. Choose **OK** in the *Select Data* dialog box. When you return to the *Advanced Locking* dialog box, the selections table is updated immediately -- your selections and the effects of those selections are visible.

- If the values selected with explicit locks, plus the values that they affect, total more than 30,000 values, Demand Planning will display a warning. Although it will use significant system resources, the application will continue with the operation if that is your choice.
 - You should be aware that, because each measure being processed may have different allocation floors, the calculation of the number of dimension value combinations that is affected may be influenced in such a way that the total is less than the product of all **Values Affected** totals.
7. Decide whether you want to enter a comment to be applied to all of the selected locked values, describing the reason for the locking them.
If you want to add a comment, check the **Add Comments to Selected Cells** box.
 8. If your System Administrator has created reason codes for comments, they will be available from the **Reason Code** list box. If reason codes are not available, you can still enter a comment in the **Comment** text box.
 9. Choose **OK** to complete the locking operation.



Procedure: Applying Persistent Locks with the Modify Selected Data Tool

1. Open a new or saved worksheet.
2. Select the cells that you intend to lock. They are highlighted.

3. From the Navigation toolbar, choose **Modify Selected Data**.
4. From the **Modify Selected Data** menu, select **Lock Cells**.
5. From the submenu, select **Persistent Locks**.

Demand Planning applies locking to the selected cell or cells, as reflected by the change in background color.

Note: Remember that you will not be able to apply locks to any values that are above your assignment level or the default level for the plan.

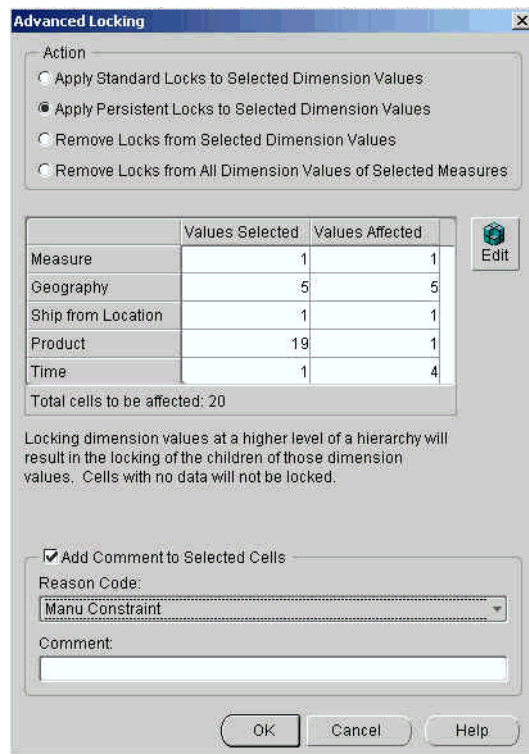
6. Adding a comment is always an optional activity, but you may be more likely to add one when you have locked an individual cell or a small number of cells without resorting to advanced locking.

To add a comment explaining why you have locked cells, you must reselect the locked cells and select the **Comments** command from the **Modify Selected Data** menu to access the *Comments* dialog box.

- a. Enter a comment in the **New Comment** box.
- b. Select a reason code, if one is available from the **Reason** box.
- c. Choose **Add**.
- d. Choose **OK**.

Note: Whether you add comments or not, you must save the worksheet for your locking operation to take effect.

7. Choose the **Save As** command from the Worksheet toolbar and save the worksheet.



Procedure: Applying Persistent Locks Manually

1. Open a new or saved worksheet.
2. Select the cells that you intend to lock. They are highlighted.
3. Right-click to access the worksheet commands popup menu.
4. Select **Lock Cells**.
5. From the **Locking** submenu, select **Persistent Locks**.
6. Demand Planning applies locking to the selected cell or cells, as reflected by the change in background color.

Note: Remember that you will not be able to apply locks to any values that are above your assignment level or the default level for the plan.

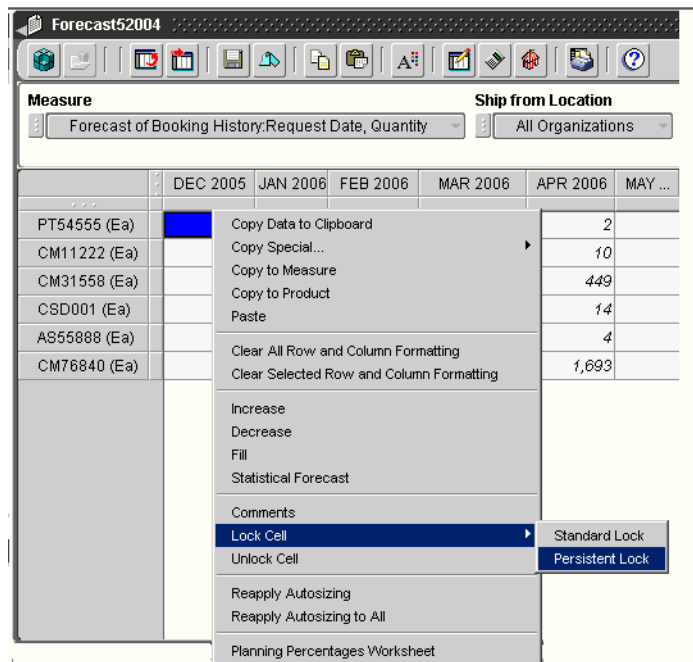
7. Adding a comment is always an optional activity, but you may be more likely to add one when you have locked an individual cell or a small number of cells without resorting to advanced locking.

To add a comment explaining why you have locked cells, you must reselect the locked cells. Then, select **Comments** from the worksheet commands popup menu to access the *Comments* dialog box.

- a. Enter a comment in the **New Comment** box.
- b. Select a reason code, if one is available from the **Reason** box.
- c. Choose **Add**.
- d. Choose **OK**.

Note: Whether you add comments or not, you must save the worksheet for your locking operation to take effect!

8. Choose **Save As** from the Worksheet toolbar and save the worksheet.



Removing Persistent Locks in Worksheets

The procedures that follow describe how to "unlock" data to which you have applied cycle-persistent locks. An "unlock" or remove operation affects your last modification of that kind (i.e., persistent versus standard).

Procedure: Removing Persistent Locks with Advanced Locking

1. Open a worksheet containing locked cells. Cells that have cycle-persistent locks will be dark pink in color.
2. From the Navigation toolbar, choose the **Tools** icon.
3. From the **Tools** menu, select **Advanced Locking**.
Demand Planning displays the *Advanced Locking* dialog box.
4. In the **Action** frame choose **Remove Locks from Selected Dimension Values**.

You will see that all of the non-measure dimensions are disabled in the **Dimension Value Selections** frame.

The counts in the grayed-out **Values Selected** and **Values Affected** columns (for non-measure dimensions) are set to **(all)**.

5. Choose **Edit**.

Demand Planning displays the *Dimension Value Selector* for the *Measure* dimension. A list of the measures in which locks can be removed is displayed.

You can select the measure from which you want to remove locks.

6. Choose **OK** in the *Dimension Value Selector*.

Demand Planning removes the locks from the selected cell or cells, as reflected by the change in background color.

7. Choose **OK** in the *Advanced Locking* dialog box.

8. Choose **Save As** from the Worksheet toolbar and save the worksheet.

Procedure: Removing Persistent Locks with the Modify Selected Data Tool

1. Open a worksheet containing locked cells. Cells that have cycle-persistent locks will be dark pink in color.
2. Select the cells that you intend to unlock. They are highlighted.
3. From the Navigation toolbar, choose **Modify Selected Data**.
4. From the **Modify Selected Data** menu, select **Unlock Cells**.
5. From the submenu, select **Persistent Locks**.

Demand Planning removes the locks from the selected cell or cells, as reflected by the change in background color.

6. Choose **Save As** from the Worksheet toolbar and save the worksheet.

Note: You must save the worksheet for your unlocking operation to take effect!

Procedure: Removing Persistent Locks Manually

1. Open a worksheet containing locked cells. Cells that have cycle-persistent locks will be dark pink in color.

2. Select the cells that you intend to unlock. They are highlighted.
3. Right-click to access the worksheet commands popup menu.
4. Select **Unlock Cells**.
5. From the **Locking** submenu, select **Persistent Locks**.

Demand Planning removes the locks from the selected cell or cells, as reflected by the change in background color.

6. Choose **OK** in the *Advanced Locking* dialog box.
7. Choose **Save As** from the Worksheet toolbar and save the worksheet.

Procedure: Removing All Locks

This procedure describes how to remove all locks in a measure using the *Advanced Locking* dialog box. It applies to both persistent and standard locks.

1. Open a worksheet containing locked cells. Cells that have cycle-persistent locks will be dark pink in color. Cells with standard locks have a light pink background color. Cells in which the numbers are in bold font have a comment attached.
2. From the Navigation toolbar, choose the **Tools** icon.
3. From the **Tools** menu, select *Advanced Locking*.

Demand Planning displays the *Advanced Locking* dialog box.

4. In the **Action** frame, choose the **Remove Locks from All Dimension Values of Selected Measures** button.

You will see that all of the non-measure dimensions are disabled in the **Dimension Value Selections** frame.

The counts in the grayed-out **Values Selected** and **Values Affected** columns are set to **(all)**.

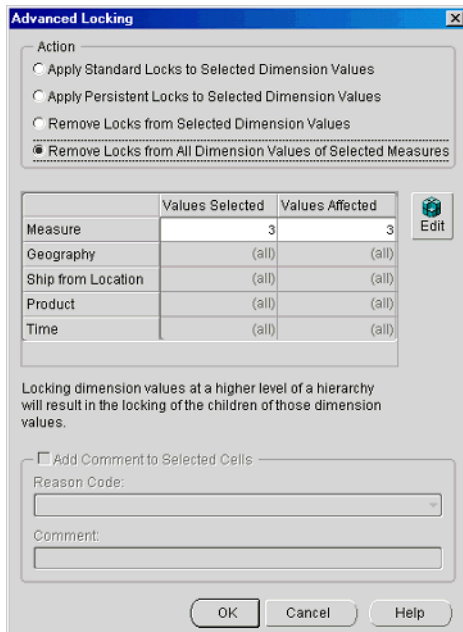
The **Add Comment to Selected Cells** checkbox is disabled.

5. Choose **Edit**.

Demand Planning displays the *Dimension Value Selector* dialog box for the *Measure* dimension. A list of the measures in which locks have now been removed is displayed.

Demand Planning removes the locks from the selected cell or cells, as reflected by the change in background color.

6. Choose **OK** in the *Advanced Locking* dialog box.
7. Choose **Save As** from the Worksheet toolbar and save the worksheet.



Using Standard Locks in Your Worksheets

The procedures for applying standard locks in worksheets do not differ significantly from the procedures for applying persistent locks. Refer to the following procedures for these tasks:

- [Procedure: Applying Persistent Locks with Advanced Locking](#)
- [Procedure: Applying Persistent Locks with the Modify Selected Data Tool](#)
- [Procedure: Applying Persistent Locks Manually](#)
- [Procedure: Removing Persistent Locks with Advanced Locking](#)
- [Procedure: Removing Persistent Locks with the Modify Selected Data Tool](#)
- [Procedure: Removing Persistent Locks Manually](#)
- [Procedure: Removing All Locks](#)

The most important difference between applying standard and persistent locks is that standard locks can be applied to any of the values displayed in a worksheet, as long as the measure is editable. However, when you use advanced locking, persistent locks can only be applied at the planner's assignment level or below. This is enforced in the *Select Data* dialog box, when you access it from the *Advanced Locking* dialog box. You will not be able to see values that are above the assignment level.

When you access the *Select Data* dialog box from the *Advanced Locking* dialog box to apply standard locks, you will be able to see all values for each particular dimension.

Resolving Locking Conflicts

During the process of copying persistent data, locks, and comments from one measure to another, a conflict may occur between the source measure and the target measure.

Conflicts tends to arise because of one of two problems: either the target measure has locks on the same cells that the source measure is trying to overwrite, or else the source and target measures have different allocation and/or aggregation methods.

Locks are copied at the highest level in order to implicitly lock the child values.

The following rules apply in cases of locking conflicts between a source and a target measure:

- If the target measure has an allocation floor, it must be equal to or lower than the allocation floor of the source.
- You cannot copy data, locks, and comments between measures that have different aggregation methods.
- You cannot copy data, locks, and comments between measures that have different allocation methods.
- You cannot copy data, locks, and comments between measures with are dimensioned by different dimensions.
- You cannot copy data, locks, and comments to a measure that has its allocation set to "None."

In the event that a source measure with cycle-persistent data is copied to a target measure and the source measure has a higher allocation floor, the data of the allocation floor level children of persistent-locked cells is copied over and allocated down.

Preserving Locked Data for Submission to the Planning Manager

When a planner places persistent locks on worksheet cells, the data is preserved across planning cycles. This means that the locks are submitted along with the measures to which they apply. The locks, data, and associated comments may be copied into the scenario measure which is generated for the next planning cycle (if the System Administrator has selected that option in the Measure Wizard).

Submitting Cycle-Persistent Data

If you work as a Demand Planner and select a final forecast to submit to the shared database, the persistent locks currently associated with the measure are automatically collected when the data collection stage runs. The data is marked for consolidation in the shared database, where it will be reviewed by the Planning Manager.

Only cycle-persistent data, locks, and comments that fall within the bounds of a planner's write scope are submitted, just as with adjusted planning data. Cycle-persistent data, locks, and comments outside of an assignment's write scope, but within its view scope, are not included.

Before the Submission measure is uploaded, the Planning Manager can remove cycle-persistent locks that planners have placed on the submitted measures.

When you work as a Demand Plan Manager and select a forecast to upload to the Demand Planning Server, the persistent locks associated with the measure are automatically uploaded when the upload stage runs.

Collecting Cycle-Persistent Data

When the System Administrator collects assignments, a process in Oracle Workflow reads the contents of the planners' submitted measures into the Submission measure specified for a particular scenario. Contents of submitted cycle-persistent locks are imported, both explicit and implicit locks. Comments are also imported.

Applying Previous Adjustments to New Planning Cycles

Demand Planners can apply the data of the explicitly cycle-locked cells and the child values that inherit those locks from a previous scenario's default measure. The cycle locked data is copied with the locks intact as well as any comments associated with the locked tuples.

Procedure:Applying Previous Adjustments to New Planning Cycles

To copy data from a previous planning cycle, follow the steps described below:

1. On the Navigation toolbar, click **New**.
2. From the command menu, choose **New Measure**.
3. From the submenu, choose **Stored Measure**.

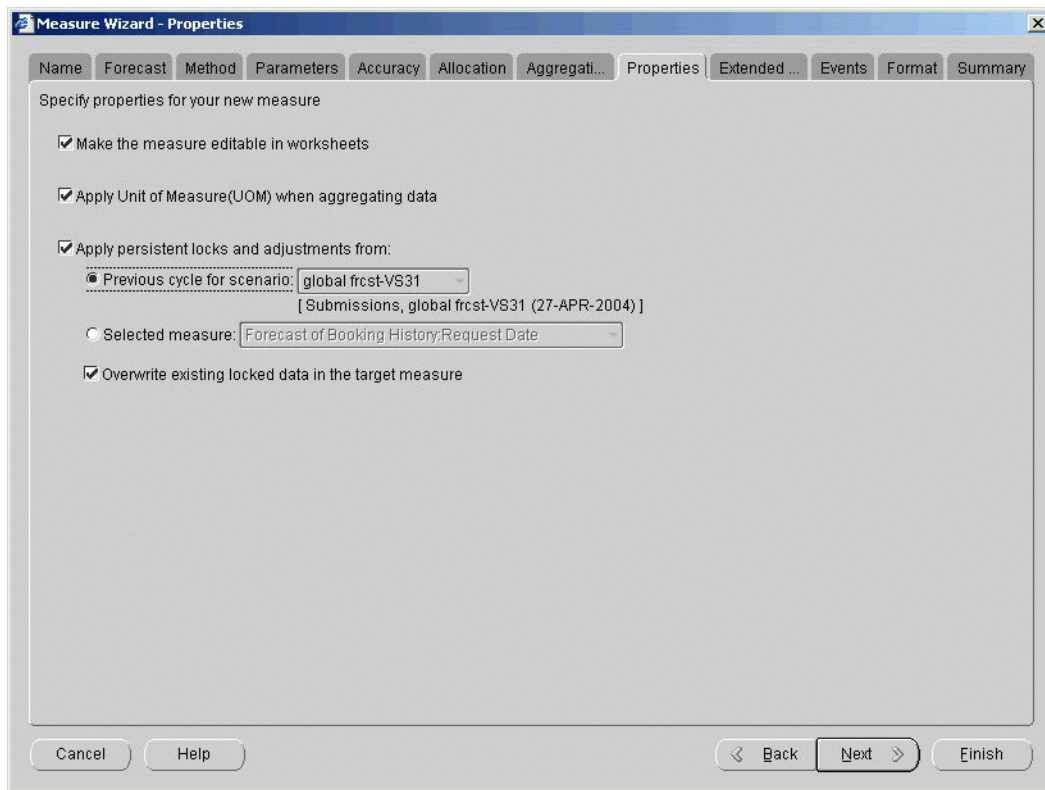
Demand Planning displays the Measure Wizard.

4. In the **Choose Method** step, name your measure by entering a name in the text box below the **Specify a name for your new measure** label.
5. Choose **Copy Measure** and go to the next step ("Step 2 of 8: Copy Measure").
6. In the box beneath the **What measure do you want to copy your data from?** label, select, from the drop-down list, the name of the measure containing the persistent locks.
7. Click **Next** to navigate to the **Properties** step.
8. To ensure that the cycle-persistent locks are transferred to the target measure, check the box labeled **Make the measure editable in worksheets** box.
9. Check **Apply persistent locks and adjustments from**.
10. Choose **Previous cycle for scenario**.

The box to the right of the option is now enabled. If there is only one measure available, the name will appear in the box.

11. If there are multiple measures, you can select one from a drop-down list.
12. Check **Overwrite existing locked data in the target measure**.
13. Navigate through the remaining steps of the wizard and create your measure.

The following figure shows the way in which the **Properties** step or tab will appear during this procedure.



Demand planners can also copy the data of explicitly cycle-locked cells and child values from a selected measure. The Measure Wizard is the vehicle for doing this, for more information refer to "Creating a Temporary Measure to Preserve Cycle-Persistent Locks."

Distributing Adjusted Forecasts with Cycle-Persistent Data

By using persistent locks to save forecast adjustments, the Demand Planning System Administrator can reapply the previous cycle's preserved adjustments to the new baseline forecast for a scenario.

When *Distribution* occurs, the previous cycle's data adjustments, locks, and comments are part of the distributed forecast.

The System Administrator specifies the inclusion of cycle-persistent data in the distribution of measures to assignments by modifying the properties of the measures that are distributed. The modification of measures is accomplished by using the procedure described in "Applying Previous Adjustments to New Planning Cycles."

The System Administrator can specify that, for any existing or newly-defined measure, its data can be overwritten with any cycle-persistent data found in another measure or the default measure of a specified scenario.

Name	Source	Rebuild	New...
Workday Allocation Weights:End Date	Planning Server	<input type="checkbox"/>	Edit Delete Properties
Booking History - Booked Items:Booked Date	Planning Server	<input type="checkbox"/>	
Forecast of Booking History - Booked Items:Booked Date	Shared	<input checked="" type="checkbox"/>	
Submissions, First-Book (01-APR-2003)	Shared	<input type="checkbox"/>	

Using Ad Hoc Reports

This section describes how to use ad hoc reports when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- About Ad Hoc Reports
- Creating Ad Hoc Reports
- Opening Ad Hoc Reports
- Selecting Data for Ad Hoc Reports
- Arranging and Viewing Data in Ad Hoc Reports
- Creating Ranking/Exception Reports
- Viewing Events for Measures in Ad Hoc Reports
- Formatting Ad Hoc Reports
- Formatting Ad Hoc Reports Based on Data Conditions (Color Coding)
- Printing Ad Hoc Reports
- Saving Ad Hoc Reports
- Copying Data from Ad Hoc Reports
- Exporting Data from Ad Hoc Reports
- Closing Ad Hoc Reports
- Renaming Ad Hoc Reports
- Viewing Ad Hoc Report Properties
- Deleting Ad Hoc Reports

About Ad Hoc Reports

Ad hoc reports display data in tabular format. When you work as a Demand Planner or Demand Plan Manager you can create an ad hoc report to analyze an issue on the fly. You can also save an ad hoc report and run it on a regular basis.









Example: Ad hoc report






The following illustration shows a sample ad hoc report.

Optimistic Forecast, Q1						
Measure		Ship from Location				
Optimistic Forecast, Amount		All Organizations				
		AZ	CA	TX	WA	UT
5870	JAN 2002	\$34,567.00	\$76,543.00	\$45,358.00	\$45,691.00	\$45,812.00
	FEB 2002	\$876,543.00	\$87,654.00	\$54,671.00	\$65,483.00	\$45,612.00
	MAR 2002	\$234,675.00	\$76,568.00	\$65,476.00	\$54,376.00	\$71,523.00
5884	JAN 2002	\$45,874.00	\$34,586.00	\$45,761.00	\$45,678.00	\$54,376.00
	FEB 2002	\$45,337.00	\$77,654.00	\$33,214.00	\$43,543.00	\$48,812.00
	MAR 2002	\$76,352.00	\$33,546.00	\$66,712.00	\$45,678.00	\$45,123.00
5875	JAN 2002	\$57,665.00	\$71,235.00	\$81,134.00	\$66,543.00	\$33,345.00
	FEB 2002	\$22,346.00	\$55,542.00	\$44,453.00	\$44,429.00	\$76,112.00
	MAR 2002	\$33,658.00	\$88,432.00	\$55,421.00	\$55,123.00	\$61,123.00
5886	JAN 2002	\$77,543.00	\$66,542.00	\$44,365.00	\$39,976.00	\$66,643.00
	FEB 2002	\$44,588.00	\$49,870.00	\$30,098.00	\$22,256.00	\$66,453.00
	MAR 2002	\$76,599.00	\$14,567.00	\$55,768.00	\$66,543.00	\$44,345.00
5885	JAN 2002	\$76,634.00	\$55,545.00	\$55,623.00	\$45,674.00	\$44,441.00
	FEB 2002	\$55,432.00	\$442,123.00	\$55,432.00	\$22,234.00	\$33,432.00
	MAR 2002	\$22,226.00	\$65,124.00	\$44,365.00	\$55,512.00	\$27,798.00

Toolbar for ad hoc reports

The Document toolbar appears at the top of an open ad hoc report. The toolbar buttons enable you to perform the functions that are listed in the following table.

Button	Description	Function
	Select Data	Select values from a list and access various data selection tools. Also sort selections.
	Apply Saved Selection	Replace the current values in the report with a saved selection of values.
	Change Layout	Change the layout of the report.
	Change Document Type	Change the report to a graphical format.
	Export	Export data and labels from the report to a comma delimited (.csv), tab delimited (.txt), or Excel 2000+ (*.htm) file.
	Save As	Save the report.
	Copy	Copy selected data from the report to the Windows clipboard.
	Format Document	Specify a title, subtitle, and footnote for the report. Also apply formatting to the entire report and to selected rows and columns.

Button	Description	Function
	Color Coding	Apply color formats based on data conditions to the report.
	Ranking/Exception Reports	Display rows that meet exception, ranking, or exception and ranking criteria.
	Events Calendar	View a calendar that displays information about events associated with the demand plan.
	Print	Print the report.
	Help	Display online Help for planners and the Demand Plan Manager.

Creating Ad Hoc Reports

You can base an ad hoc report on the default ad hoc report document. You can also use any saved document as the starting point for a new report.

The data in a new report initially reflects the document on which the report is based. You can then customize the report so that it displays exactly the data that you want to work with. You can also select layout and format options.

To create an ad hoc report:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Report**.

Alternatively, you can click the right mouse button on **Documents** in the navigation list and choose **New Report** from the popup menu.

3. Choose one of the following:

- **Use default** — Creates an ad hoc report that is based on the default ad hoc report document.
- **Based on** — Creates an ad hoc report that is based on a selected document.

If there are no saved documents, then you do not have these options. The report will automatically be based on the default report document. For information about setting the default, see ["Saving Ad Hoc Reports" on page 14-43](#).

4. Choose **OK** to create the report.

Result: The report is displayed in the workspace. A generic name, such as "Document 1," appears above the body of the document.

Opening Ad Hoc Reports

You can open a saved ad hoc report. Saved reports are displayed as objects in the navigation list, located in the left frame of your browser. Depending on how a report was saved, it might appear in the main Documents folder or in a folder that you created.

To open an ad hoc report:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the report that you want to open.

Tip: To search for an ad hoc report in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the document object.

Alternatively, you can click the right mouse button on the document object and choose **Open** from the popup menu.

Selecting Data for Ad Hoc Reports

When you create a new ad hoc report, the data reflects selections for the document on which the report is based. When you open a saved ad hoc report, the data reflects selections that were in effect when the document was saved.

You can select *measures* and *dimension values* so that the report displays exactly the data that you want to work with.

- A *measure* represents a variable which is a placeholder for storing data values for all levels of all dimensions. For example Booking History, Shipment History, and Q1 Forecast might be measures in your database.
- A *dimension* is a database object that organizes and indexes the data, similar to a key in a relational database. For example, if you have data with values for various time periods, then the data has a Time dimension; that is, it is organized by time.
- *Dimension values* are the elements that make up a dimension. For example, the Time dimension in your database might include values for years, quarters, months, and weeks. You can select any or all of the values that are available within a dimension, including custom aggregates that you have defined.

To select data for an ad hoc report:

1. With the document open in the workspace, choose the **Select Data** button on the Document toolbar.



Result: A list of the dimensions in your database appears. The list includes Measure.

2. Choose a dimension for which you want to select values.

Result: The Select Data dialog box opens. The dimension that you chose is displayed in the Select Values for box.

3. Choose values for the current dimension.

For information about data selection tools and techniques, see ["Selecting Data" on page 22-1](#).

4. To select values for another dimension, in the Select Values for box choose the dimension and repeat Step 3.
5. Repeat Steps 3 and 4 until the document includes the values that you want to work with.

Applying custom aggregates and saved selections to an ad hoc report

In addition to using a selection list or selection tools to select data values for an ad hoc report, you can change the data that is displayed in a report by applying saved selections and custom aggregates to the open document. For more information, see the following topics:

["Defining Custom Aggregates" on page 19-2](#)

["Applying Custom Aggregates to Open Documents" on page 19-5](#)

["Defining Saved Selections" on page 20-2](#)

["Applying Saved Selections to Open Documents" on page 20-7](#)

If expected rows do not display

It is possible that a row that you expect to see might not appear if rows that contain NA (unavailable) data are suppressed in the report. For example, assume that you position Time on the row edge of a report, and select three Time values: October, November, and December. If NA row suppression is turned on and there is no data for December, then the report will display rows for October and November, but no row for December.

If you think that NA or zero rows are being suppressed and you want to view these rows, you can use a format option to display the rows. For more information, see ["Specifying general display elements for an ad hoc report" on page 14-25](#).

Arranging and Viewing Data in Ad Hoc Reports

You can change an ad hoc report so that the data is arranged in the way that you want. The following options are available:

- You can change the layout by rearranging the dimensions on the page.
- You can display the report data in graphical format.
- You can drill through aggregate values to expose component values.

- You can page through the report to view data for dimensions in the page position.
- You can change the size of columns or rows to enhance your view of the data.

Changing the layout of an ad hoc report

You can use the Change Layout button on the Document toolbar to change the layout of an ad hoc report. Alternatively, you can change the layout manually, by dragging and dropping dimension tiles.

To use the Change Layout button to change the report layout:

1. With the report open in the workspace, choose the **Change Layout** button on the Document toolbar.



Result: The Layout box displays the current positions of the dimensions on the page. Dimensions for which data displays as separate pages are shown in the page position. Dimensions for which data goes across the page are shown in the row position. Dimensions for which data goes down the page are shown in the column position.

2. You can click a dimension and drop it on another location or drag it to a new location.

Result: The dimension moves as follows:

- If you drag a dimension near another dimension and the dimension turns gray, this indicates that the two dimensions will exchange (swap) positions.
 - If you drag a dimension and a black bar appears, this indicates that the dimension will be moved to the position.
3. You can also use the controls at the top of the page to manipulate dimension positions as follows:
 - a. In the left box, select an action.
 - * Choose **Move** to move a dimension to another position.
 - * Choose **Swap** to exchange the position of one dimension with another dimension.

- b. In the center box, select the dimension on which to perform the move or exchange.
- c. If you chose **Move** in Step 2a, use the right box to select the target location for the move.

If you chose **Swap** in Step 2a, use the right box to select the dimension or edge for the exchange.
- d. Choose **Go** to update the display in the Layout box to reflect the current status of the boxes.

4. When the Layout box displays the desired settings for the dimensions, choose **OK**.

Result: The Change Layout dialog box closes. The elements in the document are moved to the locations that you specified.

To use drag and drop to change the layout:

1. Click a row, column, or page selector. These selectors are located beside the row, column, and page labels and appear similar to a stoplight, as shown following.



2. Drop the selection on another location or drag it to a new location.

Result: The dimension moves with the selector as follows:

- If you drag a dimension near another dimension and the dimension turns gray, this indicates that the two dimensions will exchange (swap) positions.
- If you drag a dimension and a black bar appears, this indicates that the dimension will be placed on the edge.

Changing the document type for an ad hoc report

You can change an ad hoc report from a tabular format into a graphical format.

To change an ad hoc report into a graph:

1. With the document open in the workspace, choose the **Change Document Type** button on the Document toolbar.



Result: The Change Document dialog box opens.

2. In the Change document type to box, select **Graph**.
3. In the With the following subtype box, select the type of graph you want to work with.
4. Choose **OK** to apply the current settings.

Result: The Change Document Type dialog box closes. The current report changes to the type of graph that you specified.

Drilling through levels of data in an ad hoc report

If an ad hoc report includes hierarchical dimension values and the drilling option has been turned on for the document, you can view data at various levels by drilling within aggregate values. For example, if the report displays a geography that includes lower level values, you can “drill down” and expand the display to show component geographies. You can then “drill up” to collapse the display.

You can drill a dimension value that is in the row or column position if a drill arrow appears to the left of the dimension value name. The arrow shape changes, depending on whether you can expand or collapse the value:

- ▮ **Right pointing arrow** — Located beside a value that displays a total while the values that contribute to that total are not visible. Clicking this arrow enables you to drill down, causing the report to display the lower level values.
- ▮ **Down pointing arrow** — Located beside a value that displays a total while the values that contribute to that total are visible beneath it. Clicking this arrow enables you to drill up, causing the report to display only the total value.

A report format option enables you to turn drilling on or off for a report. For more information, see ["Specifying general display elements for an ad hoc report" on page 14-25](#).

Paging through an ad hoc report

Report data is displayed one page at a time. You can use the page controls at the top of the document to display pages other than the one that is currently in view. For example, the current page might show data for Total Product, but you can select another product from the list to see its data.

Adjusting columns and rows in a report

You can change the size of columns and rows in a report so that the information is easier to read. You can use drag and drop to adjust column and row sizes. You can also use a format option. For more information about sizing rows and columns, see ["Sizing rows and columns in an ad hoc report" on page 14-27](#).

Creating Ranking/Exception Reports














Using an existing report as a starting point, you can create a report that meets exception criteria, ranking criteria, or exception then ranking criteria.

- ▮ **Exception report** — Displays data that meets criteria that you specify.
- ▮ **Ranking report** — Presents data in descending order based on criteria that you specify.
- ▮ **Exception then Ranking report** — Displays data that meets criteria that you specify, presented in descending order based on criteria that you specify.

Example: Ranking report

The following illustration shows an example of a ranking report, one type of Ranking/Exception report.

Top Ranked Products - Puerto Rico



Geography

Measure

Ship from Location

...

Puerto Rico

...

...

Shipping History, Amount

...

...

All Organizations

...

...

Qtr 1 2002

...

1. 5884	67,702.85
2. 5870	60,338.88
3. 5886	59,370.61
4. 5875	35,596.45
5. 5885	22,055.38

Planning your Ranking/Exception report

Identify the row dimension

Before you create a Ranking/Exception report, identify the dimension in which you want to rank members or specify exception criteria. This is the focus of the report and the dimension that you will select as the row dimension (also known as the *down* dimension) for the report. For example, if you intend to rank geographies by units shipped for a product within a specified time period, you would specify Geography as the row dimension.

Identify the measure and the qualifying dimension values

Also identify the measure that you want to use as the basis for evaluating the dimension values in the row position and set this as the measure in the base report. For example, if you intend to use Geography as the row dimension, do you want to evaluate the geographies in terms of Booking History, or by another measure? You should also identify the qualifying dimension values that you intend to apply to the measure. To continue with the previous example: for what time period and product do you want to look at Booking History?

By default, Oracle Demand Planning will attempt to use the first measure that is displayed in the base report as the measure for exception then ranking. You can change this selection, but before you do so, ensure that the report includes the measure that you intend to choose. This will prevent a situation in which you create a document that is correct but not relevant: for example, a report that ranks geographies by Booking History but displays data for Shipment History.

Working with Ranking/Exception reports

You can work with a Ranking/Exception report just as you would any report, with several exceptions:

- The row dimension determines the report's focus. Therefore, you cannot use drag and drop or the Change Layout tool to place an alternate dimension in the row position while the ranking/exception criteria is applied. If you want to focus the report on a different dimension, you can create a new Ranking/Exception report. Alternatively, you can remove all ranking/exception criteria from the report, change the report layout, and then reapply the criteria.
- Although you can use drag and drop or the Change Layout tool to change the column dimension, adding a dimension to the column position, or removing a dimension from the column position can change the values that are displayed.
- If you change a Ranking/Exception report to a graph, the ranking/exception settings will be removed.
- As you page through a Ranking report, the order of the rows will change as the ranking criteria is re-evaluated. For example, if Geography is in the page position and the first page of the report ranks Sales for a group of products in New York and another page ranks Sales for the same group of products in Boston, the products that are displayed on the pages may differ.

Creating a report that meets exception criteria

The following procedure describes how to apply exception criteria to a report for the first time. If you are modifying criteria, see "[Modifying exception then ranking settings for an ad hoc report](#)" on page 14-21.

To create a report that meets exception criteria:

1. With a report open in the workspace, choose the **Ranking/Exception Reports** button on the Document toolbar.



2. If you see the Welcome dialog box, choose **Next** to continue.

To suppress the Welcome dialog when creating other Ranking/Exception reports, check **Do not show this page in the future** before you continue.

Result: The Row Dimension dialog box opens.

3. In the Ranking/Exception Wizard -- Row Dimension dialog box, choose the row dimension for the report and the member values that you want to evaluate for the dimension. Proceed as follows:

- a. In the *Dimension* box, select the row dimension. You can choose the default, or you can select an alternate dimension from the list.

The dimension that you choose will become the only row dimension in the report. Any other dimensions that are currently in the row position will move to the page position.

- b. The *Choose members of the dimension* box displays the number of values that are currently selected for the dimension that you chose in Step 3a. Choose the *Ellipsis* button to access the Select Data dialog box, where you can view the current selections and choose alternate values.

- c. Choose **Next** to continue.

Result: The Ranking/Exception Wizard -- Exception dialog box opens.

4. In the Ranking/Exception Wizard -- Exception dialog box, choose **Yes** for the "Do you want to apply exception criteria to the *xyz* dimension" prompt, where *xyz* is the dimension that you chose in Step 3a. This enables you to choose the measure on which to base the exception, specify cutoff values, and select qualifying dimension values. Proceed as follows:
 - a. In the *measure* box, select the measure on which to base the exception condition. You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
 - b. In the *operator* box, choose the operator that specifies how the values for the measure that you selected in Step 4a must relate to a value. You can choose **equal to**, **not equal to**, **greater than**, **less than**, **greater than or equal to**, **less than or equal to**, **between including**, **between excluding**, or **outside**.
 - c. In the *value* box, enter the value to which the values in the measure will be compared. If you chose the **between including**, **between excluding**, or **outside** operators, you must specify two values.
 - d. The *Dimensions* box displays default qualifying dimension values for the comparison. There is a qualifying value for each dimension in the row position. You can accept the default value that appears in the box for a dimension, or you can select an alternate value.

To select an alternate value for a dimension, highlight the value that you want to change and choose the **Dimension Values** button. This opens a dialog box where you can select alternate values for that dimension.
 - e. Choose **Finish** to display the exception report.

Example: Exception criteria

The following example shows the dialog box for defining exception criteria.

Ranking/Exception Wizard -- Step 2: Exception

Do you want to apply exception criteria to the Product dimension?

☒ Yes ☐ No

Exception Criteria

Keep members in the Product dimension

where ...

is

the value

for

Creating a report that meets ranking criteria

The following procedure describes how to apply ranking criteria to a report for the first time. If you are modifying criteria, see ["Modifying exception then ranking settings for an ad hoc report"](#) on page 14-21.

To create a report that meets ranking criteria:

1. With a report open in the workspace, choose the **Ranking/Exception Reports** button on the Document toolbar.



2. If you see the Ranking/Exception Wizard -- Welcome dialog box, choose **Next** to continue.

To suppress the Welcome dialog when defining other Ranking/Exception reports, check **Do not show this page in the future** before you continue.

Result: The Ranking/Exception Wizard -- Row Dimension dialog box opens.

3. In the Ranking/Exception Wizard Row Dimension dialog box, choose the row dimension for the report and the member values that you want to evaluate. Proceed as follows:

- a. In the *Dimension* box, select the row dimension. You can choose the default, or you can select an alternate dimension from the list.

The dimension that you choose will become the only row dimension in the report. Any other dimensions that are currently in the row position will move to the page position.

- b. The *Choose members of dimension* box displays the number of values that are currently selected for the dimension that you chose in Step 3a. Choose the *Ellipsis* button to access the Select Data dialog box, where you can view the current selections and choose alternate values.

- c. Choose **Next** to continue.

Result: The Ranking/Exception Wizard Exception dialog box opens.

4. In the Ranking/Exception Wizard -- Exception dialog box, choose **Next**.

Result: The Ranking/Exception Wizard -- Ranking dialog box opens.

5. In the Ranking/Exception Wizard -- Ranking dialog box, choose **Yes** for the "Do you want to apply ranking criteria to the *xyz* dimension" prompt, where *xyz* is the dimension that you chose in Step 3a. This enables you to choose the measure on which to base the ranking, specify ranking criteria, and select qualifying dimension values. Proceed as follows:

- a. In the *measure* box, select the measure on which to base the ranking condition. You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.

- b. To rank top values, in the *top* box, enter an integer that represents the number or percentage of top values to select. To indicate that the value that you entered is a percentage, choose **percent**.

- c. To rank bottom values, in the *bottom* box, enter the number or percentage of bottom values to select. To indicate that the value that you entered is a percentage, choose **percent**.
- d. The *Dimensions* box displays default qualifying dimension values. There is a qualifying value for each dimension in the row position. You can accept the default value that appears in the box for a dimension, or you can select an alternate value for any dimension.

To select an alternate value for a dimension, highlight the value that you want to change and choose the **Dimension Values** button. This opens a dialog box where you can select an alternate value for that dimension.

- e. Choose **Finish** to display the ranking report.

Example: Ranking criteria

The following example shows the dialog box for defining ranking criteria.

Ranking/Exception Wizard -- Step 3: Ranking

Do you want to apply ranking criteria to the Product dimension?

☒ Yes ☐ No

Ranking Criteria

Rank members in the Product dimension

where ...

is in the top ☒ percent

and the bottom ☐ percent

for

Creating a report that meets exception then ranking criteria

The following procedure describes how to apply exception then ranking criteria to a report for the first time. If you are modifying criteria, see ["Modifying exception then ranking settings for an ad hoc report" on page 14-21](#).

To create a report that meets exception then ranking criteria:

1. With a report open in the workspace, choose the **Ranking/Exception Reports** button on the Document toolbar.



Result: The Ranking/Exception Wizard -- Welcome dialog box or the Ranking/Exception Wizard Row Dimension dialog box opens.

2. If you see the Ranking/Exception Wizard --Welcome dialog box, choose **Next** to continue.

To suppress the Welcome dialog when defining other Ranking/Exception reports, check **Do not show this page in the future** before you continue.

Result: The Ranking/Exception Wizard -- Row Dimension dialog box opens.

3. In the Ranking/Exception Wizard -- Row Dimension dialog box, choose the row dimension for the report and the member values that you want to evaluate. Proceed as follows:

- a. In the *Dimension* box, select the row dimension. You can choose the default, or you can select an alternate dimension from the list.

The dimension that you choose will become the only row dimension in the report. Any other dimensions that are currently in the row position will move to the page position.

- b. The *Choose members of dimension* box displays the number of values that are currently selected for the dimension that you chose in Step 3a. Choose the *Ellipsis* button to access the Select Data dialog box, where you can view the current selections and choose alternate values.

- c. Choose **Next** to continue.

Result: The Exception dialog box opens.

4. In the Ranking/Exception Wizard -- Exception dialog box, choose **Yes** for the "Do you want to apply exception criteria to the xyz dimension" prompt, where

xyz is the dimension that you selected in Step 3a. This will enable you to choose the measure on which to base the exception, specify cutoff values, and select qualifying dimension values. Proceed as follows:

- a. In the *measure* box, select the measure on which to base the exception condition. You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
- b. In the *operator* box, choose the operator that specifies how the values for the measure that you selected in Step 4a must relate to a value. You can choose **equal to**, **not equal to**, **greater than**, **less than**, **greater than or equal to**, **less than or equal to**, **between including**, **between excluding**, or **outside**.
- c. In the *values* box, enter the value to which the values in the measure will be compared. If you chose the **between including**, **between excluding**, or **outside** operators, you must specify two values.
- d. The *Dimensions* box displays default qualifying dimension values for the comparison. There is a qualifying value for each dimension in the row position. You can accept the default value that appears in the box for a dimension, or you can select an alternate value.

To select an alternate value for a dimension, highlight the value that you want to change and choose the **Dimension Values** button. This opens a dialog box where you can select alternate values for that dimension.

- e. Choose **Next** to continue.

Result: the Ranking dialog box opens.

5. In the Ranking/Exception Wizard -- Ranking dialog box, choose **Yes** for the "Do you want to apply ranking criteria to the *xyz* dimension" prompt, where *xyz* is the dimension that you chose in Step 3a. This will enable you to select the measure on which to base the ranking, specify ranking criteria, and select qualifying dimension values. Proceed as follows:
 - a. In the *measure* box, select the measure on which to base the ranking condition. You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
 - b. To include top values in the ranking, in the *top* box, enter an integer that represents the number or percentage of top values to select. To indicate that the value that you entered is a percentage, choose **percent**.

- c. To include bottom values in the ranking, in the *bottom* box, enter the number or percentage of bottom values to select. To indicate that the value that you entered is a percentage, choose **percent**.
- d. The *Dimensions* box displays default qualifying dimension values. You can accept the default value that appears in the box for a dimension, or you can select an alternate value for any dimension.

To select an alternate value for a dimension, highlight the value that you want to change and choose the **Dimension Values** button. This opens a dialog box where you can select an alternate value.

- e. Choose **Finish** to display the exception/ranking report.

Modifying exception then ranking settings for an ad hoc report

You can change the measure, cut-off or ranking values, and qualifying dimension values for ranking then exception criteria in a report.

If you want to change the focus of the report — that is, place an alternate dimension in the row position, you must remove the exception/ranking settings and start again. Alternatively, you can create a new report.

To modify exception then ranking settings for an ad hoc report:

1. With the report open in the workspace, choose the **Ranking/Exception Reports** button on the Document toolbar.



Result: The Modify Ranking/Exception Settings dialog box opens.

2. Choose **Modify Ranking/Exception Settings** and then choose **OK**.

Result: The wizard starts. The Exception tab is active.

3. In the Exception tab, you can do one of the following:
 - Modify the current exception criteria.
 - Disable the current exception criteria. To do this, choose **No** for the “Do you want to apply exception criteria to the *xyz* dimension” prompt, where *xyz* is the row dimension.

If you do not want to define, disable, or modify exception criteria, proceed to Step 4.

4. To modify or disable ranking criteria, choose the **Ranking** tab or choose **Next**.

If you do not want to define, disable, or modify ranking criteria, proceed to Step 6.

5. In the Ranking tab, you can do one of the following:

- Modify the current ranking criteria.
- Disable the current ranking criteria. To do this, choose **No** for the “Do you want to apply ranking criteria to the *xyz* dimension” prompt, where *xyz* is the dimension.
- Define ranking criteria if none currently exists. To do this choose **Yes** for the “Do you want to apply ranking criteria to the *xyz* dimension” prompt, where *xyz* is the row dimension. Then define the criteria as described in the topic ["Creating a report that meets ranking criteria" on page 14-16](#).

6. Choose **Finish** to display the report.

Removing exception and ranking settings from a report

You can remove exception setting, ranking settings, or exception then ranking settings that have been applied to an ad hoc report.

To remove exception and ranking setting from an ad hoc report:

1. With the report open in the workspace, choose the **Ranking/Exception Reports** button on the Document toolbar.



Result: The Modify Ranking/Exception Settings dialog box opens.

2. Choose **Remove Ranking/Exception Settings** and then choose **OK**.

Viewing Events for Measures in Ad Hoc Reports

An *event* is an occurrence such as a promotion, new product introduction, or product phase out that is expected to impact demand for a product. When you define a stored measure, you can associate one or more events with that measure. Events might also be linked to stored measures in the shared database. Thus, your ad hoc report might include measures that have associations with events.

While you are working with reports you can access an Events Calendar which provides information about the events that are associated with a demand plan.

To view events that are associated with a measure:

Note: The following procedure describes how to use the Events Calendar to view information about a measure. For more information about events, see ["Working with Events" on page 18-1](#). For more information about the Events Calendar, see ["Using the Events Calendar" on page 18-18](#).

1. With the document open in the workspace, choose the **Events Calendar** tool on the Document toolbar.



Result: The Events Calendar opens. The Month tab displays events for the current month. The right frame displays all events that are linked to the demand plan.

2. Choose the **Filter Events by Measure** button.



Result: The Choose a Measure dialog box opens. The list displays all of the measures that have been defined for the demand plan.

3. Select a measure from the list and choose **OK**.

Result: The right panel now displays only those events that have been associated with the selected measure. The measure name appears at the bottom of the frame.

4. To view more information about the event, double-click it.

Result: The Event Wizard opens, where you can view (and optionally edit) the event definition.

5. You can move through the calendar to view the event time period. Choose **Next** to advance the month display and **Previous** to go back a month. Choose the **Year** tab to view events by year.
6. Choose **OK** to exit the calendar.

Formatting Ad Hoc Reports

You can specify the following types of formats for a report:

- You can select format options that apply to the entire report. For example, you can specify display options, fonts and background colors, row and column sizing, and text elements such as title, subtitle, and footnote. For more information, see ["Specifying formats that apply to the entire report" on page 14-24](#).
- You can select format options that apply to selected rows or columns of the report. For example, you can specify number formatting, borders, and fonts and colors. For more information, see ["Formatting data in selected rows and columns" on page 14-30](#).
- You can define special format conditions that apply when the data values for a measure meet criteria that you specify. For more information, see ["Formatting Ad Hoc Reports Based on Data Conditions \(Color Coding\)" on page 14-34](#).

Specifying formats that apply to the entire report

You can specify the following types of format options for the entire report:

- **General** — Specify parameters for displaying indented levels, horizontal and vertical gridlines, and rows that contain NA (unavailable) and zero data. Also specify how to handle formatting conflicts and drilling.
- **Font** — Specify fonts for data and labels; also specify color and alignment for data in the body of the report.

- **Autosizing** — Specify sizing options for rows and columns.
- **Titles** — Specify text, font, alignment, and color information for a title, subtitle, and footnote.

Specifying general display elements for an ad hoc report

You can set parameters that specify how to display levels of data, gridlines, and rows that contain NA (unavailable) and zero data in a report. You can also specify how to handle formatting conflicts and drilling.

To specify general display elements for an ad hoc report:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. The General tab displays the current settings for report display elements. You can change one or more of the following settings:
 - **View Rows** — Specify whether to show all rows or suppress rows with zero values, NA values, or both NA and zero values.
 - **Formatting Precedence (low to high)** — Specify the order in which to apply formatting when row, column, and page conflicts occur. For example, if you use the Format Selected Rows and Columns option and choose purple as the text color for a row and then choose yellow as the text color for a column that intersects with the row, the setting for Formatting Precedence will determine which color will display for the intersecting cell.
 - **NA Spell** — Enter a character or character string to represent NA data (up to 31 characters).
 - **Indent by Level** — For dimensions that have a hierarchical structure, specify whether to indent rows by level and enter the number of indent characters to use.

- **Horizontal Grid Lines** — Specify whether to show or hide horizontal grid lines.
 - **Vertical Grid Lines** — Specify whether to show or hide vertical grid lines.
 - **Enable Drilling** — For dimensions that have a hierarchical structure, specify whether you can drill down to lower levels.
4. Choose **OK** to apply your selections.

Selecting fonts, colors, and text alignment for an ad hoc report

You can select font style, size, color and text alignment for an ad hoc report.

Font settings will be applied to both the data *and* the labels in the report. Color and alignment settings will be applied only to the data.

To select fonts, colors, and text alignment for an ad hoc report:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.
Result: The Format Document dialog box opens. The General tab is active.
3. Select the **Font** tab.
4. The Font tab displays the current settings for font name, font size, color, and alignment. You can change one or more of these selections as follows:
 - Use the Font box to select the font name.
 - Use the Size box to select the font size.
 - In the Color box, select colors for the text and the cell background.
 - In the Alignment box, select an alignment option for data values.
5. Choose **OK** to apply your selections.

Sizing rows and columns in an ad hoc report

You can change the size of rows and columns in a report so that the information is easier to read. You can use a format option. You can also change column or row size manually.

To use a format option to set row and column size:

1. With the document open in the workspace, choose the **Format Document** tool on the Document toolbar.



2. Choose **Format Document** from the popup menu.

Result: The Format Document dialog box opens. The General tab is active.

3. Select the **Autosizing** tab.
4. The Row Sizing box displays the current setting for row size. You can choose one of the following options:
 - **Autosizing by Label** — Automatically sizes the rows based on the height and width of the row labels.
 - **Equal Sizing** — Sizes rows based on a height and width that you specify. The row height is determined by multiplying the font size of the label by the value that you enter.
 - **None** — Removes automatic or equal sizing from the rows.
5. The Column Sizing box displays the current setting for column size. You can choose one of the following options:
 - **Autosizing** — Automatically sizes the columns on the current page based on your selection. You can choose one of the following options:
 - * **by Label** — Sizes the columns according to the size of the individual column labels.
 - * **by Data** — Sizes the columns according to the size of the data each column contains.

- * **by Largest Data or Label** — Sizes the columns to the larger of either the individual column labels or the data contained in each column.
 - **Equal Widths by Average Character** — Sizes columns based on a width that you specify.
 - **None** — Removes automatic or equal sizing from the columns.
6. Choose **OK** to apply your selections.

To manually size a row or column in an ad hoc report:

With the document open in the workspace, position the cursor on the border of the label of the row or column whose size you want to change. When the cursor changes to a double arrow, click and move the border.

Result: If the current setting for row or column sizing is an Autosize option or None, each instance of the dimension value in the selected row or column will change size while the other rows or columns will retain their current size. If the current setting for column or row sizing is Equal, all of the columns or rows will change size.

To reapply autosizing to columns or rows in an ad hoc report:

1. Choose the **Format Document** button on the Document toolbar.



Alternatively, you can click the right mouse button in the document.

2. Choose one of the following options from the popup menu:
 - **Reapply Autosizing** — Applies default autosizing to rows and columns. Does not override manual resizing (drag and drop).
 - **Reapply Autosizing to All** — Applies default autosizing to rows and columns. Overrides manual resizing (drag and drop).

Note: If Equal sizing or None has been selected for rows and columns, the options for reapplying autosizing will not appear when you click the right mouse button. If Autosizing has been selected for either column or row, the options to reapply autosizing will appear when you click the right mouse button, but will only apply to the dimension position (column or row) that has autosizing turned on.

Adding a title, subtitle, and footnote to an ad hoc report

You can add a title, subtitle, and footnote to an ad hoc report and specify whether each of these elements will display in the current document.

To specify a title, subtitle, or footnote for an ad hoc report:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Format Document** from the popup menu.
Result: The Format Document dialog box opens. The General tab is active.
3. Select the **Titles** tab.
4. In the Select Title Type box, choose a text element (**Title**, **Subtitle**, or **Footnote**) and proceed as follows:
 - a. In the Font Properties box, select font properties (name, size, style, color, background color) for the text.
 - b. In the Alignment box, select an alignment option for the text.
 - c. In the Display Options box, choose **Show** to display the text element in the current document.
 - d. In the Text box, enter the text for the title, subtitle, or footnote (498 characters maximum).
5. Repeat Step 4 for each text element that you want to include.
6. Choose **OK** to apply your selections.

Formatting data in selected rows and columns

You can select one or more rows or columns in a report and apply formats for font, color, alignment and borders. You can apply these formats to data in the rows and columns. You can also apply these formats to the row or column labels. You can also specify how numeric values will be displayed.

Formats that you apply to selected rows, columns, and labels take precedence over formats that apply to the entire report.

Note: If conflicts between row and column formatting occur, Oracle Demand Planning uses the **Formatting Precedence** setting (a Format Document, General tab option), to determine which format will prevail. For example, if you use the Format Selected Rows and Columns option and choose purple as the color for a row, and then choose yellow as the color for a column that intersects with the row, the **Formatting Precedence** setting determines which color will display for the intersecting cell. For information about the Format Precedence setting see [Specifying general display elements for an ad hoc report on page 14-25](#).

Applying fonts, colors, and borders selected rows or columns

You can apply fonts, colors, and border formats to selected rows or columns in an ad hoc report.

To apply fonts, colors, and borders to selected rows or columns in an ad hoc report:

1. With the report open in the workspace, select the rows, columns, or labels to which you want to apply formatting.
 - To select a column, click the highlighter under the column label. Use SHIFT+click or CTRL+click to select more than one column.
 - To select a row, click the highlighter next to the row label. Use SHIFT+click or CTRL+click to select more than one row.
 - To select a row or column label, click the label. Use SHIFT+click or CTRL+click to select more than one label.
 - To select all labels for a row or column, click the row or column label selector. The column label selector is located to the left of the first column label. The row label selector is located at the top of the row labels.

2. Choose the **Format Document** button on the Document toolbar.



3. Choose **Format Rows and Columns** from the popup menu.

Result: The Format Rows and Columns dialog box opens. The Fonts and Borders tab is active.

4. The tab displays the current settings for font name, font size, font style, colors, alignment, and borders. You can change one or more of these selections as follows:
 - Use the Font box to select the font name.
 - Use the Size box to select the font size.
 - In the Color box, select colors for text, border, and background.
 - In the Alignment box, select alignment options for the text.
 - In the Borders box, choose styles for top, left, bottom, and right borders. For a single solid border, choose the width.
5. Choose **OK** to apply your selections.

Applying numeric formats to selected rows and columns:

You can apply unique number formats to selected rows and columns in an open ad hoc report.

To format numeric values in selected rows or columns in an ad hoc report:

1. With the document open in the workspace, select the rows or columns in which you want to format numbers.
 - To select a column, click the highlighter under the column label. Use SHIFT+click or CTRL+click to select more than one column.
 - To select a row, click the highlighter next to the row label. Use SHIFT+click or CTRL+click to select more than one row.

2. Choose the **Format Document** button on the Document toolbar.



3. Choose **Format Rows and Columns** from the popup menu.

Result: The Format Rows and Columns dialog box opens. The Fonts and Borders tab is active.

4. Select the **Number** tab.

5. The tab displays the current settings for numeric values. You can change the following settings:

- **Decimal Digits** — Specifies the number of decimal places to display.
- **Use Thousands Separator** — Indicates whether to display (or suppress) the thousands separator.
- **Positive Values** — Specifies the format for positive numbers (Available if you do not choose the Currency/Percent option).
- **Display Leading Zeroes** — Indicates whether to display (or suppress) leading zeros.
- **Negative Values** — Specifies the format for negative numbers (Available if you do not choose the Currency/Percent option).
- **Apply Currency/Percent** — Activates currency/percent format options:
 - * **Symbol** — Symbol for dollars, yen, pounds, francs, or percent.
 - * **Positive Values** — Format for positive values.
 - * **Negative Values** — Format for negative values.
- **Scale Values Down By** — Specifies scaling for large numbers.

As you make formatting choices, the Samples box in the lower left corner of the Format Number dialog box shows the effect that your choices will have on the data.

6. Choose **OK** to apply your selections.

Clearing row and column formatting

You can clear formats that have been applied to rows and columns. You can clear formats from selected rows and columns or you can clear formats from all rows and columns.

To clear selected row and column formats:

1. With the report open in the workspace, select the rows, columns, or labels from which you want to remove formatting.
 - To select a column, click the highlighter under the column label. Use SHIFT+click or CTRL+click to select more than one column.
 - To select a row, click the highlighter next to the row label. Use SHIFT+click or CTRL+click to select more than one row.
 - To select a row or column label, click the label. Use SHIFT+click or CTRL+click to select more than one label.
 - To select all labels for a row or column, click the row or column label selector. The column label selector is located to the left of the first column label. The row label selector is located at the top of the row labels.
2. Choose the **Format Document** button on the Document toolbar.



3. Choose **Clear Selected Row and Column Formatting** from the popup menu.

To clear all row and column formats:

1. With the report open in the workspace, choose the **Format Document** button on the Document toolbar.



2. Choose **Clear All Row and Column Formatting** from the popup menu.

Formatting Ad Hoc Reports Based on Data Conditions (Color Coding)

You can create conditional format rules that apply to an ad hoc report when data values for a measure meet specified criteria. This is referred to as *color coding*.

A color coding rule is composed of the following information:

- One or more conditions that the data must meet in order to be displayed with the selected formats.
- A set of formatting options that specify how the data that meets the conditions will look.

Color coding rules are saved with a report. When you open a report that includes one or more color coding rules, data that meet the criteria will have the specified formats.

Types of color coding conditions

Using color coding rules, you can implement conditions such as the following:

- When data values for a measure meet a specified condition, the data will display in a specified format. For example, you might define a rule that applies bold text and a green background to cells in which the value for a measure is greater than or equal to 100,000.
- When data values for a measure relate to another measure in a specified way, the data will display in a specified format. For example, you might define a rule that applies italic text and a red background to cells in which the value for one measure is greater than the value for another measure by 10%.

You can also combine two conditions within a single rule and specify whether the data must meet either condition or both conditions. For example, you might define a rule that applies a green background to cells in which the value for a measure is greater than or equal to 100,000 *and* greater than the value for another measure by 10%.

Color coding format options

You can specify the following formats when you define a color coding rule:

- Stoplight formatting — Stoplight formatting is a special type of color coding that highlights trends without showing values. When you apply stoplight formatting, data cells that meet the data conditions appear as solid blocks of color. The actual value for a cell becomes visible only when you select it.

- Font — You can specify font name, font size, and indicate whether the font is regular, bold or italic. If you select stoplight formatting, font options are not available.
- Color — You can specify the font color. If you select stoplight formatting, font color options are not available.
- Background color — You can specify the background color for the cell. If you select stoplight formatting, the label for this option is “Cell Color.”

Defining color coding rules

You can associate multiple color coding rules with a single report.

You can define one or two conditions for each rule and associate each measure in a report with a maximum of four rules. If the format associated with one rule conflicts with the format associated with another rule, the format that is associated with the most recently defined rule takes precedence.

To define a color coding rule for an ad hoc report:

1. With the document open in the workspace, choose the **Color Coding** button on the Document toolbar.



Result: If this is the first color coding rule for this report, the Color Coding Wizard starts. If the report has at least one color coding rule, the Color Coding dialog box opens, from which you can view the existing rules and choose **Add** to define a new rule.

2. In the Color Coding Wizard -- Specify Measure dialog box, select the measure to which the color coding rule will apply. Choose **Use Stoplight Formatting** to apply stoplight formatting.

For information about stoplight formatting, see ["Color coding format options" on page 14-34](#).

3. Choose **Next** to continue.

4. In the Color Coding Wizard -- Specify Data Condition dialog box, complete the Select by box as follows:
 - Choose **value** to compare the measure with a numeric value.
 - or*
 - Choose **measure** to compare the measure with another measure.

For more information, see ["Types of color coding conditions" on page 14-34](#).
5. If you selected **value** in Step 4, proceed as follows:
 - a. In the **where** box, select a measure on which to base the value condition. You can select the default measure, or you can select an alternate measure.
 - b. In the **is** box, select an operator that specifies how the data values in the selected measure must compare to the value in the value box.
 - c. In the **value** box, specify a number to which the data values in the measure will be compared.
6. If you selected **measure** in Step 4, proceed as follows:
 - a. In the **where measure** box, select the first measure to use in the comparison. You can select the default measure, or you can select an alternate measure.
 - b. In the **is** box, choose the operator that specifies how the data values in the first measure must compare to the data values in the second measure.
 - c. In the **measure** box, specify the second measure to use in the comparison. You can select the default measure, or you can select an alternate measure.
 - d. You can specify a percentage or numeric value to include in the condition. Select **percent** if the value is a percent.
7. When the condition definition is complete, do one of the following:
 - Choose **Next** to continue.
 - Choose **Add a Second Data Condition** to define a second condition for this rule.

8. To add a second data condition, define the condition in the Color Coding Wizard -- Specify Additional Data Condition dialog box. Then choose one of the following options:

- **Apply when both first and second condition are met**
- **Apply when either first or second condition is met**

9. Choose **Next** to continue.

10. In the Color Coding Wizard -- Specify Appearance dialog box, specify the formats in which data that meets the condition or conditions will display.

- In the Font box, select the font.
- In the Size box, select the font size.
- In the Style box, select the font style
- To select the font color, disable the Use Default box and select a color in the Font Color box.
- To select the background color for the cells, disable the Use Default box and select a color in the Background Color box.

If you selected **Use Stoplight Formatting** in Step 2, you can only choose the cell background color.

11. Choose **Next** to continue.

12. In the Color Coding Wizard -- Specify Name dialog box, review the summary description of the data conditions. You can also enter a name for the rule.

Tip: You might want to use a name that describes the condition or conditions.

13. Choose **Finish** to continue.

Result: The Color Coding dialog box opens. It includes information regarding the appearance, description, and measure for the rule.

14. Choose **OK** to apply the current rule or rules.

Result: The report displays. If there are cells that meet the condition or conditions for a color coding rule, the data in these cells is formatted as specified.

Example: Color coded ad hoc report

The following illustration shows a color coded ad hoc report. Colored cells are those that meet the color coding criteria.

Optimistic Forecast, Q1

Measure

Ship from Location

Optimistic Forecast, Amount

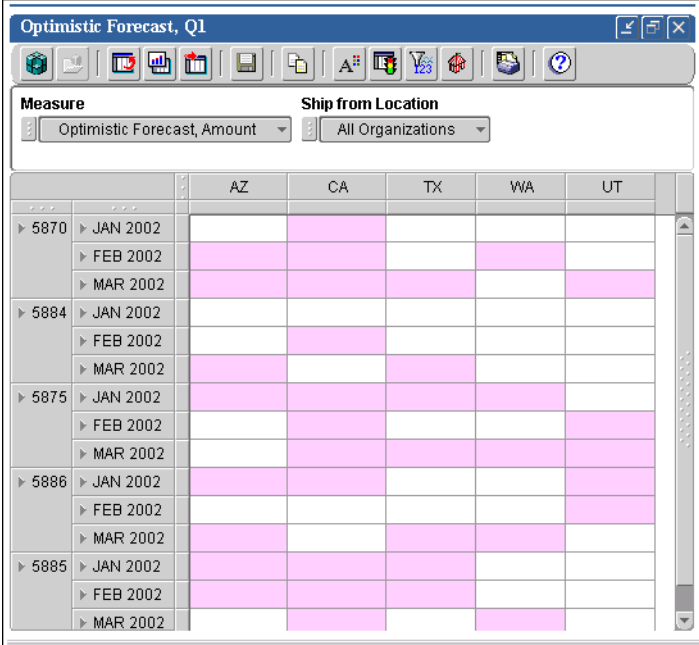
All Organizations

		AZ	CA	TX	WA	UT
▶ 5870	▶ JAN 2002	\$34,567.00	\$76,543.00	\$45,358.00	\$45,691.00	\$45,812.00
	▶ FEB 2002	\$876,543.00	\$87,654.00	\$54,671.00	\$65,483.00	\$45,612.00
	▶ MAR 2002	\$234,675.00	\$76,568.00	\$65,476.00	\$54,376.00	\$71,523.00
▶ 5884	▶ JAN 2002	\$45,874.00	\$34,586.00	\$45,761.00	\$45,678.00	\$54,376.00
	▶ FEB 2002	\$45,337.00	\$77,654.00	\$33,214.00	\$43,543.00	\$48,812.00
	▶ MAR 2002	\$76,352.00	\$33,546.00	\$66,712.00	\$45,678.00	\$45,123.00
▶ 5875	▶ JAN 2002	\$57,665.00	\$71,235.00	\$81,134.00	\$66,543.00	\$33,345.00
	▶ FEB 2002	\$22,346.00	\$55,542.00	\$44,453.00	\$44,429.00	\$76,112.00
	▶ MAR 2002	\$33,658.00	\$88,432.00	\$55,421.00	\$55,123.00	\$61,123.00
▶ 5886	▶ JAN 2002	\$77,543.00	\$66,542.00	\$44,365.00	\$39,976.00	\$66,643.00
	▶ FEB 2002	\$44,588.00	\$49,870.00	\$30,098.00	\$22,256.00	\$66,453.00
	▶ MAR 2002	\$76,599.00	\$14,567.00	\$55,768.00	\$66,543.00	\$44,345.00
▶ 5885	▶ JAN 2002	\$76,634.00	\$55,545.00	\$55,623.00	\$45,674.00	\$44,441.00
	▶ FEB 2002	\$55,432.00	\$442,123.00	\$55,432.00	\$22,234.00	\$33,432.00
	▶ MAR 2002	\$22,226.00	\$65,124.00	\$44,365.00	\$55,512.00	\$27,798.00

Local intranet

Example: Color coded ad hoc report with stoplight formatting

The following illustration shows a color-coded ad hoc report with stoplight formatting. Colored cells are those that meet the color coding criteria; because the report uses stoplight formatting, the actual values do not display.



		AZ	CA	TX	WA	UT
5870	JAN 2002					
	FEB 2002					
	MAR 2002					
5884	JAN 2002					
	FEB 2002					
	MAR 2002					
5875	JAN 2002					
	FEB 2002					
	MAR 2002					
5886	JAN 2002					
	FEB 2002					
	MAR 2002					
5885	JAN 2002					
	FEB 2002					
	MAR 2002					

Modifying color coding rules

You can modify a color coding rule for a report.

To modify a color coding rule for an ad hoc report:

1. With the document open in the workspace, choose the **Color Coding** button on the Document toolbar.



Result: The Color Coding dialog box opens, from which you can view the existing rules.

2. Select the rule that you want to change and choose **Modify**.

Result: The color coding wizard starts. You can make new selections for measure, conditions, and color formats.

Deleting color coding rules

When you no longer want to apply a color coding rule to a report, you can delete it.

To delete a color coding rule from an ad hoc report:

1. With the document open in the workspace, choose the **Color Coding** button on the Document toolbar.



Result: The Color Coding dialog box opens, from which you can view the existing rules.

2. Select the rule that you want to change and choose **Delete**.

Result: The rule is deleted.

Printing Ad Hoc Reports

You can print an open ad hoc report and specify settings that determine how the printed pages will look. When you save the document, Oracle Demand Planning saves the print settings for order, scaling, and page setup.

You can also print one or more saved ad hoc reports and other documents directly from the navigation list. Note that when you print multiple documents, you do not have the same options that are available when you print an open ad hoc report. For example, when you print an open document, you can specify the pages to print (all or current). When you print multiple documents from the navigation list, Oracle Demand Planning prints all pages of the selected documents.

To print an open ad hoc report:

1. With the document open in the workspace, choose the **Print** button on the Document toolbar.



Result: The Print dialog box for your browser opens.

2. You can change the print defaults for the browser. For example, you can specify new values for printer and number of copies.
3. Choose **OK** to continue.

Result: The Print dialog box for Oracle Demand Planning opens.

4. In the Print box, specify the pages that you want to print. You can choose one of the following options:
 - **Current Page of Data** — Prints the current page of data as indicated by the page label.
 - **All *n* Pages of Data** — Prints all pages of data, beginning at the first logical page, regardless of the current page settings.

Note: If you choose to print all pages, the system prints *all* data for *all* dimension values that are in the page position in the document. Depending on the number of dimensions that are in status in the page position, printing all pages might result in many pages of output.

5. In the Order box, you can specify the order in which to print the pages. You can choose one of the following options:
 - **Across then down** — Prints as many rows and columns as will fit on a physical page, then moves across the columns (until all are printed) and then down the rows (until all are printed).
 - **Down then across** — Prints as many rows and columns as will fit on a physical page, then moves down the rows (until all are printed) and then across the columns (until all are printed).

6. In the Scaling box, you can specify how to scale the document. You can choose one of the following options:
 - **Adjust to** — Scales each logical page by a percentage that you select. The output will span the number of physical pages that are necessary to meet the specified percentage.
 - **Fit to** — Scales each logical page to span the width and height of the number of pages that you select.
7. To indicate how you want the printed pages to look, choose **Page Setup**. This opens the Page Setup dialog box, where you can perform the following operations:
 - Specify optional header text (up to 100 characters) for the printed page.
 - Specify an optional footer for the printed page.
 - Specify whether row, column, and page labels will be repeated on each printed page.
 - Specify whether a title, subtitle, and footnote will appear on the printed pages.
 - Specify margin settings for the printed pages.
8. If you want to preview the pages before printing them, choose **Preview**.
9. Choose **OK** to print the document.

To print multiple documents from the navigation list:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to print.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.
Result: The document is highlighted.
4. Repeat Step 3 for each document that you want to print.
5. After you make your final selection, click the right mouse button and choose **Print** from the popup menu.

Saving Ad Hoc Reports

When you have created or modified an ad hoc report, you can save it for use at another time.

Saving a report saves the view with the current measures and dimension value selections, formatting, and layout. Saving also preserves current specifications for ranking/exception, print scaling and page setup, as well as export option settings.

You have the following options when you save an ad hoc report:

- You can save the document. The saved ad hoc report appears as an object in the main Documents folder in the navigation list.
- You can save the document in a folder that you have previously created. The saved ad hoc report appears as an object in the specified folder in the navigation list. For information about folders, see ["Working with Document Folders" on page 21-1](#).
- You can save the report as the default ad hoc report document. When you create a new ad hoc report that is based on the default, the new report will have the measure and dimension value selections, layout, and format characteristics of the default.

Tip: Before you save a document as the default report, you might want to remove distinctive format elements such as a title.

To save an ad hoc report:

1. With the document open in the workspace, choose the **Save As** button on the Document toolbar.

The Save As dialog box opens. If you are saving a new document, a default name, such as "Document 1," appears in the Save Document As box. If you are saving modifications to an existing document, the document name appears in the Save Document As box.

2. Specify the name for the report that you are saving, as follows:
 - If you are saving a new document, type a name for it in the Save Document As box. The name can be up to 70 characters long.
 - If you are saving an existing document under a new name, replace the name in the Save Document As box with the new name. The name can be up to 70 characters long.

- If you want to give the report the name of an existing document (overwrite the document), choose the Save As box and select a name from the list of saved documents.

If you are saving an existing report under its current name, or if you intend to save the document as the default ad hoc report, do nothing with the information in the Save Document As box.

3. Do one of the following:

- In the Into Folder box, select the folder into which you want to save the report.

To save the report into the main Documents folder, select **(none)** in the Into Folder box.

or

- If you want to save the report as your default ad hoc report document, so that its structure will appear whenever you create a new ad hoc report, select the **Save As Default** option.

4. Choose OK.

Result: The Save As dialog box closes. The report that you saved is again visible in the workspace. If you saved the report in a folder, the document object appears within that folder in the navigation list. If you did not specify a folder, the report appears in the main Documents folder.

Copying Data from Ad Hoc Reports

You can copy data from contiguous cells in an ad hoc report to the Windows clipboard. You can choose to copy data that has been stripped of special formats such as thousands separators, currency signs, and percent symbols or you can include these elements. You can also copy row and column labels.

To copy data from an ad hoc report:

1. With the document open in the workspace, select the cell or cells that you want to copy.

You can select cells by using row and column selectors. You can also select cells by selecting a cell as a starting point, dragging the mouse pointer, and then releasing the mouse button at the end of the block.

You cannot select cells that are not contiguous.

2. Choose the **Copy** button on the Document toolbar.



Alternatively, you can click the right mouse button.

3. Choose a copy option:

- **Copy** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols.
- **Copy Special** — Presents a submenu from which you can select one of the following:
 - * **Copy Data with Labels** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols. Also copies row and column labels that are associated with the selection.
 - * **Copy Number Formatted Data** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols.
 - * **Copy Number Formatted Data with Labels** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols. Also copies the row and column labels that are associated with the selection.
 - * **Copy Row Labels** — Copies the row labels that are associated with the selected data. Does not copy the actual data.
 - * **Copy Column Labels** — Copies the column labels that are associated with the selected data. Does not copy the actual data.

4. If you see a dialog box requesting additional privileges, choose **Grant**.

Result: The data is copied to the Windows clipboard.

Exporting Data from Ad Hoc Reports

You can export data from an ad hoc report to files that can be used in Microsoft Excel and other applications. You can select one of three export format options (CSV, TXT, or HTM for Excel 2000+), and export data from all pages or from a specific page.

Note: If the document contains many pages of data, you might have difficulty opening the file in certain applications. To avoid this situation, modify the data selections to reduce the number of values before creating the export file.

To export data from an ad hoc report:

1. With the document open in the workspace, choose the **Export** button on the Document toolbar.



Result: The Export dialog box opens.

2. In the Export box, choose the pages to include in the export file. You can select one of the following options:
 - **Current Page** — Exports data from the current page as indicated by the page label.
 - **All *n* Pages** — Exports all pages of data, beginning at the first logical page, regardless of the current page settings.
3. In the As Type box, select the format for the export file. You can choose one of the following:
 - **Comma delimited (*.csv)** — Exports the data in Comma Separated Value format, in which labels and data values are separated by commas.
 - **Tab delimited (*.txt)** — Exports the data in text file format, in which labels and data values are separated by tabs.
 - **Excel 2000+ (*.htm)** — Exports the data in a format that can be read by a browser and opened in Excel version 2000 and version 2002, also known as XP.

4. In the Options box, you can choose the following options for the export file:
 - **Include Number Formatting** — For a CSV or TXT export, check this option to export the data with the current setting for number formats. Do not check this option if you want to export unformatted numeric data. Note that an HTM export automatically includes number formats.
 - **Repeat Group Labels** — Check this option to repeat outer labels for columns and rows of inner, nested dimensions. Do not check this option if you want the export file to display labels as they appear in the screen display.
Include Title, Subtitle, Footnote — Check this option to include the title, subtitle, and footnote of the document in the export file. Do not check this option if you want to exclude these elements.
 - **Create One Sheet per Page** — For a multi-page HTM export, check this option to export the data from each logical page to a separate Excel worksheet. Do not check this option if you want to export the data from all pages to a single Excel worksheet. For more information, see ["About Excel 2000+ output files"](#) on page 14-48.
5. Choose **OK** to continue.
Result: If you chose CSV or TXT format, the File Download dialog box opens. If you chose HTM format, the Export to HTML/Excel 2000+ dialog box opens.
6. For a CSV or TXT export, proceed as follows:
 - a. In the File Download box, choose **Save this file to disk**.
Result: The Save As dialog box opens.
 - b. In the Save in box, select the output directory for the export file.
 - c. In the File name box, enter a name for the export file.
 - d. Choose **OK** to export the file.
7. For an HTM export, proceed as follows:
 - a. In the Save in box, select the output directory for the export file.
 - b. In the File name box, enter a name for the export file.
 - c. Choose **OK** to export the file.

About Excel 2000+ output files

When you export to a single worksheet in Excel 2000+ (*.htm) format, Oracle Demand Planning generates a single HTML file in the directory that you specify.

When you export to a multi-page file in Excel 2000+ format and indicate that you want to create one sheet per page, Oracle Demand Planning generates an HTML table of contents file plus a number of other files in the directory that you specify. Use the table of contents file to access the individual worksheets.

Closing Ad Hoc Reports

When you have finished working in an open ad hoc report, you can close it. If you have modified the report but did not save it, you will be prompted to specify whether you want to save the document.

To close an ad hoc report:

Choose the *Close* button, located in the upper right corner of the document.



Renaming Ad Hoc Reports

You can give a new name to a saved ad hoc report. If the report is in more than one folder, it will be renamed in all folders.

To rename an ad hoc report:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the ad hoc report that you want to rename.

Tip: To search for an ad hoc report in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document object and choose **Rename** from the popup menu.
4. Enter the new name, up to 70 characters long.

Viewing Ad Hoc Report Properties

You can view the following properties of a saved ad hoc report:

- Name
- Created
- Modified
- Class
- Applied saved selections

To view the properties of an ad hoc report:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the ad hoc report whose properties you want to view.

Tip: To search for an ad hoc report in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document object and choose **Properties** from the popup menu.

Deleting Ad Hoc Reports

When you no longer need a saved ad hoc report, you can delete it. If the report exists in more than one folder, only the selected version will be deleted.

You can delete an individual report. You can also delete a report as one of multiple documents.

To delete an ad hoc report:

1. Access Oracle Demand Planning page as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the ad hoc report that you want to delete.

Tip: To search for an ad hoc report in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Select the report and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the document object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

To delete multiple documents:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to delete.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat the previous step for each document that you want to delete.
5. After you make your final selection, click the right mouse button and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Using Ad Hoc Graphs

This section describes how to use ad hoc graphs when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Ad Hoc Graphs](#)
- [Creating Ad Hoc Graphs](#)
- [Opening Ad Hoc Graphs](#)
- [Selecting Data for Ad Hoc Graphs](#)
- [Arranging and Viewing Data in Ad Hoc Graphs](#)
- [Formatting Ad Hoc Graphs](#)
- [Printing Ad Hoc Graphs](#)
- [Saving Ad Hoc Graphs](#)
- [Exporting Data from Ad Hoc Graphs](#)
- [Closing Ad Hoc Graphs](#)
- [Renaming Ad Hoc Graphs](#)
- [Viewing Ad Hoc Graph Properties](#)
- [Deleting Ad Hoc Graphs](#)

About Ad Hoc Graphs

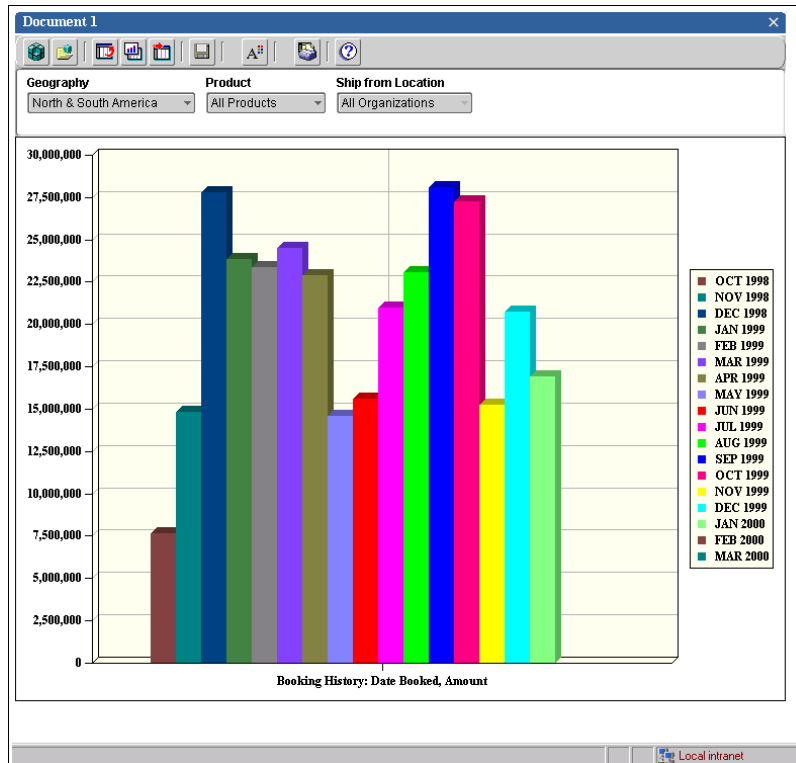
Ad hoc graphs display multi-dimensional data in graphical format. When you work as a Demand Planner or Demand Plan Manager you can create an ad hoc graph to visualize an analysis on the fly. You can also save an ad hoc graph and run it on a regular basis.

You can use ad hoc graphs to accomplish the following:

- Show trends and emphasize the degree or rate of change.
- Quickly compare data associated with different dimension values.
- Show part-to whole relationships.
- Show the relationship between two measures.









Example: Ad hoc graph


The following example shows a sample ad hoc graph.



Toolbar for ad hoc graphs

The Document toolbar appears at the top of an open ad hoc graph. The toolbar buttons enable you to perform the functions that are listed in the following table.

Button	Description	Function
	Select Data	Select values from a list and access various data selection tools. Also sort selections.
	Apply Saved Selection	Replace the current values in the graph with a saved selection of values.
	Change Layout	Change the layout of the graph.
	Change Document Type	Change the graph to a report or change the graph type.
	Export	Export data and labels from the graph to a comma delimited (.csv), tab delimited (.txt), or Excel 2000+ (*.htm) file.
	Save As	Save the graph.
	Format Document	Specify a title, subtitle, and footnote text for the graph. Also apply formatting to tick labels and legend.
	Print	Print the graph.

Button	Description	Function
	Help	Display online Help for planners and the Demand Plan Manager.

Types of graphs

The following table describes the types of graphs that are available.

Graph Type	Description	Subtypes
Bar	Compares data associated with different dimension values	<ul style="list-style-type: none"> ■ Clustered ■ Clustered Dual-Y ■ Stacked
Line	Shows trends over time and emphasizes rates of change	<ul style="list-style-type: none"> ■ Absolute ■ Absolute Dual-Y ■ Stacked ■ Stacked Dual-Y ■ Percentage
Area	Shows trends and emphasizes the degrees of change	<ul style="list-style-type: none"> ■ Absolute ■ Stacked ■ Percentage
3D	Isometric presentation of an area stacked graph, representing the same type of data, but from a different perspective	
Single pie	Shows part to whole relationships	
Scatter	Dual-Y	Shows relationships between two measures

Creating Ad Hoc Graphs

You can base an ad hoc graph on the default ad hoc graph document. Alternatively, you can use any saved document as the starting point for a new graph. You can also change a tabular report display into a graph.

The data in the new graph initially reflects the document on which the graph is based. You can then customize the graph so that it displays exactly the data that you want to work with. You can also select graph type, layout, and format options.

The following procedure describes how to create a new graph. For information about changing a report to a graph, see ["Changing the document type for an ad hoc graph" on page 15-10](#).

To create an ad hoc graph:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Graph**.

Alternatively, you can click the right mouse button on **Documents** in the navigation list and choose **New Graph** from the popup menu.

3. Choose one of the following:
 - **Use default** — Creates an ad hoc graph that is based on the default ad hoc graph document.
 - **Based on** — Creates an ad hoc graph that is based on a selected document.

If there are no saved documents, then you do not have these options. The graph will automatically be based on the default graph document. For information about setting the default, see ["Saving Ad Hoc Graphs" on page 15-16](#).

4. Choose **OK** to create the graph.

Result: The graph is displayed in the workspace. A generic name, such as "Document 1," appears above the body of the graph.

Opening Ad Hoc Graphs

You can open a saved ad hoc graph.

Saved graphs are displayed as objects in the navigation list, located in the left frame of your browser. Depending on how a graph was saved, it might appear in the main Documents folder or in a folder that you created.

To open an ad hoc graph:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the graph that you want to open.

Tip: To search for an ad hoc graph in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the document object.

Alternatively, you can click the right mouse button on the document object and choose **Open** from the popup menu.

Selecting Data for Ad Hoc Graphs

When you create a new ad hoc graph or change a report to a graph, the data reflects selections that were made for the document on which the graph is based. When you open a saved ad hoc graph, the data reflects selections that were in effect when the document was saved.

You can select *measures* and *dimension values* so that the graph displays exactly the data that you want to work with.

- A *measure* represents a variable which is a placeholder for storing data values for all levels of all dimensions. For example Booking History, Shipment History, and Q1 Forecast might be measures in your database.
- A *dimension* is a database object that organizes and indexes the data, similar to a key in a relational database. For example, if you have data with values for

various time periods, then the data has a Time dimension; that is, it is organized by time.

- *Dimension values* are the elements that make up a dimension. For example, a Time dimension might include values for years, quarters, months, and weeks. You can select any or all of the values that are available within a dimension, including custom aggregates that you have defined.

To select data for an ad hoc graph:

1. With the document open in the workspace, choose the **Select Data** button on the Document toolbar.



Result: The Select Data dialog box opens.

2. Select the values that you want to include in the graph.

For information about data selection tools and techniques, see ["Selecting Data" on page 22-1](#).

Applying custom aggregates and saved selections to an ad hoc graph

In addition to using a selection list or selection tools to select data values for a graph, you can change the data that is displayed by applying saved selections and custom aggregates to the open document. For more information, see the following topics:

["Defining Custom Aggregates" on page 19-2](#)

["Applying Custom Aggregates to Open Documents" on page 19-5](#)

["Defining Saved Selections" on page 20-2](#)

["Applying Saved Selections to Open Documents" on page 20-7](#)

Arranging and Viewing Data in Ad Hoc Graphs

You can change an ad hoc graph so that the data is arranged in the way that you want. The following options are available:

- You can change the layout by rearranging the dimensions on the page.

- You can change the graph type, or display the graph data as a tabular report.
- You can drill through aggregate values to expose component values.
- You can page through the graph to view data for dimensions in the page position.

Changing the layout of an ad hoc graph

You can change the layout of a graph by moving one of the graph's elements relative to another element.

To change the layout of an ad hoc graph:

1. With the document open in the workspace, choose the **Change Layout** button on the Document toolbar.



Result: The Layout box displays the current positions of the dimensions on the page. Dimensions for which data displays as separate pages of the graph are shown in the Page position. Dimensions for which data is on the X-axis of the graph are shown in the across position. Dimensions for which data is on the Y-axis of the graph are shown in the series position.

2. You can click a dimension and drop it on another location or drag it to a new location.

Result: The dimension moves as follows:

- If you drag a dimension near another dimension and the dimension turns gray, this indicates that the two dimensions will exchange (swap) positions.
 - If you drag a dimension and a black bar appears, this indicates that the dimension will be moved to the position.
3. You can also use the controls at the top of the page to manipulate dimension positions as follows:
 - a. In the left box, select an action.
 - * Choose **Move** to move a dimension to another position.
 - * Choose **Swap** to exchange the position of one dimension with another dimension.

- b. In the center box, select the dimension on which to perform the move or exchange.
 - c. If you chose **Move** in Step 2a, use the right box to select the target location for the dimension.

If you chose **Swap** in Step 2a, use the right box to select the dimension or edge with which to make the exchange.
 - d. Choose **Go** to update the display in the Layout box to reflect the current status in the boxes.
4. When the Layout box displays the desired layout, choose **OK** to apply the current settings.

Result: The Change Layout dialog box closes. The elements in the document are moved to the locations that you specified.

Changing the document type for an ad hoc graph

You can change a graph to a different type of graph. You can also change the document from a graphical format into a tabular report format.

To change the document type for an ad hoc graph:

1. With the document open in the workspace, choose the **Change Document Type** button on the Document toolbar.



Result: The Change Document dialog box opens.

2. In the Change document type box, do one of the following:
 - To change the graph to a report, select **Report**.
 - or*
 - To change the type of graph, select a graph type.

For information about graph types, see "Types of graphs" on page 15-5.

3. Choose **OK** to apply the current settings.

Result: The Change Document Type dialog box closes. The graph changes to the specified document type.

Drilling through levels of data in an ad hoc graph

You can view data at various levels in a graph by drilling within aggregate dimension values. For example, if the document displays a geography that includes lower level values, you can “drill down” and expand the display to show component geographies. You can then “drill up” to collapse the display.

You can drill a dimension value that is on the X or Y axis if a plus (+) or minus (-) symbol and the words “Drill down (or up) from *dimension value name*” appears when you move the cursor over the value.

Paging through an ad hoc graph

Graph data is displayed one page at a time. You can use the page controls at the top of the document to display pages other than the one that is currently in view. For example, the current page might show data for Total Product, but you can select another product from the list to see its data.

Formatting Ad Hoc Graphs

You can format a graph as follows:

- You can add text elements such as title, subtitle, and footnote.
- You can specify properties for tick labels on the graph’s X-axis.
- You can show or hide the graph legend and specify whether its orientation is horizontal or vertical.

Specifying title, subtitle, and footnote for an ad hoc graph

You can add a title, subtitle, and footnote to a graph and specify whether each of these elements will display in the current document.

To specify a title, subtitle, and footnote for an ad hoc graph:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar



and choose **Format Document** from the submenu.

Result: The Format Document dialog box opens. The Titles tab is active.

2. Choose a text element (**Title**, **Subtitle**, or **Footnote**) and proceed as follows:
 - a. Select font properties (name, size, color, bold/italic, background color) for the text.
 - b. Specify the alignment for the text.
 - c. In the Display Options box, choose **Show** to display the specified text element in the current document.
 - d. In the Text box, type the text for the title, subtitle, or footnote (498 characters maximum).
3. Repeat Step 3 for each text element that you want to include.
4. Choose **OK** to apply the current settings.

Formatting tick labels in an ad hoc graph

You can change the frequency and position of tick labels in an ad hoc graph.

To format tick labels in an ad hoc graph:

1. With the document open in the workspace, choose the **Format Document** button on the Document toolbar



and choose **Format Document** from the submenu.

Result: The Format Document dialog box opens. The Titles tab is active.

2. Select the **Tick Labels** tab.
3. To offset every other label for readability, choose **Staggered**.
4. If you want to skip some tick labels, select one of the following options in the Skip Mode box:
 - **Automatic** — Skips tick labels using a default interval that is set by the system.
 - **Manual** — Skips tick labels using interval settings that you provide.

If you do not want to skip any tick labels, choose **None**.

5. If you chose **Manual** in the previous step, in the Skip Amount box specify the number of tick labels that should be skipped.

Formatting the legend in an ad hoc graph

You can change the position and orientation of the graph legend and specify the font to use.

To format the legend for an ad hoc graph:

1. With the graph open in the workspace, choose the **Format Document** button on the Document toolbar.



Result: The Format Document dialog box opens. The Titles tab is active.

2. Select the **Legend** tab.
3. Choose **Show Legend** to display the legend in the current document.
4. The Font Properties box displays the current font settings for the legend. You can change one or more of these selections as follows:
 - Use the Font box to select the font.
 - Use the Size box to select the font size.
 - Use the Color box to select the color for the text.
5. The Legend Location box shows the current location of the legend. To change the location, click the desired position.
6. The Orientation box shows the current orientation of the legend. To change the orientation, choose **Vertical** or **Horizontal**.
7. Choose **OK** to apply your selections.

Printing Ad Hoc Graphs

You can print an open ad hoc graph and specify settings that determine how the printed pages will look. When you save the document, Oracle Demand Planning saves the print settings for order, scaling, and page setup.

You can also print one or more saved ad hoc graphs and other documents directly from the navigation list. Note that when you print multiple documents, you do not have the same options that are available when you print an open graph. For example, when you print an open graph, you can specify the pages to print (all or current). When you print multiple documents from the navigation list, Oracle Demand Planning prints all pages of the selected documents.

To print an open ad hoc graph:

1. With the document open in the workspace, choose the **Print** button on the Document toolbar.



Result: The Print dialog box for your browser opens.

2. You can change the print defaults for the browser. For example, you can specify new values for printer and number of copies.
3. Choose **OK** to continue.

Result: The Print dialog box for Oracle Demand Planning opens.

4. In the Print box, specify the pages that you want to print. You can choose one of the following options:
 - **Current Page of Data** — Prints the current page of data as indicated by the page label.
 - **All *n* pages of Data** — Prints all pages of data, beginning at the first logical page, regardless of the current page settings.

If you choose to print all pages, the system prints *all* data for *all* dimension values that are in the page position in the document. Depending on the number of dimensions that are in status in the page position, printing all pages might result in many pages of output.

5. In the Order box, you can specify the order in which to print the pages. You can choose one of the following options:

- **Across then down** — Prints as many rows and columns as will fit on a physical page, then moves across the columns (until all are printed) and then down the rows (until all are printed).
 - **Down then across** — Prints as many rows and columns as will fit on a physical page, then moves down the rows (until all are printed) and then across the columns (until all are printed).
6. To indicate how you want the printed pages to look, choose **Page Setup**. This opens the Page Setup dialog box, where you can perform the following operations:
 - Specify optional header text (up to 100 characters) for the printed page.
 - Specify an optional footer for the printed page.
 - Specify margin settings for the printed pages.
 7. In the Scaling box, you can specify how to scale the graph. Choose one of the following options:
 - **Fit to Page** — Scales the graph to fit the width and height of the physical printed page. If you want to maintain the proportions that are presented on the screen, also select **Maintain Proportions**.
 - **Actual Size** — Scales the graph to fit the width and height of the physical printed page.
 8. If you want to preview the pages before printing them, choose **Preview**.
 9. Choose **OK** to print the document.

To print multiple documents from the navigation list:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to print.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat Step 3 for each document that you want to print.
5. After you make your final selection, click the right mouse button and choose **Print** from the popup menu.

Saving Ad Hoc Graphs

When you have created or modified an ad hoc graph, you can save it for use at another time.

Saving a graph saves the view with the current measures and dimension value selections, formatting, and layout. Saving also preserves current specifications for print scaling and page setup, as well as export option settings.

You have the following options when you save an ad hoc graph:

- You can save the document. The saved ad hoc graph appears as an object in the main Documents folder in the navigation list.
- You can save the document in a folder that you have previously created. The saved ad hoc graph appears as an object in the specified folder in the navigation list. For information about folders, see ["Working with Document Folders" on page 21-1](#).
- You can save the document as the default ad hoc graph document. When you create a new graph that is based on the default, the new graph will have the dimension value and measure selections, layout, and formatting characteristics of the default.

Tip: Before you save a graph as the default graph, you might want to remove distinctive format elements such as a title.

To save an ad hoc graph:

1. With the document open in the workspace, choose the **Save As** button on the Document toolbar.



The Save As dialog box opens. If you are saving a new graph, a generic name, such as “Document 1,” appears in the Save Document As box. If you are saving an existing graph, its name appears in the Save Document As box.

2. Specify the name for the graph that you are saving, as follows:
 - If you are saving a new graph, type a name for it in the Save Document As box. The name can be up to 70 characters long.

- If you are saving an existing graph under a new name, replace the name in the Save Document As box with the new name. The name can be up to 70 characters long.
- If you want to give the graph the name of an another saved document (overwrite a document), in the Save As box, select a name from the list of saved documents.

If you are saving an existing graph under its current name, or if you intend to save the graph as the default graph document, do nothing with the information in the Save Document As box.

3. Do one of the following:

- In the Into Folder box, select the folder into which you want to save the graph.

To save the graph into the main Documents folder, select **(none)** in the Into Folder box.

or

- If you want to save the graph as your default graph document, so that its structure will appear whenever you create a new ad hoc graph, select the **Save As Default** option.
- Choose **OK** to save the graph.

Result: The Save As dialog box closes. The document that you saved is again visible in the workspace. If you saved the graph into a folder, the document object appears within that folder in the navigation list.

Exporting Data from Ad Hoc Graphs

You can export data from an ad hoc graph to files that can be used in Microsoft Excel and other applications. You can select one of three export format options (CSV, TXT, or HTM for Excel 2000+), and export data from all pages or from a specific page.

Note: If the document contains many pages of data, you might have difficulty opening the exported file in certain applications. To avoid this situation, modify the data selections to reduce the number of values before creating the export file.

To export data from an ad hoc graph:

1. With the document open in the workspace, choose the **Export** button on the Document toolbar.



Result: The Export dialog box opens.

2. In the Export box, choose the pages to include in the export file. You can select one of the following options:
 - **Current Page** — Exports data from the current page as indicated by the page label.
 - **All *n* Pages** — Exports all pages of data, beginning at the first logical page, regardless of the current page settings.
3. In the As Type box, select the format for the export file:
 - **Comma delimited (*.csv)** — Exports the data in Comma Separated Value format, in which labels and data values are separated by commas.
 - **Tab delimited (*.txt)** — Exports the data in text file format, in which labels and data values are separated by tabs.
 - **Excel 2000+ (*.htm)** — Exports the data in a format that can be read by a browser and opened in Excel version 2000 and version 2002, also known as XP.
4. In the Options box, you can choose the following options for the export file:
 - **Include Number Formatting** — For a CSV or TXT export, check this option to export the data with the current setting for number formats. Do not check this option if you want to export unformatted numeric data. Note that an HTM export automatically includes number formats.
 - **Repeat Group Labels** — Check this option to repeat outer labels for inner, nested dimensions. Do not check this option if you want the export file to display labels as they appear in the screen display.

Include Title, Subtitle, Footnote — Check this option to include the title, subtitle, and footnote of the document in the export. Do not check this option if you want to exclude these elements.

- **Create One Sheet per Page** — For a multi-page HTM export, check this option to export the data from each logical page to a separate Excel worksheet. Do not check this option if you want to export the data from all pages to a single Excel worksheet. For more information, see ["About Excel 2000+ output files"](#) on page 15-19.
5. Choose **OK** to continue.
Result: If you chose CSV or TXT format, the File Download dialog box opens. If you chose HTM format, the Export to HTML/Excel 2000+ dialog box opens.
 6. For a CSV or TXT export, proceed as follows:
 - a. In the File Download box, choose **Save this file to disk**.
Result: The Save As dialog box opens.
 - b. In the Save in box, select the output directory for the file.
 - c. In the File name box, enter a name for the file.
 - d. Choose **OK** to export the file.
 7. For an HTM export, proceed as follows:
 - a. In the Save in box, select the output directory for the file.
 - b. In the File name box, enter a name for the file.
 - c. Choose **OK** to export the file.

About Excel 2000+ output files

When you export to a single worksheet in Excel 2000+ (*.htm) format, Oracle Demand Planning generates a single HTML file in the directory that you specify.

When you export to a multi-page file in Excel 2000+ format and indicate that you want to create one sheet per page, Oracle Demand Planning generates an HTML table of contents file plus a number of other files in the directory that you specify. Use the table of contents file to access the individual worksheets.

Closing Ad Hoc Graphs

When you have finished working in an ad hoc graph, you can close it. If you have modified the graph, you will be prompted to specify whether you want to save it.

To close an ad hoc graph:

Choose the *Close* button, located in the upper right corner of the document.



Renaming Ad Hoc Graphs

You can give a new name to a saved ad hoc graph. If the graph is in more than one folder, it will be renamed in all folders.

To rename an ad hoc graph:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the graph that you want to rename.

Tip: To search for an ad hoc graph in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document object and choose **Rename** from the popup menu.
4. Enter the new name. The name can be up to 70 characters long.

Viewing Ad Hoc Graph Properties

You can view the following properties of a saved ad hoc graph:

- Name
- Created
- Modified
- Class
- Applied saved selections

To view the properties of an ad hoc graph:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the graph whose properties you want to view.

Tip: To search for an ad hoc graph in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document object and choose **Properties** from the popup menu.

Deleting Ad Hoc Graphs

When you no longer need a saved ad hoc graph, you can delete it. If the document exists in more than one folder, only the selected version will be deleted.

You can delete an individual graph. You can also delete a graph as one of multiple documents.

To delete an ad hoc graph:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the graph that you want to delete.

Tip: To search for an ad hoc graph in the navigation list, right-click the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can click the *Find* button on the navigation toolbar.

3. Click the document object and click the **Delete** button on the navigation toolbar.



Alternatively, you can right-click the document object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

To delete multiple documents:

1. Access Oracle Demand Planning page as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folders that contain the documents that you want to delete.
3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat the previous step for each document that you want to delete.
5. After you make your final selection, right-click and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Using Predefined Reports

This section describes how to use predefined reports when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Predefined Reports](#)
- [Comparison Accuracy Document](#)
- [Aged Accuracy Document](#)
- [Other Predefined Reports](#)
- [Opening Predefined Reports](#)
- [Changing Data in Predefined Reports](#)
- [Viewing Data in Predefined Reports](#)
- [Printing Predefined Reports](#)
- [Copying Data from Predefined Reports](#)
- [Exporting Data from Predefined Reports](#)
- [Closing Predefined Reports](#)

About Predefined Reports

Predefined reports are standardized documents. When you work as a Demand Planner or Demand Plan Manager, you can use predefined reports to conduct defined business analyses along specific dimensions.

Comparison: Predefined reports vs. ad hoc reports and graphs

The following table compares predefined reports to ad hoc reports and graphs.





Predefined reports	Ad hoc reports and graphs
The Demand Planning System Administrator determines the documents that will be available. All users have access to the same set of documents.	You define your own documents.
The focus of each document is predetermined, but you can change certain default settings.	You determine the focus and content of each document.
You cannot make layout changes or apply formatting.	You can specify layout and formatting for each document.
You can change most reports to graphs and graphs to reports.	You can change reports to graphs and graphs to reports. You can also select the graph type.
You cannot save documents. However, you can save changes in the default document settings.	You can save documents.
You can print documents.	You can print documents.
You can export data from documents.	You can export data from documents.

What documents can you run?

You might have access to all of the predefined reports that are discussed in this section, or you might have access to only a subset of documents. When the Demand Planning System Administrator sets up the user environment, he or she selects from among all of the predefined reports, those that will be available to planners and the Demand Plan Manager.

Toolbar for predefined reports

The Document toolbar appears at the top of an open predefined report. The toolbar buttons enable you to perform the functions that are listed in the following table.

Button	Description	Function
	Export	Export data and labels from the report to a comma delimited (.csv), tab delimited (.txt), or Excel 2000+ (*.htm) file.
	Copy	For a report view, copies selected data from the document to the Windows clipboard.
	Print	Print the document.
	Help	Display online Help for planners and the Demand Plan Manager.

Comparison Accuracy Document

The Comparison Accuracy document enables you to evaluate the accuracy of your forecasts. It compares two measures over a specified time period and quantifies the difference and percent difference between them. For example, you might use the Comparison Accuracy document to compare a forecast that was submitted in a prior cycle to actuals.

If your installation includes the Comparison Accuracy document, the document appears within the Forecast folder in the navigation list.

Comparison Accuracy accuracy measures and statistics

The Comparison Accuracy report view includes the includes the following accuracy measures and statistics:

- **MAD (Mean Absolute Deviation)** — Reflects the magnitude of the data on which the forecast is based. A lower value of MAD indicates that, on the average, there is less difference between actual sales or shipments and the forecast.
- **MAPE (Mean Absolute Percentage Error)** — Divides MAD by the average. This is a relative measure: a lower MAPE indicates a lower percentage difference between the actual sales or shipments than the forecast.
- **RMSE (Root Mean Squared Error)** — Summarizes the overall error and reflects the variability in the data. The individual errors are squared, added together, dividing by the number of individual errors, and then square rooted. A large RMSE indicates high fluctuations in differences between actual sales or shipments to corresponding forecast data.
- **S.D. (Standard Deviation)** — A measure of the variability of a set of numbers around their mean. If the numbers cluster tightly around the mean score, the SD is smaller than it would be with higher deviations from the mean.
- **AV (Average)** — The arithmetic average (or the mean) of a set of numbers. This is a measure of the central tendency.
- **C.V.** — The ratio of the standard deviation (S.D) to the average (AV).

Example: Comparison Accuracy document (Report view)

The following example shows the report view for a Comparison Accuracy document.

Comparison Accuracy

Geography

Ship from Location

Product

All Geography

All Organizations

All Products

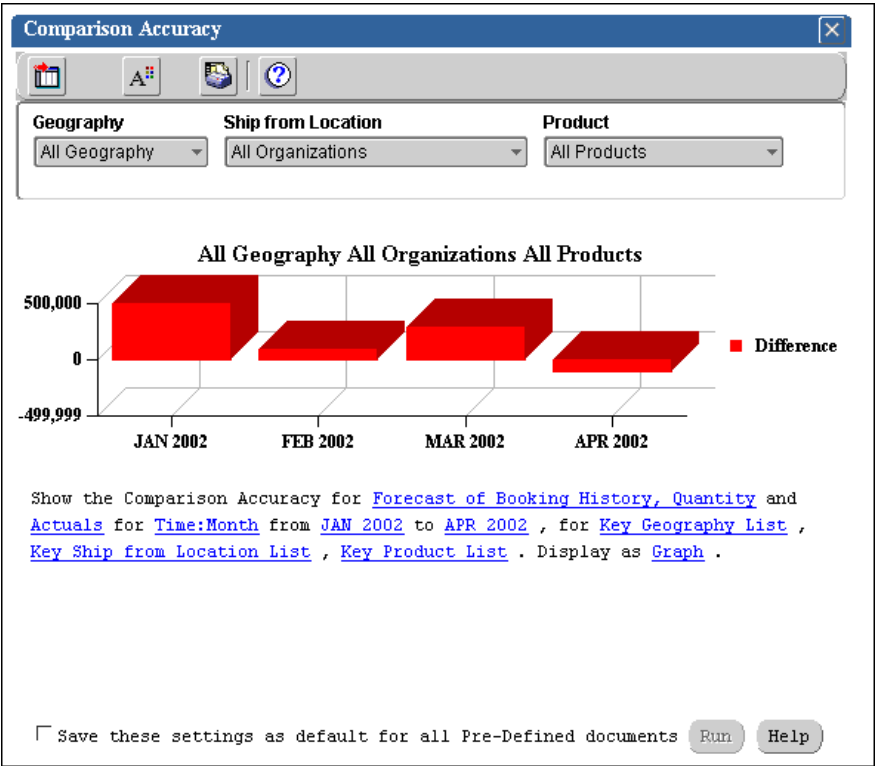
	JAN 2002	FEB 2002	MAR 2002	APR 2002
Forecast of ...	5,464,962	4,746,840	5,169,137	3,439,308
Actuals	4,959,056.00	4,653,765.00	4,876,544.00	3,545,678.00
Difference	495,906	93,075	292,593	-106,370
% Difference	10.00%	2.00%	6.00%	(3.00%)
MAD	246,986			
MAPE	5%			
RMSE	296,442			
S.D.	567,139			

Show the Comparison Accuracy for [Forecast of Booking History, Quantity](#) and [Actuals](#) for [Time:Month](#) from [JAN 2002](#) to [APR 2002](#) , for [Key Geography List](#) , [Key Ship from Location List](#) , [Key Product List](#) . Display as [Report](#) .

☐ Save these settings as default for all Pre-Defined documents

Example: Comparison Accuracy (Graph view)

The following example shows the graph view for a Comparison Accuracy document.



Aged Accuracy Document

The Aged Accuracy document quantifies and presents the accuracy of a set of forecasts over time.

Each row of the report shows data for a previously submitted version of the forecast, for example "Forecast Submitted in January 2003," "Forecast Submitted in February 2003," and so forth. Each column shows the forecast numbers and the corresponding accuracy measures for the given time buckets, for example "February 2003," "March 2003," and so forth. The system generates the accuracy measures by

comparing a measure (for example, the actual history) that you specify with the forecasts.

Each cell of the report shows the forecast numbers generated from the corresponding forecast version for the time bucket under consideration. Thus, one single column might have all of the forecast numbers generated for January, 2002, from all of the previous monthly forecasts (January 2001 to December 2001).

If your installation includes the Aged Accuracy document, the document appears within the Forecast folder in the navigation list.

Setting up the Aged Accuracy document

To ensure that your Aged Accuracy document displays meaningful data, select the measure that represents actuals as the base measure and choose previous submitted versions of the forecast as measures to be compared to actuals. Note that the report parameters (time buckets, forecast versions, and the base measure) must all work together. When you make selections, also consider the availability of forecast versions, the granularity of the time buckets, and the availability of information for the base measure.

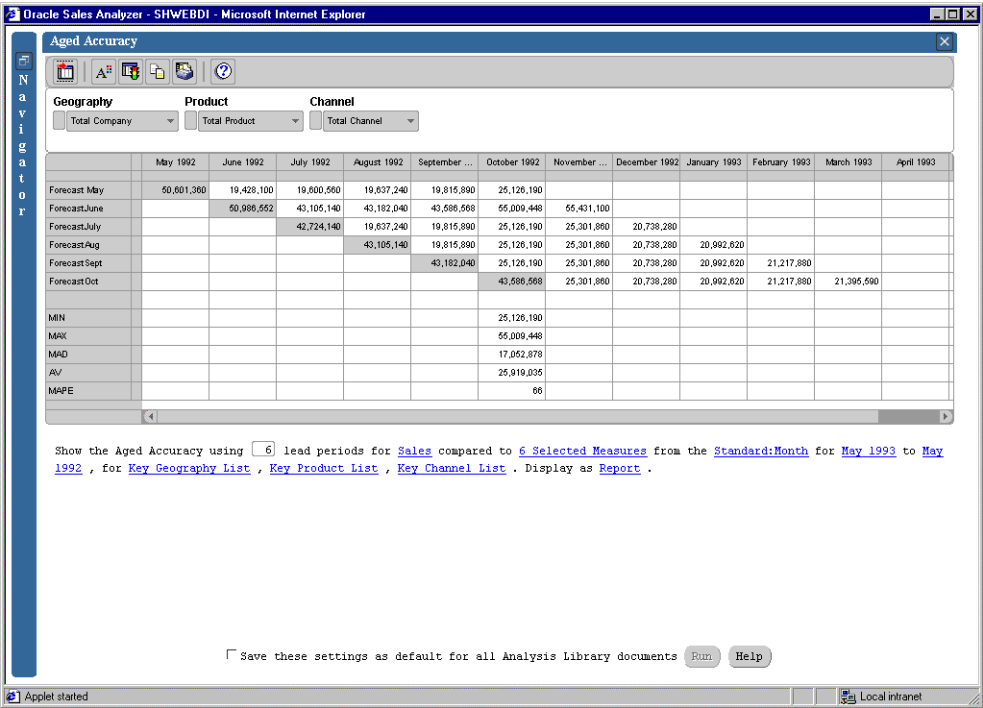
Aged Accuracy accuracy measures and statistics

The Aged Accuracy report view includes the following accuracy measures and statistics:

- Min (Minimum) — The minimum (value) of a set of numbers.
- Max — (Maximum) The maximum (value) of a set of numbers.
- MAD (Mean Absolute Deviation) — Reflects the magnitude of the data on which the forecast is based. A lower value of MAD indicates that, on the average, there is less difference between actual sales or shipments and the forecast.
- AV (Average) — The arithmetic average (or the mean) of a set of numbers. This is a measure of the central tendency.
- MAPE (Mean Absolute Percentage Error) — Divides MAD by the average. This is a relative measure: a lower MAPE indicates a lower percentage difference between the actual sales or shipments than the forecast.

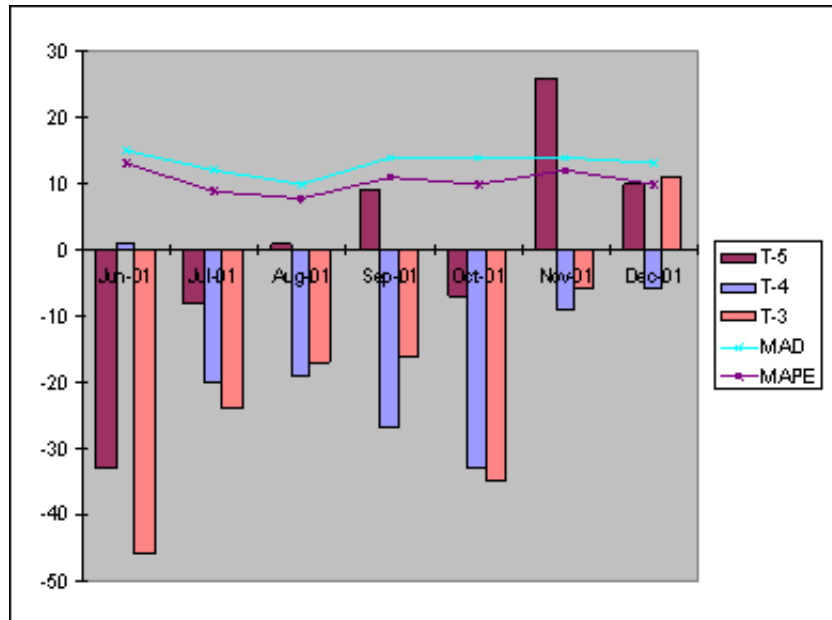
Example: Aged Accuracy (Report view)

The following example shows the report view for an Aged Accuracy document.



Example: Aged Accuracy (Graph view)

The following example shows a graph view of the Aged Accuracy document.



Other Predefined Reports

In addition to the Comparison Accuracy and Forecast Accuracy documents, you might have access to the following predefined reports:

- Comparison documents
- Percentage Share documents
- Increasing/Decreasing Demand documents
- 80/20 Rule documents
- Growth documents
- Ranking documents

- Top/Bottom Ranking documents
- Trend documents
- Moving Average/Total documents

Comparison documents

Comparison documents compare data for two dimension values for specified time periods. The comparison is based on a specified measure. The analysis shows difference and percentage difference.

If your installation includes Comparison documents, the documents appear within the Comparison folder in the navigation list.

Percentage Share documents

Percentage Share documents compare data for a dimension value to its aggregate for specified time periods. The comparison is based on a specified measure. The analysis shows percentage share.

If your installation includes Percentage Share documents, the documents appear within the Comparison folder in the navigation list.

Increasing/Decreasing Demand documents

Increasing/Decreasing Demand documents display dimension values for which demand has increased or decreased by a specified percentage between two time periods. Demand is based on average values for a specified measure. The analysis shows difference and percentage difference.

If your installation includes Increasing/Decreasing Demand documents, the documents appear within the Distribution folder in the navigation list.

80/20 Rule documents

80/20 Rule documents display data for dimension values that show specified percentage of increased or decreased activity within specified time periods. Activity is based on a specified measure. The analysis shows cumulative percentage.

If your installation includes 80/20 Rule documents, the documents appear within the Exception folder in the navigation list.

Growth documents

Growth documents contain data that highlight the difference in a dimension value's performance between two time periods. Performance is based on a specified measure. The analysis shows amount change and percentage change.

If your installation includes Growth documents, the documents appear within the Growth folder in the navigation list.

Ranking documents

Ranking documents rank dimension values in terms of performance during specified time periods. Performance is based on a specified measure. The analysis shows the share of total.

If your installation includes Ranking documents, the documents appear within the Ranking folder in the navigation list.

Top/Bottom Ranking documents

Top/Bottom Ranking documents rank a specified number of top or bottom dimension values for two time periods in terms of performance. Performance is based on a specified measure. The analysis shows difference and percentage difference.

If your installation includes Top/Bottom Ranking documents, the documents appear within the Ranking folder in the navigation list.

Trend documents

Trend documents show performance trends within a specified time range for specified dimension values. Performance is based on a specified measure.

If your installation includes Trend documents, the documents appear within the Trend folder in the navigation list.

Moving Average/Total documents

Moving Average/Total documents show totals and moving averages for specified dimension values over a series of time periods. The averages and totals are based on a specified measure.

If your installation includes Moving Average/Total documents, the documents appear within the Ranking folder in the navigation list.

Opening Predefined Reports

Predefined reports are organized into folders, by document type. The folders appear in the navigation list in the main Documents folder, below any folders that you have created to organize your documents. If you did not create any folders, the folders for predefined reports appear below individual documents.

To open a predefined report:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the folder that contains the document that you want to open.

Tip: To search for a predefined report click the right mouse button on the Documents folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the document object.

Alternatively, you can click the right mouse button on the object and choose **Open** from the popup menu.

Changing Data in Predefined Reports

The data that is displayed when you open a predefined report is determined by the current values in the document's settings. The settings are displayed in a full sentence that describes the analysis that will be performed.

If a specific setting is not relevant to your needs, you can modify it by specifying or selecting an alternate value. You can modify settings in two ways:

- You can change the current settings — You can change one or more settings and run the document. Your change applies only while the document is open in the workspace. The next time that you open the document, the settings script reverts to its previous values.
- You can permanently modify settings — You can change one or more settings and *save* the new settings. When you alter settings in this way, the new values that you choose replace the previous default selections for the settings, and the

new defaults are used from then on in *every* predefined report in which the settings appear.

Important: Defaults are used in *every* predefined report in which the settings appear. Since it is unlikely that the same defaults will be appropriate for *all* predefined documents, you might want to set defaults that are appropriate for the documents that you use most often, and then expect to make ad hoc changes as needed for other documents.

To change current settings in a predefined report:

1. With the document open in the workspace, click the hypertext link for the setting that you want to change.

Result: Depending on the setting that you chose, the Single Value Selector dialog box or a popup menu might appear.

2. To select a single value, choose it in the Single Value Selector dialog box.
3. To select multiple values, do one of the following:
 - To select a custom set of dimension values, from the popup menu choose **Custom Selection**. This opens the Select Data dialog box, where you can select values from a list, choose values that meet specific criteria, and sort your selections. For more information about selecting values, see ["Selecting Data" on page 22-1](#).
 - To apply a previously saved selection of dimension values, from the popup menu choose the saved selection by name. This option is only available if there is at least one saved selection for the dimension. For more information about saved selections, see ["Working with Saved Selections" on page 20-1](#).

To reapply the default settings, from the popup menu, choose **Key Dimension List**, where *Dimension* is the name of a dimension, such as Product.

4. To change a numeric value, type a new value.
5. Choose **Run** to apply the new settings and redisplay the current document based on your changes.

Result: The document displays the values that you specified. Your choices persist only while the document is open in the workspace. The next time that you run the document, the view reverts to the default settings.

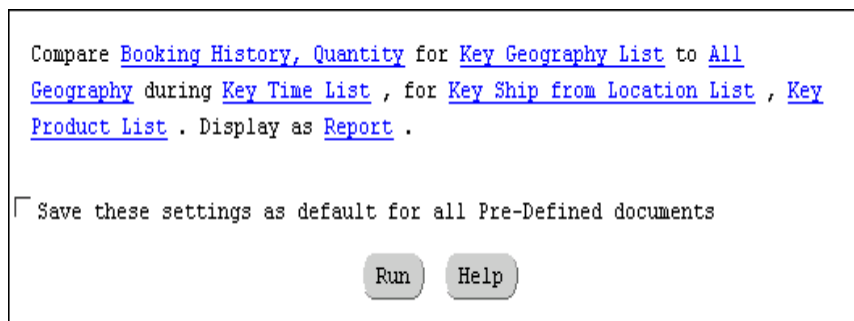
To permanently change settings in a predefined report:

1. Change one or more settings as described in ["To change current settings in a predefined report:" on page 16-13](#).
2. Choose the **Save these settings as default for all Pre-Defined documents** option.
3. Choose **Run** to save the settings and redisplay the current document based on your changes.

Result: The document displays the values that you specified. Your choices are saved as the default in all other predefined reports that includes the same settings.

Example: Hypertext settings

The following illustration shows sample hypertext settings for a predefined report. You can change the value for each underlined element.



Compare Booking History, Quantity for Key Geography List to All Geography during Key Time List , for Key Ship from Location List , Key Product List . Display as Report .

☐ Save these settings as default for all Pre-Defined documents

Viewing Data in Predefined Reports

You can view the data in a predefined report as follows:

- You can change a report view to a graph view. You can also change a graph view to a report view.
- You can drill through aggregate values to expose component values.
- You can page through the report to view data for dimensions in the page position.
- You can change the size of columns and rows.

Changing a report view to a graph view

When you open a predefined report, the default view is report (tabular format). You can change the report to a graph. You can also change back to a report.

Note: The graph view setting persists only while the document is open in the workspace. The next time that you open the document, it is displayed as a report.

To change the type of view:

1. With the document open in the workspace, locate the setting under the document that reads "Display as *viewtype*," where *viewtype* is **Report** or **Graph**.
2. Choose the *viewtype* hypertext.
Result: The setting toggles to the alternate view. For example, if you choose **Report**, the setting toggles to **Graph**.
3. Choose **Run** to apply the setting and redisplay the current document based on the change.

Drilling through levels of data in a predefined report

You can view data at various levels by drilling within aggregate dimension values. For example, if the document displays a Geography dimension value that includes lower level values, you can "drill down" and expand the display to show component geographies. You can then "drill up" to collapse the display.

You can drill a dimension value that is in the row or column position if a drill arrow appears to the left of the dimension value name. The arrow shape changes, depending on whether you can expand or collapse the value:

- Right pointing arrow — Located beside a value that displays a total while the values that contribute to that total are not visible. Clicking this arrow enables you to drill down, causing the report to display the lower level values.
- Down pointing arrow — Located beside a value that displays a total while the values that contribute to that total are visible beneath it. Clicking this arrow enables you to drill up, causing the report to display only the total value.

Your drill selections persist only while the document is open in the workspace. The next time that you run the document, the view reverts to the default view.

Paging through data in a predefined report

Data in a predefined report is displayed one page at a time. You can use the page controls at the top of a document to display a page other than the one that is currently in view. For example, the current page might show data for Total Product, but you can select another product from the list to see its data.

Your selection persists only while the document is open in the workspace. The next time that you run the document, the page reverts to the default page.

Sizing columns and rows in a predefined report

You can change the size of rows and columns in a predefined report so that the information is easier to read.

Note: Row and column sizing persists only while the document is open in the workspace. The next time that you run the document, the view reverts to the default.

To size columns and rows in a predefined report:

1. With the report view open in the workspace, position the cursor on the border of a row or column label.
2. When the cursor changes to a double arrow, click and move the border.

Printing Predefined Reports

You can print a predefined report and specify settings that determine how the printed page will look.

You can also print one or more predefined reports and other documents directly from the navigation list. Note that when you print multiple documents, you do not have the same options that are available when you print an open predefined report. For example, when you print an open predefined report, you can specify the pages to print (all or current). When you print multiple documents from the navigation list, Oracle Demand Planning prints all pages of the selected documents.

To print a predefined report:

1. With the document open in the workspace, choose the **Print** button on the Document toolbar.



Result: The Print dialog box for your browser opens.

2. You can change the print defaults for the browser. For example, you can specify new values for printer and number of copies.
3. Choose **OK** to continue.

Result: The Print dialog box for Oracle Demand Planning opens.

4. In the Print box, specify the pages that you want to print. You can choose one of the following options:
 - **Current Page of Data** — Prints the current page of data as indicated by the page label.
 - **All *n* pages of Data** — Prints all pages of data, beginning at the first logical page, regardless of the current page settings.

Note: If you choose to print all pages, the system prints *all* data for *all* dimension values that are in the page position in the document. Depending on the number of dimensions that are in status in the page position, printing all pages might result in many pages of output.

5. For a report view, in the Order box, you can specify the order in which to print the pages. You can choose one of the following options:
 - **Across then down** — Prints as many rows and columns as will fit on a physical page, then moves across the columns (until all are printed) and then down the rows (until all are printed).
 - **Down then across** — Prints as many rows and columns as will fit on a physical page, then moves down the rows (until all are printed) and then across the columns (until all are printed).

6. In the Scaling box, you can specify how to scale the document.

For a graph view, you can choose one of the following options:

- **Fit to Page** — Scales the graph to fit the width and height of the physical printed page. If you want to maintain the proportions that are presented on the screen, also select **Maintain Proportions**.
- **Actual Size** — Scales the graph to fit the width and height of the physical printed page.

For a report view, you can choose one of the following options:

- **Adjust to** — Scales each logical page of the report by a percentage that you select. The output will span the number of physical pages that are necessary to meet the specified percentage.
- **Fit to** — Scales each logical page to span the width and height of the number of pages that you select.

7. To indicate how you want the printed pages to look, choose **Page Setup**. This opens the Page Setup dialog box, where you can perform the following operations:
 - Specify optional header text (up to 100 characters) for the printed page.
 - Specify an optional footer for the printed page.
 - For a report view, specify whether row, column, and page labels will be repeated on each printed page.
 - For a report view, specify whether a title, subtitle, and footnote will appear on the printed pages.
 - Specify margin settings for the printed pages.
8. If you want to preview the pages before printing them, choose **Preview**.
9. Choose **OK** to print the document.

To print multiple documents:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. For documents that are in a folder, open the folder to display the document.

3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat Step 3 for each document that you want to print.
5. After you make your final selection, click the right mouse button and choose **Print** from the popup menu.

Copying Data from Predefined Reports

You can copy data from contiguous cells in a predefined report to the Windows clipboard. You can choose to copy data that has been stripped of special formats such as thousands separators, currency signs, and percent symbols or you can include these elements. You can also copy row and column labels.

To copy data from a predefined report:

1. With the report view open in the workspace, select the cell or cells that you want to copy.

You can select cells by using row and column selectors. You can also select cells by selecting a cell as a starting point, dragging the mouse pointer, and then releasing the mouse button at the end of the block.

Note: You cannot copy cells that are not contiguous.

2. Choose the **Copy** button on the Document toolbar.



Alternatively, you can click the right mouse button and select a copy option from the popup menu.

3. Choose a copy option:
 - **Copy** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols.
 - **Copy Special** — Presents a submenu from which you can select one of the following:

- * **Copy Data with Labels** — Copies the data but excludes formats such as thousands separators, currency signs, and percent symbols. Also copies the row and column labels that are associated with the selected data.
- * **Copy Number Formatted Data** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols.
- * **Copy Number Formatted Data with Labels** — Copies the data and includes formats such as thousands separators, currency signs, and percent symbols. Also copies the labels that are associated with the selected data.
- * **Copy Row Labels** — Copies the row labels that are associated with the selected data. Does not copy the actual data.
- * **Copy Column Labels** — Copies the column labels that are associated with the selected data. Does not copy the actual data.

Exporting Data from Predefined Reports

You can export dimension labels and data values from an open predefined report to a file format that can be used in a spreadsheet. You can select one of three export format options (CSV, TXT, or HTM for Excel 2000+), and export data from all pages or from a specific page.

Note: If the document contains many pages of data, you might have difficulty opening the file in certain applications. To avoid this situation, modify the data selections to reduce the number of values before exporting the document.

To export data from a predefined report:

1. With the document open in the workspace, click the **Export** button on the Document toolbar.



Result: The Export dialog box opens.

2. In the Export box, choose the pages to include in the export file. You can select one of the following options:
 - **Current Page** — Exports data from the current page as indicated by the page label.
 - **All *n* Pages** — Exports all pages of data, beginning at the first logical page, regardless of the current page settings.
3. In the As Type box, select the format for the export file:
 - **Comma delimited (*.csv)** — Exports the data in Comma Separated Value format, in which labels and data values are separated by commas.
 - **Tab delimited (*.txt)** — Exports the data in text file format, in which labels and data values are separated by tabs.
 - **Excel 2000+ (*.htm)** — Exports the data in a format that can be read by a browser and opened in Excel version 2000 and version 2002, also known as XP. For more information, see ["About Excel 2000+ output files" on page 16-22](#).
4. In the Options box, you can choose the following options for the export file:
 - **Include Number Formatting** — For a CSV or TXT export file, check this option to export the data with its current number formatting. Do not check this option if you want to export unformatted data. Note that an HTM export always includes number formatting.
 - **Repeat Group Labels** — Check this option to repeat the outer labels for columns and rows of inner, nested dimensions. Do not check this option if you want the export file to display labels as they appear in the screen display.
 - **Include Title, Subtitle, Footnote** — Check this option if you want to include the title, subtitle, and footnote of the document as part of the export file. Do not check this option if you do not want to include these elements.
 - **Create One Sheet per Page** — For an multi-page HTM export, check this option to export the data from each logical page to a separate worksheet. Do not check this option if you want to export the data from all pages to a single worksheet.
5. Choose **OK** to proceed.

Result: If you chose CSV or TXT format, the Save As dialog box opens. If you chose HTM format, the Export to HTML/Excel 2000+ dialog box opens.

6. Proceed as follows:
 - a. In the Save in box, select the output directory for the export file.
 - b. In the File name box, enter a name for the export file.
 - c. Choose **OK** to export the file.

About Excel 2000+ output files

When you export data to a single worksheet, the system generates a single HTML file in the directory that you specify.

When you export a multi-page file in Excel 2000+ and specify that you want to create one sheet per page, the system generates an HTML table of contents file plus a number of other files in the specified directory. Use the table of contents file to access the individual worksheets

Closing Predefined Reports

When you have finished working with a predefined report, you can close it.

To close a predefined report:

Click the *Close* button, located in the upper right corner of the document.



Working with Measures

This section describes how to create, modify, and delete measures when you work as a Demand Planner or Demand Plan Manager.

This section includes the following topics:

- [About Measures](#)
- [Types of Measures](#)
- [Creating Forecast Measures](#)
- [Creating Simple Copy Measures](#)
- [Creating Complex Copy Measures](#)
- [Creating Accuracy Measures](#)
- [Creating Formula Measures](#)
- [Editing Measures](#)
- [Renaming Measures](#)
- [Viewing Measure Properties](#)
- [Deleting Measures](#)
- [Importing Data into a Measure from a Flat File](#)

About Measures

A *measure* is a database object, such as a history or forecast, that stores or calculates data in Oracle Demand Planning. When you work as a Demand Planner or Demand Plan Manager, you use measures to analyze, edit, share, and submit or upload data.

Certain measures are defined in the Demand Planning Server. Additional measures might be defined in the shared database and distributed by the Demand Planning Administrator. You can view shared measures and use them in data analyses. You can also define new measures, edit measure definitions, and delete measures.

This section describes how to create, modify, and delete measures. For information about working with measure data, see the following sections:

- ["Using Worksheets" on page 11-1](#) describes how to edit data in a measure.
- ["Sharing Data" on page 23-1](#) describes how to share the most current data in a measure with planners with whom you are collaborating.
- ["Selecting Measures to Submit or Upload" on page 24-1](#) describes how to submit or upload measures that contain the data for your final forecasts.

Working with measures as a Demand Plan Manager

If your responsibility is Demand Plan Manager, you work with measures in the shared database. You have immediate access to any new measures that you create; planners will get access when the Demand Plan Administrator adds the measures to planners' assignments and runs a distribution. A full distribution distributes all measures; a quick distribution distributes selected measures.

Working with measures as a Demand Planner

If your responsibility is Demand Planner, you can work with shared measures that have been distributed to you. You can also create "personal" measures, to which only you have access.

Types of Measures

You can define two types of measures: *stored* measures and *formula* measures.

Stored measures

A stored measure is a variable for which calculations and properties are permanently stored in the database. Define a stored measure when you want to use

Oracle Demand Planning's built-in forecasting engine to generate a statistical forecast, copy data from one or more measures, or create an estimate of statistical accuracy. Also define a stored measure when you want to create a permanent variable that differs in some aspect from an existing measure.

Methods for defining stored measures

You can use the following methods to define a stored measure:

- **Create a forecast** — Calculates a measure that forecasts data based on values in another measure. For example, you might use this method to create a forecast measure based on Booking History. For more information, see ["Creating Forecast Measures" on page 17-4](#).
- **Copy measure** — Calculates a measure that is a copy of another measure. For example, you might use this method to create a measure that copies all data from a measure and applies an event factor. Or you might create a measure that copies data from a measure and shifts the data backward or forward in time. For more information, see ["Creating Simple Copy Measures" on page 17-16](#).
- **Copy measures depending on more than one dimension** — Calculates a measure that copies selected subsets of data in specified dimensions at specified levels from one or more measures. For example, you might use this method to create a measure that copies data at the month level from the Sales Opportunity Forecast for January through June of a given year and from the Forecast of Booking History for July through December of the same year. For more information, see ["Creating Complex Copy Measures" on page 17-24](#).
- **Create an accuracy measure** — Calculates a measure that estimates the statistical accuracy of one measure when compared to another measure at specified levels for a specified time period. You can use this method to create an accuracy estimate to submit with a forecast. Oracle Inventory Optimization (IO) uses the forecast and its accuracy to calculate safety stocks. You might also use this method to statistically quantify the accuracy of any two measures. For more information, see ["Creating Accuracy Measures" on page 17-33](#).

Formula measures

A formula measure calculates values on the fly. You can base a formula measure on any stored measure or on another formula measure. A formula measure is not stored in the database, has no unit of measure association, and its values are never editable in worksheets. Formula measures do not impact storage or system performance. Define a formula measure when you want to change the value of a measure by applying a simple mathematical formula. For example, you might

define a formula measure that lifts a stored measure by 5%. For more information, see "[Creating Formula Measures](#)" on page 17-37.

Important: Consider storage space when selecting measure type

To enhance system performance and conserve storage space, Oracle Corporation recommends that you limit the number of stored measures that you define.

Note that you can use a single stored measure as the basis for multiple formula measures. For example, consider a situation in which you want to view a standard forecast and an optimistic forecast. Rather than create two stored forecast measures, you can create a single forecast measure and use it as the basis for a formula measure defined as the stored forecast lifted by a specified percentage.

Creating Forecast Measures

Creating a forecast measure calculates a stored measure that is a statistical forecast based on data in another measure. For example, you might use this method to generate a forecast based on Booking History.

To create a forecast:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Measure** from the popup menu.

Alternatively, you can click the right mouse button on the Measures folder in the navigation list. Then choose **New Measure** from the popup menu.

3. In the Create Measure dialog box, choose **Stored Measure**.

If you see the Measure Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Measure Wizard -- Choose Method page opens.

4. Complete the Measure Wizard - Choose Method page.
 - a. In the *Name* box, enter a name for the measure, up to 70 characters long.
 - b. In the Method box, choose **Create Forecast**.
 - c. Choose **Next** to continue.

Result: The Measure Wizard -- Create Forecast page opens.

5. Complete the Measure Wizard -- Create Forecast page.
 - a. In the What measure to you want to base your forecast on? box, choose the measure that you want to use as the basis for the forecast.

Note: Although you can choose any measure, Oracle Corporation recommends that you choose a true history measure such as Booking History or Shipment History.

- b. The Dimension/Level grid displays the levels at which Oracle Demand Planning will generate the forecast for each dimension in your database. To change a level setting, click the Level column for the dimension and select the level that you want to use.

Note: The default level setting for a dimension is the highest level for the dimension.

The dimension levels that you choose should relate to your individual business needs and processes. Note that if you set levels too low, the variations in the data might be large, causing decreased accuracy. Inaccuracies might be magnified at aggregate levels. If you set levels too high, the aggregated forecasts might pick up localized trends and allocate them wrongly.

- c. Choose the time period on which to base the forecast. This is the time period to consider for data in the measure on which the forecast is based.

- * In the From box, select the earliest time period in the time range.

- * In the To box, select the latest time period in the time range.

The defaults for From and To are based on the values for Horizon Start Date and the Horizon End Date defined for the scenario in the Demand Planning Server, projected back by the number of periods at the level that you chose for forecasting the Time dimension in Step 5b. If the demand plan definition includes more than one scenario, then the default is based on the horizon for the first scenario.

Note: The period that you specify must include at least two periods worth of historical data at the specified level.

- d. Choose the time period for the forecast. This is the output time period for the forecasted data.

- * In the From box, select the earliest time period to forecast.

- * In the To box, select the latest time period to forecast.

The defaults for From and To are based on the values for Horizon Start Date and the Horizon End Date as defined for the scenario in the Demand Planning Server at the level that you chose for forecasting the Time dimension in Step 5b. If the demand plan definition includes more than one scenario, then the default is based on the horizon for the first scenario.

- e. Choose **Next** to continue.

Result: The Measure Wizard -- Select Forecast Method page opens.

- 6. On the Measure Wizard -- Select Forecast Method page, choose a forecast method.

Automatic is the default method for a new measure. **For more information about this and other forecasting methods, see "Forecast Methods" on page A-2.**

After you choose a method, choose **Next** to continue.

Result: The Measure Wizard -- Set Forecast Parameters page opens.

7. On the Measure Wizard -- Set Forecast Parameters page, you can set statistical parameters for the forecast method that you chose in Step 6.
 - a. For an exponential smoothing forecast method, you can use the slider to indicate how you want to weight recent changes in alpha (for the Single Exponential Smoothing, Double Exponential Smoothing, and Holt-Winters methods), beta (for the Double Exponential Smoothing and Holt-Winters methods), and gamma (for the Holt-Winters method).
 - b. If you want to view or fine-tune the available statistical parameters for the forecast method that you chose in Step 6, choose **Advanced**. This opens the Advanced Parameters page where you can view the current settings and modify values.

Choose **OK** to save your settings and return to the Measure Wizard -- Set Forecast Parameters page.

Note: Setting forecast parameters is optional. For the Automatic method, the forecasting engine selects the optimal parameters when it runs the forecast. For all other methods, the engine uses default parameters.

For information about advanced statistical forecast parameters, see "Advanced statistical parameters" on page A-3.

- c. Choose **Next** to continue.

Result: The Measure Wizard -- Set Forecast Accuracy Info page opens.

8. You can use the Set Forecast Accuracy Info page to create one or more statistical accuracy measures for the forecast. You can also specify that the system save forecast information in text measures.
 - a. You can select one or more of the following accuracy measures:
 - * **Mean Absolute Deviation (MAD)** — Calculates the mean absolute deviation of forecasted values from the measure on which the forecast is based.
 - * **Mean Absolute Percentage Error (MAPE)** — Divides MAD by the average.
 - * **Root Mean Squared Error (RMSE)** — Summarizes the overall error of the forecast and reflects the variability in the data. The individual errors

are squared, added together, divided by the number of individual errors, and then square rooted.

b. You can select one or both of the following informational text measures:

- * **Forecast Methods** — Describes the forecast method.
- * **Forecast Parameters** — Describes the forecast parameters.

c. Choose **Next** to continue.

Result: The Measure Wizard -- Allocation page opens.

9. Use the Measure Wizard -- Allocation page to select the forecast allocation method and the method that will be used to allocate new data.

a. In the topmost box, choose the algorithm that will be used to allocate data down to lower levels from the level at which the data is forecasted. Choose one of the following forecast allocation methods:

- * **Allocate based on forecasted weights aggregated from the lowest level** — The system uses the lowest allocation levels specified in the Demand Planning Server for the data stream on which the measure is based to allocate the results generated at the forecast levels that you chose in Step 5b. Forecasts for intermediate levels (between specified and lowest available) are obtained by rolling up the results of the nodes after allocation. This method is the fastest and is the default for a new measure.
- * **Allocate based on a forecast at each level** — The system starts at the forecast levels that you chose in Step 5b for each hierarchy, goes down one level at a time, and uses the results of the forecast on the level below to allocate the results on the level above. This process continues until the lowest available level is reached. Forecasts for levels above the specified level are achieved through rollup. This method is often the most accurate, but might involve substantial processing time.
- * **Allocate based on historical weights for the last n periods** (where n is an integer and period is the time level for the forecast) — The system uses the number of historical time periods that you specified in Step 5c to determine weights for allocating data to the lower aggregate levels along each dimension. If there is no data for the specified periods, then the system uses the whole history. Forecasts at higher levels are achieved through rollup. This method does not adequately account for trends.

- * **Allocate based on new data allocation settings specified below** — The system uses the method for allocating new data that you will choose in Step 9c to determine weights for allocating data to lower aggregate levels along each dimension. Any overrides that you specify in Step 9d will also apply. This method is useful when you are creating a measure that does not have adequate data at lower levels or when you want to allocate based on the data pattern in some other data stream. Note that this method can impact system performance. Also, if the forecast and history data do not match, the system will default to even allocation.
- b. If you chose **Allocate based on forecasted weights aggregated from the lowest level**, **Allocate based on a forecast at each level**, or **Allocate based on historical weights for the last n periods**, the **Override Time allocation** using box is active. To allocate data based on the time allocation weights in another measure, choose the **Override Time allocation using** and select the measure that you want to use. This option is useful when you want to retain the historical weights for all dimensions except Time in order to allocate forecasts based on the workday patterns of several organizations. The weights in the Time dimension of the selected data stream will be used to allocate the forecast numbers.

Note: The selected data stream should have at least one other dimension in addition to the Time dimension.

- c. In the Method box, choose the allocation method that will be used when new data is added to the measure. This allocation method applies when data for the measure is edited in worksheets. For example, if you edit an NA value at the All Products level in a worksheet, Oracle Demand Planning uses the allocation method to determine how the value will be allocated down to the Item level.

You can select one of the following allocation methods:

- * **Weights in Another Measure** — Allocates values based on ratios in another measure. In the Base Measure box, select the measure on which to base the weighting. This is the default for a new measure.
- * **Avg Weight Based on History** — Allocates values based on data in another measure for a specified number of time periods. In the Base Measure box, select the measure on which to base the weighting. In the Period box, enter the number of time periods to average.

- * **None** — Does not allocate values below the current level.
- * **Even Allocation** — Allocates values evenly. Note that this method can have a negative impact on database size and performance.

Note: Oracle Corporation recommends that unless you have a specific reason for selecting an alternate method, you should use **Weights in Another Measure** (the default for a new measure) or **Avg Weight Based on History**. While even allocation is the default behavior in situations where allocation needs to occur but no base can be found, Oracle recommends that you try to specify a base.

If data exists at the lowest available level within the measure, then the allocation weights will be calculated using that data. If data does not exist at the lowest available level, then the specified allocation will be used if valid non-NA allocation rules can be determined. If data does not exist at the lowest available level and the specified allocation method does not provide valid allocation rules (for example, there is no data in the base allocation measure), then even allocation will be used.

- d. You can choose a different allocation method for one or more dimensions of the measure.

Note: Oracle Corporation recommends that you usually apply the same allocation method to all dimensions of the measure. Although you technically have the ability to set different allocation methods for dimensions, doing so can have a negative impact on system performance.

To override the allocation method that you set in Step 9c for one or more dimensions, check the **Do you want to override the default method of allocation of newly added data** box and proceed as follows:

- * In the Dimension list, identify a dimension for which you want to change the default allocation method. ("Default" refers to the allocation method that you chose in Step 9c.)
- * In the Method box, choose the method that you want to use to allocate data for this dimension. If the method requires a base measure, select it in the Base Measure box. If the method requires a number of time periods, enter this in the Periods box.

- * To override the default for another dimension, repeat the previous steps.

e. Choose **Next** to continue.

Result: The Measure Wizard -- Aggregation page opens.

10. Use the Measure Wizard -- Aggregation page to specify how to roll data up through parent values when data for the measure is edited in worksheets. For example, if you edit a value at the Item level, Oracle Demand Planning will use the aggregation method to determine how the value will be aggregated up to the All Products level.
 - a. Choose one of the following aggregation options in the Method box:
 - * **Additive** — Adds values. This is the default for a new measure.
 - * **Average** — Averages values.
 - * **Minimum** — Takes the minimum value at each child level. You might use this in a special case such as a population type measure.
 - * **Maximum** — Takes the maximum value at each child level. You might use this in a special case, such as if you were aggregating population over time.
 - * **First** — Takes the first value at each level. Recommended only for the Time dimension.
 - * **Last** — Takes the last value at each level. Recommended only for the Time dimension.
 - * **Weighted Average** — Averages values weighted by a specified measure. In the Based on box, select the measure on which to base the weighting.
 - b. You can choose a different aggregation method for one or more dimensions.

Note: Oracle Corporation recommends that you generally apply the same aggregation method to all dimensions of the measure. Although you technically have the ability to set different aggregation methods for dimensions, doing so can have a negative impact on system performance.

To override the aggregation method that you set in Step 10a for one or more dimensions, check the **Do you want to override the default aggregation per dimension** box and proceed as follows:

- * In the Dimension list, identify a dimension for which you want to change the default aggregation method. ("Default" refers to the aggregation method that you chose in Step 10a.)
- * In the Method box, choose the method that you want to use to aggregate data for this dimension.
- * To override the default for another dimension, repeat the previous steps.

c. Choose **Next** to continue.

Result: The Measure Wizard -- Properties page opens.

11. On the Measure Wizard -- Properties page, you can associate one or more properties with the measure.

- a.** To enable editing data for the measure in worksheets, check the **Make the measure editable in worksheets** box. If you will be associating a planning percentage with the measure (see Step 11c), selecting this option also makes the associated planning percentages and dependent demand measures editable in the Planning Percentages worksheet.
- b.** To convert quantities to the base unit of measure for the plan when data is aggregated from the lowest available level of the Product dimension, check the **Apply Unit of Measure (UOM) when aggregating data** box.

For information about this parameter, see "Measure Property: Unit of Measure Association" on page A-6.

- c.** To create a measure for dependent demand and manipulate dependent demand and planning percentages in the Planning Percentages worksheet, check the **Show Dependent Demand relationship (product to parts)** box and specify the planning percentage that you want to use.

Note: This option is only available if dependent demand has been enabled in the Demand Planning Server and model bills of material have been brought into Demand Planning. In addition, the lowest allocation level for each dimension of the measure must be set to leaf level.

You have the following options for specifying a planning percentage for the measure:

- * **Use *selected planning percentage*** — Associates the measure with a planning percentage object that you specify.
 - Choose **Existing Planning Percentage** to use the existing planning percentage object. This is the default for a new measure.
 - Choose an alternate planning percentage (if another planning percentage object exists).
 - Create a new planning percentage object by selecting the existing planning percentage or another planning percentage and copying it to a new planning percentage object. Enter a name for the new object, up to 70 characters long.

Note: The existing planning percentage object reflects the planning percentages from the Bills of Material (BOM) and the numbers may change every time that this data is collected. If you expect to modify planning percentages and you want to retain these edits when data is collected again, then you should copy the existing planning percentage object to a new object.

- * **Create Planning Percentage based on forecasted dependent history** — Calculates planning percentages for models and options based on forecasted dependent history. This choice only appears if the measure that you chose in Step 5a as the basis for the forecast is a stream downloaded from the Demand Planning Server that has dependent history: for example, Booking History. (Note that dependent history is not available for measure that is based on a copy of history). The default name of the planning percentage is *MeasureName*, Planning Percentage, Forecast. You can change the name.
- * **Create Planning Percentage based on historical weights for the last n periods** (where n is a number that you specify) — Calculates planning percentages based on dependent history for the base measure for the number of previous periods that you specify. This choice only appears if the measure that you chose in Step 5a as the basis for the forecast is a stream downloaded from the Demand Planning Server that has dependent history: for example, Booking History. (Note that dependent history is not available for measure that is based on a copy of history).

The default name of the planning percentage is *MeasureName*, Planning Percentage, Average. You can change the name.

Whether you want to create measures for dependent demand and the planning percentage option that you choose depends on the base measure and how you anticipate that the measure will be used in analyses. For more information, see ["Using the Planning Percentages Worksheet" on page 12-1](#).

- d. To use a price list as the basis for calculating an amount measure from a quantity measure or a quantity measure from an amount measure, check the **Calculate volumes and amounts using a price list** box, and select the price list to use for the calculation. For example, if the measure is a Manufacturing Forecast which has only a quantity measure, then checking this box would ensure that the new measure would have a quantity portion as well as an amount portion.

Note: This option is only available if a price list is associated with the demand plan in the Demand Planning Server.

- e. Choose **Next** to continue.

Result: The Measure Wizard -- Events page opens.

- 12. On the Measure Wizard -- Events page, you can choose one or more events and event groups to apply to the measure. Events are factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand. For information about events, see ["Working with Events" on page 18-1](#).

- a. Select events as follows:

- * To add a single event or group, double-click its name in the left box
or
- * Highlight it and choose the single arrow button that points to the right box.
- * To add multiple nonsequential events or event groups, press and hold the CTRL key, select each event or event group that you want to add, and then choose the single arrow button that points to the right box.
- * To add multiple sequential events and event groups, select the first event or group that you want to add, press and hold the SHIFT key, select the event or group that you want to add, and then choose the

single arrow button that points to the right box. You can also select the events to add by clicking and dragging the mouse.

- * To add all events, choose the double arrow button that points to the right box.

b. Choose **Next** to continue.

Result: The Measure Wizard -- Number Formatting page opens.

- 13.** On the Measure Wizard -- Number Formatting page, you can specify how data for the measure will be displayed in documents.

Note: The default formats reflect settings established for the plan in the Demand Planning Server. Your changes will not impact how the data is written back to the Demand Planning Server.

If you associated a price list with the measure in Step 11d, then you can choose formats for both Quantity and Amount. If no price list has been associated with the measure, then you can only choose the formats that are related to the base measure: if the forecast is based on a quantity measure, you can choose formats for Quantity; if the forecast is based on an amount measure, then you can choose formats for Amount.

a. You can set the following format options:

- * **Decimal Digits** — Specifies the number of decimal places to display. You can choose an alternate number.
- * **Positive Values** — Specifies the format for positive numbers. You can choose an alternate format.
- * **Negative Values** — Specifies the format for negative numbers. You can choose an alternate format.
- * **Use Thousands Separator** — Indicates whether to display the thousands separator. Check the box to display the thousands separator. Clear the box to suppress the thousands separator.
- * **Display Leading Zero** — Indicates whether to display leading zeros. Check the box to display leading zeros. Clear the box to suppress leading zeros.

As you make formatting choices, the Samples area displays their effect.

b. When your format choices are complete, choose **Next** to continue.

Result: The Measure Wizard -- Summary page opens, showing the choices that you have made.

14. Choose **Finish** to save the measure.

Creating Simple Copy Measures

You can create a measure that copies data from another measure. For example, you might use this method to create a measure that copies data in the same time period and applies an event factor. Or you might create a measure that copies the data and shifts it backward or forward in time.

To create a simple copy measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Measure** from the popup menu.

Alternatively, you can click the right mouse button on the Measures folder in the navigation list and choose **New Measure** from the popup menu.

Result: The Create Measure dialog box opens.

3. In the Create Measure dialog box, choose **Stored Measure**.

If you see the Measure Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Measure Wizard -- Choose Method page opens.

4. Complete the Measure Wizard -- Choose Method page.
 - a. In the *Name* box, enter a name for the measure, up to 70 characters long.
 - b. In the Method box, choose **Copy Measure**.
 - c. Choose **Next** to continue.

Result: The Measure Wizard -- Copy Measure page opens.

5. Complete the Measure Wizard -- Copy Measure page.
 - a. In the What measure do you want to copy your data from? box, select the measure to copy.
 - b. Indicate how you want to copy the data. You can choose one of the following options:
 - * **Leave data in original time** — Copies the data in the same time period as the base measure. This is the default for a new measure.
 - * **Shift data back by n periods** (where n is an integer and *periods* is a time level) — Copies the data in the base measure and shifts it back in time. Enter the number of time periods and choose the time level.
 - * **Shift data forward by n periods** (where n is an integer and *periods* is a time level) — Copies the data in the base measure and shifts it forward in time. Enter the number of time periods and choose the time level.
 - c. Choose **Next** to continue.

Result: The Measure Wizard -- Allocation page opens.

6. Use the Measure Wizard -- Allocation page to select the allocation method that will be used when new data is added to the measure. The allocation method applies when data for the measure is edited in worksheets. For example, if you edit an NA value at the All Products level in a worksheet, Oracle Demand Planning uses the allocation method to determine how the value will be allocated down to the Item level.
 - a. In the Method box, choose one of the following methods:
 - * **Weights in Another Measure** — Allocates values based on ratios in another measure. In the Base Measure box, select the measure on which to base the weighting. This is the default for a new measure.
 - * **Avg Weight Based on History** — Allocates values based on data in another measure for a specified number of time periods. In the Base

Measure box, select the measure on which to base the weighting. In the Period box, enter the number of time periods to average.

- * **None** — Does not allocate values below the current level. (This option is only available if you selected **Shift data back by *n* periods** or **Shift data forward by *n* periods** in Step 5b.)
- * **Even Allocation** — Allocates values evenly. Note that this method can have a negative impact on database size and performance.

Note: Oracle Corporation recommends that unless you have a specific reason for selecting an alternate method, you should use **Weights in Another Measure** (the default for a new measure) or **Avg Weight Based on History**. While even allocation is the default behavior in situations where allocation needs to occur but no base can be found, Oracle recommends that you try to specify a base.

If data exists at the lowest available level within the measure, then the allocation weights will be calculated using that data. If data does not exist at the lowest available level, then the specified allocation will be used if valid non-NA allocation rules can be determined. If data does not exist at the lowest available level and the specified allocation method does not provide valid allocation rules (for example, there is no data in the base allocation measure), then even allocation will be used.

- b. You can choose a different allocation method for one or more dimensions.

Note: Oracle Corporation recommends that you usually apply the same allocation method to all dimensions of the measure. Although you technically have the ability to set different allocation methods for dimensions, doing so can have a negative impact on system performance.

- c. To override the allocation method that you set in Step 6a for one or more dimensions, check the **Do you want to override the default method of allocation of newly added data** box and proceed as follows:
 - * In the Dimension list, identify a dimension for which you want to change the default allocation method. ("Default" refers to the allocation method that you choose in Step 6a.)

- * In the Method box, choose the method that you want to use to allocate data for this dimension. If the method requires a base measure, select it in the Base Measure box. If the method requires a number of time periods, enter this in the Periods box.
- * To override the default for another dimension, repeat the previous steps.

d. Choose **Next** to continue.

Result: The Measure Wizard -- Aggregation page opens.

7. For a measure that shifts data back or forward in time, use the Measure Wizard -- Aggregation page to specify how to roll data up through parent values when data for the measure is edited in worksheets. For example, if you edit a value at the Item level, Oracle Demand Planning will use the aggregation method to determine how the value will be aggregated up to the All Products level.

Note: You cannot select an aggregation method for data that is copied in original time. For this type of measure, aggregation is additive and cannot be changed.

a. Choose one of the following aggregation options in the Method box:

- * **Additive** — Adds values. This is the default for a new measure.
- * **Average** — Averages values.
- * **Minimum** — Takes the minimum value at each child level. You might use this in a special case such as a population type measure.
- * **Maximum** — Takes the maximum value at each child level. You might use this in a special case, such as if you were aggregating population over time.
- * **First** — Takes the first value at each level. Recommended only for the Time dimension.
- * **Last** — Takes the last value at each level. Recommended only for the Time dimension.

- * **Weighted Average** — Averages values weighted by a specified measure. In the Based on box, select the measure on which to base the weighting.
 - * **None** — Does not aggregate values.
- b. You can choose a different aggregation method for one or more dimensions.

Note: Oracle Corporation recommends that you generally apply the same aggregation method to all dimensions of the measure. Although you technically have the ability to set different aggregation methods for dimensions, doing so can have a negative impact on system performance.

To override the aggregation method that you set in Step 7a for one or more dimensions, check the **Do you want to override the default aggregation per dimension** box and proceed as follows:

- * In the Dimension list, identify a dimension for which you want to change the default aggregation method. ("Default" refers to the aggregation method that you chose in Step 7a.)
 - * In the Method box, choose the method that you want to use to aggregate data for this dimension.
 - * To override the default for another dimension, repeat the previous steps.
- c. Choose **Next** to continue.
- Result: The Measure Wizard -- Properties page opens.
8. On the Measure Wizard -- Properties page, you can associate one or more properties with the measure.
- a. To enable editing data for the measure in worksheets, check the **Make the measure editable in worksheets** box. If you will be associating a planning percentage with the measure (see Step 8c), selecting this option also makes the associated measures for planning percentages and dependent demand editable in the Planning Percentages worksheet.
 - b. To convert quantities to the base unit of measure for the plan when data is aggregated from the lowest available level of the Product dimension, check the **Apply Unit of Measure (UOM) when aggregating data** box.

Note: This option is not available for a measure that is copied in original time.

For information about this parameter, see "Measure Property: Unit of Measure Association" on page A-6.

- c. To create a measure for dependent demand and manipulate dependent demand and planning percentages in the Planning Percentages worksheet, check the **Show Dependent Demand relationship (product to parts)** box and specify the planning percentage that you want to use.

Note: This option is only available if dependent demand has been enabled in the Demand Planning Server and model bills of material have been brought into Demand Planning. In addition, the lowest allocation level for each dimension of the measure must be set to leaf level.

You have the following options for specifying a planning percentage for the measure:

- * Choose **Existing Planning Percentage** to use planning percentages from the Bills of Material (BOM). This is the default for a new measure.
- * Choose another planning percentage (if another planning percentage object exists).
- * Create a new planning percentage object by selecting the existing planning percentage or another planning percentage and copying it to a new planning percentage object. Enter a name for the new object, up to 70 characters long.

Note: The existing planning percentage object reflects the planning percentages from the Bills of Material (BOM) and the numbers may change every time that this data is collected. If you expect that you will be modifying planning percentages and want to retain the edits when data is collected again, then you should copy the existing planning percentage object to a new object.

Whether you opt to create measures for dependent demand and which planning percentage option you choose depends how you anticipate that the measure will be used in analyses. For example, if you are copying sales history or a reference forecast (customer, sales, manufacturing, annual plan, financial plan), you might not want to calculate dependent demand. For more information, see ["Using the Planning Percentages Worksheet" on page 12-1](#).

- d. To use a price list as the basis for calculating an amount measure from a quantity measure or a quantity measure from an amount measure, check the **Calculate volumes and amounts using a price list** box, and select the price list to use for the calculation.

Note: This option is only available if a price list is associated with the demand plan in the Demand Planning Server.

- e. Choose **Next** to continue.

Result: The Measure Wizard -- Events page opens.

- 9. On the Measure Wizard -- Events page, you can choose one or more events and event groups to apply to the measure. Events are factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand. For information about events, see ["Working with Events" on page 18-1](#).

- a. Select events as follows:

- * To add a single event or group, double-click its name in the left box
or
- * Highlight it and choose the single arrow button that points to the right box.
- * To add multiple nonsequential events or event groups, press and hold the CTRL key, choose each event or event group that you want to add, and then choose the single arrow button that points to the right box.
- * To add multiple sequential events and event groups, select the first event or group that you want to add, press and hold the SHIFT key, select the event or group that you want to add, and then choose the single arrow button that points to the right box. You can also select the events to add by clicking and dragging the mouse.

- * To add all events, choose the double arrow button that points to the right box.

b. Choose **Next** to continue.

Result: The Measure Wizard -- Number Formatting page opens.

10. On the Measure Wizard -- Number Formatting page, you can specify how data for the measure will be displayed in documents.

Note: The default formats reflect settings established for the plan in the Demand Planning Server. Your changes will not impact how the data is written back to the Demand Planning Server.

If you associated a price list with the measure in Step 8d, then you can choose formats for both Quantity and Amount. If no price list has been associated with the measure, then you can only choose formats that are related to the base measure: if the new measure is based on a quantity measure, you can choose formats for Quantity; if the new measure is based on an amount measure, then you can choose formats for Amount.

a. You can set the following format options:

- * **Decimal Digits** — Specifies the number of decimal places to display. You can choose an alternate number.
- * **Positive Values** — Specifies the format for positive numbers. You can choose an alternate format.
- * **Negative Values** — Specifies the format for negative numbers. You can choose an alternate format.
- * **Use Thousands Separator** — Indicates whether to display the thousands separator. Check the box to display the thousands separator. Clear the box to suppress the thousands separator.
- * **Display Leading Zero** — Indicates whether to display leading zeros. Check the box to display leading zeros. Clear the box to suppress leading zeros.

As you make formatting choices, the Samples area displays their effect.

b. When your format choices are complete, choose **Next** to continue.

Result: The Measure Wizard -- Summary page opens, showing the choices that you have made.

11. Choose **Finish** to save the measure.

Creating Complex Copy Measures

You can create measures that copy subsets of data from more than one dimension of more than one measure.

Following are some examples of when you might want to use this method:

- You might want to create a measure that copies data at the month level from the Sales Opportunity Forecast for January through June of a given year and from the Forecast of Booking History for July through December of the same year.
- You might want to create a measure that uses a statistical forecast for mature products and a "based on last submitted forecast" for products with transient customers.
- You might want to create a measure that uses a statistical forecast for mature products for a defined customer population, a "based on last submitted forecast" for a specific customer product combination where the demand is not expected to evolve at all, and last years history (with appropriate lag or lead) for a few customers/products where you know the demand is not expected to evolve at all.

To create a stored measure that copies a measure depending on more than one dimension:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Measure** from the popup menu.

Alternatively, you can click the right mouse button on the Measures folder in the navigation list. Then choose **New Measure** from the popup menu.

3. In the Create Measure dialog box, choose **Stored Measure**.

If you see the Measure Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Measure Wizard -- Choose Method page opens.

4. Complete the Measure Wizard -- Choose Method page.
 - a. In the Measure Name box, enter a name for the measure, up to 70 characters long.
 - b. In the Method box, select **Copy Measures Depending on More than One Dimension**.

Result: The Copy Measures Depending On More Than One Dimension page opens.

5. In the The Copy Measures Depending On More Than One Dimension page, specify the levels at which to copy values for each dimension and choose the values to copy.
 - a. The Dimension/Level grid displays defaults for the levels at which to copy data. To select an alternate level for a dimension, in the Level box for the dimension choose the level that you want to use.

Note: Set the levels at which you want to copy the data before you select specific measures and dimension values. If you change a level after you select measures and values, you will have to re-enter your selections.

- b. Choose **Add** to select a measure from which to copy data.

Result: A default measure appears in the Measure column of the Measure/Values box.

- c. To select an alternate measure, click the current measure to display a list of available measures and choose the measure that you want to use.

Note: The list of available measures changes after you select the initial data subset. This occurs because each measure selected for copying must have the same properties for Unit of Measure and aggregation method as the first measure that you chose. For example, a measure that only has an amount portion can only be combined with other amount measures.

Result: The Measure column of the Copy Regions box lists each measure from which you want to copy data. The Values column is blank.

- d. Repeat Steps 5b and 5c for each measure from which you want to copy data.
- e. To select values for a measure, highlight the measure and choose **Edit**.

Result: The Select Data dialog box opens. The Available box lists values for one dimension of this measure.

- f. In the Select Data dialog box, choose values to copy as follows:
 - * Select values for the current dimension (this is the dimension that is displayed in the Select Values for box). For information about selecting values, see ["Techniques for selecting values from a list"](#) on page 22-4.
 - * Choose another dimension in the Select Values for box. Then select values for that dimension.
 - * Repeat the selection process until you have made selections for all dimensions of the measure. When your selections are complete, choose **OK**.

Note: The **OK** button is only enabled when you have selected values for *all* dimensions.

Result: You are returned to the Choose Method page. The Values column of the Copy Regions box shows the product for the number of cells that are currently selected. For example, if you chose three countries, three products, two years, and one ship-from location, the Values column would show 18 (3 countries * 3 items * 2 years * 1 ship-from location), representing 18 cells or 18 selected values.

6. Repeat Steps 5e and 5f for each measure for which you want to copy data.

Result: Each entry in the Measure column now shows a corresponding entry in the Values column.

7. Choose **Next** to continue.

Result: The Measure Wizard -- Allocation page opens.

8. Use the Measure Wizard -- Allocation page to select the allocation method that will be used when new data is added to the measure. The allocation method applies when data for the measure is edited in worksheets. For example, if you edit an NA value at the All Products level in a worksheet, Oracle Demand Planning uses the allocation method to determine how the value will be allocated down to the Item level.

- a. Choose one of the following allocation methods:

- * **Weights in Another Measure** — Allocates values based on ratios in another measure. In the Base Measure box, select the measure on which to base the weighting. This is the default for a new measure.
- * **Avg Weight Based on History** — Allocates values based on data in another measure for a specified number of time periods. In the Base Measure box, select the measure on which to base the weighting. In the Period box, enter the number of time periods to average.
- * **Even Allocation** — Allocates values evenly. Note that this method can have a negative impact on database size and performance.

Note: Oracle Corporation recommends that unless you have a specific reason for selecting an alternate method, you should use **Weights in Another Measure** (the default for a new measure) or **Avg Weight Based on History**. While even allocation is the default behavior in situations where allocation needs to occur but no base can be found, Oracle recommends that you try to specify a base.

If data exists at the lowest available allocation level within the measure, then the allocation weights will be calculated using that data. If data does not exist at the lowest available level, then the specified allocation will be used if valid non-NA allocation rules can be determined. If data does not exist at the lowest available level and the specified allocation method does not provide valid allocation rules (for example, there is no data in the base allocation measure), then even allocation will be used.

- b. You can choose a different allocation method for one or more dimensions.

Note: Oracle Corporation recommends that you usually apply the same allocation method to all dimensions of the measure. Although you technically have the ability to set different allocation methods for dimensions, doing so can have a negative impact on system performance.

To override the allocation method that you set in Step 8a for one or more dimensions, check the **Do you want to override the default method of allocation of newly added data** box and proceed as follows:

- * In the Dimension list, identify a dimension for which you want to change the default allocation method. ("Default" refers to the allocation method that you choose in Step 8a.)
- * In the Method box, choose the method that you want to use to allocate data for this dimension. If the method requires a base measure, select it in the Base Measure box. If the method requires a number of time periods, enter this in the Periods box.
- * To override the default for another dimension, repeat the previous steps.

- c. Choose **Next** to continue.

Result: The Measure Wizard -- Aggregation page opens.

9. Use the Measure Wizard -- Aggregation page to specify how to roll data up through parent values when data for the measure is edited in worksheets. For example, if you edit a value at the Item level, Oracle Demand Planning will use the aggregation method to determine how the value will be aggregated up to the All Products level.
- a. In the Method box, choose one of the following aggregation options:
- * **Additive** — Adds values. This is the default for a new measure.
 - * **Average** — Averages values.
 - * **Minimum** — Takes the minimum value at each child level. You might use this in a special case such as a population type measure.

- * **Maximum** — Takes the maximum value at each child level. You might use this in a special case, such as if you were aggregating population over time.
 - * **First** — Takes the first value at each level. Recommended only for the Time dimension.
 - * **Last** — Takes the last value at each level. Recommended only for the Time dimension.
 - * **Weighted Average** — Averages values weighted by a specified measure. In the Based on box, select the measure on which to base the weighting.
 - * **None** — Does not aggregate values.
- b. You can choose a different aggregation method for one or more dimensions.

Note: Oracle Corporation recommends that you generally apply the same aggregation method to all dimensions of the measure. Although you technically have the ability to set different aggregation methods for dimensions, doing so can have a negative impact on system performance.

To override the aggregation method that you set in Step 9a for one or more dimensions, check the **Do you want to override the default aggregation per dimension** box and proceed as follows:

- * In the Dimension list, identify a dimension for which you want to change the default aggregation method. ("Default" refers to the aggregation method that you chose in Step 9a.)
 - * In the Method box, choose the method that you want to use to aggregate data for this dimension.
 - * To override the default for another dimension, repeat the previous steps.
- c. Choose **Next** to continue.

Result: The Measure Wizard -- Properties page opens.

10. On the Measure Wizard -- Properties page, you can associate one or more properties with the measure.

- a. To enable editing data for the measure in worksheets, check the **Make the measure editable in worksheets** box. If you will be associating a planning percentage with the measure (see Step 10c), selecting this option also makes the associated measures for planning percentages and dependent demand editable in the Planning Percentages worksheet.
- b. To convert quantities to the base unit of measure for the plan when data is aggregated from the lowest available level of the Product dimension, check the **Apply Unit of Measure (UOM) when aggregating data** box.

For information about this parameter, see "Measure Property: Unit of Measure Association" on page A-6.

- c. To create a measure for dependent demand and manipulate dependent demand and planning percentages in the Planning Percentages worksheet, check the **Show Dependent Demand relationship (product to parts)** box and specify the planning percentage that you want to use.

Note: This option is only available if dependent demand has been enabled in the Demand Planning Server and model bills of material have been brought into Demand Planning. In addition, the lowest allocation level for each dimension of the measure must be set to leaf level.

You have the following options for specifying a planning percentage for the measure:

- * Choose **Existing Planning Percentage** to use the planning percentages from the Bills of Material (BOM). This is the default for a new measure.
- * Choose another planning percentage (if another planning percentage object exists).
- * Create a new planning percentage object by selecting the existing planning percentage or another planning percentage and copying it to a new planning percentage object. Enter a name for the new object, up to 70 characters long.

Note: The existing planning percentage object reflects the planning percentages from the Bills of Material (BOM) and the numbers may change every time that this data is collected. If you expect to modify planning percentages and you want to retain these edits when data is collected again, then you should copy the existing planning percentage object to a new object.

Whether you opt to create measures for dependent demand and which planning percentage option you choose depends on how you anticipate that the measure will be used in analyses. For more information, see ["Using the Planning Percentages Worksheet" on page 12-1](#).

- d. To use a price list as the basis for calculating an amount measure from a quantity measure or a quantity measure from an amount measure, check the **Calculate volumes and amounts using a price list** box, and select the price list to use for the calculation.

Note: This option only appears if a price list is associated with the demand plan in the Demand Planning Server.

- e. When you complete the Properties page, choose **Next** to continue.

Result: The Measure Wizard -- Events page opens.

- 11. On the Measure Wizard -- Events page, you can choose one or more events and event groups to apply to the measure. Events are factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand. For information about events, see ["Working with Events" on page 18-1](#).

- a. Select events as follows:

- * To add a single event or group, double-click its name in the left box
or
- * Highlight it and choose the single arrow button that points to the right box.
- * To add multiple nonsequential events or event groups, press and hold the CTRL key, choose each event or event group that you want to add, and then choose the single arrow button that points to the right box.

- * To add multiple sequential events and event groups, select the first event or group that you want to add, press and hold the SHIFT key, select the event or group that you want to add, and then choose the single arrow button that points to the right box. You can also select the events to add by clicking and dragging the mouse.
- * To add all events, choose the double arrow button that points to the right box.

b. Choose **Next** to continue.

Result: The Measure Wizard -- Number Formatting page opens.

- 12.** On the Measure Wizard -- Number Formatting page, you can specify how data for the measure will be displayed in documents.

Note: The default formats reflect settings established for the plan in the Demand Planning Server. Your changes will not impact how the data is written back to the Demand Planning Server.

If you associated a price list with the measure in Step 10d, then you can choose formats for both Quantity and Amount. If no price list has been associated with the measure, then you can only choose the formats that are related to the base measure: if the new measure is based on a quantity measure, you can choose formats for Quantity; if the new measure is based on an amount measure, then you can choose formats for Amount.

a. You can set the following format options:

- * **Decimal Digits** — Specifies the number of decimal places to display. You can choose an alternate number.
- * **Positive Values** — Specifies the format for positive numbers. You can select an alternate format.
- * **Negative Values** — Specifies the format for negative numbers. You can select an alternate format.
- * **Use Thousands Separator** — Indicates whether to display the thousands separator. Check the box to display the thousands separator. Clear the box to suppress the thousands separator.
- * **Display Leading Zero** — Indicates whether to display leading zeros. Check the box to display leading zeros. Clear the box to suppress leading zeros.

As you make formatting choices, the Samples area displays their effect.

- b. When your format choices are complete, choose **Next** to continue.

Result: The Measure Wizard -- Summary page opens, showing the choices that you have made.

- 13. Choose **Finish** to save the measure.

Creating Accuracy Measures

At the conclusion of a planning cycle, Oracle Demand Planning publishes the final forecast numbers for onward supply and inventory planning to other Oracle applications such as Advanced Supply Chain Planning (ASCP) and Inventory Optimization (IO). If Demand Planning provides a measure of forecast accuracy, Inventory Optimization uses the forecast and its accuracy to calculate safety stocks. You can use the Stored Measure option to create these accuracy measures.

You can also use this option to quantify accuracy between any two measures at specified levels for a specified time period: for example you might create an accuracy measure that compares a previous period forecast to new sales history. Or you might compare the forecast accuracy from one period to another. You can also create specific accuracy measures for various organization and product combinations.

Note: When you define or modify a forecast measure, you can generate MAD, MAPE, and RSME statistics that compare the forecast with its base measure at the forecasted levels. Creating an ad hoc accuracy measure complements and expands this function and makes it more dynamic. You can compare *any* two measures at specified levels and time periods and generate statistics for Cumulative Error (CE) and Percent Bias (PB) as well as for MAD, MAPE, and RSME.

To create an ad hoc accuracy measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Measure** from the popup menu.

Alternatively, you can click the right mouse button on the Measures folder in the navigation list. Then choose **New Measure** from the popup menu.

3. In the Create Measure dialog box, choose **Stored Measure**.

If you see the Measure Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Measure Wizard -- Choose Method page opens.

4. Complete the Measure Wizard -- Choose Method page.
 - a. Enter a name for the measure, up to 70 characters long.
 - b. Choose **Create an accuracy measure** as the method for creating the measure.
 - c. Choose **Next** to continue.

Result: The Measure Wizard -- Create Accuracy Measure page opens.

5. Complete the Measure Wizard -- Create Accuracy Measure page.
 - a. Choose the type of accuracy measure that you want to create. You can choose one of the following:
 - * **Mean Absolute Deviation (MAD)** — Calculates the mean absolute deviation between the base measure and the comparison measure.
 - * **Mean Absolute Percentage Error (MAPE)** — Divides MAD by the average.

- * **Root Mean Squared Error (RMSE)** — Summarizes the overall error and reflects the variability in the data. The individual errors are squared, added together, divided by the number of individual errors, and then square rooted.
 - * **Cumulative Error (CE)** — Provides a measure of the overall errors in a forecast when compared to actuals, or the difference between any two measures. This is calculated by summing the difference between the two measures.
 - * **Percent Bias (PB)** — Provides a measure of the overall errors in a forecast when compared to actuals, or the difference between any two measures. This is calculated by summing the difference between two measures as a percentage of the base measure.
- b. Choose the measure on which to base the accuracy calculation. For example, you might choose a previous period forecast.
 - c. Choose the comparison measure for the calculation. For example, you might choose new sales history.
 - d. The Dimension/Level grid displays the levels at which Oracle Demand Planning will generate the accuracy measure for each dimension in your database. To change a level setting, choose the Level column for the dimension and select the level that you want to use.
 - e. In the Start and End Date boxes, choose the time period over which to evaluate accuracy.

The default time periods are based on the level selection for Time. If you want to choose time values at specific level, ensure that you select that level before you set dates.

Important: Accuracy calculations will be performed at the selected dimension levels across the specified time range. If the base and comparison measures that you chose do not both have data at these levels within the time range, then the resulting accuracy measure will not contain data (it will be NA).

- f. Choose **Next** to continue.

Result: The Measure Wizard -- Properties page opens.

6. On the Measure Wizard -- Properties page, you can specify whether data for the measure will be editable in worksheets. To make the measure editable, enable the **Make the measure editable in worksheets** box.

When you complete the Properties page, choose **Next** to continue.

Result: The Measure Wizard -- Number Formatting page opens.

7. On the Measure Wizard -- Number Formatting page, you can specify how data for the measure will be displayed in documents.

Note: The default formats reflect settings established for the plan in the Demand Planning Server. Your changes will not impact how the data is written back to the Demand Planning Server.

- a. You can specify the following format options:

- * **Decimal Digits** — Specifies the number of decimal places to display. You can choose an alternate number.
- * **Positive Values** — Specifies the format for positive numbers. You can select an alternate format.
- * **Negative Values** — Specifies the format for negative numbers. You can select an alternate format.
- * **Use Thousands Separator** — Indicates whether to display the thousands separator. Check the box to display the thousands separator. Clear the box to suppress the thousands separator.
- * **Display Leading Zero** — Indicates whether to display leading zeros. Check the box to display leading zeros. Clear the box to suppress leading zeros.

As you make formatting choices, the Samples area on the left side of the page displays the effect of your choices.

- b. Choose **Next** to continue.

Result: The Measure Wizard -- Summary page opens, showing the choices that you have made.

8. Choose **Finish** to save the measure.

Creating Formula Measures

When you define a formula measure, you select the measure or measures on which to base the formula, specify the calculations to apply, and enter appropriate parameters.

To create a formula measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Measure** from the popup menu.

Alternatively, you can click the right mouse button on the Measures folder in the navigation list. Then choose **New Measure** from the popup menu.

Result: The Create Measure dialog box opens.

3. In the Create Measure dialog box, choose **Formula Measure**.

Result: The New Formula Measure dialog box opens.

4. In the name boxes, enter a short name and a long name for the measure.

The short name can be up to 16 characters long. The long name can be up to 70 characters long.

5. The Type box specifies the method and associated formula that will be used to calculate the measure. Choose the method that you want to use. You can select one of the following:
 - **Change** — Calculates the change in a measure's value between the current time period and a previous time period. You select the measure and specify the time period. You can choose "Prior Period," "Year Ago," or "Custom." If you choose Custom, enter the number of time periods.
 - **Fiscal-Year-to-Date** — Sums the value of a measure through the fiscal year to date. You select the measure.
 - **Lag** — Calculates a measure that lags data for a specified time period. You select the measure and specify the time level and time period for the lag.

You can choose "Prior Period," "Year Ago," or "Custom." If you choose Custom, enter the number of time periods.

- **Lead** — Calculates a measure that leads data for a specified time period. You select the measure and specify the time level and time periods for the lead. You can choose "Custom" or "Next Period." If you choose "Custom," enter the number of time periods.
- **Moving Average** — Averages the values of a measure over time. You select the measure and specify the number of time periods to consider.
- **Moving Maximum** — Finds the maximum value for a measure over time. You select the measure and specify the number of time periods to consider.
- **Moving Minimum** — Finds the minimum value for a measure over time. You select the measure and specify the number of time periods to consider.
- **Moving Total** — Sums the values of a measure over time. You select the measure and specify the number of time periods to consider.
- **Percent Change** — Calculates the percentage change in a measure's value between the current time period and a previous time period. You select the measure and specify the previous time period. You can choose "Prior Period," "Year Ago," or "Custom." If you choose Custom, enter the number of time periods.
- **Year-to-Date** — Sums up the value of a measure through the current calendar year. You select the measure.
- **Difference** — Subtracts the value of one measure from another. You select the measures.
- **Multiplication** — Multiplies the value of a measure by a numeric literal. You select the measure and specify the multiplier.
- **Ratio** — Divides the values of one measure by another. You select the measures.
- **Sum** — Adds the value of one or more measures and a numeric literal. You select the measure and specify the value to add.
- **Index** — Calculates the ratio between the current value for a dimension of the measure and a reference dimension value or level. You select the measure, the dimension, and the reference dimension value or level.

- **Nested** — Performs simple nested formula calculations. These formulas take the form (A ? B) ? (C ? D), where you can replace each letter with a measure and each question mark with an arithmetic operator, qualified by a dimension value. You select the measures and specify the operators and the qualifying dimension values.
- **Variance** — Calculates the difference between the current value for a dimension of the measure and a reference dimension value or level. You select the measure, the dimension, and the reference dimension value or level.

Result: The components of the Definition box change depending on the type of measure that you chose.

6. Complete the other fields in the Definition box. The information that you provide depends on the measure type.

For example, if you are defining a Difference measure, you select the base measure and the measure to subtract.

7. To specify an additional calculation to include in the formula, proceed as follows:
 - a. In the Additional Calculations box, select an operator and enter a number.
 - b. To specify that calculated values be positive, check **Absolute Value**.
8. To specify display formats for the data associated with this measure, choose **Format**.

Result: The Format Number dialog box opens.

9. In the Format Number dialog box, you can specify how data for the measure will be displayed in documents. You can specify the following format options:
 - **Decimal Digits** — Specifies the number of decimal places to display. You can select an alternate number.
 - **Positive Values** — Specifies the format for positive numbers. You can select an alternate format.
 - **Negative Values** — Specifies the format for negative numbers. You can select an alternate format.
 - **Use Thousands Separator** — Indicates whether to display the thousands separator. Check the box to display the thousands separator. Clear the box to suppress the thousands separator.

- **Display Leading Zero** — Indicates whether to display leading zeros. Check the box to display leading zeros. Clear the box to suppress leading zeros.

As you make formatting choices, the Samples box shows you the effect your choices will have on the data.

10. If the Format Number dialog box is open, choose **OK** to close it.

Result: You are returned to the New Formula Measure dialog box.

11. Choose **OK** to save the measure.

Editing Measures

You can edit the definition of any measure that is displayed in the navigation list.

Note: Editing a measure definition is distinct from editing the *data* for the measure. You use the Measures function to modify the measure definition. You use a worksheet to edit measure data.

If your role is Demand Plan Manager, the modified definition will be made available to planners whose assignment includes the measure the next time a distribution runs, assuming that it is a full distribution or a quick distribution that includes the measure.

To edit a measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the measure whose definition you want to change.

Tip: To search for a measure, click the right mouse button on the Measures folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Highlight the measure that you want to modify and choose **Edit**.

Result: If you are editing a stored measure, a tabbed page opens. If you are editing a formula measure, the Edit Formula Measure dialog box opens.

4. To edit a stored measure, use the tabs, the **Next** button, and the **Back** button to move through the measure definition to make your changes. You can also change the measure name.

Note: If the measure is a stored accuracy measure or a measure from the Planning Server, you can only edit the measure name, specify the numeric format, and change the property that determines whether data for the measure will be editable in worksheets.

Choose **Finish** to save your changes and close the measure definition.

5. To edit a formula measure, view and change the measure attributes in the Edit Formula Measure dialog box. You can also change the measure name.

Choose **OK** to save your changes.

Renaming Measures

You can give a new name to a measure in the navigation list. You can also rename a measure by editing it, as described in ["Editing Measures" on page 17-40](#).

To rename a measure in the navigation list:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the measure that you want to rename.

Note: To search for a measure, click the right mouse button on the Measures folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the measure object and choose **Rename** from the popup menu.
4. Enter the new name. The name can be up to 70 characters long.

Viewing Measure Properties

You can use the navigation list to view information about a measure.

Note: If you are viewing properties as a planner, you might see "Personal" as the Type for a measure. This means that you created the measure in your personal database (or edited a shared measure and saved it). Although you can work with personal measures in documents and submit them to the shared database, you will not be able share personal measures in a collaborative environment.

For a Planning Server measure, the following properties are displayed:

- Name — *Measure name*
- Transformation — None
- Source — Planning Server
- Type — Quantity, Amount, or Quantity and Amount
- Aggregate — Yes or No
- Allocate — Yes or No
- Editable — Yes or No
- Price List — None
- Events — None
- Lowest Allocation Levels — For each dimension, specifies the lowest level to which data will be allocated

For a stored measure that is a forecast or a copy of one or more measures, the following properties are displayed:

- Name — *Measure name*
- Transformation — Method used to create the measure, for example: Forecast
- Source — Shared or Personal
- Type — Quantity, Amount, or Quantity and Amount
- Aggregate — Yes or No
- Allocate — Yes or No

- Editable — Yes or No
- Price List — *Price list name* or None
- Events — *Event names* or None
- Lowest Allocation Levels — For each dimension, specifies the lowest level to which data will be allocated (depends on the data stream on which the forecast or copy is based)

For a stored accuracy measure, the following properties are displayed:

- Name — *Measure name*
- Transformation Method — Accuracy
- Source — Shared or Personal
- Accuracy Measure Type — Type of accuracy measure, for example, Mean Absolute Percentage Error (MAPE)
- Base Measure — Base measure for accuracy calculation
- Comparison Measure — Comparison measure for accuracy calculation
- Editable — Yes or No

For a formula measure, the following properties are displayed:

- Name — Long name for the measure
- Transformation — Formula
- Source — Shared or Personal

To view measure properties:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the measure whose information you want to view.

Note: To search for a measure, click the right mouse button on the Measures folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the measure object and choose **Properties** from the popup menu.

Deleting Measures

When you no longer need access to a measure, you can delete it.

Important: Before you delete a measure, ensure that there are no saved objects that reference it. If you fail to do this, warning messages and errors can occur when you work with reports, graphs, worksheets, or alerts that contain the deleted measure. If your role is Demand Plan Manager, also ensure that planners do not have saved objects that reference the measure.

To delete a measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the measure that you want to delete.

Tip: To search for a measure, click the right mouse button on the Measures folder in the navigation list and choose **Find** from the popup menu. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the measure object and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the measure and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Importing Data into a Measure from a Flat File

An import feature enables you “read” data from a flat file into a measure. You might use this feature to bring in data for a customer forecast that is in an ASCII file. You might also use this feature to integrate data from internal collaborators such as Sales or Marketing that has been converted to comma delimited (CSV) format.

General requirements for import file

Any file from which you import data must meet the following general requirements:

- Data for each dimension must be consistent in terms of level. For example, time values must all be in days, or all in weeks, or all in months. You cannot import some time values in days and others in weeks or months.
- Data must be within the time range of the measure that you define for the data.
- Data must have a consistent unit of measure (quantity or amount) and must not be a negative number.
- Data must have a display format that is consistent with the language setting for the browser.

Format requirements for import file

The first record of an import file is the template record. The template record defines the format for all of the records that follow. The required format for the template record is as follows:

```
delimiter  
space  
delimiter  
first dimension name  
delimiter  
second dimension name  
delimiter  
third dimension name  
delimiter (if the data model has four dimensions)  
fourth dimension name (if the data model has four dimensions)  
end delimiter
```


Format requirements for all records after the template record are as follows:

value of the first dimension
delimiter
value of the second dimension
delimiter
value of the third dimension
delimiter
value of the fourth dimension (if the data model has four dimensions)
delimiter (if the data model has four dimensions)
quantity or amount value
delimiter (if optional comment is included)
optional comment (not supported in this release)

To import data from a flat file into a measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. Create a stored measure and ensure that the measure is editable. You will use this measure to “hold” the data from the flat file.

For example, you might create a measure that is a copy of another measure.

3. Ensure that the data in the import file meets requirements. For more information, see ["General requirements for import file" on page 17-45](#) and ["Format requirements for import file" on page 17-45](#).
4. On the navigation toolbar, choose the **Tools** button.



5. From the submenu, choose **Import Data**.
Result: The File to Import dialog box opens.
6. In the File to Import dialog box, browse to the flat file from which you want to import data and choose **Open**.
Result: the Select Measure dialog box opens.

7. In the Select Measure dialog box, select the measure that you created in Step 2 and proceed as follows:
 - Choose **Quantity** if the file contains values for quantity.
 - Choose **Amount** if the file contains values for amount.
8. Choose **OK** to import the file.

Result: The import process begins. If there are minor errors, the Import Errors dialog box opens, with a description of the problems. You can choose to terminate the import or to continue. If the file format does not meet requirements, an error message appears and data is not imported.

Example: Import file

Following is an excerpt from a sample import file with four dimensions.

```
:: ::Time::Product::Organization::Geography
31-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::104
30-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::105
29-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::106
28-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::107
27-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::108
26-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::109
25-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::100
24-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::101
23-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::102
22-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::103
21-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::104
20-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::105
19-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::106
18-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::107
17-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::108
16-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::109
15-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::100
14-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::101
13-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::102
12-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::103
11-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::104
10-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::105
09-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::106
08-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::107
07-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::108
06-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::109
05-MAR-2003::CM25287::Boston Manufacturing::Vision-Boston::100
```

Working with Events

This section describes how to create and maintain events when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Events](#)
- [Creating Promotion Events](#)
- [Creating Product Introduction Events](#)
- [Creating Product Phase out Events](#)
- [Modifying Events](#)
- [Viewing Event Properties](#)
- [Deleting Events](#)
- [Applying Events to Measures](#)
- [Using the Events Calendar](#)

About Events

Events are factors such as promotions, product introductions, and product phase outs that are expected to have a quantifiable impact on demand. You can apply events to forecasts to model the effect on demand.

You can view existing events, define new events, edit events, delete events, and apply event factors to measures.

Working with events as Demand Plan Manager

If your responsibility is Demand Plan Manager, you work with events in the shared database. When you create a new event, the event exists in the shared database. You have access to the event, but it will only become available to planners when the Demand Plan Administrator runs a distribution. All events will be available to planners when a full distribution runs; only events associated with distributed measures will be available when a quick distribution runs.

Working with events as Demand Planner

If your responsibility is Demand Planner, you work with events in your personal database. You can use events that have been distributed to you. You can also create new events, to which only you have access.

Creating Promotion Events

A promotion is an event that is expected to impact demand for an existing product. You characterize a promotion as *mandatory* or *optional*. A mandatory promotion is always applied, whether or not other promotions have been applied. An optional promotion is applied only when there is no other optional promotion for the same portion of the data (product and other dimension values).

To create a promotion event:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Event** from the popup menu.

Alternatively, you can click the right mouse button on the Events folder in the navigation list. Then choose **New Event** from the popup menu.

If you see the Event Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Event Wizard -- Name page opens.

3. Complete the Event Wizard -- Name page.
 - a. Enter a name for the event, up to 70 characters long.
 - b. Choose **Promotion** as the event type.
 - c. In the date boxes for Event Range, specify the starting date and the ending date for the promotion. Select the part of the date (month, day, or year) that you want to change and then click the arrow to increase or decrease the value.
 - d. Choose **Next** to continue.

Result: The Event Wizard -- Type page opens.

4. Complete the Event Wizard -- Type page.
 - a. Select the promotion type. The promotion type determines the circumstances in which the event will be applied to a measure.
 - * **Optional Promotion** — The event will be applied only when no other optional promotions for the same portion of the data (product and other dimensions) have been applied.
 - * **Mandatory Promotion** — The event will always be applied for the specified portion of the data.
 - b. Choose **Next** to continue.

Result: The Event Wizard -- Group page opens.

5. Use the Event Wizard -- Group page to specify a grouping option for the event. You can use groups to organize similar types of events into event folders in the navigation list.
 - a. Choose one of the following grouping options:
 - * **Do not group** — The event is not in any group. It will be displayed as an independent event object in the navigation list. This is the default for a new event.
 - * **Create new event group** — The event is in a new group. Enter a name for the group, up to 70 characters long. The event will be displayed in an event folder in the navigation list. The folder will have the name that you enter for the group.
 - * **Use existing event group** — The event will be displayed in the group folder that you choose. (If no event groups have been defined, this option will not be available.)

Note: You can group a mandatory promotion with other mandatory promotions and an optional promotion with other optional promotions. However, you cannot put a mandatory promotion and an optional promotion in the same group.

- b. Choose **Next** to continue.

Result: The Event Wizard -- Priority page opens.

6. Use the Event Wizard -- Priority page to specify the priority for the event when another event of the same type is applied to the same measure. The priority will be evaluated relative to the priorities of other events.
 - a. Examine the Promotion/Priority grid to view the priority settings for other events.
 - b. Using the slider, set a priority for the new event.

For mandatory promotions, the priority setting determines the order in which the events will be applied. For example, if two mandatory promotions are defined for the same time period, one at the All Product level with a 10% modification factor (priority 1) and the second for Product A with a 20% modification factor (priority 2), the result would be a lift of 10% for all products except for Product A, which would have a 20% lift on top of the 10% lift.

For optional promotions, the priority setting determines the order in which multiple promotions will be applied when there is an overlap. For example, suppose that a soda vendor has a 10% discount on cans in North America (priority 1), and a 5% worldwide discount on all products (priority 2). This means that North American buyers will get 10% off cans, and 5% off other products, while consumers in the rest of the world will still get 5% off everything.

Note: If you set the same priority for two events, then Oracle Demand Planning will assign the priority to the event that was created first.

- c. Choose **Next** to continue.

Result: The Event Wizard -- Properties page opens.

7. Use the Event Wizard -- Properties page to specify the product to which the promotion applies and set optional qualifying values. Proceed as follows:

- a. Select a product:

- * Click the *ellipsis* button next to the top box.

Result: The Dimension Value Selector opens, listing the products in the hierarchy displayed in the Organize by box.

- * You can change the hierarchy in the Organize by box to view values in another product hierarchy.
- * Select a product from the list. To apply the event to all products, choose **All Products**. You can use the *Find* button to search for a specific product.

Note: If you want to apply the event to multiple products, you can define similar events for the products and group the events together.

- b. You can qualify the event by values in dimensions other than Product. For example, you might limit the event to a specific geography. Proceed as follows:

- * In the Dimension column of the Dimension/Value grid, highlight the dimension for which you want to set qualifying values and choose **Edit**.

Result: The Dimension Value Selector dialog box opens. The list displays values for the hierarchy in the Organize by box.

- * You can select an alternate hierarchy and view its values.
- * Choose a value and choose **OK**.

Result: You are returned to the Properties page.

Note: To change a qualifying value, highlight it and choose **Edit**. To delete a qualifying value, highlight it and choose **Delete**.

- c. To select a qualifying value for another dimension, repeat Step 7b.
- d. Choose **Next** to continue.

Result: The Event Wizard -- Action page opens.

8. Use the Event Wizard -- Action page to specify the effect that the promotion event will have when it is applied to a measure.
 - a. In the Quantities box, specify the effect of the event on quantity. Choose one of the following options:
 - * **No effect** — The event will have no effect on quantity.
 - * **Increase value by** — The event will increase quantity by a number or percentage that you specify.
 - * **Decrease value by** — The event will decrease quantity by a number or percentage that you specify.
 - * **Set to absolute value** — The event will set quantity to a number that you specify.
 - b. If you chose **Increase value by**, **Decrease value by**, or **Set to absolute value**, enter a number. For **Increase value by** and **Decrease value by**, check the percent box to indicate that the number is a percentage.

Result: The Example box shows the effect that your choice will have on a quantity of 1000.

- c. In the Price box, specify the effect of the event on price. Choose one of the following options:
 - * **No effect** — The event will have no effect on price.
 - * **Increase value by** — The event will increase price by a number or percentage that you specify.
 - * **Decrease value by** — The event will decrease price by a number or percentage that you specify.
 - * **Set to absolute value** — The event will set price to a figure that you specify.
 - d. If you chose **Increase value by**, **Decrease value by**, or **Set to absolute value**, enter a number. For **Increase value by** or **Decrease value by**, check the percent box to indicate that the number is a percentage.
 Result: The Example box shows the effect that your choice will have on a price of \$1000.
 - e. Choose **Next** to continue.
 Result: The Event Wizard -- Summary page opens, showing the choices that you have made.
9. Choose **Finish** to save the event.

Creating Product Introduction Events

A product introduction is an event for a product that does not have any historical or forecast data, but for which you anticipate that sales will be similar to some product or products that have a known history or forecast. You characterize a product introduction as a *lifecycle* event or a *supercession* event. For a lifecycle event, the historical sales data for one or more base products is used as the basis of demand for the new product. For a supercession event, the forecast for one or more base products is used to determine demand for the new product. You can also indicate whether the event is expected to cannibalize sales for one or more existing products.

To create a product introduction event:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Event** from the popup menu.

Alternatively, you can click the right mouse button on the Events folder in the navigation list. Then choose **New Event** from the popup menu.

If you see the Event Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Event Wizard -- Name page opens.

3. Complete the Event Wizard -- Name page.
 - a. Enter a name for the event, up to 70 characters long.
 - b. Choose **Product Introduction** as the event type.
 - c. In the date boxes for Event Range, specify the starting date and the ending date for the product introduction. Select the part of the date (month, day, or year) that you want to change and click the arrow to increase or decrease the value.
 - d. Choose **Next** to continue.

Result: The Event Wizard -- Type page opens.

4. Complete the Event Wizard -- Type page.
 - a. Select the product introduction type. The product introduction type determines the basis for predicting demand for the new product. Choose one of the following:
 - * **Lifecycle - based on history** — Uses the history for a specified base product to derive demand for the new product.

- * **Supercession - based on forecast** — Uses the forecast for a specified base product to predict demand for the new product.

Note: You will select the base product in Step 8.

- b. Choose **Next** to continue.

Result: The Event Wizard -- Group page opens.

- 5. Use the Event Wizard -- Group page to specify a grouping option for the event. You can use groups to organize similar types of events into event folders in the navigation list.

- a. Choose one of the following grouping options:

- * **Do not group** — The event is not in any group. The event will be displayed as an independent event object in the navigation list. This is the default for a new event.
- * **Create new event group** — The event is in a new group. Enter a name for the group, up to 70 characters long. The event will be displayed in an event folder in the navigation list. The folder will have the name that you enter for the group.
- * **Use existing event group** — The event will be displayed in the group folder that you choose. (If no event groups have been defined, this option will not be available.)

Note: You can group a lifecycle product introduction with other lifecycle product introductions and a supercession product introduction with other supercession introductions. However, you cannot put a lifecycle product introduction and a supercession product introduction in the same group.

- b. Choose **Next** to continue.

Result: The Event Wizard -- Properties page opens.

6. Use the Event Wizard -- Properties page to specify the product to which the product introduction event applies and set optional qualifying values. Proceed as follows:

- a. Select a product:

- * Click the *ellipsis* button next to the top box.

Result: The Dimension Value Selector opens, listing available products.

- * Choose a product from the list. You can use the *Find* button to search for a specific product.

Note: If you want to apply the event to multiple products, you can define similar events for these products and group the events together.

- b. You can qualify the event by values in dimensions other than Product. For example, you might limit the event to a specific geography. Proceed as follows:

- * In the Dimension column of the Dimension/Value grid, highlight the dimension for which you want to set qualifying values and choose **Edit**.

Result: The Dimension Value Selector dialog box opens. The list displays values for the hierarchy in the Organize by box.

- * You can select an alternate hierarchy and view its values.
- * Select a value and choose **OK**.

Result: You are returned to the Properties page.

Note: To change a qualifying value, highlight it and choose **Edit**. To delete a qualifying value, highlight it and choose **Delete**.

- c. To select a qualifying value for another dimension, repeat Step 6b.

- d. Choose **Next** to continue.

Result: The Event Wizard -- Action page opens.

7. Use the Event Wizard -- Action page to specify the effect that the product introduction event will have when it is applied to a measure.

Note: The action that you specify on this page will be applied *on top of* the weight that you will assign to the base product's history (for a lifecycle event) or forecast (for a supercession event) in Step 8.

- a. In the Quantities box, specify the effect of the event on quantity. Choose one of the following options:
 - * **No effect** — The event will have no effect on quantity.
 - * **Increase value by** — The event will increase quantity by a number or percentage that you specify.
 - * **Decrease value by** — The event will decrease quantity by a number or percentage that you specify.

Result: The Example box shows the effect that your choice will have on a quantity of 1000.

- b. If you chose **Increase value by** or **Decrease value by**, enter a number. Check the percent box to indicate that the number is a percentage.
- c. Choose **Next** to continue.

Result: The Event Wizard -- Base Products page opens.

8. Use the Event Wizard -- Base Products page to select the product or products that will be used to predict demand for the new product. If you chose **Lifecycle - based on history** in Step 4a, then Oracle Demand Planning will base the calculation on the product's history. If you chose **Supercession - based on forecast** in Step 4a, then Oracle Demand Planning will base the calculation on the product's forecast.

- a. Choose **Add**.

Result: The Dimension Value Selector dialog box opens showing available products.

- b. Select a product from the list and choose **OK**.

Result: The Dimension Value Selector dialog box closes. The product that you chose is displayed in the grid.

- c. In the Weight column, enter a number that specifies the percentage of the product's forecast (for a supercession event) or history (for a lifecycle event) to consider when calculating demand for the new product. The default is 100.

Examples: 0.0 applies no weight to the product's forecast or history; 50.0 applies 50% of the value to the product's forecast or history; 100.0 applies the full value of the forecast or history; 150.0 applies 150% of the value of the forecast or history.

- d. For a lifecycle event, choose a date in the Start Date column. This date specifies the start date for the history that will be used to calculate demand for the new product.
- e. You can qualify the forecast or history for the base product by values in dimensions other than Product. For example, you might limit the forecast or history by geography. Proceed as follows:
 - * Highlight the column for the dimension for which you want to set qualifying values and choose **Edit**.
Result: The Dimension Value Selector dialog box opens. The list displays values for the current hierarchy in the Organize by box.
 - * You can select an alternate hierarchy and view its values.
 - * Select a value and choose **OK**.

Note: To change a qualifying value, highlight it and choose **Edit**. To delete a qualifying value, highlight it and choose **Delete**.

- f. To select a qualifying value for another dimension, repeat Step 8e.
- g. To select another base product, repeat Steps 8a through 8f.
- h. When your selections are complete, choose **OK**.
Result: The Event Wizard -- Cannibalized Products page opens.
- 9. If you expect that demand for the new product will decrease demand for one or more existing products, use the Event Wizard -- Cannibalized Products page to specify the affected products and quantify the impact.
 - a. Choose **Add**.
Result: The Dimension Value Selector dialog box opens.
 - b. Select a product from the list and choose **OK**. You can use the *Find* button to search for a specific product.
Result: The Dimension Value Selector dialog box closes. The product that you chose is displayed in the grid.

- c. In the Decrease (%) column, enter a number that specifies the percentage that demand for this product is expected to decrease within a specified timeframe.

Note: The decrease percentage will be applied to the new product and the result subtracted from the quantity for the "cannibalized" product.

- d. In the From and To columns, select the start and end dates for the decrease.
- e. To add another cannibalized product, repeat Steps 9a through 9d.

Tip: The percentage that you enter in Step 9c will be applied in a linear manner within the time frame that you specified in Step 9d. If you expect that demand will decrease in a non-linear fashion (for example, 10% in October, 20% in November, and 30% in December), repeat Steps 9a through 9d for the same product, but specify different time frames and percentages.

- f. Choose **Next** to continue.

Result: The Event Wizard -- Summary page opens, showing the choices that you have made.

- 10. Choose **Finish** to save the event.

Creating Product Phase out Events

A product phase out is an event for an existing product for which sales are expected to become flat or be reduced to zero.

A single phase out event models a linear decrease in which demand for the product decreases evenly over the event time period. To model a situation in which demand decreases in a non-linear fashion, you can define multiple phase out events for the same product and group the events together. For example, you can use multiple events to handle a situation in which demand is expected to decline 10% in October, 20% in November, and 30% in December.

To create a product phase out event:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Event** from the popup menu.

Alternatively, you can click the right mouse button on the Events folder in the navigation list. Then choose **New Event** from the popup menu.

If you see the Event Wizard -- Introduction page, choose **Next** to continue.

Tip: To suppress the display of this page in the future, clear the **Show this page next time** box before you continue.

Result: The Event Wizard -- Name page opens.

3. Complete the Event Wizard -- Name page.
 - a. Enter a name for the event, up to 70 characters long.
 - b. Choose **Product Phase out** as the event type.
 - c. In the date boxes for Event Range, specify the starting date and the ending date for the product phase out. Select the part of the date (month, day, or year) that you want to change and click the arrow to increase or decrease the value.
 - d. Choose **Next** to continue.

Result: The Event Wizard -- Group page opens.

4. Use the Event Wizard -- Group page to specify a grouping option for the event. You can use groups to organize similar types of events into event folders in the navigation list.
 - a. Choose one of the following grouping options:
 - * **Do not group** — The event is not in any group. The event will be displayed as an independent event object in the navigation list. This is the default for a new event.

- * **Create new event group** — The event is in a new group. Enter a name for the group, up to 70 characters long. The event will be displayed in an event folder in the navigation list. The folder will have the name that you enter for the group.
- * **Use existing event group** — The event will be displayed in the group folder that you choose. (If no event groups have been defined, this option will not be available.)

Result: The Event Wizard -- Properties page opens.

5. Use the Event Wizard -- Properties page to specify the product to which the product phase out event applies and set optional qualifying values.
 - a. Select a product:
 - * Click the *ellipsis* button next to the top box.

Result: The Dimension Value Selector opens, listing the products in the hierarchy displayed in the Organize by box.
 - * You can change the hierarchy in the Organize by box and view values in another product hierarchy.
 - * Choose a product from the list. To apply the event to all products, choose **All Products**. You can use the *Find* button to search for a specific product.
 - b. You can qualify the event by values in dimensions other than Product. For example, you might limit it by geography. Proceed as follows:
 - * Highlight the column for the dimension for which you want to set qualifying values and choose **Edit**.

Result: The Dimension Value Selector dialog box opens. The list displays values for the current hierarchy in the Organize by box.
 - * You can select an alternate hierarchy and view its values.
 - * Select a value and choose **OK**.

Note: To change a qualifying value, highlight it and choose **Edit**. To delete a qualifying value, highlight it and choose **Delete**.

- c. To select a qualifying value for another dimension, repeat Step 5b.

- d. Choose **Next** to continue.

Result: The Event Wizard -- Action page opens.

- 6. Use the Event Wizard -- Action page to specify how the product phase out event will decrease quantity when it is applied to a measure.

- a. In the Quantities box, enter a number. Check the percent box to indicate that the number is a percentage.

Result: The Example box shows the effect that your choice will have on a quantity of 1000.

- b. Choose **Next** to continue.

Result: The Event Wizard -- Summary page opens, showing the choices that you have made.

- 7. Choose **Finish** to save the event.

Modifying Events

When you want to change some aspect of an event, you can edit the event.

If your role is Demand Plan Manager, the modified event will be made available to planners when a distribution runs. All events will be available when a full distribution runs; only events applied to distributed measures will be available when a quick distribution runs.

To edit an event:

- 1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
- 2. In the navigation list, identify the event that you want to change.

Tip: To search for an event, click the right mouse button on the Events folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

- 3. Select the event and choose **Edit**.

Result: A tabbed page opens.

4. Use the tabs, the **Next** button, and the **Back** button to move through the event definition to make your changes. You can also change the event name.

Note: You cannot change the event type.

5. Choose **Finish** to save the event.

Viewing Event Properties

In the navigation list, you can view the following information about events:

- Name
- Start Date
- End Date
- Event Type

To view event properties:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the event whose information you want to view.

Note: To search for an event, click the right mouse button on the Events folder in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the event object and choose **Properties** from the popup menu.

Deleting Events

When you no longer want to maintain an event, you can delete the event.

Important: If you delete an event as a Demand Plan Manager, planners will lose access to the event the next time that a full distribution runs. Before deleting, ensure that planners do not maintain measures that reference the event.

To delete an event:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the event that you want to delete.
3. Highlight the event and choose **Delete**.

Result: You are prompted to confirm the deletion.

4. Choose **OK**.

Applying Events to Measures

As you define a measure, you have the option to apply one or more events, event groups, or a combination of events and groups to the measure.

If you are working as a Demand Plan Manager and apply an event to a measure *before* a distribution runs, then the distributed measure will include the event factor.

If you apply an event after a distribution runs, the measure will not include the event factor until the measure is repopulated. Similarly, if you modify an event that has been applied to a measure *after* distribution, the modification will not take effect until the measure is repopulated.

For information about associating events with measures, see ["Working with Measures" on page 17-1](#). For information about the effect of events on measures, see ["Effect of Events on Measures" on page A-7](#).

Using the Events Calendar

The Events Calendar enables you to view information about events that are currently associated with your demand plan. You can view events by month and by week. You can also view events that have been associated with specific measures.

This can be useful when you are defining a stored measure or working with a measure that has an event component.

Viewing a monthly display of events

You use the Events Calendar to view a monthly display of events.

To view events by month:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation list toolbar, choose the **Tools** button.



3. From the submenu, choose **Events Calendar**.

Result: The Events Calendar opens. The Month tab displays event information for the current month.

4. Ensure that the **View events list button** is active.
5. Choose **Previous** to go back one month. Choose **Next** to go forward one month.
6. To view more information about a specific event, proceed as follows:

- a. Choose the event in the calendar.

Result: The selected event is highlighted in the right frame.

- b. Double-click the event.

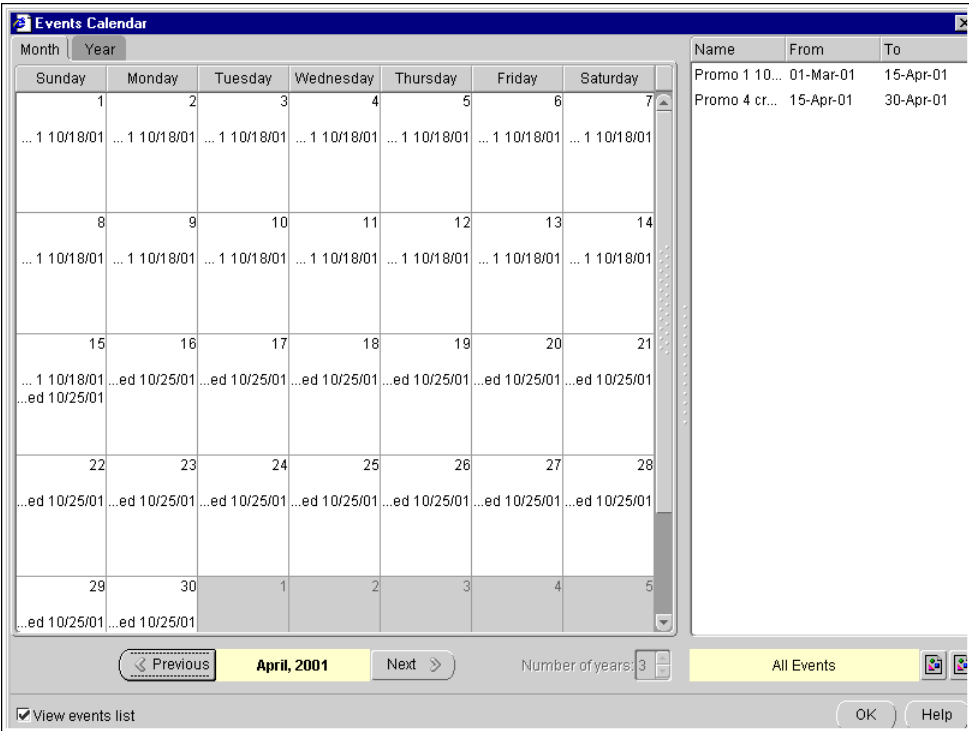
Result: The Event Wizard opens, where you can view (and optionally edit) the event definition.

7. To expand the calendar display, disable the **View events list button**.

Result: The right frame closes and the calendar display enlarges.

Example: Display of events by month

In the following illustration, the user views events for a selected month. In this example, the View Events list option is enabled. The left frame displays the daily events for the month. The right frame displays all events that have been associated with the demand plan.



Viewing events by year

You can use the Events Calendar to view a yearly display of events.

To view events by year:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation list toolbar, choose the **Tools** button.



3. From the submenu, choose **Events Calendar**.

Result: The Events Calendar opens. The Month tab displays event information for the current month.

4. Make the Year tab active.

Result: The calendar frame on the left displays the events by year.

5. In the Number of years box, choose the number of years for which to display events.

Result: Each event that falls within the selected time period displays as a colored horizontal bar beneath the appropriate year. The event time span is indicated by the placement of the bar.

6. Ensure that the **View events list button** is active.

7. Choose **Previous** to go back one year. Choose **Next** to go forward one year.

8. To view more information about an event, proceed as follows:

- a. Choose the event in the calendar.

Result: The selected event is highlighted in the right frame.

- b. Double click the event.

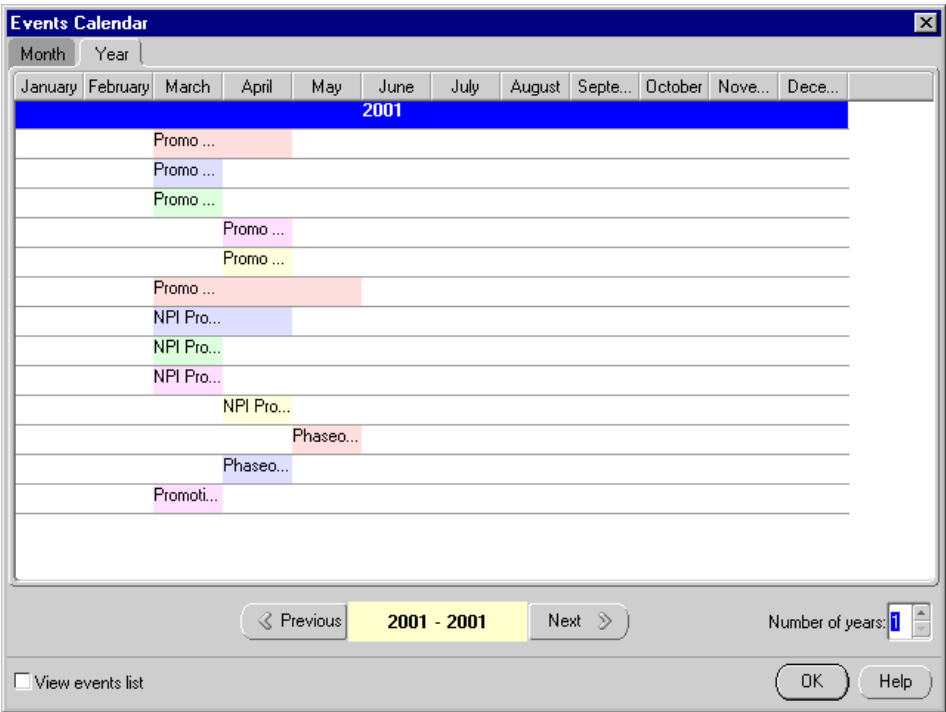
Result: The Event Wizard opens, where you can view (and optionally edit) the event definition.

9. To expand the calendar display, disable the **View events list button**.

Result: The right frame closes and the calendar display enlarges.

Example: Events calendar for year

In the following illustration, the user views events for a selected year. In this example, the View Events list option has been disabled so that only the calendar displays.



Viewing events for a measure

You can use the Events Calendar to view all of the events that are related to a specific measure.

To view the events for a measure:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation list toolbar, choose the **Tools** button.



3. From the submenu, choose **Events Calendar**.

Result: The Events Calendar opens. The Month tab displays event information for the current month.

4. Ensure that the **View events list** button is enabled.

Result: The right frame displays all events that are linked to the demand plan.

5. Choose the **Filter Events by Measure** button.



Result: The Choose a Measure dialog box opens. The list shows measures that have been defined for the demand plan. These might be Planning Server measures or measures in the shared database. If your responsibility is Demand Planner, they might be measures that you have defined.

6. Select a measure from the list and choose **OK**.

Result: The right panel now displays only those events that have been linked to the selected measure. The measure name appears at the bottom of the frame.

7. To view more information about the event, double-click it.

Result: The Event Wizard opens, where you can view (and optionally edit) the event definition.

Working with Custom Aggregates

This section describes how to create, modify, and delete user-defined combinations of dimension values known as *custom aggregates* when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Custom Aggregates](#)
- [Defining Custom Aggregates](#)
- [Applying Custom Aggregates to Open Documents](#)
- [Editing Custom Aggregates](#)
- [Renaming Custom Aggregates](#)
- [Viewing Custom Aggregate Properties](#)
- [Deleting Custom Aggregates](#)

About Custom Aggregates

A *custom aggregate* is a single dimension value that combines multiple values for a dimension. When you work as a Demand Planner or Demand Plan Manager, you can create custom aggregates and use them in worksheets, reports, and graphs.

For example, you might define a custom aggregate that combines the values for five products into a single value. You might also define a custom aggregate that adds the values of four products and subtracts the value of a fifth product. This might be useful if you were creating a what-if simulation and wanted to see the effect that phasing out one of the products would have on your key value drivers.

Note: Custom aggregates are independent of any hierarchy. If you are selecting values from a specific hierarchy, then custom aggregates will not be available.

Defining Custom Aggregates

You define a custom aggregate by naming the aggregate and selecting its member values. You can also specify how a specific member will be processed within the aggregate.

To define a custom aggregate:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Custom Aggregate** from the popup menu.

Alternatively, you can click the right mouse button on the Custom Aggregates folder in the navigation list or the Custom Aggregates folder for a specific dimension. Then choose **New Custom Aggregate** from the popup menu.

Result: If you use the right-click technique on the Custom Aggregates folder, the Custom Aggregates dialog box opens, displaying a default dimension. If you use the right-click technique on a specific Custom Aggregates folder, the Custom Aggregates dialog box opens, displaying the selected dimension.

3. If you have not already done so, in the Dimension box, select the dimension for the custom aggregate.
4. In the name boxes, enter a short name and a long name for the custom aggregate.

The short name can be up to 16 characters long. The long name can be up to 70 characters long.

5. Choose the **Selector** button to access the Select Data dialog box and select the values that will comprise the custom aggregate.

You can choose values from a list. You can also use the buttons on the Data Selection toolbar to choose values by specific criteria. For more information about selecting values, see ["Selecting Data" on page 22-1](#).

6. If this is a Time aggregate, you can define derived aggregates for prior time periods. You can choose one or both of the following:
 - **Year Ago** — Creates a custom aggregate for the same time period in the previous year. For example, if you define a custom aggregate whose members are two months (November and December) of the current year, choosing **Year Ago** will also create a custom aggregate for November and December of the previous year. The name of the year ago aggregate will be *Mytime Year Ago*, where *Mytime* is the name that you entered for the custom aggregate.
 - **Prior Period** — Creates a custom aggregate for the previous time segment. For example, if you define a custom aggregate whose members are two months (November and December) of the current year, choosing **Prior Period** will also define a custom aggregate for September and October of the current year. The name of the prior period aggregate will be *Mytime Previous Period*, where *Mytime* is the name that you entered for the custom aggregate.

Note: Year Ago and Prior Period custom aggregates will be displayed in the Selector when you select dimension values. However, objects for these derived aggregates will not appear in the navigation list.

7. When your selections are complete, choose **OK**.

Result: You are returned to the New Custom Aggregate dialog box. The Values list displays the values that you chose. A plus sign (+) next to a value indicates that the value is additive.

8. To subtract a value from the aggregate, click the plus sign next to that value.

Result: A minus sign (-) appears next to the value, indicating that it is subtractive.

Note: Time aggregates for Year Ago and Prior Period require positive member values. If you try to include a subtractive value in the aggregate definition, the system will create the custom aggregate, but will not create Year Ago and Prior Period aggregates.

9. Choose **OK** to save the custom aggregate.

Result: The custom aggregate object appears in the Custom Aggregates folder for the dimension in the navigation list.

Example: Custom aggregate definition

In the following example, the user creates a custom aggregate, High End Products, that includes three values in the Product dimension. The plus sign (+) indicates that the values will be added.

New Custom Aggregate

Dimension: Product

Short Name: High End Long Name: High End Products

Members

+ Hi 8 Video	Product ...
+ 8MM Video	Product ...
+ Hi 8 Camcorder	Product ...
+ Stereo VCR	Product ...

4 members

Attributes: None

Class: Personal

Modified:

☐ Apply to Open Report

Buttons: Help, OK, Cancel

Applying Custom Aggregates to Open Documents

You can apply a custom aggregate directly to an open report, graph, or worksheet. Applying a custom aggregate adds the aggregate value to the current values for the dimension in the document.

Methods for applying custom aggregates to ad hoc reports, ad hoc graphs, and worksheets

You can use the following methods to apply a custom aggregate to an ad hoc report, ad hoc graph, or worksheet:

- You can select a saved custom aggregate in the navigation list and use a right mouse button command to apply it to the open document.
- As you define a new custom aggregate or modify a saved custom aggregate definition, you can apply it directly to an open document.

To apply a saved custom aggregate to an open ad hoc report, ad hoc graph, or worksheet:

1. In the navigation list, identify the custom aggregate that you want to use.

Tip: To search for a custom aggregate in the navigation list, click the right mouse button on the Custom Aggregates folder or the Custom Aggregates folder for a specific dimension, choose **Find Custom Aggregates**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. Ensure that the open document includes the dimension to which the custom aggregate refers.
3. Click the right mouse button the custom aggregate object and choose **Apply to Open Report**, **Apply to Open Graph**, or **Apply to Open Worksheet**.

Result: The document displays the custom aggregate as the last selection for the specified dimension.

To apply a new or modified custom aggregate definition to an open ad hoc report, ad hoc graph, or worksheet:

As you define or modify the custom aggregate, choose **Apply to Open Report**, **Apply to Open Graph**, or **Apply to Open Worksheet** in the New Custom Aggregate or Edit Custom Aggregate dialog box. When you choose **OK**, Oracle Demand Planning will add the custom aggregate to the specified document.

Example: Applying a new custom aggregate definition to an open document

In the following example, an ad hoc report is open in the workspace and the user applies a new custom aggregate definition to the report.

New Custom Aggregate

Dimension: Product

Short Name: High End Long Name: High End Products

Members

+ Hi 8 Video	Product ...
+ 8MM Video	Product ...
+ Hi 8 Camcorder	Product ...
+ Stereo VCR	Product ...

4 members

Attributes: None

Class: Personal

Modified:

☒ Apply to Open Report

Help OK Cancel

Editing Custom Aggregates

You can change the name or definition of a custom aggregate.

To modify a custom aggregate:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the custom aggregate that you want to modify.

Tip: To search for a custom aggregate in the navigation list, click the right mouse button on the Custom Aggregates folder or the Custom Aggregates folder for a specific dimension, choose **Find Custom Aggregates**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the custom aggregate object.
Alternatively, you can click the right mouse button on the custom aggregate object and choose **Edit** from the popup menu.
Result: A dialog box opens, showing the object's name and definition.
4. You can change the object's name and make new dimension selections.
5. Choose **OK** to save your changes.

Renaming Custom Aggregates

You can give a new name to a saved custom aggregate.

Note: Renaming a Time aggregate that has derived aggregates for Year Ago or Prior Period also renames the derived aggregates.

To rename a custom aggregate:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the custom aggregate that you want to rename.

Tip: To search for a custom aggregate in the navigation list, click the right mouse button on the Custom Aggregates folder or the Custom Aggregates folder for a specific dimension, choose **Find Custom Aggregates**, and enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the custom aggregate object and choose **Rename** from the popup menu.
4. Enter the new name.

Viewing Custom Aggregate Properties

You can view the following properties of a custom aggregate:

- Description
- Name
- Created
- Modified
- Class

To view the properties of a custom aggregate:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the custom aggregate whose properties you want to view.

Tip: To search for a custom aggregate, click the right mouse button on the Custom Aggregates folder or the custom aggregates folder for the dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button the custom aggregate object and choose **Properties** from the popup menu.

Deleting Custom Aggregates

When you no longer need a custom aggregate, you can delete it. Deleting a custom aggregate permanently removes it from the navigation list and the selection list of dimension values.

You can delete an individual custom aggregate. You can also delete multiple custom aggregates in the same dimension. Deleting a custom time aggregate that has derived aggregates for year ago or prior period also deletes the derived aggregates.

Important: Before you delete a custom aggregate, ensure that there are no saved objects that reference it. Failure to do so can cause warning and errors to occur when you work with ad hoc reports, ad hoc graphs, worksheets, or alerts that contain the deleted custom aggregate.

To delete a custom aggregate:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the custom aggregate that you want to delete.

Tip: To search for a custom aggregate, click the right mouse button on the Custom Aggregates folder or the custom aggregates folder for the dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Select the custom aggregate object and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the custom aggregate object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

To delete multiple custom aggregates:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folder that contains the custom aggregates that you want to delete.

Note: You can only delete custom aggregates that are in the same dimension folder.

3. Scroll to an object, press the CTRL key and simultaneously click the object.
Result: The object is highlighted.
4. Repeat the previous step for each custom aggregate that you want to delete.
5. After you make your final selection, click the right mouse button and choose **Delete** from the popup menu.

Result: You are prompted to confirm the deletion.

Working with Saved Selections

This section describes how to create, modify, and delete saved selections of values when you work as a Demand Planner or Demand Plan Manager. The section also describes how to apply saved selections to documents.

The section includes the following topics:

- [About Saved Selections](#)
- [Defining Saved Selections](#)
- [Applying Saved Selections to Open Documents](#)
- [Editing Saved Selections](#)
- [Renaming Saved Selections](#)
- [Viewing Saved Selection Properties](#)
- [Deleting Saved Selections](#)

About Saved Selections

A *saved selection* is a set of dimension values that you select once, save, and reuse in multiple documents. When you work as a Demand Planner or Demand Plan Manager, saved selections enable you to quickly retrieve a group of values without repeating the steps that you followed to select them.

You can apply a saved selection to an open ad hoc report, ad hoc graph, or worksheet. You can also choose a saved selection when you change the settings script for a predefined report.

Defining Saved Selections

When you define a saved selection, you name the selection, specify the dimension for the saved selection, and select the component dimension values. You also specify whether to save the *members* of the selection (for example, Geography 1, Geography 2, and Geography 3) or the selection *steps* (for example, “the top three geographies based on Booking History Quantity for products *x*, *y*, and *z* during Q1”).

Defining a saved selection

You can define a saved selection from the navigation list. You can also define a saved selection on the fly when you select data for a document.

To define a saved selection from the navigation list:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



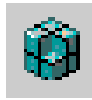
and choose **New Saved Selection** from the popup menu.

Alternatively, you can click the right mouse button on the Saved Selections folder in the navigation list or the Saved Selections folder for a specific dimension. Then choose **New Saved Selection** from the popup menu.

Result: The New Saved Selection dialog box opens. If you used the right-click technique on the Saved Selections folder, the New Saved Selections dialog box

displays a default dimension, which you can change. If you used the right-click technique on a Saved Selections folder for a specific dimension, the Saved Selections dialog box displays the selected dimension.

3. In the Name box, enter a name for the saved selection. The name can be up to 70 characters long.
4. The Dimension box displays a default dimension. If this is not the dimension for which you want to define a saved selection, select an alternate dimension.
5. Choose the **Selector** button.



Result: The Select Data dialog box opens.

6. Choose the values that will comprise the saved selection.
You can select individual values. You can also use the buttons on the Data Selection toolbar to select values by specific criteria. For information about the tools and techniques for selecting dimension values, see ["Selecting Data" on page 22-1](#).
7. When your value selections are complete, choose **OK**.

Result: You are returned to the New Saved Selection dialog box. The Selections box displays the member values that you chose.

8. In the Options box, choose the option that specifies how you want the values to be saved:
 - **Save steps** — Saves the script that drives the selection criteria, rather than the actual values. Choose this option when you anticipate applying the same criteria repeatedly over a long period of time, but expect that the values that comprise the selection might change.
 - **Save members** — Saves the actual dimension values. A member selection is always comprised of the same values, regardless of when the selection is applied. Choose this option when you want to examine data for the same dimension values on an ongoing basis.

Note: If you used the drag and drop method or a right mouse function to sort values for the selection, then you will not be able to save steps.

9. In the Description box, you can enter optional text to identify the saved selection.
10. Choose **OK** to save the selection.

Result: The saved selection object appears in the Saved Selections folder for the dimension in the navigation list.

To define a saved selection while working in a document:

1. With an ad hoc report, ad hoc graph, or worksheet open in the workspace, choose the **Select Data** button on the Document toolbar.



2. From the drop-down list, select a dimension.

Result: The Select Data dialog box opens, displaying values for the dimension.

3. Choose the values that will comprise the saved selection.

You can select individual values. You can also use the buttons on the Data Selection toolbar to select values by specific criteria. For information about the tools and techniques for selecting dimension values, see "[Selecting Data](#)" on [page 22-1](#).

4. When your selections are complete, choose the **Save Current Selection** button on the toolbar.



Result: The Save a Selection for *Dimension* dialog box opens.

5. In the Save a Selection for *Dimension* dialog box, enter information for the saved selection as follows:
 - a. In the Save current selection as box, enter a name for the saved selection. The name can be up to 70 characters long.
 - b. In the Description box, you can enter optional text to describe the components of the saved selection.
 - c. Specify how to save the selection:
 - * **Save steps** — Saves the script that drives the selection criteria, rather than the actual values. Choose this option when you anticipate applying the same criteria repeatedly over a long period of time, but expect that the values that comprise the selection might change.
 - * **Save members** — Saves the actual dimension values. A member selection is always comprised of the same values, regardless of when the selection is applied. Choose this option when you want to examine data for the same dimension values on an ongoing basis.

For more information about these options, see ["Defining Saved Selections" on page 20-2](#).

Note: If you used the drag and drop method or a right mouse function to sort values for the selection, then you will not be able to save steps.

6. Choose **OK** to save the selection.

Result: The saved selection object will appear in the Saved Selections folder for the dimension in the navigation list.

Example: Saved selection definition

The following illustration shows the New Saved Selection dialog box, which opens when you define a saved selection from the navigation list. The example shows a selection of product values that will be saved as steps. The user has provided a

descriptive name and has entered optional text that further describes the saved selection.

New Saved Selection

Name:

Top Ten Products

Dimension:

Product

Selections:

Port. Stereo

Tuner

Amplifier

Color TV

Portable TV

Standard VCR

Selector

Options:

☒ Save steps

☐ Save members

Description:

Select the tope ten products by Sales\$ for the prior quarter for all geographies, all channels

☐ Apply to Open Report

Help

OK

Cancel

Applying Saved Selections to Open Documents

You can apply a saved selection to an open ad hoc report, ad hoc graph, or worksheet. Applying a saved selection to a document replaces the current values for the dimension with the values in the saved selection.

Methods for applying saved selections to open documents

You can use the following methods to apply a saved selection directly to an open ad hoc report, ad hoc graph, or worksheet:

- You can choose a previously saved selection in the navigation list and use a right mouse button command to apply it to an open document.
- You can use the **Apply Saved Selection** tool in the Select Data dialog box and choose a previously saved selection to apply.
- As you define new saved selection or modify a saved selection, you can apply it to an open document.

To apply a saved selection of values to an open document:

1. With the document open in the workspace, identify the saved selection that you want to use.

Tip: To search for a saved selection, click the right mouse button on the Saved Selections folder or the Saved Selections folder for a dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. Ensure that the open document includes the dimension to which the saved selection refers.
3. Click the right mouse button on the saved selection object. From the popup menu, choose **Apply to Open Report**, **Apply to Open Graph**, or **Apply to Open Worksheet**.

Result: The saved selection replaces the current values for the dimension in the document.

To use a data selection tool to apply a saved selection to a document:

1. With the document open in the workspace, choose the **Apply Saved Selection** button on the Data Selection toolbar.



Result: A list of dimensions for which one or more saved selections have been defined appears.

2. Select a dimension.

Result: The Apply Saved Selection dialog box opens. The Available box lists the saved selections for the dimension that you chose.

3. Choose a saved selection from the list.
4. You can choose **Preview** to preview the values that will be selected as a result of your choice.
5. Choose **OK** to apply the saved selection.

Result: The saved selection replaces the current values for the dimension in the document.

To apply a new or modified saved selection definition to an open document:

As you create or modify a saved selection, choose **Apply to Open Report**, or **Apply to Open Graph** in the New Saved Selection or Edit Saved Selection dialog box. When you choose **OK**, Oracle Demand Planning will apply the saved selection to the specified document.

Example: Applying a new saved selection to an open document

In the following example, an ad hoc report is open in the workspace and the user applies a new saved selection definition to the report.

The screenshot shows a 'New Saved Selection' dialog box with the following fields and controls:

- Name:** A text box containing 'Top Ten Products'.
- Dimension:** A dropdown menu with 'Product' selected.
- Selections:** A list box containing 'Port. Stereo', 'Tuner', 'Amplifier', 'Color TV', 'Portable TV', and 'Standard VCR'. To the right of the list is a 'Selector' button with a cube icon.
- Options:** Two radio buttons: 'Save steps' (selected) and 'Save members'.
- Description:** A text box containing 'Select the tope ten products by Sales\$ for the prior quarter for all geographies, all channels'.
- Apply to Open Report:** A checked checkbox.
- Buttons:** 'Help', 'OK', and 'Cancel' buttons at the bottom.

Editing Saved Selections

You can change the name or definition of a saved selection.

To edit a saved selection:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the saved selection that you want to modify.

Tip: To search for a saved selection, click the right mouse button on the Saved Selections folder or the Saved Selections folder for a dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Double-click the saved selection object.

Alternatively, you can click the right mouse button on the saved selection object and choose **Edit** from the popup menu.

Result: A dialog box opens, showing the object's name and definition.

4. You can change the name, dimension value selections, and method for saving (Steps or Members).
5. Choose **OK** to save your changes.

Renaming Saved Selections

You can rename a saved selection.

To rename a saved selection:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the saved selection that you want to rename.

Tip: To search for a saved selection, click the right mouse button on the Saved Selections folder or the Saved Selections folder for a dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the saved selection object and choose **Rename** from the popup menu.
4. Enter the new name, up to 70 characters long.

Viewing Saved Selection Properties

You can view the following properties of a saved selection:

- Name
- Created
- Modified
- Class

To view the properties of a saved selection:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the saved selection whose properties you want to view.

Tip: To search for a saved selection, click the right mouse button on the Saved Selections folder or the Saved Selections folder for a dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the saved selection and choose **Properties** from the popup menu.

Deleting Saved Selections

When you no longer need to have access to a saved selection, you can delete it. Deleting a saved selection permanently removes it from the navigation list.

You can delete an individual saved selection. You can also delete multiple saved selections in the same dimension.

Important: Before you delete a saved selection, ensure that there are no saved objects that reference it. Failure to do so can cause warning and errors to occur when you work with ad hoc reports, ad hoc graphs, worksheets, or alerts that contain the deleted saved selection.

To delete a saved selection:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the saved selection that you want to delete.

Tip: To search for a saved selection, click the right mouse button on the Saved Selections folder or the Saved Selections folder for a dimension in the navigation list and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Select the saved selection object and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the saved selection object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

To delete multiple saved selections:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folder that contains the saved selections that you want to delete.

You can only delete saved selections that are in the same dimension folder.

3. Scroll to an object, press the CTRL key and simultaneously click the object.
Result: The object is highlighted.
4. Repeat the previous step for each saved selection that you want to delete.
5. After you make your final selection, click the right mouse button and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion

Working with Document Folders

This section describes how to use document folders when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Folders](#)
- [Creating Folders](#)
- [Moving Documents Between Folders](#)
- [Copying Documents to Folders](#)
- [Changing the Order of Documents in Folders](#)
- [Deleting Documents from Folders](#)
- [Renaming Folders](#)
- [Viewing Folder Properties](#)
- [Deleting Folders](#)

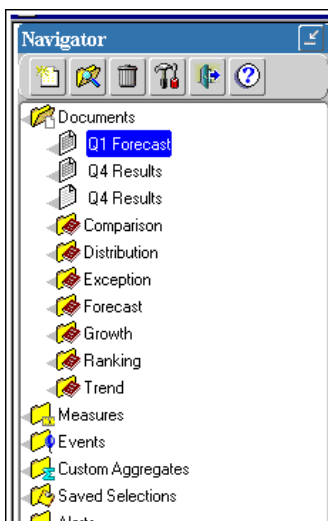
About Folders

Folders are objects that organize ad hoc reports, ad hoc graphs, and worksheets. When you work as a Demand Planner or Demand Plan Manager you can save documents in folders and move or copy documents between folders.

Example: Display of folders

The folders that you create to manage your documents appear as objects in the navigation list under the main Documents folder.

In the following illustration, Hard Drive Forecasts and Monitor Forecasts are user-defined folders. Note the difference between the icons for these folders and the icon for the main Documents folder and the icons for predefined reports (Comparison, Distribution, and so forth).



Creating Folders

You can create a new folder.

To create a new folder:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Folder** from the popup menu.

Alternatively, you can click the right mouse button on **Documents** in the navigation list and choose **New Folder** from the popup menu.

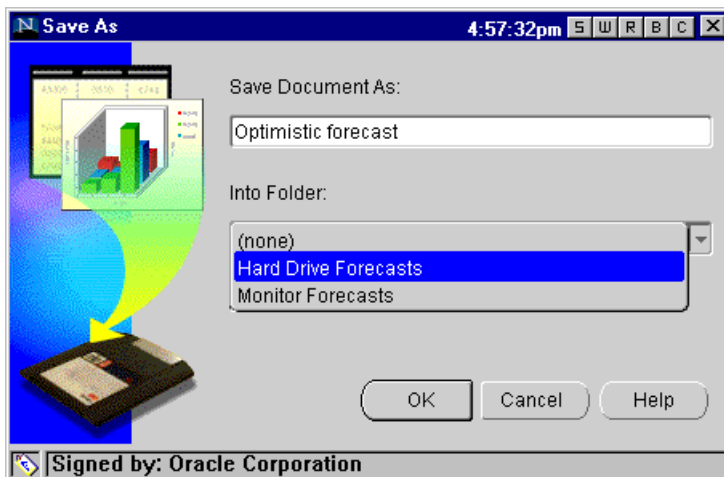
Result: The New Folder dialog box opens.

3. Enter a name for the folder and choose **OK**. The long name can be up to 70 characters long.

Result: The folder object appears under the main Documents folder in the navigation list.

Adding Documents to Folders

When you save an ad hoc report, ad hoc graph, or worksheet, you have the option to add it to a folder that you have previously created. You specify the folder in the Save As dialog box, **as shown in the following example**.



If you choose **(None)**, the document will be saved in the main Documents folder.

Moving Documents Between Folders

To better organize your documents, you can move documents from one folder to another as follows:

- You can use the drag and drop method.
- You can use popup menu commands.

Note: You can move documents between folders, but it is important to note that a document that resides in the Documents folder can reside in no other folder at the same time. This means that if you move a document into the Documents folder, any other copies of that document that are stored in another folder will be removed.

To move a document from one folder to another using the drag and drop method:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to move.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the document and, while holding the mouse button down, drag the document to the new folder.
4. Release the mouse button to drop the document on the selected folder.
Result: The document appears as an object within the folder.

To move a document from one folder to another using popup menu commands:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to move.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document.
Result: A popup menu appears.
4. From the popup menu, choose **Cut**.
5. Scroll to the folder into which you want to place the document and click the right mouse button on it.
Result: A popup menu appears.
6. From the popup menu, choose **Paste**.
Result: The document appears as an object within the folder.

To move a document from one folder to another using keyboard shortcuts:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to move.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the document and press CTRL+x.
4. Scroll to the folder into which you want to place the document and click it.
5. Press CTRL+v.

Result: The document appears as an object within the folder.

Copying Documents to Folders

You can copy documents from one folder to another as follows:

- You can use the drag and drop method.
- You can use popup menu commands.
- You can use keyboard shortcuts.

Note: You can copy documents between folders, but it is important to note that a document that resides in the Documents folder can reside in no other folder at the same time. This means that if you copy a document into the Documents folder, any other copies of that document that are stored in your another folder will be removed

To copy a document from one folder to another using the drag and drop method:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to copy.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the document, press the CTRL key and, while holding the mouse button down, drag the document to the target folder.
4. Release the mouse button to drop the document on the selected folder.

Result: The document appears as an object within the folder.

To copy a document from one folder to another using popup menu commands:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to copy.

Tip: To search for a document in the navigation list, right-click the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the right mouse button on the document.

Result: A popup menu appears.

4. From the popup menu, choose **Copy**.

5. Scroll to the folder into which you want to place the copy and click the right mouse button on it.

Result: A popup menu appears.

6. From the popup menu, choose **Paste**.

Result: The document appears as an object within the folder.

To copy a document from one folder to another using keyboard shortcuts:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the document that you want to copy.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the document and press CTRL+c.
4. Scroll to the folder into which you want to place the document and click it.
5. Press CTRL+v.

Result: The document appears as an object within the folder.

Changing the Order of Documents in Folders

You can change the order of documents in a folder by dragging one or more documents from the current position to a new position.

To change the order of documents in a folder:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, open the folder that contains the documents that you want to reorder.

3. Scroll to a document, press the CTRL key and simultaneously click the document object.

Result: The document is highlighted.

4. Repeat the previous step for each document that you want to move.
5. Drag the selection to the new location in the folder. As you move the object or objects, a black bar appears to help you identify the new position.
6. When the black bar is below the desired location, release the selection.

Deleting Documents from Folders

You can delete a document from a folder.

Note: If there is a copy of the document in another folder, that version will not be removed.

To delete a document from a folder:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the folder that contains the document that you want to delete.

Tip: To search for a document in the navigation list, click the right mouse button on the main Documents folder or a specific folder and choose **Find** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Click the document object and click the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the document in the navigation list and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Renaming Folders

You can give a new name to a folder.

To rename a folder:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the folder that you want to rename.
3. Click the right mouse button on the folder object and choose **Rename** from the popup menu
4. Enter the new name, up to 70 characters long.

Viewing Folder Properties

You can view the properties of a folder.

To view the properties of a folder:

1. In the navigation list, identify the folder whose properties you want to view.
2. Click the right mouse button on the folder object and choose **Properties** from the popup menu.

Result: The following information is displayed:

- Name
- Created
- Modified
- Class

Deleting Folders

When you no longer need to maintain a folder, you can delete it. Deleting a folder permanently removes it from the navigation list.

Note: Deleting a folder deletes all the documents that the folder contains. If there is a version of a document in another folder, that version will not be deleted.

To delete a folder:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the folder that you want to delete.
3. Select the folder object and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the folder object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Selecting Data

This section describes how to select data when you work as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- About Selecting Data
- Selecting Values From a List
- Selecting Values by Level
- Selecting Values by Family Relationship
- Selecting Values by Attribute
- Selecting Values that Match a Character String
- Selecting Values that Meet a Value Condition
- Selecting Values that Meet a Measure Condition
- Selecting Top and Bottom Values
- Selecting Time Values by Range
- Saving Value Selections
- Sorting Selected Values

About Selecting Data






When you work as a Demand Planner or Demand Plan Manager, you select data for documents, custom aggregates, and saved selections. You can choose values from a list, use tools to establish selection criteria, or combine list and tool operations.







Data selection tools

When you choose the Select Data tool on a Document toolbar or when you are working with a saved selection or custom aggregate definition,



the Select Data dialog box opens. The Data Selection toolbar appears at the top. The toolbar buttons enable you to perform the following tasks.

Button	Description	Function
	Apply Saved Selection	Apply a previous saved selection of values to an open ad hoc report, ad hoc graph, or worksheet.
	Save Current Selection	Save selected values as a custom saved selection.
	Choose Values by Level	Select values at a specified level in a hierarchy.
	Choose Values by Family	Select values that have a specified family relationship.
	Choose Values by Attribute	Select values that share specific attributes.

Button	Description	Function
	Choose Matching Values	Select values that match one or more character strings.
	Choose Values Meeting Value Condition	Select values based on the way in which values in a measure compare to a specified value or range of values.
	Choose Values Meeting Measure Condition	Select values based on the way in which values in one measure compare to the values in another measure.
	Choose Top/Bottom Values	Select the largest and smallest values.
	Choose Values by Range	For the Time dimension, select values by time range.
	Sort	Sort selected values.

Selecting Values From a List

You can choose a dimension and select one or more values from a list of values for that dimension.

To select values from a list:

- Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.

- If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the current dimension includes one or more hierarchies, in the Organize by box, you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Move values between the Available and Selected boxes until the Selected box contains the dimension values that you want.

For information about searching for values, expanding the value list, and adding values to and removing values from the Selected box, see ["Techniques for selecting values from a list" on page 22-4](#).

4. You can order values in the Selected box according to how you want your selections to appear.

For more information, see ["Sorting Selected Values" on page 22-30](#).

5. Choose **OK** to apply your selections.

Result: If you are selecting values for a document, the values that you chose are displayed in the document. If you are selecting values for a custom aggregate, the values appear in the Members list. If you are selecting values for a saved selection, the values appear in the Selections list.

Techniques for selecting values from a list

Searching for values in the Available box

You can use the *Find* button to search for a value by name. The *Find* button is located under the Available box. It resembles a pair of binoculars.



If you selected a hierarchy in the Organize by box, the system will search only within that hierarchy. If you did not select a hierarchy, the system will search the values in all hierarchies.

Expanding and collapsing values in the Available box

You can view data at various levels by expanding and collapsing aggregate dimension values. For example, if the list displays a geography that includes lower level values, you can expand the list to show component geographies. You can subsequently collapse the list to reaggregate the display.

An aggregate value is preceded by a plus sign (+), indicating that it can be expanded. An expanded value is preceded by a minus sign (-), indicating that it can be collapsed. Choose the plus sign to expand a value. Choose the minus sign to collapse a value. You can also use the *Expand All* and *Collapse All* buttons to expand or collapse all values. These buttons are located under the Available box, next to the *Find Value* button. The *Expand All* and *Collapse All* buttons resemble large plus and minus symbols.

Adding values to the Selected box

You can add one or more values in the Available box to the Selected box as follows:

- To add a single value, double-click the value

or

Highlight the value and choose the single arrow button that points to the Selected box.



To add multiple nonsequential values, press and hold the CTRL key, choose each value that you want to add, and then choose the single arrow button that points to the Selected box.

To add multiple sequential values, select the first value that you want to add, press and hold the SHIFT key, select the last value that you want to add, and then choose the single arrow button that points to the Selected box. You can also select the values to add by clicking and dragging the mouse.

- To add all values, choose the double arrow button that points to the Selected box.



Removing values from the Selected box

You can remove values from the Selected box as follows:

- To remove a single value, double-click the value

or

Highlight the value and choose the single arrow button that points to the Available box.



To remove multiple nonsequential values, press and hold the CTRL key, choose each value that you want to remove, and then choose the single arrow button that points to the Available box.

To remove multiple sequential values, select the first value that you want to remove, press and hold the SHIFT key, select the last value that you want to remove, and then choose the single arrow button that points to the Available box. You can also select the values to remove by clicking and dragging the mouse.

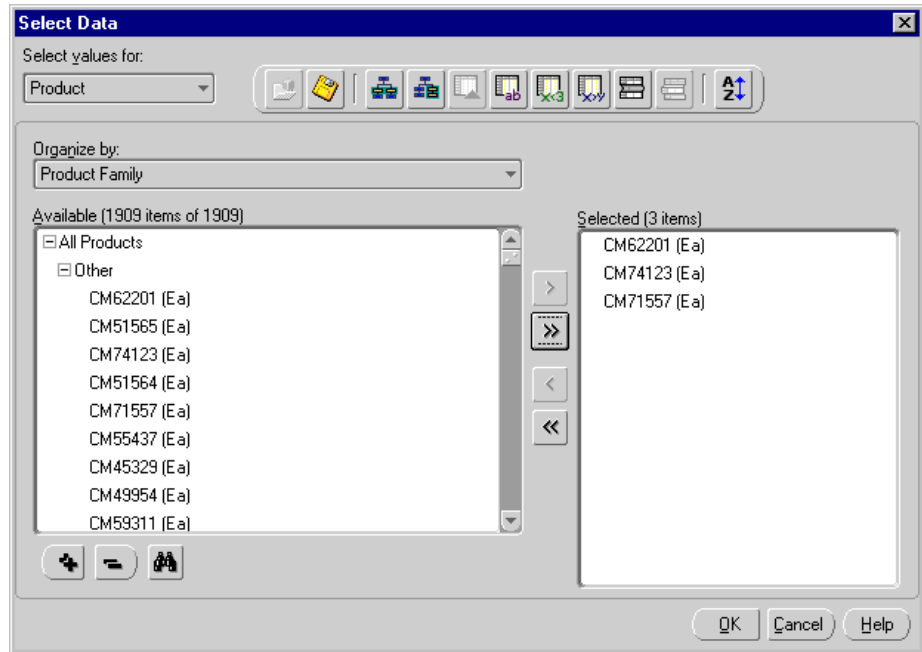
- To remove all values, choose the double arrow button that points to the Available box.



You can also choose the values that you want to remove, click the right mouse button, and choose **Remove** from the popup menu.

Example: Selecting values from a list

The following illustration shows the Select Data dialog box. In the example, the user selects four values in the Product dimension. The choices appear in the Selected box.



Selecting Values by Level

When you are working with a hierarchical dimension, you can limit selections to values at a particular level of the hierarchy. For example, in a Geography dimension you might select values at the Customer level.

To select values by level:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. In the Organize by box, select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values By Level** button on the toolbar.



Result: The Choose *Values* By Level dialog box opens for the dimension that you chose in Step 1.

4. In the *Action* box, specify how you want the new values to affect the values in the Selected box of the Select Data dialog box:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. In the *Level* box, select one or more levels.

6. You can choose **Preview** to preview the values that will be selected as a result of your choices.
7. You can order the values in the Selected box according to how you want your selections to appear.

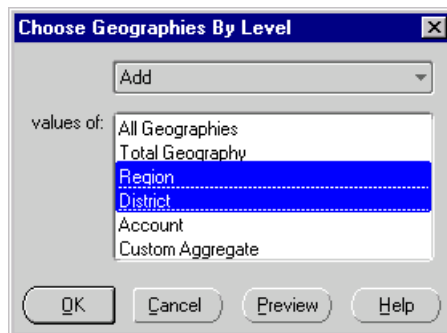
For more information, see ["Sorting Selected Values" on page 22-30](#).

8. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting values by level

The following illustration shows the Choose *Values By Level* dialog box. In the example, the user selects geography values at the Region and District levels.



Selecting Values by Family Relationship

When you are working with a hierarchical dimension, you can select values according to their familial relationship with other values in the hierarchy. For example, in a Geography dimension you might select descendants of Massachusetts and New York.

To select values by family:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and select a dimension from the popup menu.

- If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. In the Organize by box, select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values By Family** button on the toolbar.



Result: The Choose *Values* By Family dialog box opens for the dimension that you chose in Step 1.

4. In the *Action* box, specify how you want the new values to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. In the *family of* box, select the value whose family members you want to choose.

You can accept the default value or choose the *Ellipsis* button to access a dialog box where you can select one or more alternate values.
6. In the operator box, select the term that determines how the value or values that you select in Step 7 will relate to the values that you chose in the previous step. You can choose **at the level** (the default), or you can select **using the relationship**.
7. In the *relationship type* box, select one or more relationships that will determine how the selected values are related to the value you chose in the previous step.

8. You can choose **Preview** to preview the values that will be selected as a result of your choices.
9. You can order the values in the Selected box according to how you want your selections to appear.

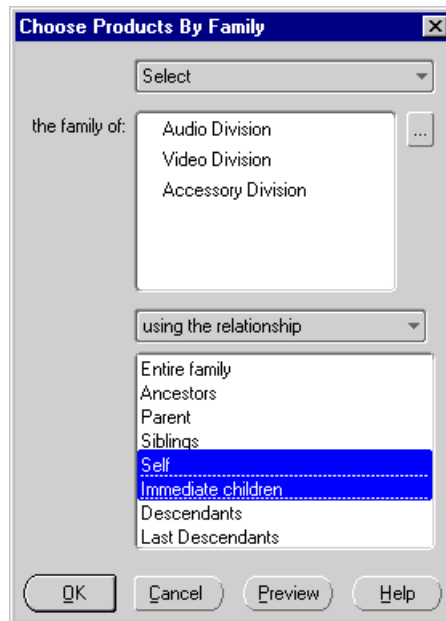
For more information, see ["Sorting Selected Values"](#) on page 22-30.

10. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting values by family

The following illustration shows the Choose *Values* By Family dialog box. In the example, the user selects Self and Immediate Children as the relationship for selecting product values.



Selecting Values by Attribute

You can select dimension values that share related characteristics. For example, in a Product dimension you might select item level attributes such as color. Or, you might select items which have been identified with an attribute that marks them as as key value driver.

Note: In order to select data by attribute, the attributes must have been defined for the dimension in the Demand Planning Server. If the Attribute tool is unavailable when you are selecting data for a dimension, then you can assume that there are no attributes for that dimension.

To select values by attribute:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the current dimension includes one or more hierarchies, in the Organize by box you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values By Attribute** button on the toolbar.



Result: The Choose *Values By Attribute* dialog box opens for the dimension that you chose in Step 1.

4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. If you selected a hierarchy in the Organize by box, the *Level* box contains levels for that hierarchy. Select one or more levels at which you want to choose values. Use CTRL+click or SHIFT+click to select multiple levels.
6. In the where box, select an attribute.
7. In the is box, select one or more values for the attribute. Use CTRL+click or SHIFT+click to select multiple values.
8. You can choose **Preview** to preview the values that will be selected as a result of your choices.
9. Choose **OK**.

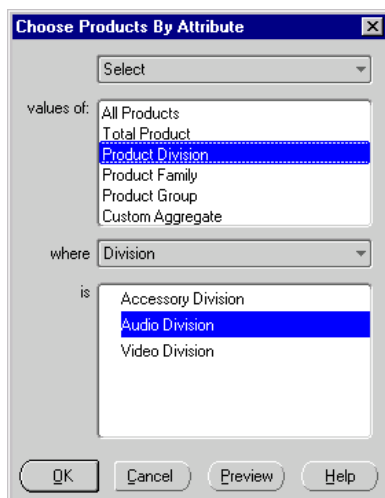
Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

10. You can order values in the Selected box according to how you want your selections to appear.

For more information, "[Sorting Selected Values](#)" on page 22-30.

Example: Selecting values by attribute

The following illustration shows products selected on the basis of a "Division" attribute.



Selecting Values that Match a Character String

You can select dimension values that contain, begin with, end with, or exactly match one or more character strings. For example, in a Product dimension you might select products that contain the characters "mini" and "maxi."

To select values that match a character string:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the current dimension includes one or more hierarchies, in the Organize by box you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Matching Values** button on the toolbar.



Result: The Choose Matching *Values* dialog box opens for the dimension that you chose in Step 1.

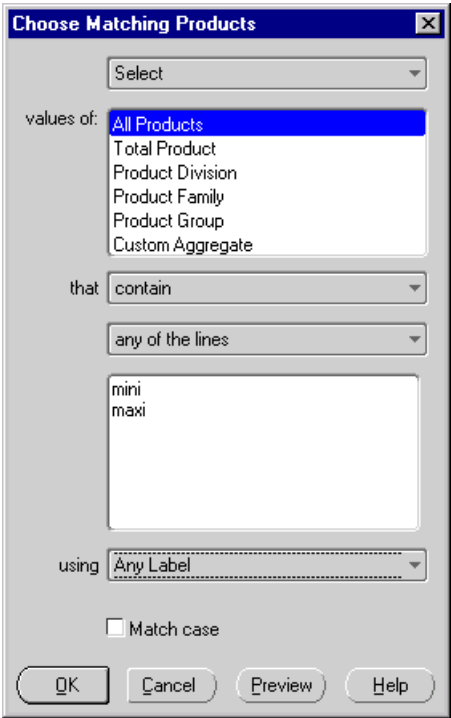
4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. If you selected a hierarchy in the Organize by box, the *Level* box contains levels for that hierarchy. Select one or more levels at which you want to choose values.
6. In the *that* box, select the term that specifies how the values must match the characters that you will enter. You can choose **contain**, **start with**, **end with**, or **are identical**.
7. In the *lines* box, select the option that specifies how you want Oracle Demand Planning to search for matching values:
 - **any of the lines** — Retrieves dimension values that match any of the entries in the values to match box. This is equivalent to the boolean OR operator.
 - **all of the lines** — Retrieves dimension values that match all of the entries in the **values to match** box. This is equivalent to the boolean AND operator. This option is available only when the option in the *lines* box is **contains**.

8. In the *values to match* box, enter one or more alphanumeric strings that you want to match. Use separate lines to enter multiple values.
9. You can limit the match to values with a specific type of dimension label.
For all dimensions, you can select **Long Name** or **Dim Value**. For a custom measure, you can also select **Short Name**.
10. If the values must also match the case in the *characters* box, select **Match case**.
11. You can choose **Preview** to preview the values that will be selected as a result of your choices.
12. You can order the values in the Selected box according to how you want your selections to appear.
For more information, see "[Sorting Selected Values](#)" on page 22-30.
13. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The values that match your specifications are displayed in the Selected box.

Example: Selecting values that match a character string

The following illustration shows the Choose Matching *Values* dialog box. In the example, user specifies “mini” or “maxi” as the character string to match for selecting product values.



Selecting Values that Meet a Value Condition

You can select dimension values that relate to a numeric value in a specific way. For example, in a Geography dimension you might select geographies where Booking History, Quantity for a selected product and time period exceeds a specified amount.

To select values that meet a value condition:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the current dimension includes one or more hierarchies, in the Organize by box, you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values Meeting Value Condition** button on the toolbar.



Result: The Choose *Values* Meeting Value Condition dialog box opens for the dimension that you chose in Step 1.

4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. If you selected a hierarchy in the Organize by box, the *list* box contains levels for that hierarchy. Select one or more levels at which you want to choose values.

6. In the *measure* box, select the measure on which to base the condition.
You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
7. In the *operator* box, choose the operator that specifies how the data values for the measure that you selected in Step 6 must relate to a value.
8. In the *value* box, enter a numerical value to which the values in the measure will be compared. If you chose the **between** or **outside** operator, you must specify two values.
9. The *Dimensions* box displays default qualifying dimension values for the comparison.
You can accept the default values that appear in the box, or you can select an alternate qualifying value for a dimension. To select an alternate value, highlight the dimension whose value you want to change and choose the **Dimension Values** button.
10. You can specify additional conditions for the comparison as follows:
 - To exclude missing values from the values that you are selecting, choose **Exclude missing values**.
 - To exclude zero values from the values that you are selecting for a numeric measure, choose **Exclude zero values**.
11. To exclude zero values from the values that you are selecting, choose **Exclude zero values**.
12. You can choose **Preview** to preview the values that will be selected as a result of your choices.
13. You can order the values in the Selected box according to how you want your selections to appear.
For more information, see ["Sorting Selected Values" on page 22-30](#).
14. Choose **OK** to apply your selections.
Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting values that meet a value condition

The following illustration shows the Choose *Values* Meeting Value Condition dialog box. In this example, the user selects all products where Shipping History, Quantity is greater than 1,000,000 for all geographies in January, 2002 for all organizations and ship from locations.

Choose Product Meeting Value Condition

Select

values of:

All Product
All Products
Product Solution Portfolio
Market Segment
Product Class

where Shipping History, Quantity

is greater than

the value 1000000

for

Geography	All Geography
Ship from Location	All Organizations
Time	JAN 2002

Dimension Values...

☒ Exclude missing values ☐ Exclude zero values

OK

Cancel

Preview

Help

Selecting Values that Meet a Measure Condition

You can select values based on the way in which the values in one measure compare to the values in another measure. For example, in a Geography dimension you might select geographies where Sales Forecast, Quantity is 10% greater than Booking History, Quantity for a specified product and time period.

To select values that meet a measure condition:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the dimension includes one or more hierarchies, you can select a hierarchy in the Organize by box.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values Meeting Measure Condition** button on the toolbar.



Result: The Choose *Values* Meeting Measure Condition dialog box opens for the dimension that you selected in Step 1.

4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. If you selected a hierarchy in the Organize by box, the *Level* box contains levels for that hierarchy. Select one or more levels at which you want to choose values.
6. In the first *measure* box, select the measure on which to base the condition.

You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
7. In the **where** box, choose an operator that specifies how the data values in the measure that you selected in Step 6 must relate to a comparison measure.

You can choose **is equal to**, **is not equal to**, **is greater than**, **is greater than or equal to**, **is less than**, **is less than or equal to**, **is between**, or **is not between**.
8. In the *Comparison* box, select the measure whose values will be compared to those of the measure in the *measure* box.

You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
9. To include an additive or subtractive value in the comparison, proceed as follows:
 - a. If you choose **less than** or **greater than** in Step 7, select **plus** or **minus**. If you chose **within** or **not within** in Step 7, plus or minus is the only selection.
 - b. In the *value* box, enter the value to be added or subtracted when the measure values are compared.
 - c. If the value is a percentage, choose **percent**.
10. The *Dimensions* box displays default qualifying dimension values for the comparison.

You can accept the default values that appear in the box, or you can select an alternate qualifying value for a dimension. To select an alternate value, highlight the dimension whose value you want to change and choose the **Dimension Values** button.

11. You can specify additional conditions for the comparison as follows:
 - To exclude missing values from the values that you are selecting, choose **Exclude missing values**.
 - To exclude zero values from the values that you are selecting, choose **Exclude zero values**.
12. You can choose **Preview** to preview the values that will be selected as a result of your choices.
13. You can order the values in the Selected box according to how you want your selections to appear.

For more information, see "[Sorting Selected Values](#)" on page 22-30.

14. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting values that meet a measure condition

The following illustration shows the Choose *Values* Meeting Measure Condition dialog box. In this example, the user selects products where Revised Forecast, Quantity is greater than Baseline Forecast, Quantity plus 10% in January 2002 for the Americas in all organizations.

Choose Product Meeting Measure Condition

Add

values of:

All Product
All Products
Product Solution Portfolio
Market Segment
Product Class

where Revised Forecast Quantity

is greater than

Baseline Forecast, Quantity

plus10percent

for

GeographyAmericas

Ship from LocationAll Organizations

TimeJAN 2002

Dimension Values...

☒ Exclude missing values

☒ Exclude zero values

OK

Cancel

Preview

Help

Selecting Top and Bottom Values

You can specify a number or percentage of values that you want to select from the top, bottom, or top and bottom values for a measure. For example, in a Product dimension you might select the top ten products based on Booking History, Quantity for a specified geography and time period.

To select values top and bottom values:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. The dimension that you chose appears in the Select values for box.

2. If the dimension includes one or more hierarchies, in the Organize by box you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Top/Bottom Values** button on the toolbar.



Result: The Select Top/Bottom *Values* dialog box opens for the dimension that you chose in Step 1.

4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.

- To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.
5. If you selected a hierarchy in the Organize by box, the *Level* box contains a list of levels for that hierarchy. Select one or more levels at which you want to choose values.
 6. In the *measure* box, specify the measure for which you want to select values.
You can accept the default measure that appears in the box, or choose the *Ellipsis* button to access a dialog box where you can select an alternate measure.
 7. To include top values in your selection, in the *top* box, enter the number or percentage of top values to select. To indicate that the value that you entered is a percentage, choose **percent**.
 8. To include bottom values in your selection, in the *bottom* box specify the number or percentage of bottom values to select. To indicate that the value that you entered is a percentage, choose **percent**.
 9. The *Dimensions* box displays default qualifying dimension values for the top/bottom selections.
You can accept the default values that appear in the box, or you can select an alternate qualifying value for a dimension. To select an alternate value, highlight the dimension whose value you want to change and choose the **Dimension Values** button.
 10. To exclude missing values from the values that you are selecting, choose **Exclude missing values**. To exclude zero values, choose **Exclude zero values**.
 11. You can choose **Preview** to preview the values that will be selected as a result of your choices.
 12. You can order the values in the Selected box according to how you want your selections to appear.
For more information, see ["Sorting Selected Values" on page 22-30](#).
 13. Choose **OK** to apply your selections.
Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting top and bottom values

The following illustration shows the Choose Top/Bottom *Values* dialog box. In the example, the user selects the top 10% of product items, based on Shipping History, Quantity for the Americas in January for all organizations.

Choose Top/Bottom Product

Select

values of:

- Product Solution Portfolio
- Market Segment
- Product Class
- Item**
- Custom Aggregate

where: Shipping History, Quantity

is in the top 10 percent

and the bottom 0 percent

for

Geography	Americas
Ship from Location	All Organizations
Time	JAN 2002

Dimension Values...

☒ Exclude missing values ☒ Exclude zero values

OK Cancel Preview Help

Selecting Time Values by Range

When selecting values for the time dimension, you can specify a time range within which to limit value selections. For example, you might choose time values from January 2002 through June 2002 at the month level.

To select time values by range:

1. Do one of the following:
 - If you are working in an open document, choose the **Select Data** button on the Document toolbar and choose a dimension from the popup menu.
 - If you are working within a custom aggregate or a saved selection definition, choose a dimension in the Dimension box and choose the **Selector** button.

Result: The Select Data dialog box opens. Time appears in the Select values for box.

2. If the Time dimension includes one or more hierarchies, in the Organize by box you can select the hierarchy that you want to work with.

Result: The values in the Available box might change depending on which hierarchy you choose.

3. Choose the **Choose Values by Range** button on the toolbar.



Result: The Choose Time By Range dialog box opens.

4. In the *Action* box, specify how you want the new values that you are selecting to affect the values in the Selected box of the Select Data dialog box, as follows:
 - To replace any values that are already in the Selected box with just the values that you specify in this dialog box, choose **Select**.
 - To add the new values that you specify in this dialog box to any values that are already in the Selected box, choose **Add**.
 - To retain only the values already in the Selected box that match the values that you specify in this dialog box, choose **Keep**.
 - To remove the values that you specify in this dialog box from the values that are already in the Selected box, choose **Remove**.

5. In the *Interval* box, choose one of the following:
 - **a range of** — Selects all time values between and including a starting value and an ending value at a level that you choose.
 - **the latest** — Selects a number of latest time values at a level that you choose.
 - **the next** — Selects a number of future time values at a level that you choose.
6. If you selected **a range of** in Step 5, proceed as follows:
 - a. In the *Level* box, choose the level at which to select time values.
 - b. In the from box, specify the beginning of the time range.

You can accept the default value or choose the *Ellipsis* button to access a dialog box, where you can select an alternate value.
 - c. In the to box, specify the end of the time range. Alternatively, you can choose **to latest value** to extend the range to the latest time period at the level you specified in the *Level* box.

You can accept the default value or choose the *Ellipsis* button to access a dialog box, where you can select an alternate value.
7. If you selected **the latest** in Step 5, proceed as follows:
 - a. In the value box, enter the number of time periods for which you want to select the latest values.
 - b. In the *Level* box, choose the level at which to select time values.
8. If you selected **the next** in Step 5, proceed as follows:
 - a. In the value box, enter the number of periods for which you want to select the future time values.
 - b. In the *Level* box, choose the level at which to select time values.
9. You can choose **Preview** to preview the values that will be selected as a result of your choices.

10. You can order the values in the Selected box according to how you want your selections to appear.

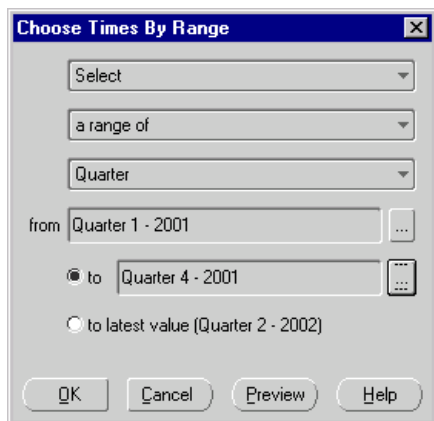
For more information, see ["Sorting Selected Values" on page 22-30](#).

11. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The values that you chose are displayed in the Selected box.

Example: Selecting time values by range

The following illustration shows the Choose Time By Range dialog box. In the example, the user selects a range of time values at the quarter level.



Sorting Selected Values

Once you have selected values, you can arrange them in the Selected box in the order in which you want them to appear. You can use the following techniques to sort values:

- Use the Sort tool on the Data Selection toolbar to specify sorting criteria.
- Drag and drop values to specific positions.
- Click the right mouse button and select an option for changing the relative position of a value or values.

To use the Sort tool to sort values:

1. Choose the **Sort** button on the Data Selection toolbar.



2. Select a sort option. Depending on the dimension and whether you selected a hierarchy when you chose the values, the following options are available:
 - **name** — Sorts values in alphabetical by name. You can choose **A to Z** or **Z to A**.
 - **data value** — Sorts values numerically based on a specified measure and qualifying dimension values for that measure. You can choose **high to low** or **low to high**.
 - **hierarchy** — Sorts values based on their position in a hierarchy. Values are grouped by family. You can choose **top to bottom** or **bottom to top**.
 - **level** — Sorts values based on level. All values at a given level are displayed. You can choose **top to bottom** or **bottom to top**.
 - **time** — For the time dimension, sorts values by time period. You can choose **earliest to latest** or **latest to earliest**.
3. You can choose **Preview** to preview the results of the sort.
4. Choose **OK** to apply your selections.

Result: The Select Data dialog box reopens. The selected values are sorted according to your specifications.

To use drag and drop to order values:

1. Choose one or more values and drag them to a new position.

As you move the selection, a black bar appears to help you identify the current position.
2. When the black bar is under the desired location, release the selection.

To use a right mouse button function to order values:

1. In the Selected box, click the right mouse button on the value whose position you want to change.

Result: A popup menu appears, listing options for changing the value's position. The options vary depending on the current position of the value.

2. Choose the option that specifies how you want to position the value:
 - To place the selected value first in the list, choose **Move to top**.
 - To place the selected value last in the list, choose **Move to bottom**.
 - To place the selected value below another value in the list, choose **Move below**, choose the target value, and then choose **OK**.

You can also choose **Remove** to remove the selected value from the selected list.

Saving Value Selections

A *saved selection* is a set of dimension values that you save to use again in other documents. Saved selections are useful when you want to quickly retrieve a group of values without repeating the steps that you followed to select them. Selections that are saved as steps (for example, "the top ten products based on Booking History Date Booked, Quantity in geographies *x*, *y*, and *z* during the previous quarter") also provide the ability to dynamically update your analyses.

Once you define a saved selection, you can replace the dimension values in an open ad hoc report, ad hoc graph, worksheet, or predefined report with the saved selection.

The following procedure describes how to create a saved selection when you the process of selecting values for a dimension. For information about alternative methods for creating a saved selection and applying saved selections to documents, see "[Working with Saved Selections](#)" on page 20-1.

To save selected values as a saved selection:

1. Choose the values that will comprise the saved selection.

You can select individual values. You can also use the buttons on the Data Selection toolbar to select values by specific criteria.

2. When your selections are complete, choose the **Save Current Selection** button on the toolbar.



Result: The Save a Selection for *Dimension* dialog box opens.

3. In the Save a Selection for *Dimension* dialog box, enter information for the saved selection as follows:
 - a. In the Save current selection as box, enter a name for the saved selection, up to 70 characters long.
 - b. In the Description box, you can enter optional text to describe the components of the saved selection.
 - c. Specify how to save the selection:
 - * **Save steps** — Saves the script that drives the selection criteria, rather than the actual values. Select this option when you anticipate applying the same criteria repeatedly over a long period of time, but expect that the values that comprise the selection might change.
 - * **Save members** — Saves the actual dimension values. A member selection is always comprised of the same values, regardless of when the selection is applied. Select this option when you want to examine data for the same dimension values on an ongoing basis.

For more information about these options, see "[Defining Saved Selections](#)" on page 20-2.

Note: If you used the drag and drop method or a right mouse button function to sort values for the selection, you will not be able to save steps.

4. Choose **OK** to save the selection.

Result: The saved selection will be appear as an object in the Saved Selections folder for the dimension.

Sharing Data

This section describes how to share data with other users when you work as a Demand Planner or Demand Plan Manager.

This section includes the following topics:

- [About Sharing Data](#)
- [Sending Measures](#)
- [Notifications About Collaboration Measures](#)
- [Receiving Measures](#)
- [Viewing Collaboration History](#)

About Sharing Data

Oracle Demand Planning provides tools that enable planners and the Demand Plan Manager to share their most current data before providing final submissions to the shared database. Users share data by "sending" and "receiving" measures or portions of measures that contain the data.

Sharing is established through planner assignments

The extent to which planners can share data is established in Demand Plan Administration where the administrator defines planner assignments. Assignments specify the data values that planners are responsible for forecasting and the scope of the data that they can view. A collaborative relationship is established when the administrator gives a planner viewing rights to data that another planner is responsible for forecasting.

If dependent demand has been enabled in the Demand Planning Server and model bills of material have been brought into Demand Planning, assignments must also take account of product and model relationships. For example, if one planner is responsible for options while another is responsible for its parent model, the parent model should be in the view scope of the first planner and in the edit scope of the second planner.

Sharing is limited to assignment scopes

The data that a planner can share with others is limited to the values that he or she is responsible for forecasting. Only that portion of the data will be updated in other planners' views and in the shared database. Data is shared at the lowest available allocation level, as specified in the Demand Planning Server for the data stream on which the measure is based.

Note: To view the lowest available allocation level for a measure, click the right mouse button on the measure object in the navigation list and view its properties.

Demand Planner: Sharing data

When you work as a planner you can share data for a stored, shared measure. A stored measure is permanently stored in the database, as opposed to a formula measure which is calculated on the fly. A shared measure is one that has been distributed to you, as opposed to a measure that you created in your personal database.

You might want to share a measure when you have changed its values. Note that when editing a shared measure, you should avoid locking cells at aggregate levels as it is possible for a locked cell to be modified if a measure is received that affects the cell.

Important: Only the data values that you are responsible for forecasting and related comments will be shared. If you change the measure definition (for example, apply an event factor), the resulting values will be shared but the definition will not.

Demand Plan Manager: Sharing Data

When you work as a Demand Plan Manager, you can share data for stored, shared measures. You might want to share a measure when you have changed its values. You can also share updates to input parameters that have been previously distributed to planners. For example, if you know that new data for an input parameter has recently been downloaded and a distribution has been run, you might want to share the measure with your planner community. This will enable planners to quickly view the latest version of the data.

Important: You cannot immediately share a measure that you have just defined. Before you can share the measure, it must be populated in the shared database, included in planners' assignments, and distributed to planners.

Sending Measures

In order to share data with others, you "send" the measure or measures that contain the data. You can choose to send all of the data for a measure or you can limit the data to specific geographies, products, and time periods.

Note: Oracle Corporation recommends that you send only those measures or portions of measures that need to be updated. For example, if you know that a specific area of the data cube has been modified, then you should only send that area. This will make both sending and receiving more efficient.

To send measures:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **Tools** button.



3. Choose **Collaboration** from the submenu and then choose **Send**.

Result: The Send Measures dialog box opens.

4. In the Select Measure to Send box, the Available box displays measures that you can send. Choose measures to send as follows:
 - To select a single measure, double-click its name in the Available box
or
 - Highlight it and choose the single arrow button that points to the Selected box.
 - To select multiple nonsequential measures, press and hold the CTRL key, choose each measure that you want to add, and then choose the single arrow button that points to the Selected box.
 - To select multiple sequential measures, select the first measure that you want to add, press and hold the SHIFT key, select the measure that you want to add, and then choose the single arrow button that points to the Selected box. You can also select the events to add by clicking and dragging the mouse.

- To select all measures, choose the double arrow button that points to the Selected box.
- 5. To send all values that you are responsible for forecasting, in the Send Options box, choose **Send entire assignment scope of measure** and proceed to Step 7.
- 6. To limit the data to specific values that you are responsible for forecasting, choose **Send selected values of measures** and choose the portion of the measure to send as follows:
 - a. In the Dimension/Level grid, choose a dimension and select a level. This level will apply for this dimension to all measures that you send.

Note: The level that you set determines the selection list for dimension values. It does not affect the level at which the data will actually be sent. This is always the lowest available allocation level for the measure. To view the lowest available allocation level for a measure, click the right mouse button on the measure object in the navigation list and view its properties.

- b. Repeat the previous step for each dimension.

Result: The **Edit** button becomes active.

- c. Choose **Edit**.

Result: The Select Data dialog box opens for the first dimension. The values that you see are filtered by the level that you chose in Step 6a. Proceed as follows:

- * Choose values for the dimension by moving values between the Available box and Selected box until the Selected box displays the values that you want to keep for the current dimension.
- * Repeat the previous steps for the next dimension.
- * Choose **OK** to save the current selections.

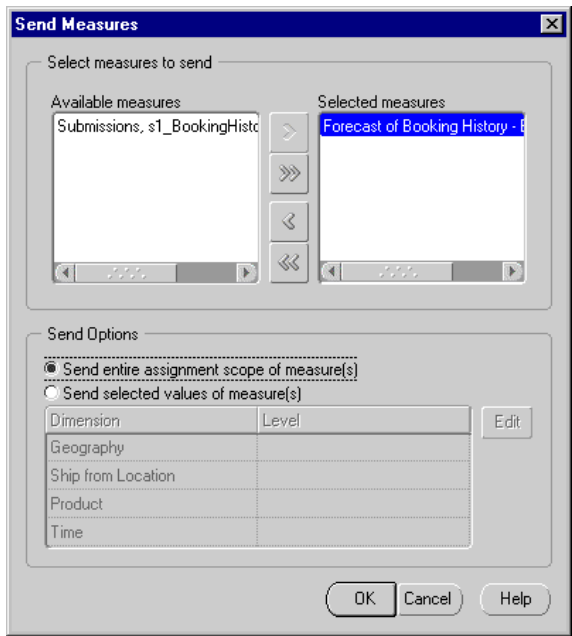
Result: You are returned to the Send Measures dialog box.

Note: The **OK** button is only enabled when you have selected values for all dimensions.

- 7. Choose **OK** to send measures.

Example: Sending Measures

In the following example, the user sends the entire assignment scope of a single measure.



Notifications About Collaboration Measures

Each planner whose view scope includes a measure that you send will receive a message that collaboration measures are ready to be received. The message will be displayed in their Notifications list.

Receiving Measures

A message appears in your Notifications list when there are measures that are ready to be received.

Note: Oracle Corporation recommends that you choose to receive only those measures that you currently need for your analyses. When data is received, it must be imported and aggregated, which can be time consuming. The more measures that you receive, the more time the process will take.

To receive measures:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. Click the notification.

Alternatively, you can choose the **Tools** button on the navigation toolbar



and choose **Collaboration** and then **Receive**.

Result: The Receive Measures dialog box opens.

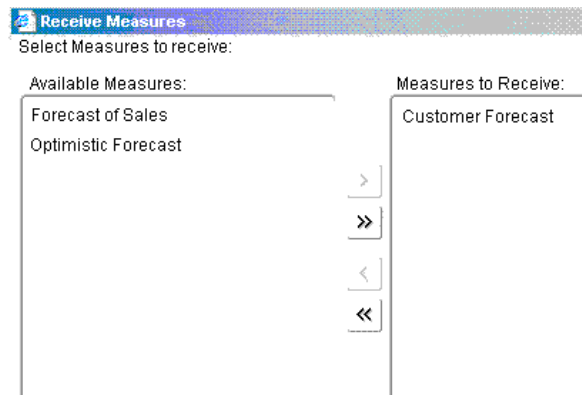
3. In the Receive Measures dialog box, the Available measures box displays measures that you can receive. Choose measures to receive as follows:
 - To select a single measure, double-click its name in the Available box
or
 - Highlight it and choose the single arrow button that points to the Selected box.
 - To select multiple nonsequential measures, press and hold the CTRL key, choose each measure that you want to add, and then choose the single arrow button that points to the Selected box.
 - To select multiple sequential measures, select the first measure that you want to add, press and hold the SHIFT key, select the measure that you want to add, and then choose the single arrow button that points to the

Selected box. You can also select the events to add by clicking and dragging the mouse.

- To select all measures, choose the double arrow button that points to the Selected box.
4. Choose **OK** to receive measures.

Example: Receiving measures

In the following example, the user receives a measure.



Viewing Collaboration History

The Collaboration History log enables you to view and sort information about actions that are related to data sharing.

The Collaboration History Log provides the following information:

- Action — The action that occurred.
 - Send — The measure was sent.
 - Receive — The measure was received.
 - Download — The measure was downloaded from the Demand Planning Server.

- Distribution — The measure was distributed.
- Measure — The name of a measure affected by the action.
- Timestamp — The date on which the action occurred.
- Assignment — For an action initiated by a planner, this is the name of the planner's assignment. For an action initiated by the Demand Plan Manager, this is "Planning Manager"; for an action initiated by the Demand Planning System Administrator, this is "Administrator."
- User — For an action initiated by a planner, this is the user ID of the individual who initiated the action. For an administrator, this is "Demand Plan Administrator." For a Demand Plan Manager, this is "Demand Plan Manager."

To view collaboration history:

1. Access the Demand Planning Administration page.
2. In the navigation list, choose **Collaboration History**.

To sort collaboration history:

Note: By default, collaboration history is sorted by date.

With the Collaboration History page open, choose the label of the column by which you want to sort the list. For example, to sort by assignment name, choose the Assignment column label.

Example: Collaboration history

The following illustration shows an example of the Collaboration History log.

View Collaboration History				
Action	Measure	Timestamp	Assignment	User
Download	Booking History - Boo...	2002/12/11 14:34:17	Demand Plan Adminis...	Demand Plan Adminis...
Distribute	Booking History - Boo...	2002/12/11 16:46:13	Demand Plan Adminis...	Demand Plan Adminis...
Distribute	Forecast of Booking ...	2002/12/11 16:46:13	Demand Plan Adminis...	Demand Plan Adminis...
Send	Forecast of Booking ...	2002/12/18 10:43:38	Planning Manager	WCDE
Send	Forecast of Booking ...	2002/12/20 11:42:01	Planning Manager	RABERBAC
Send	Submissions, s1_Boo...	2002/12/20 11:42:03	Planning Manager	RABERBAC

Selecting Measures to Submit or Upload

This section describes how to select measures that contain your final forecasts for submission to the shared database when you work as a Demand Planner. The section also describes how to select measures that contain consolidated forecasts for uploading to the Demand Planning Server when you work as a Demand Plan Manager.

This section includes the following topics:

- [About Scenarios](#)
- [Demand Planner: Selecting Measures to Submit](#)
- [Demand Plan Manager: Selecting Measures to Upload](#)
- [Automating the Submissions Process](#)
- [The Benefits of Automatic Submissions](#)
- [Administrator Options for Configuring Submissions Measures](#)
- [Procedure: Setting Up Automatic Submissions Measures](#)
- [Viewing Scenario Properties](#)

About Scenarios

A *scenario* is a repository for maintaining, archiving, and viewing the forecasts that are submitted for a demand plan. Scenarios are defined in the Demand Planning Server and linked to demand plans. A plan might have one scenario or multiple scenarios. For example a plan with multiple scenarios might include an "optimistic" scenario, a "pessimistic" scenario, and a "realistic" scenario.

If your responsibility is Demand Planner, you can select a measure to submit as your final forecast for each scenario. If Oracle Demand Planning is integrated with Oracle Inventory Optimization (IO), you can also select a measure of statistical accuracy to submit with the forecast. Selecting a measure to submit marks the data for consolidation in the shared database where it will be reviewed by the Demand Plan Manager.

If your responsibility is Demand Plan Manager, you can select a measure to upload as the final forecast for each scenario. If Oracle Demand Planning is integrated with Oracle Inventory Optimization (IO), you can also select a measure of statistical accuracy to upload with the forecast. Selecting a measure to upload marks the data for writing to the Demand Planning Server. You also have the option to initiate the process that runs the upload.

Demand Planner: Selecting Measures to Submit

When you are satisfied with your forecast for a scenario, you can choose the measure that contains the forecast data and mark it for submission to the shared database.

Selecting measures to submit is not *mandatory*. If you do not select a specific measure to submit for a scenario, then Oracle Demand Planning will use the default submissions measure for the portion of the data that you are responsible for forecasting.

Note that when you select a measure to submit, you are choosing to submit *all* data for all dimensions of the measure; that is, data for all time periods, all geographies, all locations, and all products.

If you select the wrong measure, if you discover that a measure that you previously selected does not include the correct values, or if the Demand Plan Manager requests that you edit your data, you can re-submit the same measure or an alternate measure. Your selections are valid until data collection is terminated.

When data collection runs, data will be submitted at the lowest available level for the values in your assignment scope. When the data is collected into the shared database during the data collection process, it will be aggregated up using the aggregation method of the submissions measure in the shared database. Thus, formula measures or measures that have non-standard aggregation methods may show different results at aggregate levels in the shared database.

How data is submitted for dependent demand

If you submit a measure that has a dependent association with other products, then the current values for the related planning percentages will be automatically submitted with the measure. If you have edited data for dependent demand or planning percentages, ensure that the appropriate planning percentage object is associated with the measure that you submit. For example, if you used the Planning Percentages worksheet to modify planning percentages for *MyPlanningPercentage* which is associated with *MyMeasure* but then you do not submit *MyMeasure* or another measure associated with *MyPlanningPercentage*, the submission will use the existing planning percentage object.

For information about how planning percentages are associated with measures, see ["Working with Measures" on page 17-1](#). For information about editing planning percentages prior to submitting data, see ["Using the Planning Percentages Worksheet" on page 12-1](#).

Before you proceed: Check scenario time horizon and output level

When the submission runs, Oracle Demand Planning runs a validation check to ensure that at least one Time dimension value has data at the top level for all other dimensions. If the measure is NA (unavailable) for all time values at the specified output level for the scenario, then a warning message will appear.

For example, if a scenario has been defined in the Demand Planning Server with a time horizon range of 01/01/2003 through 12/31/2003 and an output level of Month for the Time dimension, the validation will ensure that at least one Time value in the measure selected for submission has data for the top level for all other dimensions. Even if there is only data for one out of the twelve months, the submission will succeed. However, if none of the twelve months has data, then a warning message will appear.

Before you select a measure to submit for a scenario, you might want to check the time horizon and output level that are defined for the scenario in the Demand Planning Server. This can help you to avoid an unsuccessful submission. To see scenario time horizon and output levels, you can check the properties of the scenario. For more information, see ["Viewing Scenario Properties" on page 24-11](#).

Selecting measures to submit

To select a measure to submit for a scenario, you choose the measure from the list of available measures. If the scenario requires an accuracy measure, you can also choose an accuracy measure.

To submit a measure for a scenario:

1. Access Oracle Demand Planning as a Demand Planner.
2. On the Navigation toolbar, choose the **Tools** button.



3. From the submenu, choose **Submit Measures**.

Result: The Submit Measures dialog box opens, displaying submission information for each scenario in the demand plan. If a measure has not yet been submitted for a scenario, the Measure to Submit column shows the default submissions measure for the scenario (if a default measure has been set); otherwise it shows "None." If a measure has previously been submitted for the scenario, the Previously Submitted column displays the name of this measure; otherwise it displays "None."

4. To select an alternate measure (or to select a measure if "None" is the current selection), in the Measure to Submit column, choose the measure that you want to submit.

Important: Do not select a measure that has been limited by a qualifying value such as a single geography. If you do so, then the qualifying value will be used to generate uploaded values for all dimension values at this level.

5. If an accuracy measure is required for the scenario, the Type column displays the type of accuracy statistic specified for the scenario in the Demand Planning

Server and the Accuracy Measure column displays the default accuracy measure for the scenario. To select an alternate accuracy measure, click the column and choose the measure that you want to use.

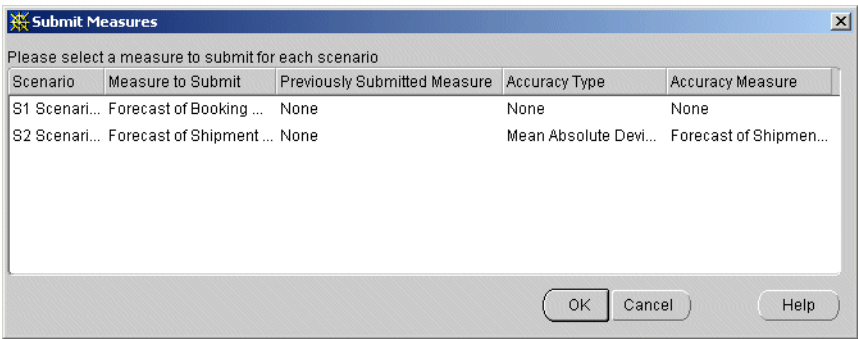
- 6. To select a measure to submit a measure for another scenario, repeat Steps 4 and 5.

Note: It is not necessary to select measures for *all* scenarios at the same time. However, if you have previously selected a measure for one scenario and you are satisfied with your choice, choose "None" as the measure to submit for that scenario when you select a measure to submit for another scenario.

- 7. Choose **OK**.

Example: Selecting measures to submit

In the following illustration, the planner selects measures to submit for two scenarios. The planner also submits accuracy measures for one of the scenarios.



Demand Plan Manager: Selecting Measures to Upload

As a Demand Plan Manager, you review and edit the consolidated forecast for each scenario after the Collect Data from Planners stage runs. When you are satisfied with the final forecast numbers for a scenario, you can select the measure that contains the data for uploading to the Demand Planning Server. You also have the option to run the upload immediately.

Selecting measures to upload is not *mandatory*. If you do not select a measure to upload for a scenario, then Oracle Demand Planning will upload the consolidated submissions measure along with related objects such as accuracy measure and planning percentages for that scenario when the Upload to Planning Server stage runs. The system will name the forecast and assign a version number. If the measure has been previously uploaded, it will increment the version.

You will want to select a measure to upload for a scenario in the following circumstances:

- You want to explicitly specify which measure will be written back to the Demand Planning Server for the scenario. You do not want to write back the consolidated submissions measure.
- You want to overwrite a previous submission.
- You want to use the option to upload selections immediately. You do not want to wait until the administrator runs the upload.

Note that when you select a measure to upload, you are choosing to upload *all* data for all dimensions in the forecast. You are uploading quantity and amount for all time periods, all geographies, all locations, and all products.

What data is uploaded for dependent demand

If you upload a measure that has a dependent association with other products, then the planning percentages that are associated with the measure will be automatically uploaded with the measure. Therefore it is important to choose a measure that is associated with the consolidated planning percentage object.

For information about how planning percentages are associated with measures, see ["Working with Measures" on page 17-1](#). For information about editing planning percentages prior to uploading, see ["Using the Planning Percentages Worksheet" on page 12-1](#).

Uploading a version or overwriting a forecast

Oracle Demand Planning maintains multiple versions of a measure. Thus, you might have Optimistic Scenario Version #1, uploaded on February 1, 2003, Optimistic Scenario Version #2, uploaded on March 1, 2003, and so forth.

The first time that you upload a measure for a scenario, the system stamps the forecast with the current date and assigns it a version number of 1. The next time that you attempt to upload a measure for the same scenario, the system default is to stamp the measure with the new date and increment the version number.

However, in certain cases, you might want to *overwrite* the measure rather than upload a new version. For example, if you uploaded a submission measure on February 1 and suddenly heard about an upcoming sales promotion that will have a major impact on sales, you might want planners to rework and resubmit their forecasts. In this case, you could then upload the consolidated submission measure and *overwrite* the February 1 forecast rather than submit a new forecast version.

Before you proceed: Check scenario time horizon and output level

When the upload runs, Oracle Demand Planning performs a validation check to ensure that at least one time dimension value has data at the top level for all other dimensions. If the measure is NA (unavailable) for all Time dimension values at the specified output level for the scenario, then a warning message will appear.

For example, if a scenario has been defined in the Planning Server with a time horizon range of 01/01/2003 through 12/31/2003 and an output level of Month for the Time dimension, the validation will ensure that at least one Time value in the measure selected for submission has data for the top level for all other dimensions. Even if there is only data for one out of the twelve months, the submission will succeed. However, if *none* of the twelve months has data, then a warning message will appear.

Before you select a measure to upload for a scenario, you might want to check the time horizon and output level that are defined for the scenario in the Planning Server. This can help you to avoid an unsuccessful upload.

To see scenario time horizon and output levels, you can check the properties of the scenario. For more information, see "[Viewing Scenario Properties](#)" on page 24-11.

Selecting measures to upload

To select a measure to upload for a scenario, you choose the measure from the list of available measures. If the scenario requires an accuracy measure, you can also choose an accuracy measure. You also have the option to run the stage that uploads data from the shared database to the Demand Planning Server.

To select measures to upload for a scenario:

1. Access Oracle Demand Planning as a Demand Plan Manager.
2. On the Navigation toolbar, choose the **Tools** button.



3. From the submenu, choose **Select Upload Measure**.

Result: The Select Upload Measure dialog box opens. If a measure has not yet been uploaded for a scenario, the Measure to Upload column shows the consolidated submissions measure as the default measure to upload for the scenario. If a measure has previously been uploaded for the scenario, the Previously Submitted column displays the name of this measure.

4. To select an alternate measure, in the Measure to Upload column choose the measure that you want to upload.

Important: Do not select a measure that has been limited by a qualifying value such as a single geography. If you do so, then the qualifying value will be used to generate uploaded values for all dimension values at this level.

5. The Forecast Name column displays a default name. You can accept this information, or you can take one of the following actions:
 - Type a new name in the Forecast Name box, up to 70 characters long.
 - Click in the column to view a list of forecast names and select a name from the list (overwrite the forecast).
6. If an accuracy measure is required for the scenario, the Type column displays the type of accuracy statistic specified for the scenario in the Demand Planning Server. The Accuracy Measure column displays the default accuracy measure for the scenario. You can choose an alternate measure.
7. Repeat Steps 4 through 6 for each scenario for which you want to select a measure to upload.

Note: If there are multiple scenarios in the demand plan, it is not necessary to select measures to upload for *all* scenarios at the same time. However, if you have previously uploaded a measure for one scenario and you are satisfied with the data, choose "None" as the measure to upload for that scenario when you upload the final forecast for another scenario.

8. Choose **OK**.

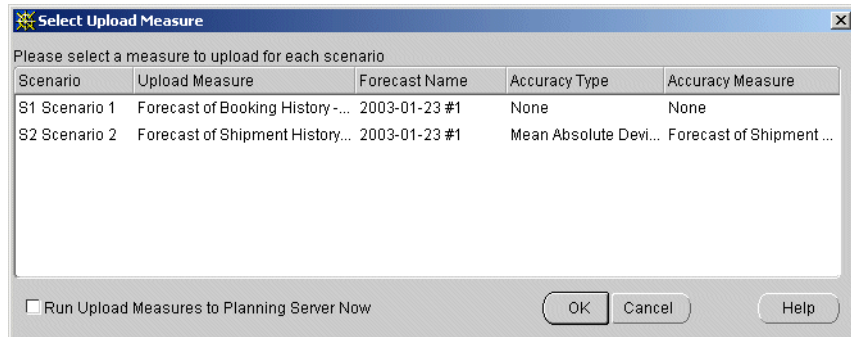
To run the upload immediately:

1. In the Select Upload Measure dialog box, check the **Upload Measures to Planning Server Now** box.
2. Choose **OK**.

Important: Consult with the Demand Planning System Administrator before you choose this option. Running the upload might duplicate an automated program or an administrative action.

Example: Selecting measures to upload

In the following illustration, the Demand Plan Manager selects measures to upload for two scenarios. The manager also uploads an accuracy measure for one of the scenarios. He or she does not choose to run the upload immediately.



Automating the Submissions Process

This topic will contain information on automating the submissions process. With each distribution, a new submission measure must be created for each scenario. This can result in an extremely large number of submission measures. The solution is to automate this process.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

The Benefits of Automatic Submissions

This topic will contain information on the benefits to be derived from automating the submissions process. By collecting and consolidating forecasts into the same measure in every planning cycle, you can create a reusable submission measure. This prevents the proliferation of submission measures. It saves time and resources.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Administrator Options for Configuring Submissions Measures

This topic will contain information on the options available to Administrators for configuring submissions measures. The Administrator now has the flexibility of choosing from among these options:

- Allowing managers to create only one set (one for each scenario) of Submission measures.
- Allowing planners to create new sets of Submission measures with each "Distribute to Assignments" process.
- Allowing managers to switch from one type to the other as needed.

Further content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Procedure: Setting Up Automatic Submissions Measures

This topic will describe the procedures needed to automate submissions measures. Content for this feature is pending.

Please check Metalink for documentation patches that contain additional information on this feature.

Viewing Scenario Properties

Before you submit or upload measures, you might want to view the properties of a scenario. The following information is available.

- Name
- Horizon Range
- Default Measure Association
- Submitted Measure (if a measure for this scenario has been previously submitted)
- Uploaded Measure (if a measure for this scenario has been previously uploaded)
- Output Levels
- Accuracy Measure Type (if an accuracy measure has been associated with the scenario in the Demand Planning Server)

To view scenario properties:

1. Access Oracle Demand Planning as a Demand Planner or Planning Manager.
2. In the navigation list, locate the scenario whose properties you want to view.
3. Click the right mouse button on the object and choose **Properties** from the popup menu.

Working with Alerts and Notifications

This section describes how to work with alerts and notifications as a Demand Planner or Demand Plan Manager.

The section includes the following topics:

- [About Alerts](#)
- [Defining Alerts](#)
- [Modifying Alerts](#)
- [Disabling Alerts](#)
- [Enabling Alerts](#)
- [Manually Running Alerts](#)
- [Renaming Alerts](#)
- [Viewing Alert Properties](#)
- [Deleting Alerts](#)
- [Working with Notifications](#)

About Alerts

An alert is an exception condition that generates a message to specified users when the condition has been met. When the alert runs, it generates an e-mail message to each recipient for whom the exception condition is true.

If your role is Demand Planner, you might define an alert to warn yourself when a product or group of products have unacceptable margins for a specified time period. If your role is Demand Plan Manager, you might define an alert to warn planners when their forecasts over- or under- predict actuals.

Important: In order to generate alert messages, e-mail messaging must be set up and enabled in Oracle Workflow. In order for you to receive e-mail alerts, your Preferences must be set to receive Workflow messages via e-mail.

How alerts are displayed

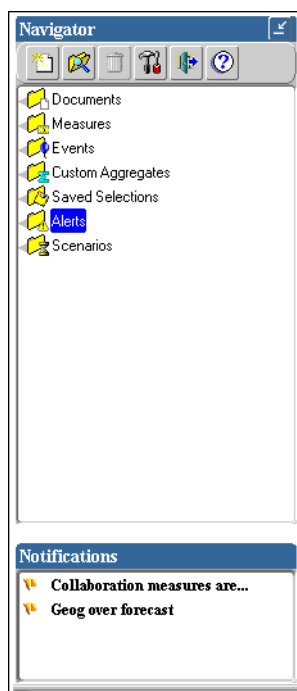
The Alerts folder in the navigation list displays *all* alerts that you have defined.

Your Notifications list displays only those alerts that meet all of the following criteria:

- You defined the alert.
- The alert has run.
- The exception condition has been met.

Example: Display of alerts and notifications

The following illustration shows how alerts and notifications appear in the user interface. In the example, the user has defined two alerts, both of which are displayed in the Alerts folder in the navigation list. One of the alerts is also displayed in the Notifications list, indicating that the alert has run and the exception condition has been met. The Notifications list also displays a message that there are collaboration measures ready to be received.



Defining Alerts

You create an alert by defining the exception condition that will trigger the e-mail message. You also specify when and how the alert will run.

You can select one of the following as the basis for the exception:

- **Value** — Sets up a comparison between a measure and a numeric value or range of values.
- **Measure** — Sets up a comparison between two measures.

Defining an alert based on a value exception

An alert that is based on a value exception compares a measure to a numeric value or range of values. For example, you might use the Value option to alert yourself or other users when a forecast difference measure (a custom measure defined as forecast less actuals) is less than or greater than a specific number.

To define an alert that compares a measure with a numeric value or range of values:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Alert** from the popup menu.

Alternatively, you can click the right mouse button on the **Alerts** folder in the navigation list and choose **New Alert** from the popup menu.

Result: The Alert Wizard -- Exception page opens.

3. In the Alert Wizard -- Exception page, define exception criteria as follows:
 - a. In the *Select* box, choose the dimension to which the exception condition applies.
 - b. In the *within* box, click the arrow to display the hierarchies for the dimension. Select a hierarchy and then select a level within the hierarchy.
 - c. In the *condition* box, select **Value**.
 - d. In the *measure* box, select the measure on which to base the exception condition.

You can accept the default measure or choose the *Ellipsis* button to access the Dimension Value Selector dialog box, where you can select an alternate measure.

- e. In the *operator* box, select the operator that identifies how data values will compare to a specified value. You can select one of the following terms:
 - * less than
 - * less than or equal to

- * equal to
 - * not equal to
 - * greater than or equal to
 - * greater than
 - * between
 - * outside
- f. Complete the value box (or boxes) as follows:
- * If the operator is other than **between** or **outside**, enter a number that is to be compared to the values of the selected measure.
 - * If the operator is **between** or **outside**, enter the top and bottom of the value range that is to be compared to the values of the selected measure.
4. Choose **Next** to continue.

Result: The Alert Wizard -- Dimension Selections page opens.

5. The Alert Wizard -- Dimensions Selections page displays dimension value selections that further define the exception condition. You can accept the defaults, or make new selections. Proceed as follows:
- a. Select a dimension and choose the **Selector** button.

Result: The Select Data dialog box opens, displaying the current values that are selected for the dimension.
 - b. Move values between the Available and Selected boxes until the Selected box contains the dimension values that you want to use. Choose **OK** to return to the Alert Wizard -- Dimensions Selections page.

For more information about techniques for selecting values, see "[Selecting Data](#)" on page 22-1.
 - c. Repeat Steps a and b for each dimension for which you want to change values.

Note: For the exception dimension, you can only refine the selection by removing values.

6. Choose **Next** to continue.

Result: The Alert Wizard -- Notification Type and Content page opens.

7. In the Alert Wizard -- Notification Type and Content page, proceed as follows:

- a. In the Available box, select the users who will receive e-mail containing the alert notification when the exception condition has been met.

The Selected box displays your choices.

- b. In the Priority box, specify a priority: **Low** or **High**.

- c. The Subject box displays default text for the alert name. You can enter a new name, up to 70 characters long.

- d. The Message box displays default text for the e-mail message. This is the text that will appear at the top of the e-mail notification. You can edit the text.

- e. Specify how you want the e-mail message to display:

- * Select **HTML Report** to display the e-mail message as a report.
- * Clear **HTML Report** to limit the e-mail to the text that you entered in the Message box.

8. Choose **Next** to continue.

Result: The Alert Wizard -- Set Execution Times page opens.

9. The Enable Alert box is checked, indicating that the alert is active. Specify when to execute the exception conditions (run the alert) as follows:

- To execute the exception conditions now, choose **Immediately**.
- To execute the exception conditions when the **Distribute to Planners** batch runs, choose **On Database Update**.
- To execute the exception conditions now *and* each time that the database is updated, choose both **Immediately** and **On Database Update**.

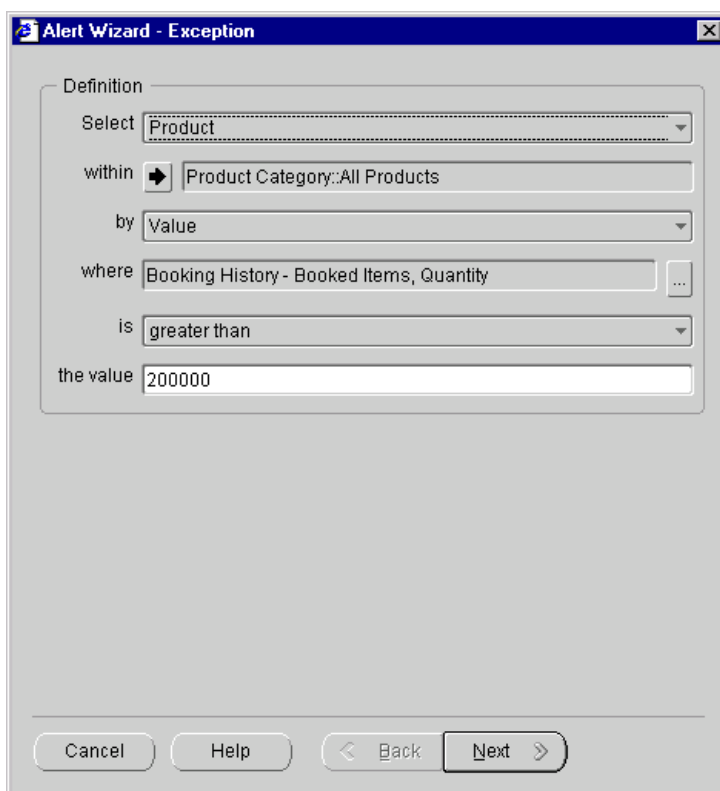
Note: You can opt *not* to specify an execution option. Instead, you can disable the Enable Alert box and run the alert manually as described in the section "[Manually Running Alerts](#)" on page 25-14.

10. Choose **Finish** to create the alert.

Result: The alert object appears in the Alerts folder in the navigation list.

Example: Alert definition based on value exception

In the following example, the user defines a value exception that will be met when the Booking History - Booked Items, Quantity for the specified products is greater than 200,000.



The screenshot shows a dialog box titled "Alert Wizard - Exception". It contains a "Definition" section with the following fields:

- Select:** A dropdown menu with "Product" selected.
- within:** A dropdown menu with "Product Category::All Products" selected.
- by:** A dropdown menu with "Value" selected.
- where:** A text field containing "Booking History - Booked Items, Quantity" and a small "..." button to its right.
- is:** A dropdown menu with "greater than" selected.
- the value:** A text field containing "200000".

At the bottom of the dialog box, there are four buttons: "Cancel", "Help", "< Back", and "Next >".

Defining an alert based on a measure exception

An alert based on a measure exception compares the values for one measure to the values of another measure. For example, you might use the measure exception to alert yourself or other users when a forecast for a specified time period exceeds the customer forecast by a specified percentage.

To define an alert based on a measure exception:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. On the navigation toolbar, choose the **New** button,



and choose **New Alert** from the popup menu.

Alternatively, you can click the right mouse button on the **Alerts** folder in the navigation list and choose **New Alert** from the popup menu.

Result: The Alert Wizard -- Exception page opens.

3. In the Select box of the Alert Wizard -- Exception page, define the exception condition for the alert as follows:
 - a. In the Select box, choose the dimension to which the exception applies.
 - b. In the within box, click the arrow to display the hierarchies for the dimension. Select a hierarchy and then select a level within the hierarchy.
 - c. In the *condition* box, select **Measure**.
 - d. In the first *measure* box, select the measure on which to base the exception condition.

You can accept the default measure or choose the *Ellipsis* button to access the Dimension Value Selector dialog box, where you can select an alternate measure.

- e. In the *operator* box, select the operator that identifies how the measure that you chose in Step d will relate to a comparison measure. You can select one of the following terms:
 - * less than
 - * greater than
 - * within
 - * not within
- f. In the *measure* box, select a comparison measure.

You can accept the default value or choose the *Ellipsis* button to access the Dimension Value Selector dialog box, where you can choose an alternate measure.

- g. You can specify a numeric or percentage value to consider when comparing the measures. To do this, proceed as follows:
 - * If the operator is less than or greater than, choose **plus** or **minus**. If the operator is within or not within, **plus or minus** is the only selection.
 - * In the *value* box, enter a numeric value.
 - * If the value is a percentage, choose **percent**.

4. Choose **Next** to continue.

Result: The Alert Wizard -- Dimension Selections page opens.

5. The Alert Wizard -- Dimensions Selections page displays dimension value selections that further define the exception condition. You can accept the defaults, or make new selections. Proceed as follows:

- a. Select a dimension and choose the **Selector** button.

Result: The Select Data dialog box opens, displaying the values that are currently selected for the dimension.

- b. Move values between the Available and Selected boxes until the Selected box contains the dimension values that you want. Choose **OK** to return to the Alert Wizard -- Dimensions Selections page.

For more information about selecting values, see ["Selecting Data" on page 22-1](#).

- c. Repeat Steps *a* and *b* for each dimension for which you want to change values.

Note: For the exception dimension, you can only refine the selection by removing values.

6. Choose **Next** to continue.

Result: The Alert Wizard -- Notification Type and Content page opens.

7. In the Alert Wizard -- Notification Type and Content page, proceed as follows:

- a. In the Available box, select the users who will receive e-mail containing the alert when the exception condition has been met. The Selected box displays your choices.
 - b. In the Priority box, specify a priority: **Low** or **High**.
 - c. The Subject box displays default text for the alert name. You can enter a new name, up to 70 characters long.
 - d. The Message box displays default text for the e-mail message. This is the text that will appear at the top of the e-mail notification. You can edit the text.
 - e. Specify how you want the e-mail message to display:
 - * Select **HTML Report** to display the e-mail message as a report.
 - * Clear **HTML Report** to limit the e-mail to the text that you entered in the Message box.
8. Choose **Next** to continue.

Result: The Alert Wizard -- Set Execution Times page opens.

9. The Enable Alert box is checked, indicating that the alert is active. Specify when to execute the exception conditions (run the alert) as follows:
- To execute the exception conditions now, choose **Immediately**.
 - To execute the exception conditions when the **Distribute to Planners** stage runs, choose **On Database Update**.
 - To execute the exception conditions now *and* each time that a distribution runs, choose both **Immediately** and **On Database Update**.

Note: You can opt not to specify an execution option. Instead, you can disable the Enable Alert box and manually run the alert as described in the section "[Manually Running Alerts](#)" on page 25-14.

10. Choose **Finish** to create the alert.

Result: The alert object appears in the Alerts folder in the navigation list.

Example: Alert definition based on measure exception

In the following example, the user defines a measure exception condition that will be met when Revised Forecast, Quantity is greater than Booking History - Booked Items, Quantity plus 10%.

The screenshot shows the 'Alert Wizard - Exception' window. The 'Definition' section contains the following fields:

- Select: Product
- within: Product Category::Item
- by: Measure
- where: Revised Forecast, Quantity
- is: greater than
- the measure: Booking History - Booked Items, Quantity
- plus: 10 percent

At the bottom, there are four buttons: 'Cancel', 'Help', 'Back', and 'Next'.

Modifying Alerts

You can change the definition of a saved alert.

Note: If you edit the exception definition or the dimension selections, you do not have the option to specify when to run the alert. The alert will automatically run after you apply your changes.

To change the definition of an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. In the navigation list, double-click the alert.

Alternatively, you can click the right mouse button on the alert object and choose **Edit** from the popup menu.

Result: The Alert Wizard starts. The Alert Wizard -- Exception page opens.

3. Use the tabs, the **Next** button, and the **Back** button to move through the alert definition and change its attributes. You can also change the alert name.
4. To save the alert definition, choose **Finish**:

Disabling Alerts

You can disable a saved alert. Disabling an alert makes its conditions inactive. The alert object remains on the navigation list.

To disable an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the alert that you want to disable.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Use one of the following techniques to make the alert inactive:
 - Click the right mouse button on the alert and choose **Disable** from the popup menu.
 - or*
 - Open the alert, choose the Execution Times tab and clear the Enable Alert box.

Enabling Alerts

You can enable an alert that has been disabled. Enabling an alert re-activates the alert conditions.

To enable an alert that has been disabled:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. Identify the alert that you want to enable.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Use one of the following techniques to enable the alert:
 - Click the right mouse button on the alert object and choose **Enable** from the popup menu.
 - or*
 - Open the alert, choose the Execution Times tab and check the Enable Alert box.

Manually Running Alerts

You can manually run an active alert.

To manually run an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. Identify the alert that you want to run.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. In the navigation list, click the right mouse button on the alert object and choose **Run** from the popup menu.

Renaming Alerts

You can give a new name to an alert.

To rename an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. In the navigation list, click the right mouse button on the alert object and choose **Rename** from the popup menu.
3. Enter the new name, up to 70 characters long.

Viewing Alert Properties

You can view the properties of a saved alert.

To view the properties of an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.

Note: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find** from the popup menu. Alternatively, you can choose the *Find* button on the navigation toolbar.

2. In the navigation list, click the right mouse button on the alert object and choose **Properties** from the popup menu.

Result: The following information is displayed:

- Description
- Active
- Priority
- Exception Dimension
- Class
- Execute

Deleting Alerts

When you no longer need to maintain an alert you can delete it.

To delete an alert:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the navigation list, identify the alert that you want to delete.

Tip: To search for an alert, click the right mouse button on the Alerts folder in the navigation list and choose **Find Alerts** from the popup menu. Then enter a name or name fragment. Alternatively, you can choose the *Find* button on the navigation toolbar.

3. Select the alert object and choose the **Delete** button on the navigation toolbar.



Alternatively, you can click the right mouse button on the alert object and choose **Delete** from the popup menu.

Result: You will be prompted to confirm the deletion.

Working with Notifications

Your Notifications list displays messages that have been generated by Oracle Workflow. You might see two types of notifications:

- When there is an alert for your attention, a notification concerning the alert is displayed.
- If another planner or the Demand Plan Manager has sent data that is within the scope of your assignment, a notification that collaboration measures are ready to receive is displayed.

You can work with notifications as follows:

- Open a notification
- Delete a notification
- View the properties of a notification (alert only)

Opening a notification

Open a notification when you want to access the information that it contains. If you open an alert notification, you can print the results. When you open a collaboration notification, you can opt to receive the data.

To open a notification:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the Notifications list, double-click the notification that you want to open.

Alternatively, you can click the right mouse button on the notification and choose **View** from the popup menu.

Deleting a notification

When you no longer need to maintain a notification, you can delete it from the list.

To delete a notification:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the Notifications list, click the right mouse button on the notification and choose **Delete** from the popup menu.

Viewing notification properties

You can view the properties of a notification that has been generated by an alert.

To view the properties of a notification:

1. Access Oracle Demand Planning as a Demand Planner or Demand Plan Manager.
2. In the Notifications list, click the right mouse button on the notification and choose **Properties** from the popup menu.

Result: The following information is displayed:

- Description
- Priority

Advanced Topics

This section describes basic concepts and user procedures to accomplish the following:

- Customizing Demand Planning hierarchies
- Forecasting for Dependent Demand
- Multiple Step UOM Conversion
- Using Sales Forecasts and Opportunities
- Forecasting for Service Parts
- Line of Business Specific Demand Plans

Customizing Demand Planning hierarchies

Oracle Demand Planning supports eight dimensions: product, time, geography, ship from location, sales channel, sales representative, user defined dimension 1, and user defined dimension 2. Hierarchies and levels for the first six dimensions are preseeded, while they need to be defined for the two user defined dimensions.

This whole Oracle Demand Planning structure consisting of dimensions, hierarchies, and levels is very flexible and can be easily altered. The steps to exploit this flexibility are presented in this section. The first feature pertains to the one time setup related changes in the basic Oracle Demand Planning structure. The second feature relates to the ongoing and routine changes.

For details about the preseeded dimensions, hierarchies, and levels, see: [Setup Demand Planning Dimensions](#) on page 2-8 and [Setup Demand Planning Hierarchies](#) on page 2-10.

Manipulating hierarchies

Every business is structured differently and it may be required to match the respective business processes while implementing Oracle Demand Planning. During the normal course of business also, it is often necessary to restructure the hierarchies. Such restructuring may include changing the names of levels or hierarchies, or defining new hierarchies.

- The names of the levels and hierarchies can be changed using a simple user interface. For example, the levels Ship-to-Location and Region may need to be renamed as Customer Store and Distribution Center respectively, while the geography hierarchy may need to be called Customer Geography. This can be done from the Demand Planning Levels or Demand Planning Hierarchies forms, which can be accessed respectively from the Levels or Hierarchies menu under Setup for the Demand Planning System Administrator responsibility. To change the names of any level or hierarchy, open the corresponding window, select the level or hierarchy, and enter the new name.
- The existing and preseeded levels can be manipulated to define a new hierarchy. For example, the geography hierarchy, one of the three preseeded hierarchies of the geography dimension consists of the following levels:

Ship-to-Location – Region – Country – Area – All Geography

A new hierarchy can be defined where Ship to Location rolls up to Country and Country rolls up to All Geography.

When the six dimensions with preseeded levels and hierarchies are not adequate, two user defined dimensions can be used. When the preseeded levels and hierarchies are not adequate, new levels and hierarchies can be defined.

To define a new Hierarchy using the existing levels:

For this example, My Geo Hierarchy is the name of the new hierarchy to be represented as: Ship to Location – Country – All Geography.

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Hierarchies.

The Demand Planning Hierarchies window appears.

The screenshot shows the 'Demand Planning Hierarchies' window. It contains a table with the following data:

Name	Description	Dimension	Valid []
Customer Class	Customer Class Hierarchy	Geography	<input checked="" type="checkbox"/>
Customer Group	Customer Group Hierarchy	Geography	<input checked="" type="checkbox"/>
Geography	Geography Hierarchy	Geography	<input checked="" type="checkbox"/>
My Geo Hierarchy	Test New Hierarchy	Geography	<input type="checkbox"/>
Product Category	Product Category Hierarchy	Product	<input checked="" type="checkbox"/>
Product Family	Product Family Hierarchy	Product	<input checked="" type="checkbox"/>
Sales Channel	Sales Channel Hierarchy	Sales Channel	<input checked="" type="checkbox"/>
Sales Group	Sales Group Hierarchy	Sales Representative	<input checked="" type="checkbox"/>
Sales Representative	Sales Rep Hierarchy	Sales Representative	<input checked="" type="checkbox"/>
Organization	Organization Hierarchy	Ship from Location	<input checked="" type="checkbox"/>

At the bottom right of the window is a button labeled 'Hierarchy Levels'.

3. Add a new record to enter a new hierarchy by completing these fields: Name, Description, and Dimension.

Field	Value
Name	My Geo Hierarchy
Description	Test Hierarchy
Dimension	Geography

4. From the Navigator, select Setup > Hierarchy Levels.
- The Demand Planning Hierarchy Levels window appears:

Demand Planning Hierarchy Levels

Hierarchy	Level	Parent Level	Relationship View	Level ID Column
Geography	Region	Country	MSD_SR_REG_COUNT	LEVEL_VALUE_PK
Geography	Ship To Location	Region	MSD_SR_LOC_REG_V	LEVEL_VALUE_PK
My Geo Hierarchy	Country	All Geography	MSD_SR_COUNT_ALL	LEVEL_VALUE_PK
My Geo Hierarchy	Ship To Location	Country	MSD_SR_SHIPTO_COI	LEVEL_VALUE_PK
Organization	Business Group	All Organization	MSD_SR_BG_ALL_V	LEVEL_VALUE_PK
Organization	Legal Entity	Business Group	MSD_SR_LE_BG_V	LEVEL_VALUE_PK
Organization	Operating Unit	Legal Entity	MSD_SR_OU_LE_V	LEVEL_VALUE_PK
Organization	Organization	Operating Unit	MSD_SR_ORG_OU_V	LEVEL_VALUE_PK
Product Category	Item	Product Category	MSD_SR_PRD_CAT_V	LEVEL_VALUE_PK
Product Category	Product Category	All Products	MSD_SR_CAT_ALL_V	LEVEL_VALUE_PK

Validate Hierarchies

5. Enter a new record. As an example, you can complete the fields with the following information:
- Select My Geo Hierarchy for the Hierarchy column.
 - Select Country for the Level column.
 - Select All Geography for the Parent Level column.

- Enter MSD_SR_COUNT_ALL_V for the Relationship View column. Any view name on the same pattern can be specified.
 - Enter the same values in all the remaining columns as already specified for existing hierarchies.
6. Repeat steps 5 through 10 to enter the second relationship. Enter the second relationship from Ship to Location to country as shown above (the row below the highlighted entry). For example:

Field	Value
Hierarchy	My Geo Hierarchy
Level	Ship to Location
Parent Level	Country
Relationship View	MSD_SR_SHIPTO_COUNT_V
Level ID Column	LEVEL_VALUE_PK

The Relationship Views entered in the previous steps are the source views that steer the aggregation of levels collected from the source applications. For any new set of relationship between levels, these relationship views, which are source views, must be defined.

The SQL commands that create one of the new views, MSD_SR_SHIPTO_COUNT_V is presented below to impart some understanding of the view's definition. The purpose for this view is to map the values and primary keys of levels and parent levels to the source data. For example, the following table shows what will be achieved by creating this view:

Level	Level Value	Primary Key for Level Value	Parent Level Value	Primary Key for Parent Level Value
1	Detroit	101	United States	1001
2	East Bay	102	United States	1001
3	San Jose	103	United States	1001

The following section contains the SQL commands that created this view:

MSD_SR_SHIPTO_COUNT_V

```
CREATE OR REPLACE VIEW MSD_SR_SHIPTO_COUNTRY_V
```



```
(level_value_pk, level_value, parent_value_pk, parent_value, attribute1,
attribute2, attribute3, attribute4, attribute5)

AS SELECT

/* Uses the following for the values and primary keys of Levels and Parent
Levels */

/* Maps to line 2 above. null corresponds to attributes. prs and pra are aliases
*/

prs.site_use_id, rac.customer_name || '-' || prs.location, pra.country,
pra.country, null, null, null, null, null

FROM

/* Table names */

ra_site_uses_all prs, ra_customers rac, ra_addresses_all pra

WHERE

pra.address_id = prs.address_id and pra.customer_id = rac.customer_id and
prs.site_use_code = 'SHIP_TO'

UNION

SELECT

/* This takes care of the null values, if any for ship to location */

msd_sr_util.get_null_pk, msd_sr_util.get_null_desc, to_char(msd_sr_util.get_
null_pk), msd_sr_util.get_null_desc, null, null, null, null, null

FROM dual
```

To define new Levels and Hierarchies:

The process of defining new levels and creating hierarchies using these new levels is described below for user defined dimension 1. The same process is applicable for user defined dimension 2 and other regular dimensions such as product, geography, ship from location, sales channel, and sales representative. Assume that the user defined dimension 1 should be set up such that it consists of two user defined hierarchies:

- User defined hierarchy 1 is where user defined level 1 rolls up to user defined level 2
- User defined hierarchy 2 is where user defined level 1 rolls up to user defined level 2; and user defined level 2 rolls up to user defined level 3

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Levels.

The Demand Planning Levels window appears.

Name	Description	Dimension	Level Type	User Attribute 1
Sales Manager 4	Sales Manager Level	Sales Represe	Intermediate	
Sales Representative	Sales Rep Level	Sales Represe	Bottom	
All Organization	All Organization Leve	Ship from Loca	Top	
Business Group	Business Group Level	Ship from Loca	Intermediate	
Legal Entity	Legal Entity Level	Ship from Loca	Intermediate	
Operating Unit	Operating Unit Level	Ship from Loca	Intermediate	
Organization	Organization Level	Ship from Loca	Bottom	
UD Level 1	User Defined Level 1	User Defined D	Bottom	
UD Level 2	User Defined Level 2	User Defined D	Intermediate	
UD Level 3	User Defined Level 3	User Defined D	Top	

Hierarchy Levels

3. Enter the three new records for the new Levels (UD Level 1, UD Level 2, and UD Level 3) as follows, then save the records. For example:

Field	Value
Name	Record 1: UD Level 1, Record 2: UD Level 2, Record 3: UD Level 3
Description	Record 1: User Defined Level 1, Record 2: User Defined Level 2, Record 3: User Defined Level 3
Dimension	User Defined Dimension 1
Level Type	Record 1: Bottom, Record 2: Intermediate, Record 3: Top

- 4. In the Dimension column, associate these levels to the User defined Dimension 1 by selecting the Dimension name from the list of values.
- 5. In the Level Type column, select the appropriate level type from the list of values. The choices are Bottom, Intermediate, and Top.

There can only be one bottom and one top level, while any numbers of intermediate levels are possible within one Dimension. UD Level 2 is the only intermediate level in this example.
- 6. Close the Demand Planning Levels window.
- 7. In the Navigator, select Setup > Hierarchies.

The Demand Planning Hierarchies window appears. For details, see: [To define a new Hierarchy using the existing levels](#): on page 26-3.
- 8. Enter the two new records for the new hierarchies, UD Hierarchy 1 and UD Hierarchy 1 as follows and save the records:

Field	Value
Name	Record 1: UD hierarchy 1, Record 2: UD hierarchy 2
Description	Record 1: Hierarchy 1 for User Defined Dimension 1, Record 2: Hierarchy 2 for User Defined Dimension 1
Dimension	User Defined Dimension 1

- 9. Select Hierarchy Levels.

The Demand Planning Hierarchy Levels window appears.
- 10. Associate the hierarchy levels with the user defined hierarchies as follows:

Field	Values
Hierarchy	UD hierarchy 1, UD Hierarchy 2, UD Hierarchy 3
Level	UD Level 1, UD Level 2, UD Level 3
Parent Level	UD Level 3, US Level 2, UD Level 3
Relationship View	MSD_SR_UL1_UL3_V, MSD_SR_UL1_UL2_V, MSD_SR_UL2_UL3_V
Level ID Column	LEVEL_VALUE_PK (for all three rows)

- 11. Define the Relationship Views.

For details, see: [To define a new Hierarchy using the existing levels](#): on page 26-3.

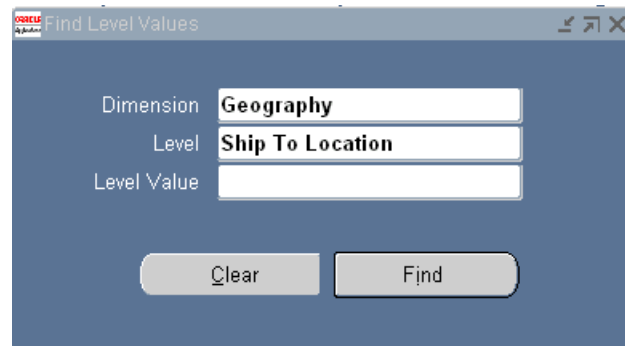
Manipulating the level values and associations

Level values, such as, Western distribution center and southwest distribution center, for a level can be viewed and changed after collecting them from the sources applications. The routine business changes in the level value associations can also be accomplished. Forecasts for the lower levels can roll up to the corresponding higher levels. For example, consider the reassignment of a particular customer site (AU Dodge - CDET) from the Michigan sales region to the Ohio sales region. Forecasts for AU Dodge - CDET need to roll up under the Ohio sales region instead of the Michigan sales region.

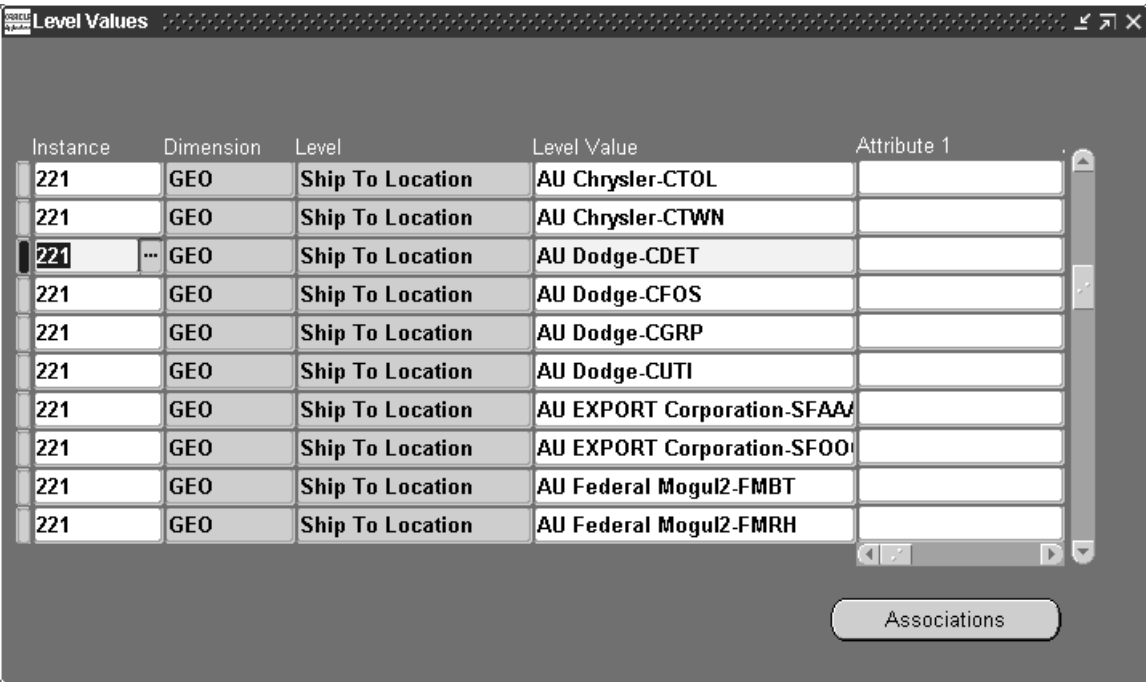
To change Level Value associations:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Dimension Values > Level Values.

The Find Level Values window appears.



3. Enter the Dimension, Hierarchy, and Level of the child level value in the Find Level Values window.
4. Select Find. The Level Values window is populated with all the values of the selected hierarchy level.



Instance	Dimension	Level	Level Value	Attribute 1
221	GEO	Ship To Location	AU Chrysler-CTOL	
221	GEO	Ship To Location	AU Chrysler-CTWN	
221	...	Ship To Location	AU Dodge-CDET	
221	GEO	Ship To Location	AU Dodge-CFOS	
221	GEO	Ship To Location	AU Dodge-CGRP	
221	GEO	Ship To Location	AU Dodge-CUTI	
221	GEO	Ship To Location	AU EXPORT Corporation-SFAA	
221	GEO	Ship To Location	AU EXPORT Corporation-SFOO	
221	GEO	Ship To Location	AU Federal Mogul2-FMBT	
221	GEO	Ship To Location	AU Federal Mogul2-FMRH	

Associations

5. Select the appropriate value on the Level Values window and select Associations.
The Level Associations window appears.
6. You can change the Parent Level Value from the list of values.
7. Select OK.

Forecasting for Dependent Demand

Dependent Demand Forecasting is the capability to forecast demand for partially or fully dependent products whose demand depends wholly or partially on the demand for another product. Some of the typical questions that are addressed by dependent demand forecasting are:

- To the Auto Manufacturer: How many alloy wheels or V6 engines would be sold?

- To the PC Manufacturer: How many total hard disks would need to be manufactured, of them how many would sell as part of a new PC and how many would sell individually?

The typical business flow would be:

- From sales history for models, a model forecast is derived.
- Item-level forecasts for options and mandatory items are derived by applying planning factors (percentages) to the model forecast.
- Item-level forecasts are analyzed and updated as required in multiple dimensions.
- Forecast is published for supply planning.

The dependent demand forecast for a dependent item is calculated by exploding the forecast from its respective parents using the corresponding bills of material. The independent demand forecast is generated on the basis of the independent history for the item. The total demand for any item is the sum of the dependent and independent components of demand. For example, the demand for computer monitors is a composite of its direct demand and the demand deriving from the sale of PC Systems. Some basic components of dependent demand forecasting are explained below.

Forecast explosion

This section explains forecast explosion functionality, whereby the forecast for one item is used to derive the forecast for another related item. This functionality is calculation intensive, and may not be used by all the companies. Therefore, a Calculate Dependent Demand check box is provided on the Demand Plans form. This check box remains turned off by default and should be checked to enable the forecast explosion functionality for a demand plan. Thus, it is possible to not use this functionality for one demand plan while enabling it for another demand plan.

Consider a business scenario where the components of a typical PC system are sold as a part of the computer configuration and independent components. The total demand is calculated by the system as follows:

- By forecasting computer demand based on its sales history.
- By exploding this forecast to the components, using the planning percentages specified in the model bill (for the computer) or calculated in Oracle Demand Planning.

- By forecasting independent demand for components based on their independent history.
- By suitably adding the independent and dependent portions to find out total demand.

The following table shows the independent and dependent demands for the model, standard items, option class, and options of a computer system being manufactured:

Configuration	Type	Planning Percentages	Generated Forecast (based on independent history)	Derived Forecast (dependent portion of demand)	Total Forecast
Computer Model, A500	ATO Model (Parent Item)	NA	1000	NA	1000
■ Monitor, 66MHz	Standard item (Child of Computer)	80%	300	800	1100
■ CPU	Standard item (Child of Computer)	100%	50	1000	1050
■ CD Drive	Option Class (Child of Computer)	50%	200	500	700
❑ Read/Write CD Drive	Option (Child of CD Drive)	80%	100	400	500
❑ Read Only CD Drive	Option (Child of CD Drive)	20%	80	100	180

From the above table, the demand planner (responsible for planning monitors) can see the independent and dependent portions as well as the total demand for the monitors. When the demand planner submits an edited independent demand forecast, the total and dependent demand forecasts are also submitted along with it. The dependent demand forecasts are updated in the shared database on the basis of the independent demand forecasts submitted by the other planners.

You can calculate dependent demand for input parameters. This gives you the ability to explode the reference forecasts, such as customer forecast and manufacturing forecast, to the options dependent demand. Then the forecast for the options can be compared to the statistically generated forecasts in Oracle Demand Planning. This also gives you the ability to analyze forecasts in Oracle Demand Planning from external systems.

Forecast Control

Forecast control of an item determines how the demand for the item is forecast and used. The forecast control for an item's source applications can be set up in Oracle Inventory from the Item/Master Item menu under the MPS/MRP Planning tab.

Forecast control can be one of the following three types:

- **Consume:** is a forecast control, which when associated with an item, identifies that the item has only independent demand. The forecast for consume items is used as such for supply planning.
- **Consume & Derive:** is a forecast control, which when associated with an item, identifies that the item has both independent demand and dependent demand. Oracle Demand Planning publishes the total (dependent and independent) forecast for consume & derive items. The total forecast is used as such for supply planning.
- **None:** is a forecast control, which when associated with an item identifies that the item only has dependent demand. Oracle Demand Planning publishes planning percentages for none items. The planning percentages are used to calculate their dependent demand for supply planning.

While Consume and Consume & Derive items are always used in Oracle Demand Planning, None items are collected depending on the profile options MSD: Calculate Planning Percentages and MSD: Two-level Planning.

Notes:

- Items with an MRP Planning Method of Not Planned are not brought into Oracle Demand Planning for forecasting, except for PTO models. PTO models are collected as unplanned items.
- The demand is exploded based on the item attributes in the respective inventory organizations, and is not exploded based on those in the master organization.

Bills of Material

The forecasts for components or any dependent item are generated using bills of material (BOM) from the source application. The planning percentages can be set up in the Oracle Bill of Material application from the Bills of Materials/Bills menu under the Component Details tab.

The figure below is a sample Bills of Material for a car:

Car [F/C = C]

- Steering Column (1 per Car) Planning Factor = 100% [F/C = C & D]
- Door (2 per Car) Planning Factor = 100% [F/C = C & D]
- Sunroof (1 per Car) Planning Factor = 50% [F/C = C & D]
- Alloy wheel (1 per Car) Planning Factor = 50% [F/C = C & D]

F/C = forecast control

C = consume

C & D = consume and derive

Different bills of material may exist for different organizations. Oracle Demand Planning uses the organization specific model bills. For example, if the master and inventory organizations have different bills, then the dependent demand explosions are performed on the basis of forecast control and planning percentages, defined in the respective organization. However, Oracle Demand Planning does not use organization specific product family bills. The product family bills are collected only for the master organization specified in the profile option MSD: Master organization.

Item Type

The type of an item is important in the context of bills of materials and is the same as BOM_ITEM_TYPE in the source instance. Item Type can be set up in the source Oracle Inventory application from the Item/Master Item menu under the Bills of Materials tab. The five possible values are:

- **Model:** this item's bills of material list the option classes and options available when you place an order for the model item. Forecast for models with forecast control of Consume or Consume & Derive is generated in Oracle Demand Planning based on the shipment/booking history of configured items.
- **Option Class:** this item's bills of material contain a list of related options. Option classes group like options together. Model forecasts are exploded down to the option class level in Oracle Demand Planning.

- **Planning:** this item's bills of material contain a list of items and planning percentages. A planning item can represent a product family or demand channel. The total component planning percentages on a planning bill can exceed 100%. Only Model bills and product family bills are used in Oracle Demand Planning. The generic planning bills are not used.
- **Standard:** is any item that can have a bill or be a component on a bill, except planning, model, or option class items. Standard items include purchased items, subassemblies, or finished products. In Oracle Demand Planning, bills for standard items are not used.
- **Product Family:** is a grouping of products whose similarity in resource usage, design, and manufacturing process facilitates planning at an aggregate level. To explode the forecast from the Product Family to product family member items, predefined allocation rules in Oracle Demand Planning are used in place of using the planning percentages specified in the bills. For details, see: [Product Family Level Planning](#) on page 26-28.

Planning Percentages

Oracle Demand Planning supports configure-to-order environments.

There are two ways to calculate dependent demand:

- Using planning percentages from model bills of material.
- Using the planning percentages calculated in Oracle Demand Planning based on the dependent sales history of options and option classes.

The key data element for any calculation or projection of planning percentages is historical sales. For models, the actual sales are of configured items created during the configuration process during order entry. The total sales for the model are calculated by summing the sales of the configuration items. The sales of the options and option classes are derived by exploding the bills of the configurations that have been sold. The calculated planning percentages are editable only at the forecasting levels.

Planning percentages collected from the ERP source can be compared to the forecasted planning percentages calculated in Oracle Demand Planning at the lowest time level of the demand plan. Optionally, you can average the existing planning percentages to the forecasting levels, compare to the forecast planning percentages at the forecasting levels, and modify the forecast planning percentages at the forecasting levels. The planning percentages are averaged weighted by the number of days. In the example diagram below, the planning percentages for April '04 for the Monitor (Option Class) have been calculated as:

$$((\text{Planning Percentage Days} * \text{Existing Planning Percentage}) + (\text{Planning Percentage Days} * \text{Existing Planning Percentage})) / \text{Days in the month}$$
$$= (15 \text{ days} * 80\% + 15 \text{ days} * 60\%) / 30 \text{ days in April}$$
$$= 70\%$$

ATO Model Bill	Existing Planning Percentages	Existing Planning Percentages	Average Planning Percentage for April '04
	1-15 April '04	16-31 April '04	
Desktop SB600 Model			
- CPU	100%	100%	100%
- Monitor (OC)	80%	60%	70%
- 17"	25%	15%	20%
- 19"	75%	85%	80%

Oracle Demand Planning also collects and accounts for the dependent demand of mandatory items for which the forecast control is set to Consume & Derive. The mandatory items are distinguished from options, they have fixed planning percentages (generally 100% indicating that one mandatory component is used for every model configuration), and their planning percentages cannot be forecast in ODP as the dependent sales history does not exist for them. The planning percentages of the mandatory components are switched to the existing planning percentages, which are the planning percentages on the model bills collected from the ERP source for the entire forecasting horizon. Then the independent model forecast is exploded to the dependent forecast of mandatory components, using the switched planning percentages. If an item is mandatory in one model but optional in another, then the planning percentages are switched only for the former model.

In the diagram example below, the calculated planning percentage for the mandatory component, CPU, is changed to 100%.

ATO Model Bill	Input Data	Input Data	Adjusted Planning Percentage
	Sales History	Calculated Planning Percentage	
Desktop SB600 Model	1000		
- CPU (Mandatory)			100%

ATO Model Bill	Input Data	Input Data	Adjusted Planning Percentage
- Monitor (OC)	800	80%	80%
- 17"	200	25%	25%
- 19"	600	75%	75%

Many conditions affect the process of estimating the planning percentages, but the most significant variable is the variability of the product mix. The more stable the product mix, the more likely a planner is to use infrequent updates of planning percentages based mostly on history where the planning percentages are based on the ratio of average historical sales of options to the historical sales of model.

The more variable the product mix, the more likely a planner will use trend and seasonally projections by product where the planning percentages are based on the ratio of forecast of options to the forecast of model.

Shorter product life cycles, and to some extent increasing product mix variability, make qualitative assessments more important as opposed to quantitative assessments, and make it more likely that a planner will apply judgment by comparing to external forecasts (such as customer forecasts) and manual adjusting the dependent demand.

The collection of items and model bills and thus of sales history from ERP depends on the Calculate Planning Percentages profile. You can select to bring all the Options and Option Classes, which are specified as Optional in the Order Entry tab of Oracle Bills of Material, regardless of the forecast control flag.

You can also select to exclude the option classes from getting into Oracle Demand Planning and to adjust the bills in Oracle Demand Planning such that options roll directly to models. This allows you to set unique planning percent combinations for options when their parent Option class is associated to different assemble-to-order models.

MSD: Calculate Planning Percentages. The table below shows the list of values for the Calculate Planning Percentages profile option. For details, see: [Setup Profile Options](#) on page 2-18.

List of Values	What to collect
No, use existing planning percentages	Indicates the planning percentages are not be calculated in Oracle Demand Planning and only the existing planning percentages specified in the enterprise resource planning (ERP) source are used to explode the forecast.

List of Values	What to collect
Yes, for "Consume & Derive" Options and Option Classes	Indicates when you calculate planning percentages in Oracle Demand Planning from the sales history of Options and Option Classes, based on the model bills as defined in ERP.
Yes, for "Consume & Derive" Options only	Enables all the functionality of the preceding profile value except that the option classes are excluded from Oracle Demand Planning and treated as phantoms.
Yes, for all the Options and Option Classes	<p>Enables all the functionality of the Yes, for Consume & Derive Options and Option Classes value. All of the Options and Option Classes, specified as Optional in the Order Entry tab of Bills of Material, are brought into Oracle Demand Planning regardless of the forecast control flag, as long as the models' forecast control is set to Consume or Consume & Derive.</p> <p>For example, this BOM is not supported: Model: ATO Model = Consume & Derive with OC1 (Option Class = None and O1 Option= Consume & Derive.</p> <p>Oracle Demand Planning collects the option class OC1, and it passes on the planning percentage value for OC1 to Oracle Advanced Supply Chain Planning (because the forecast control = None) and it passes the demand for the option (because the forecast control = Consume & Derive). Since Oracle Advanced Supply Chain Planning explodes forecast control = None items, the demand for option O1 is double counted.</p>

Historical Planning Percentages

Model Bill	Booking History	Booking History	Planning Percentage	Planning Percentage
	November '02	December '02	January '03	February '03
Desktop Computer	600	700		
- Monitor	250	400	50%	50%
- Keyboard	425	550	75%	75%
- CPU	600	700	100%	100%
- Pentium II	300	300	46%	46%
- Pentium III	300	400	54%	54%

In the example presented above, the desktop computer is a model for which Monitor, Keyboard, and CPU are option classes. The CPU option class has two options: Pentium II and Pentium III.

The average historical planning percentages are calculated as follows:

For the Monitor

$$\begin{aligned}
 &= \text{Total Monitor sales} / \text{Total Desktop sales} \\
 &= (250 + 400) / (600 + 700) \% \\
 &= 50\%
 \end{aligned}$$

For the Pentium II

$$\begin{aligned}
 &= \text{Total Pentium II sales} / \text{Total CPU sales} \\
 &= (300 + 300) / (600 + 700) \% \\
 &= 46\%
 \end{aligned}$$

The historical planning percentages do not change with time and the same planning percentages are used for all the forecasting periods. If a forecast is created for January 03 and February 03 based on this booking history, the same planning percentages will be used to calculate dependent demand of options for both January 03 and February 03.

If you select to calculate dependent demand, based on historical planning percentages, an editable stored object for planning percentages associated to the forecast is created provided the historical data for options are available and the allocation to the item level has been allowed. This planning percentage object uses the properties of the forecast. For example, if the forecast was generated based on booking history, the planning percentage measure would use the same booking history. If the forecast is generated at the Quarter and Region levels, planning percentages are also calculated at the same levels.

8. Forecasted Planning Percentages

Model Bill	Booking's Forecast	Booking's Forecast	Planning Percentage	Planning Percentage
	January '03	February '03	January '03	February '03
Desktop Computer	800	850		
- Monitor	450	500	56%	59%
- Keyboard	600	650	75%	76%
- CPU	800	850	100%	100%
- Pentium II	280	250	35%	29%
- Pentium III	520	600	65%	71%

Individual model and options forecasts are created for January 03 and February 03 on the basis of their respective booking history for November 02 and December 02.

These forecasts are used to calculate planning percentages as follows:

For the Monitor

January 03 Planning Percentages

= Monitor forecast for January 03 / Desktop forecast for January 03

= 450 / 800

= 56%

For the Pentium II

January 03 Planning Percentages

= Pentium II forecast for January 03 / CPU forecast for January 03

= 280 / 800

= 35%

The February 03 planning percentages are created in the same manner from the forecast for February 03. The forecasted planning percentages are dynamic meaning they change with time and should be used for variable product mix. The planning percentages reflect decreasing sales of Pentium II with respect to Pentium III.

If you select to calculate dependent demand based on forecasted planning percentages, an editable stored object for planning percentages associated to the forecast is created provided the historical data for options are available and the allocation to the item level has been allowed. This planning percentage object uses the properties of the forecast. For example, if the forecast is generated based on booking history, the planning percentage measure would use the same booking history. If the forecast is generated at the Quarter and Region levels, planning percentages are also calculated at the same levels.

Pick-To-Order Models

You can also calculate planning percentages for pick-to-order optional items and components based on the sales history of configured items. Using the planning percentages, you can explode the independent forecast of pick-to-order models to derive the dependent demand of pick-to-order optional items and components.

Pick-to-order models and kits are collected into Oracle Demand Planning when their forecast control is Consume or Consume & Derive, even though their planning

method is 'not planned'. This is the one exception to the general rule that Oracle Demand Planning does not collect not planned items.

However, the pick-to-order model components and kit components are collected into Oracle Demand Planning only when their forecast control is Consume & Derive. The kits under other kits are not be exploded.

Configurations

Only the configurations with forecast control set to Consume & Derive are collected into Oracle Demand Planning, independent of the base model. The demand of configurations is not counted towards the demand of base models and is collected into Oracle Demand Planning as independent demand separate from the model demand. The demand for all other configurations are collected into Oracle Demand Planning as the demand of the base model.

Only the top level configurations are supported. Thus, if there are configurations under configurations, the lower level configurations are not supported.

Dependent and Total Revenues

The calculated and adjusted planning percentages and dependent demand must align well with the revenue projections or the targets by product categories and business units. Such alignment can be achieved by comparing the total revenues by product categories and business units. Adjustments if any are allocated down to the options. The independent revenue of a model is adjusted which changes its independent demand and in turn the dependent demand of its options.

You can calculate dependent and total revenues based on the options' planning percentages for the model. The independent demand of models and the dependent demand of options are multiplied by the price of base models and the price of options respectively to calculate and display the dollar forecasts for models and options.

$$\text{Estimated total revenue} = \text{Model's independent demand} * \text{Model's base price} + \text{Option's dependent demand} * \text{Option's price}$$

These dollar forecasts are added to display the total revenues. The price of all the mandatory components is rolled up into the model's base price, while the total revenue depends on the selection of options.

To calculate the dependent amount, it is assumed that one price list contains the prices of models, and the prices of the components. It is also assumed that the price list does not contain prices for the option classes. The dependent revenue is calculated by applying the specified price list to the dependent demand quantity.

The total revenue is calculated by adding the independent and dependent amounts. Both the dependent and total amounts are non-editable measures and are displayed in the regular worksheets and reports, but not in the planning percentages worksheet. The total amount for the model does not include the revenue for the options. The consolidated total is displayed only at aggregate levels in the product dimension. Thus, the total revenue analysis should be done at the product family or category levels.

Global Forecasting

Oracle Demand Planning allows you to postpone the fulfillment decision to supply planning by publishing global forecasts that do not contain references to specific ship to sites or ship from organizations.

Also with global forecasting, the organization dimension is optional. Otherwise, it is mandatory in Oracle Demand Planning. If you use the organization dimension in Oracle Demand Planning, it is collapsible with other dimensions. When setting up the organization dimension, you must include the item validation organization for the Line of Business specific demand plans.

Use the profile option, MSC: Organization containing generic BOM for forecast explosion, to indicate your Item Validation Organization. There should be only one Item Validation Organization per instance. You should run Oracle Advanced Supply Chain Planning collections as well as set the correct instances in Oracle Demand Planning for global forecasting to work.

Global forecasts are created using the generic model bills defined in the item-validation organization. Model bills in the validation organization are used for calculating planning percentages and used for exploding forecasts. The demand for models, option classes, and options is aggregated to all organizations, and the planning percentages are calculated at all organization level using these generic bills.

In the example below, computer is a model for which monitor is an optional component. The global historical planning percentages are calculated as follows:

The sales history of computer is aggregated across all the inventory organizations.

The planning percentages are calculated at the all organization level to be:

$$\begin{aligned} & \text{Total Monitor sales} / \text{Total Computer sales} \\ &= (400 + 550) / (850 + 1050) \\ &= 50\% \end{aligned}$$

The same planning percentages are used for all the inventory organizations.

The forecast is independent of the computer demand at the all organization level. Demand planning allocates to the inventory organizations, and then it calculates the dependent demand of the monitor by using the global model bills.

Organization Dimension	Model Bill	Sales History		Planning Percentages Feb' 04	Forecast Feb' 04
		Dec' 03	Jan' 04		
All Organization	Computer Model	850	1050		1200
	- Monitor	400	550	950/1900=50	600
Seattle DC	Computer Model	650	700		800
	- Monitor	300	400	50	400
Detroit DC	Computer Model	200	350		400
	- Monitor	100	150	50	200

Alternatively, demand planning forecasts the independent computer demand at the organization level, and it calculates the dependent demand at that level.

To Calculate Planning Percentages:

The following steps are required before starting the normal forecasting process.

1. Define planning bills of material on the source ERP system.

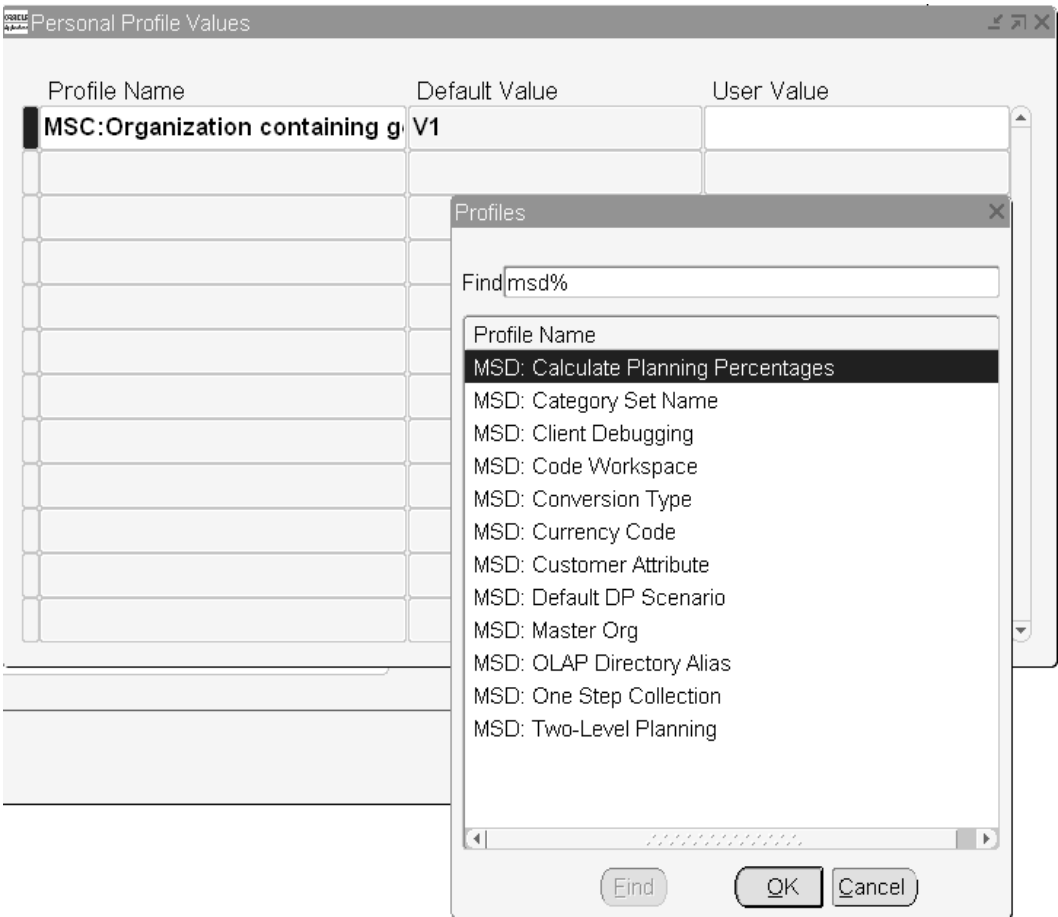
This includes defining model bills with option classes and options, as well as defining product family items and associating product family members to the families.

You can select to bring all the options and option classes that are specified as optional in the Bills of Material, even if the forecast control is None.

- Set up the Oracle Advanced Supply Chain Planning profile option. Choose Advanced Supply Chain Planners responsibility. Select Other > Profiles. Select MSC: Organization containing generic BOM for forecast explosion. In the User Value field, select your Item Validation Organization. There should

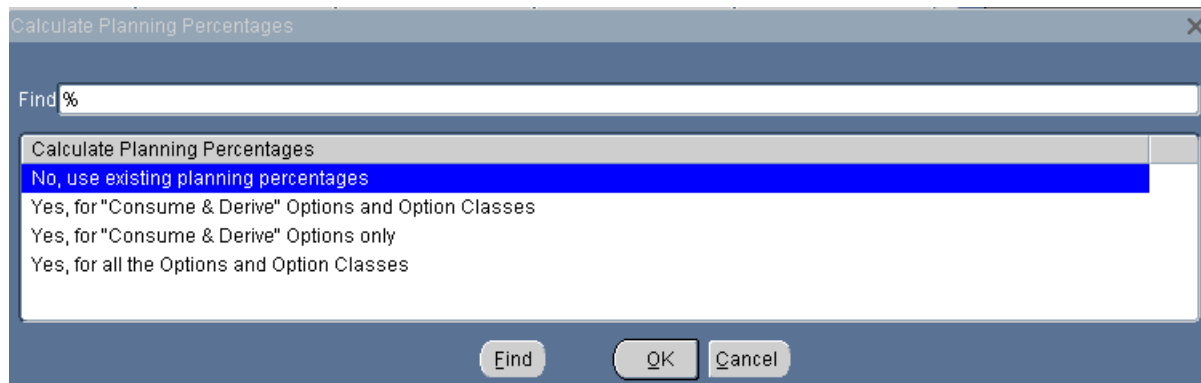
only be one Item Validation Organization per instance. For details, see: *Oracle Advanced Supply Chain Planning User's Guide, Appendix C.*

- 2. Choose Advanced Supply Chain Planners responsibility. Select Other > Profiles. Specify MSD% in the Profile field, and click Find button. System Profile Values screen appears with all the profiles related to Oracle Demand Planning. Select Calculate Planning Percentages profile.



Select a value to fit your model-options forecasting process. Set the profile option MSD: Calculate Planning Percentages to any of the last three options, as required for your business. Note that if this profile is set to Yes, for all the

Options and Option Classes, then the optional pick-to-order items are collected regardless of their forecast control and planning method.



For details on the options for this profile, see: [MSD: Calculate Planning Percentages](#) on page 26-17 and [Demand Planning Profile Options](#) on page C-2.

3. Collect the data for calculating planning percentages:

- With the Demand Planning System Administrator responsibility, select Collections > Collect from Oracle Systems > BOM Collections in the Navigator.

You need to collect Bills of Material data to bring the model bills and planning percentages from the source ERP system to Oracle Demand Planning. For details, see: [Bills of Material](#) on page 26-13.

Pick-to-order models are also collected, even though they are unplanned items.

- With the Demand Planning System Administrator responsibility, select Collections > Collect from Oracle Systems > Booking Data (and Shipment Data) in the Navigator.

You need to collect Sales history of Bookings and Shipments to bring dependent options demand and independent model demand from the source ERP system to Oracle Demand Planning.

- With the Demand Planning System Administrator responsibility, select Collections > Collect from Oracle Systems > Level Values. For details on Level Values, see: [To collect Level Values data](#): on page 4-12.

4. Verify your data streams. You will need to setup the dependent demand checkbox based on whether or not the data stream contains dependent demand data, such as booking history or shipment history.

With the Demand Planning System Administrator responsibility, select Setup > Data Stream > Define – Advanced. Select a data stream and click Next button. Check the Dependent Demand box. Then select Read or Calculate. For details on the read and calculate selections, see: [Dependent Demand](#) on page 3-8.

5. Enable forecast explosion for a Demand Plan by checking the Calculate Dependent Demand box from the Demand Plans window. This will explode the independent model forecast.

If this box is not checked for a demand plan, then the bills of materials, planning percentages, or dependent sales history will not be used by the Demand Planning Engine for that demand plan.

If it is checked, you may choose between two different modes of exploding the forecast: organization-specific bills of material or global bills of material.

With the Demand Planning System Administrator responsibility, select Demand Plans. Select the organization that owns the demand plan you want to use. Select the demand plan. Check the Calculate Dependent Demand box. Select the bills of material to be used for exploding the forecast.

- To enable global forecasting, select Global Bills of Material for Explode Forecast Using field. Calculating dependent demand based on global model bills is optional. If you do not need to explode forecasts, you can still publish the Oracle Demand Planning global forecast to Oracle Advanced Supply Chain Planning, and distribute the forecast to different inventory organizations in Oracle Advanced Supply Chain Planning.
6. Specify that dependent demand explosion should be performed by checking the Show dependent demand relationships in the measure wizard. Select a method to calculate planning percentages (historical or forecasted) in the measure wizard.

The dependent demand measures are created only for those measures that are defined using the measure wizard in the Demand Planning Engine with 'Show dependent demand relationships' checked. The dependent demand measures are not automatically created for the reference data streams loaded from the Demand Planning Server as an input parameter. To create a dependent demand measure for any reference data stream (for example, Input, Manufacturing, Forecast, and Sales Opportunities), you need to copy it to a new measure using the measure wizard with Dependent Demand checked.

The dependent demand is calculated at the lowest dimension levels. Thus, if the data is not allocated for any independent demand measure, then the dependent demand measure will not be created for it. If the measure definition is changed to allow allocation, the dependent demand measure will show up after the measure is repopulated.

7. Existing planning percentages (collected from the ERP system) and the calculated planning percentages are displayed in the planning percentages worksheet in the Demand Planning Engine. Demand planners view and change these percentages

To view and modify planning percentages, open the planning percentage worksheet, and select models and options for analysis. To modify the planning percentages worksheet to your requirements, you can drag and drop dimensions on the planning percentages worksheet. You can drag and drop dimensions to view specific trends in planning percentages.

- For global forecasting, view and modify the dependent demand in a planning percentages worksheet. If you modify the dependent demand or the planning percentages on the planning percentage worksheet for an inventory organization, you are essentially changing the global planning percentages. Thus, you are also effecting the demands for all other inventory organizations.
8. Recalculate dependent demand of options, and perform the demand planning cycle.
 9. Publish the scenario forecast to publish the associated planning percentages for use in Oracle Advanced Supply Chain Planning.

Note: for this feature, the revenue for the dependent demand is not calculated, and it is assumed that the revenue from the dependent part of the components is included in the revenue for the assembly. Only independent demand revenue is calculated.

This feature interacts with Oracle Bills of Material, Oracle Order Management, and Oracle Inventory. For details, see: *Oracle Bills of Material User's Guide*, *Oracle Configure To Order Implementation Manual*, and *Oracle Inventory User's Guide*. The user interface to calculate and edit planning percentages is explained in [Display and Calculations in the Planning Percentages Worksheet](#) on page 12-8 and details about the planning percentage worksheets are in [About the Planning Percentages Worksheet](#) on page 12-2.

Product Family Level Planning

When the product family forecast control is set to Consume or Consume & Derive, you can collect the sales history of the product families and members regardless of member item forecast control based on the profile option, MSD: Two-Level Planning.

The demand histories of members are added to produce a demand history of product families, the product family demand history is then used to generate a statistical product family forecast. You can allocate the product family forecast down to forecasts for individual member items, using an allocation method.

You can publish the product family level forecast into an Oracle Advanced Supply Chain Planning plan.

The total demand forecast for a scenario is published simultaneously at product family and item levels, when the scenario output level is product family.

Oracle Demand Planning does not publish the forecast for member items with forecast control set to None. Also, forecasts for pseudo product family levels (such as Other) created in Oracle Demand Planning to form a product family hierarchy are not published.

Planning percentages for product family member items are not collected in Oracle Demand Planning for any organizations.

For product family planning, all the family members of a product family must be either planned individually or as product family. All the family members of a product family must have the same forecast control item attribute. It can be set to either None or Consume & Derive. All the product family members must be standard items, which means they are not option classes or options and do not have dependent demand driven.

1. The following is an example of all family members of a product family planned at the product family level. In this example, there is a product family PF that has three member items A, B, and C.

Family members of product family PF	Forecast control of member
A	None
B	None
C	None

First, you collect all the family members (A, B, and C) and their sales history, where the product family forecast control is Consume or Consume & Derive.

	Oct 02	Nov 02	Dec 02
PF			
A	50	400	0
B	50	100	750
C	400	100	50

Next, you aggregate the sales history to the product family level.

	Oct 02	Nov 02	Dec 02
PF	500	600	800
A	50	400	0
B	50	100	750
C	400	100	50

Next, you generate a statistical forecast at product family level for the product family PF based on the aggregate sales history.

	Jan 03	Feb 03	Mar 03
PF	600	750	900
A			
B			
C			

Then you allocate the product family forecast based on the sales history of member items.

	Jan 03	Feb 03	Mar 03
PF	600	750	900
A	60	500	0

	Jan 03	Feb 03	Mar 03
B	60	125	844
C	480	125	56

Then you decide to modify the forecast at the product family level. You modify the 750, and consequently the member items (in italics) are changed.

	Jan 03	Feb 03	Mar 03
PF	600	750 600	900
A	60	<i>400</i>	0
B	60	<i>100</i>	844
C	480	<i>100</i>	56

Now, you can publish the forecast at product family level into a scenario.

	Jan 03	Feb 03	Mar 03
PF	600	600	900
A	-	-	-
B	-	-	-
C	-	-	-

This scenario is fed to an Oracle Advanced Supply Chain Planning plan, where the product family level forecast is exploded to the member items on the basis of planning percentages specified in product family bills in ERP.

2. The following is an example of all family members of a product family planned individually. In this example, there is a product family PF that has three member items A, B, and C.

Family members of product family PF	Forecast control of member
A	Consume & Derive
B	Consume & Derive
C	Consume & Derive

First, you collect all the family members (A, B, and C) and their sales history.

	Oct 02	Nov 02	Dec 02
PF			
A	4500	5500	4000
B	5000	9500	6000
C	3000	4000	4000

Next, you generate the statistical forecast for member items at the item level based on their sales history.

	Jan 03	Feb 03	Mar 03
PF			
A	5000	4000	4500
B	9000	6000	8000
C	4000	4000	4500

Next, you aggregate the member items forecast to the product family level.

	Jan 03	Feb 03	Mar 03
PF	18000	14000	17000
A	5000	4000	4500
B	9000	6000	8000
C	4000	4000	4500

Then you decide to modify the forecast at the member item level. You modify the member items (strikethrough numbers), and consequently the product family numbers (in italics) are changed.

	Jan 03	Feb 03	Mar 03
PF	<i>17000</i>	14000	<i>16000</i>
A	5000 4500	4000	4500

	Jan 03	Feb 03	Mar 03
B	9000 8500	6000	8000 7500
C	4000	4000	4500 4000

Now, you can publish forecast at the product family level into a scenario.

	Jan 03	Feb 03	Mar 03
PF	17000	14000	16000
A	4500	4000	4500
B	8500	6000	7500
C	4000	4000	4000

This scenario is fed to an Oracle Advanced Supply Chain Planning plan, where the product family level forecast is not exploded to the member items, the forecast control flag is set to Consume & Derive, and the forecast numbers will be used as such.

Multiple Step UOM Conversion

In Oracle Demand Planning, the forecast for an item is presented in its primary unit of measure (UOM). When the forecasts of several items are rolled up to a higher level, such as product category in the product hierarchy, the forecast numbers are converted from the base units of measure to a common unit of measure that has been selected by the user for the demand plan. Without such conversion, the rolled up numbers would be meaningless, since a single aggregate number could include quantities in different units of measure. The conversion can be accomplished whether the demand plan unit of measure belongs to the same or different UOM class for the various items. The UOM conversions across UOM classes are based on items. With this feature, the available conversion factors are analyzed and used by the system.

Some examples of units of measure are: gallon, quart, inch, yard, kilogram, case, box, unit, acre, cubic foot, and each. For example, a single unit of a product. Some examples of UOM class are: length, mass, volume, and package. Different units of measure can belong to different UOM classes. Feet belong to the length class, and pounds belong to the weight class. Conversion between two units of measure is done using a conversion factor or coefficient.

Two and three step UOM conversions

When a direct conversion from a given item's unit of measure to the demand plan unit of measure is not available, Oracle Demand Planning does a two-step or three-step conversion.

A two-step conversion is a conversion from one unit of measure to the base unit of measure of the UOM class, then from that base unit of measure to a final unit of measure. So, a two-step conversion involves the use of two different conversion factors. For example, when the item specific unit of measure of widgets is boxes and the plan unit of measure is kilograms, the boxes of widgets is converted to the base unit of measure of each (one unit), and is then converted to kilograms.

A three-step conversion is an interclass conversion between a unit of measure A in class 1 to a unit of measure B in class 2, where neither unit of measure A nor unit of measure B is the base unit of measure of its class. The conversion path is:

1. From unit of measure A to the base unit of measure of class 1.
2. From the base unit of measure of class 1 to the base unit of measure of class 2.
3. From the base unit of measure of class 2 to unit of measure B.

Analyze the available UOM conversion factors

To perform a multiple step UOM conversion, the available conversion factors are searched in the following order:

- 1-step item-specific conversion or direct conversion
- 2-step item-specific conversion
- 3-step item-specific conversion
- 1-step non-item-specific conversion
- 2-step non-item-specific conversion
- 3-step non-item-specific conversion

These conversion factors are analyzed and a conversion path is determined. The required steps are identified for each item separately. If none of the above is found, the conversion factor defaults to 1.

Aggregate the forecast by appropriate UOM conversions

The diverse units of measure of various items are converted to one demand plan unit of measure to roll up the forecast numbers along the product hierarchy. This is

accomplished using the appropriate conversion factors for the conversion path, such as, steps. The user is able to create and view the forecasts that include items whose units of measure are of UOM classes that are different from the UOM class of the demand plan, and items whose conversion coefficients are item dependent. The actuals (for example, bookings and shipments) are also rolled up the hierarchy in the same manner.

Example 1 How conversions are accomplished

In the following example, Quantity is one UOM class. Each and Dozen are the different units of measure while Each is the base unit of measure of Quantity UOM class. Weight is yet another UOM class. Pound and Kilogram are the different units of measure while Pound is the base unit of measure of Weight UOM class. The following table shows item dependent UOM conversions across these two UOM classes:

From UOM Class	From UOM	To UOM Class	To UOM	Item	Conversion Rate
Quantity	Each	Weight	Pound	Motor casing	2
Quantity	Each	Weight	Pound	Head casing	1.5

This table shows UOM conversions within the same UOM class:

From UOM Class	From UOM	To UOM Class	To UOM	Item	Conversion Rate
Quantity	Dozen	Quantity	Each	All	12
Weight	Pound	Weight	Kilogram	All	0.4536

In Oracle Demand Planning, the unit of measure has been selected as Kilogram and the primary unit of measure for the two items: Motor Casing and Head Casing, is Dozen. The forecast generated by Oracle Demand Planning for the two items: Motor Casing and Head Casing, is 1000 and 2000 respectively for August, 2002.

For the August, 2002 forecast for the Casing product category, to which these items belong, the conversion steps are:

- Dozen to each
- Each to pound
- Pound to kilogram

The Motor Casing forecast conversion calculation is $1000 * 12 * 2 * 0.4536 = 10886.4$ kg.

The Head Casing forecast conversion calculation is $2000 * 12 * 1.5 * 0.4536 = 16329.6$ kg.

The forecast for the Casing product category is $10886.4 + 16329.6 = 27216$ kg, and appears in Oracle Demand Planning as 27216 kg.

To apply UOM conversions:

Two things must be done for UOM conversions to take effect:

1. You must collect UOM conversion data from the source instance.

For details, see: [To collect Currency Conversion or UOM Conversion data](#): on page 4-8.

A quick summary of the steps you need to perform are:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Collections > Collect from Oracle Systems > UOM Conversion.

The Collection Utility window and Parameters window appear.

Collection Utility

Run this Request...

Name **Collect UOM Conversion Data** Copy...

Parameters

Language **American English** Languages...

At these Times...

As Soon as Possible Schedule...

Upon Completion...

☐ Save all Output Files

Notify

Print to **adsprinter** Options...

Help (H) Submit Cancel

- Select an instance.
 - Select OK.
3. Submit the request.
2. You must specify a base unit of measure for the demand plan.
For details, see: [About defining a Demand Plan](#) on page 7-2.

Using Sales Forecasts and Opportunities

Sales organizations can identify potential opportunities from their contacts and leads with the customers, and a portion of these opportunities end up as firm customer orders. These sales opportunities with varying degrees of probabilities of success are used to forecast sales. Demand analysts can compare sales forecasts with history based statistical forecasts and other forecasts such as manufacturing

forecasts. Analysts may also use portions of the sales forecasts in their final forecasts.

You can use the sales forecast from Oracle Sales Online in Oracle Demand Planning. Out-of-the-box collections enable you to bring into your demand plan best case sales forecast, most probable sales forecast, worst case sales forecast, weighted sales pipeline based on win probability, and best case sales pipeline numbers for the specified time period. You can specify the sales forecasts that you want to bring into Oracle Demand Planning.

Sales representatives and sales managers estimate the sales forecasts on opportunity and product category worksheets for their part of assignments. These worksheets present the summary of sales opportunities by customers and interest types, respectively. The sales forecast numbers on these worksheets can be modified and saved. After completing their estimation of future sales, the sales representatives and managers submit these worksheets through Oracle Sales Online. You can choose to collect sales forecast data into Oracle Demand Planning for any time period from any of these worksheets. Only the submitted numbers for the top most sales groups are collected in Oracle Demand Planning. The sales forecasts are compared to statistical manufacturing and customer forecasts in Oracle Demand Planning. The comparative trends as well as the upside and downside misses are used to estimate the true picture of future demand. Once agreed and approved, the resulting consensus forecast is used for planning operations.

Oracle Sales Online supports a hierarchical reporting structure of sales representatives and managers and sales groups. Due to skipped levels and multiple parents, this structure is not supported in Oracle Demand Planning. Thus, Oracle Demand Planning does not bring this information from Oracle Sales Online. All the sales forecast numbers are collected only for the highest sales groups, which do not have a parent sales group.

Since the sales forecast data enters Oracle Demand Planning at higher dimension levels, you may need to allocate the data down to lower levels. In Oracle Demand Planning, you can allocate the data based on some other data stream that has data at desired lower levels, such as Booking History.

Sales information can be brought in from Oracle Sales Online as well as other external customer relationship management applications. Data mapping information is provided so that sales opportunity data from external sources can be brought into the Demand Planning Server.

In Oracle Demand Planning, there are two ways to get sales information:

- Sales forecasts. The detailed steps are below. Oracle Demand Planning provides out-of-the-box collection programs to collect sales forecasts from Oracle Sales Online.
- Sales opportunities. The detailed steps are below. Oracle Demand Planning does not provide any out-of-the-box collection programs, and the data should be uploaded via flat files.

Sales forecasts

There are five seeded data streams to hold the five types of sales forecasts: Sales Forecast - Best Case, Sales Forecast - Worst Case, Sales Forecast - Probable Case, Sales Forecast - Pipeline, and Sales Forecast - Weighted Pipeline. The forecast data can be brought at following levels: All Sales Representatives for the top most sales group only, All Sales Channels, and All Organizations. The dimension levels for Product, Geography, and Time dimensions are kept flexible to match the levels allowed in the Oracle Sales Online worksheets.

You can also use flexible data streams to store both the parent and child data. The history of the dependent demand and of the model should be in the same data stream, either booking history or a custom data stream, for the system to calculate the planning percent.

During data collection from Oracle Sales Online, you specify a stream designator to identify the collected set of data. For example; if you name the collected data as Q1Q2-FY03, the five data streams holding just that set of data will become: Sales Forecast - Best Case: Q1Q2-FY03, Sales Forecast - Worst Case: Q1Q2-FY03, Sales Forecast - Probable Case: Q1Q2-FY03, Sales Forecast - Pipeline: Q1Q2-FY03, and Sales Forecast - Weighted Pipeline: Q1Q2-FY03.

The dimension levels at which the sales forecasts are used in Oracle Demand Planning depend on the type of worksheet used in Oracle Sales Online. The dimension level mapping to sales forecasts is flexible only for three dimensions: Geography, Product, and Time. Flexibility refers to the ability to accept sales forecasts at different levels in different collection runs. However, the dimension level has to be the same for a set of collected data. The seeded collection programs in Oracle Demand Planning determine the dimension level, depending on the selection of a data source from the following choices:

- Opportunity Worksheet: sales forecasts for a customer summed across all the inventory organizations, products, sales channels, and sales representatives. This worksheet maintains sales forecast data at the customer, interest type, and time (specifically, month, quarter, or year) levels.

- Product Category Worksheet: sales forecasts for a interest type summed across all the inventory organizations, customers, sales channels, and sales representatives.
- Forecast Worksheet for submitted forecasts: sales forecasts summed across all the inventory organizations, products, customers, sales channels, and sales representatives.

To collect sales forecasts from Oracle Sales Online:

The two prerequisites to collecting sales forecasts from Oracle Sales Online are:

- You must collect and use the appropriate fiscal calendar in Oracle Demand Planning. The fiscal calendar used in the demand plan should be the same calendar as used in Oracle Sales Online.

For details, see: [Lowest Time Levels for the demand plan](#) on page 7-5 and [To collect Calendars \(Time Data\)](#): on page 4-13.

- You must enable the interest type hierarchy in the product dimension. Interest Types for the Sales and Marketing Category Set are automatically collected into Oracle Demand Planning as a part of the level values collections.
 1. Choose the Demand Planning System Administrator responsibility.
 2. In Navigator, select Collections > Collect From Oracle Systems > Sales Forecast.

The Sales Forecast Collection window appears.

Sales Forecast Collection

☒ Sales Forecast - Best Case
☒ Sales Forecast - Worst Case
☒ Sales Forecast - Probable Case
☒ Sales Forecast - Pipeline
☒ Sales Forecast - Weighted Pipeline

Collection Parameters

Collection Type: **Collect** Single Step Collection: ☒
 Instance: Complete Refresh: ☒ Validate Data: ☒
 Stream Designator:
 Start Date:
 End Date:
 Forecast Category:
 Bucket Type:
 Source of Collection:

Submit Cancel

For details, see: [To collect Sales Forecast data from Oracle Sales Online to the Demand Planning Server](#): on page 4-9.

3. Complete the collection parameters:

- Start Date and End Date: specify a date range for which you want to collect sales forecast numbers.
- Forecast Category: an interest type can roll up to two or more forecast categories. In such situations, you should specify a forecast category to avoid double counting. You need to know and specify the exact forecast category. If this field is left blank, sales forecast numbers for all the forecast categories are brought over to Oracle Demand Planning.
- Bucket Type: for sales forecasts (at various time levels such as, fiscal month and fiscal quarter). You must select a bucket type from the list of fiscal calendar level values. Typically, all the sales representatives will use only one type of bucket, such as fiscal month or fiscal quarter, to forecast sales and you should specify that bucket only.

- **Source of Collection:** you must select the type of worksheet from where the seeded collection programs in Oracle Demand Planning will bring the data. For example, Opportunity Worksheet, Product Category Worksheet, or Forecast Worksheet.

If you have set up your data collections to be a two-step process by setting the profile option, MSD: ONE-step collection to No, you need to pull the sales forecast data from the Demand Planning staging tables to the fact tables.

1. Choose the Demand Planning System Administrator responsibility.
2. In Navigator, (to pull sales forecasts) select Collections > Pull Data > Sales Forecast.

To use Sales Forecasts in Oracle Demand Planning:

1. Choose Demand Plans. Use the Find Demand Plan window to select a demand plan.
2. From the Demand Plans window, select the Input Parameters tab. You can include the collected sales forecast numbers into your demand plan by selecting them as input parameters.

For details about Input Parameters, see: [Input Parameters](#) on page 7-12.

3. Complete the demand planning cycle by running the Demand Planning Engine batch processes, as necessary. For details, see: [Workflow Processes Within the Demand Planning Cycle](#) on page B-4.
4. Compare sales forecasts to other forecasts in a worksheet. For details, see: [Arranging and Viewing Data in Worksheets](#) on page 11-8.

You can convert the sales dollars to sales volume using a specified price list and compare the sales forecast to statistical, manufacturing, and customer forecasts. You may combine the two forecasts using formula measures functionality in Oracle Demand Planning, or modify a forecast by manual edits.

You can display and manipulate data in a demand plan using multiple time hierarchies. You can bring sales forecast at month or quarter level in fiscal calendar, and view the forecasts at week or period levels in manufacturing calendar. Generally, the sales forecasts and manufacturing forecasts are expressed in different calendars and product categories. Oracle Demand Planning will do appropriate conversions to facilitate their comparison.

The sales forecast numbers will be allocated down from fiscal quarter or month levels to the day level and aggregated up to the hierarchies on other calendars. For example, manufacturing weeks and periods in manufacturing calendar.

The sales forecasts numbers may also be available at interest type level if the data was summarized using product category worksheets. Interest types in Oracle Sales Online are analogous to product categories in ERP. An item SKUs may belong to a product category as well as to an interest type. Based on the Item Interest Type association in the Oracle Demand Planning, the sales forecasts for interest types are allocated down to items and then rolled up to other hierarchies (such as product category and product family) in the product dimension.

Sales opportunities

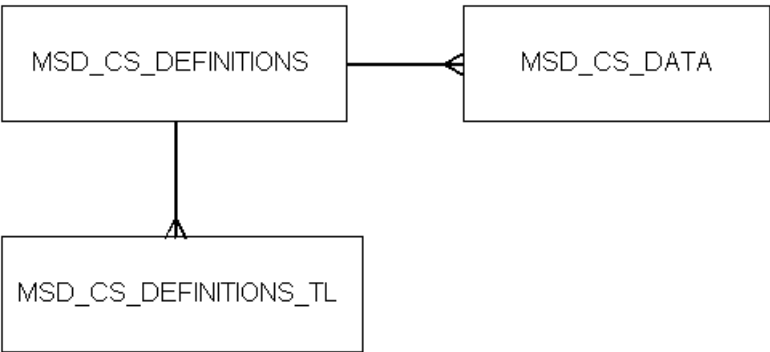
Once the sales opportunity data is in the demand planning server, the Sales Opportunity data stream can be used as an input parameter for a demand plan in Oracle Demand Planning the same way as described above for Sales Forecasts. Demand planners can then use this valuable information for forecast analysis and update:

Forecast Comparison							
<div> <div>Product</div> <div>Ship from Location</div> <div>Geography</div> </div> <div> <div>4 Products</div> <div>4 Organizations</div> <div>All Geography</div> </div>							
	2001	Qtr 2 2001	Qtr 3 2001	Qtr 4 2001	2002	Qtr 1 2002	
Sales Forecast ...	818,022.62	130,027.58	262,239.12	352,539.10	268,507.58	235,507.58	
Sales Forecast ...	236,058,951.30	55,433,080.08	71,901,678.71	101,885,331.82	80,578,413.84	80,873,419.31	
Customer Forecast ...	776,221.54	131,486.98	243,864.22	335,404.26	264,203.98	234,206.28	
Customer Forecast ...	223,577,912.49	52,925,473.24	71,383,179.44	91,904,112.92	72,113,472.10	72,032,778.10	

To import sales opportunities:

Since Oracle Demand Planning does not provide any collection programs, the sales opportunity data needs to be loaded into the Oracle Demand Planning staging tables via flat files.

The following diagram is a Data Model that shows how sales opportunity information is imported:



- MSD_CS_DEFINITIONS: stores the definition of data streams. Currently it has only one row seeded for Sales Opportunity.
- MSD_CS_DEFINITIONS_TL: stores the translations for the MSD_CS_DEFINITIONS table.
- MSD_CS_DATA: is a fact table that stores the data, such as Sales Opportunity, for data streams. Customer should upload data in this table for Sales Opportunity.

For details on how to collect sales information from Oracle Sales Online, see: [To collect Sales Forecast data from Oracle Sales Online to the Demand Planning Server](#): on page 4-9.

Sales opportunity mappings

After populating the data, the customer can use the view MSD_OPPORTUNITY_DATA_V to verify that populated rows are valid. Records that have valid information are visible via this view. The following table explains the mapping for MSD_CS_DATA table columns for populating Sales Opportunity data:

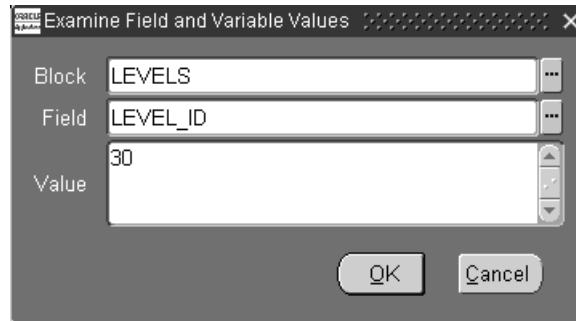
Column Name	Comments
CS_DATA_ID	Unique Key, Use MSD_CS_DATA_S sequence to generate unique key.
CS_DEFINITION_ID	This is the associated Custom Definition ID of Sales Opportunity. Fetch it using following SQL statement. Select cs_definition_id from msd_cs_definitions where name = 'MSD_SALES_OPPORTUNITY'.
ATTRIBUTE_1	Instance.
ATTRIBUTE_2	Product Dimension Level ID.

Column Name	Comments
ATTRIBUTE_3	Source Primary Key of Product Level.
ATTRIBUTE_6	Geography Dimension Level ID.
ATTRIBUTE_7	Source Primary Key of Geography Level.
ATTRIBUTE_10	Organization Dimension Level ID.
ATTRIBUTE_11	Source Primary Key of Organization Level.
ATTRIBUTE_14	Customer Level ID.
ATTRIBUTE_15	Source Primary Key for Customer.
ATTRIBUTE_18	Sales Rep Dimension Level ID.
ATTRIBUTE_19	Source Sales Rep PK.
ATTRIBUTE_22	Sales Channel Dimension Level ID.
ATTRIBUTE_23	Source Sales Channel PK.
ATTRIBUTE_34	Time Level ID (FND Lookup - MSD_PERIOD_TYPE).
ATTRIBUTE_41	Quantity.
ATTRIBUTE_42	Amount.
ATTRIBUTE_43	End Date. Store in YYYY/MM/DD format.

All dimension data is mandatory. For dimensions that are not used, please use the top dimension level as a dummy value. For example, if the Sales Channel dimension is not used, then use Level ID 33 (for example, All Sales Channel). The primary key value for the dimension should be set to -777. This corresponds to a preseeded level value of OTHER, which is present for all preseeded dimension levels in Oracle Demand Planning.

To find the level ID for a particular dimension level:

1. Choose the Demand Planning System Administrator responsibility.
2. In the Navigator, select Setup > Levels.
The Demand Planning Levels form appears.
3. Select the Dimension level you would like to examine.
4. From the Help menu, select Diagnostics > Examine.
The Examine Field and Variable Values form appears.



5. In Block, select LEVELS.
6. In Field, type LEVEL_ID.
7. Press the Tab key.

The value for the LEVEL_ID appears in the Value field.

8. Select OK.

Forecasting for Service Parts

With service parts forecasting, you can forecast the parts that are used to repair a product.

Service parts are used across a variety of industries, where their purposes and tracking differ. With Oracle Demand Planning, you can forecast for service parts across these various industries. Specifically, you can forecast service parts:

- For field service organizations with internal (repair depots) or external repair suppliers. For example, a customer reports a problem with the product. A field service engineer is dispatched to the customer site to service the product. The field service engineer replaces the defective parts in the product with usable parts in trunk stock. The repairable defective parts are sent back to a repair facility. The repaired parts are sent to the usable parts stock. Such organizations employ a combination of forecasting methodologies to estimate demand of service parts.
- For original equipment manufacturers with or without field service organizations and with internal repair depots or external repair suppliers, who provide the service parts necessary to maintain their products. For example, original equipment manufacturers customers may return products due to

excess inventory, shelf life, and so on. The returned products are re-boxed, repaired, or refurbished and sold as repaired product. Products may also be returned based on warranty or paid repairs, and can be repaired and shipped back to the customers. The typical service parts flow is generally unidirectional, flowing to the customers. Defective parts do not flow back to part suppliers.

- For service part providers, who make service parts available on demand and where service parts demand is based on maintenance schedules. For example, companies that maintain fleet operations, such as in aerospace or defense. Their customers order the service parts from a part catalog. The order is filled out of stock or procured from part suppliers. Service part providers typically use a forecasting methodology of estimating demand of service parts by projecting the shipping history of service parts by customers and distribution centers. Service part providers must keep track of engineering changes in the original equipment manufacturer products that they provide service parts for.

Forecasting based on Maintenance Schedules

Oracle Demand Planning is integrated with Oracle Complex Maintenance, Repair and Overhaul to provide consumables material planning capability for fleet maintenance operators. Example of fleet maintenance operators include companies in the aerospace and defense industries. Oracle Demand Planning considers consumables requirements for near-term and longer-term scheduled (routine or planned) maintenance as well as unscheduled (non-routine and unplanned) maintenance. The near-term schedule is for maintenance that has been scheduled and sourced to a specific repair facility, and the longer-term schedule is based on maintenance plan. For details about Oracle Complex Maintenance, Repair and Overhaul and the unit maintenance plan, see: *Oracle Complex Maintenance, Repair and Overhaul User's Guide*.

Oracle Demand Planning collects material requirements from Complex Maintenance, Repair, and Overhaul based on the consumption or usage of service parts. It collects the future material requirements from scheduled visits and unit maintenance plans, and the history of routine and non-routine material requirements. The collected data are available as separate data streams in Oracle Demand Planning.

To collect complex maintenance, repair and overhaul data into demand planning:

1. Choose the Demand Planning System Administrator responsibility.

1. In the Navigator, select Collections > Collect from Oracle Systems, and select one of the four data collection programs for streams for complex maintenance, repair, and overhaul data:
 - Material usage history - Unplanned maintenance
 - Material requirements - Planned maintenance
 - Material usage history - Planned maintenance
 - Material requirements - Scheduled visits

For details on these data streams, see: [Input Parameters](#) on page 7-12.

The table below shows the default data stream definitions for the Oracle Demand Planning Complex Maintenance, Repair, and Overhaul.

Level/ Data Stream	Product	Ship From	Time
Material Requirements – Planned Maintenance	Item	All Organizations	Day
Material Requirements – Scheduled Visits	Item	Organization	Day
Material Usage History – Planned Maintenance	Item	Organization	Day
Material Usage History – Unplanned Maintenance	Item	Organization	Day

2. The Custom Stream Collection window appears. For details on how to complete this window, see: [Procedure for Collecting Data](#) on page 4-4.
3. Select Submit. Or select Submit and Schedule.
4. Select OK.

Once the data is collected, you can set up your demand plan and complete your planning cycle activities to create two separate forecasts:

- Based on the material requirements from a unit maintenance plan in Oracle Complex Maintenance, Repair, and Overhaul. This forecast is based on the material requirements - planned maintenance data collection.
- Forecast of material requirements for unscheduled maintenance by statistically forecasting Material Usage History - Unplanned Maintenance data stream. Based on the forecast generated by Oracle Demand Planning. This is a statistical forecast based on the material usage history - unplanned maintenance.

These two forecasts can then be fed as separate forecast scenarios to Oracle Advanced Supply Chain Planning. Alternatively, the two forecasts can be added to

form an integrated forecast of material requirements and then fed as a single forecast scenario to Oracle Advanced Supply Chain Planning.

The forecasts can also be fed to Oracle Inventory Optimization in the same manner. In addition, forecast errors can be fed to Oracle Inventory Optimization. The forecast errors of the material requirements for unscheduled maintenance are created during the statistical forecasting, but the forecast errors of material requirements for scheduled maintenance need to be created by comparing the prior period forecast versions to the actuals.

To forecast complex maintenance, repair, and overhaul data in Oracle Demand Planning:

1. Build or select your desired demand plan. For details about how to setup your demand plan, see: [Procedure to define a Demand Plan](#) on page 7-2.

In the Demand Plans window Input Parameters tab, include the input parameters you want to be used in forecasting. For details about Input Parameters, see: [Input Parameters](#) on page 7-12.

2. Run the stages of the demand planning cycle (as necessary), including populating the forecast measure.

For details, see: [About the Stages in the Planning Cycle](#) on page 8-3. And for details on how to populate measures, see: [Populating Measures \(Stage 2\)](#) on page 8-9.

3. Compare the forecast to reference data. For example, you can use the Material Requirements - Scheduled Visits data to adjust the Material Requirements - Planned Maintenance forecast in a worksheet.
4. Adjust and edit the forecast. For details, see: (LINK TO DPE CHAPTER).
5. Publish forecast(s) to Oracle Inventory Optimization and/or Oracle Advanced Supply Chain Planning. For details, see: [To publish forecast data from the Planning Server to an Oracle Applications source instance:](#) on page 8-24.

Oracle Inventory Optimization generates optimal time-phased safety stock recommendations for all maintenance facilities and warehouses based on specified service level and budget constraints.

Oracle Advanced Supply Chain Planning separately collects the material requirements for scheduled visits and uses it as committed sales order demand to consume the material forecasts published by Oracle Demand Planning. Oracle Advanced Supply Chain Planning then generates recommendations for

moving or procuring material based on the consumed forecast and safety stock demands.

Usage Forecasting

Usage forecasting of service parts is applicable to service organizations when the historical usage or consumption history of the service parts is available and is adequate to estimate future demand. Service parts usage can occur when a product is repaired at the customer site (field service) or at the repair depot when a product is returned for repair. For field service, a field service engineer is assigned to carry out necessary repairs at the customer's site. After repairs are done, she completes the service part usage and return transactions via a debrief process. For depot repairs, a repair order and non-standard discrete repair jobs are created. For details about field service, see: *Oracle Field Service User Guide*. For details about depot repair, see: *Oracle Depot Repair User Guide*.

To forecast for service parts:

1. Collect service parts.
 - For details, see: [To collect Service Parts Usage History](#): on page 4-22 for the consumption of service parts used. You collect service parts usage history from Oracle Field Service as well as from Oracle Depot Repair.
2. Define supersession events in Oracle Demand Planning. For details about supersession events, see: [Life cycle and supersession based new product introductions](#) on page 6-18.

Supersession events allow you to transfer the consumption history of the superseded service parts to the up-item. You can then create a forecast of the new item based on the combined histories of the new item and the superseded items. You can also read supersede item-relationships into Oracle Demand Planning, and automate the process of modeling supersessions and creating forecasts for new items.

3. Define your demand plan, adding the input parameters and events you need. For details about defining your demand plan, see: [Procedure to define a Demand Plan](#) on page 7-2.
4. Create your desired forecast based on the collected data for service parts usage history. For details on forecasting methods, see: [Creating Forecast Measures](#) on page 17-4.
 - The service parts usage history is forecast by directly projecting the part usage history. Generally during the maturity phase of product life cycle, the historical

usage or consumption history of service parts is adequate to estimate future demand. The assumption in usage forecasting is that the consumption of a service part summed across different products eliminates the need to consider its consumption patterns by the age and operation of individual products.

5. Apply the service part supersession events. For details about applying events to your forecast, see: [Applying Events to Measures](#) on page 18-18.
6. Modify your forecast to arrive at final service parts demand.
7. Now you can publish your service parts demand forecast to Oracle Inventory Optimization or Oracle Advanced Supply Chain Planning. Your forecast is used in Oracle Advanced Supply Chain Planning as supply schedule to estimate the supply of service parts. For details about the supply plan, see: *Oracle Advanced Supply Chain Planning*.

Example

With usage forecasting, the service parts forecast demand is based on the direct projection of the service parts usage history. You collect into Oracle Demand Planning the usage history of service parts from Oracle Field Service and/or Oracle Depot Repair.

Lifter 234	Dec 2002	Jan 2003	Feb 2003	Mar 2003	Apr 2003	May 2003
Usage history	300	300	200			

Then your output from Oracle Demand Planning is a forecast of service parts.

Lifter 234	Dec 2002	Jan 2003	Feb 2003	Mar 2003	Apr 2003	May 2003
Projected usage				250	300	250

The demand planning forecast methods for usage forecasting recognize both the intermittent nature of service parts usage patterns and the possibility that outliers, such as spiked periods of usage, could be present in the usage history patterns.

For example, the automatic best-fit forecast method runs algorithm to find out the best forecasting method for a history profile. This eliminates the need to perform manual simulations. For intermittent demand forecasting and for detecting outliers, Oracle Demand Planning employs Moving Period Total data adjustments. The service parts for which the results of best-fit forecast method are not satisfactory can be re-forecast using other forecast methods.

Both long-term and short-term forecasts can be created in Oracle Demand Planning with no restriction on the number of history or forecast periods. Also, your forecast numbers can be specified and edited on a worksheet.

Once your forecasts are created, forecast accuracy can be calculated and tracked. You can define alerts to notify planners on the basis of tracking signals or control limits. For details about alerts, see: [Defining Alerts](#) on page 25-3.

Line of Business Specific Demand Plans

You may specify separate demand plans for different lines of business such that planners and planning managers can just look at the demand data pertaining to their respective line of business. The forecast for each line of business is fed into a global demand plan that represents the entire demand space to consolidate the lines of business forecasts into one corporate-wide forecast.

A line of business specific demand plan refers to limiting the scope of a demand plan to include only those level values, such as items, organizations, customers' ship to locations, and sales representatives, that pertain to that line of business. A line of business specific demand plan allows for the creation of a demand plan per line of business, such that the planners and managers for a line of business can view the demand data specific to their line of business.

There are a few ways to do this:

1. Restrict the demand plan scope to only those items for which data exist in a data stream. All the other level values are automatically filtered based on the items in scope. Thus, all the parent level values, including product families, product categories, or custom product groups in those product dimension hierarchies are included in the demand plan. Also, all the organizations for which the items are enabled are included in the demand plan. And all the parent level values, such as business groups, legal entities, and operating units of those organizations are included in the demand plan.

For example, let's say there is a sales history data stream that contains data for Printer-XT and Printer-AB in the Newark distribution center organization. If Printer-AB is enabled in the Detroit distribution center organization, then Detroit distribution center organization is also included in the line of business demand plan, but the planners will see the values NA (no data) for the sales history pertaining to Detroit distribution center organization. If other data streams of this demand plan have data corresponding to Detroit distribution center organization, then the planners will be able to see that data.

2. Restrict the demand plan scope to a level value in the ship from location dimension or to a level value in the product dimension. All the other level values are automatically filtered based on the selected level value.
 - If you restrict the demand plan scope to a business group in ship from location dimension, then all the legal entities, operating units, and organizations of the business group are included in the demand plan. All the items and their parent level values that are enabled for the organizations of the business group are included in the demand plan.
 - If you restrict the demand plan scope to a product group in ship from location dimension, then all the items of the product group are included in the demand plan. All the organizations for which the items are enabled and all the parent level values of those organizations are included in the demand plan.
3. You can restrict by both 1 (items in a data stream) and 2 (level values). If you scope the demand plan by both 1 and 2, then only those items that are allowed by both the methods are included in the demand plan. However, the organizations are restricted only by method 2 (level values).

You can also automatically scope by other dimensions based on operating units. For example, you can scope by:

- Sales representative dimension, which includes sales representatives that belong to the selected operating units.
- Geography dimension, which includes ship to locations that belong to the selected operating units.
- Sales Channel and demand class dimensions, which includes all sales channels and demand classes with no partitioning.

If sales representative or geography dimensions are included in the line of business demand plan, then the sales representatives and ship to locations for these dimensions are restricted to the line of business depending on the operating units in scope.

All the parent levels values of the sales representatives and ship to locations are also included in the demand plan. Limiting the demand plan scope has no impact on the other four dimensions: sales channel, demand class, user defined dimension 1, and user defined dimension 2. All the level values for these dimensions are always included in the demand plan.

Note: Users can optionally stripe by organization even when the Ship From Location is not a dimension in the demand plan. This may be useful if you want to create different demand plans for different lines of business, but you do not explode your forecast and you do not want to see the organization dimension in the demand plan.

You can include new products in the demand plan by using the new product introduction events. The new products are automatically included in the demand plan if the base products are in scope.

If you are calculating dependent demand based on model bills of material, the items in the scope must include all the models, option classes, and options on a model bill.

1. Ensure that the demand planning hierarchies align to lines of business. Since the demand plan scope can be restricted only to one level value in ship from location or product dimension, you may need to customize demand planning hierarchies to align them to your lines of business.

For example, if your line of business covers two or more product categories, you will add another level, such as product line, above the product category in the product category hierarchy so that the product categories of the line of business roll up to one product line.

2. Ensure that the required relationships are available in Oracle Demand Planning. The Lines of Business-specific demand plans functionality is dependent on the following three relationships:

- Item-Organization
- Sales Representative-Operating unit
- Ship-to-Location-Operating unit

These relationships can be set up in the source E-Business suite instance and are automatically collected into Oracle Demand Planning during the level values collection based on the setup. You use the level values collection program to collect these three relationships into Oracle Demand Planning.

For data sources other than Oracle ERP, these relationships can be loaded via flat files using legacy integration feature of demand planning. If a relationship is not provided, all the level values corresponding to the missing relationship are included in the demand plan.

For example, if the Sales Representative-Operating unit relationship is missing, all the Sales Representatives will be included in the demand plan.

To use lines of business specific demand plans:

1. Verify or enable the items in the organization of line of business. If you choose to restrict the demand plan scope, it always applies to both items and organizations based on the items that are enabled in the organizations of your line of business.
2. Set up the profile option MO: Default Operating Unit before specifying the ship to and the sales rep.

Level values for sales representative and geography dimensions are restricted depending on the operating units to which they are associated.

The sales representatives and ship to locations that defined after setting this profile, are automatically associated to the operating unit selected for this profile.

3. Specify the demand plan scope.

For details, see: [To specify demand scope](#): on page 7-33.

You can specify the scope by:

- Restrict by line of business. This refers to method 2 explained above. The demand plan is scoped by a level value in the ship from location dimension or product dimension. The levels and level values that available for selection are independent of the product or organization dimensions/hierarchies included in the demand plan.
- Restrict to items based on the data stream. This refers to method 1 explained above. The demand plan is scoped by items in a data stream. The data streams that available for selection are not limited to those which are included as demand plan input parameters.

Once this demand plan is built in demand planning engine, the scope cannot be changed until the demand plan data is completely purged and the demand plan is rebuilt.

Also remember that the demand plan dimensions should be selected to align with the demand plan scope. Specifically,

- Product dimension is mandatory and must be included in the demand plan. It will always be striped per the scope of the demand plan.

- Ship from location dimension will always be striped per the scope of the demand plan, even if not included in the demand plan.
- Sales representative and geography dimensions will be striped, only if these dimensions are included in the demand plan.

When the user stripes a demand plan with organizations that have no relationships to the ship to locations, the sales reps, or the products, then all level values will be included in the stripe.

4. Create and upload the line of business forecast.

After defining the scope of the demand plan in the planning server, line of business-specific demand planning process is run in the demand planning engine to arrive at the final line of business forecast. Then this is uploaded to the Planning Server.

For details, see: [About Measures](#) on page 17-2.

If you need to consolidate the Lines of Business-specific forecasts into a corporate-wide forecast, you should feed the Lines of Business forecasts into a separate global demand plan after the forecasts are uploaded to planning server. A global demand plan is a demand plan where the scope is not restricted to a Line of Business.

Reference: Stored Measure Options

This section provides additional information about the choices that you make when you define or modify a stored forecast or copy measure.

The section includes the following topics:

- [Forecast Methods](#)
- [Measure Property: Unit of Measure Association](#)
- [Effect of Events on Measures](#)

Forecast Methods

The *forecast method* specifies the statistical method used to generate the forecast.

Oracle Demand Planning offers an Automatic forecast method whereby the built-in Geneva Forecasting™ engine determines the best statistical forecasting method to use based on the historical performance of each algorithm and the application of decision rules.

You can also choose one of the following statistical forecasting methods:

- **Linear regression** — Method in which a linear relationship, $(y = a \times x + b)$, is fitted to the data, where a and b are parameters estimated from history.
- **Polynomial regression** — Method of the nonlinear regression type in which a linear relation $(y' = a \times x' + b)$ is fitted to a transformation of the original data; in this case $x' = \log(x)$ and $y' = \log(y)$. This results in the development of a polynomial model: $(y) = c \times x^a$. Note that this is one of several types of polynomial regression models and not necessarily the most general form.
- **Exponential fit** — Method of the nonlinear regression type in which a linear relationship $(y' = a \times x' + b)$ is fitted to a transformation of the original data, where $x' = x$ and $y' = \ln(y)$. This results in the development of exponential model between x and y : $y = c \times \exp(ax)$.
- **Logarithmic fit** — Method of the nonlinear regression type in which a linear relationship, $(y = a \times x + b)$ is fitted to a transformation of the original data, where $x = \log(x)$ and $y' = y$. This results in the development of a logarithmic model between x and y : $y = a \times \log(x) + b$.
- **Asymptotic fit** — Method of the nonlinear regression type in which a linear relation $(y' = a \times x' + b)$ is fitted to a transformation of the original data, where $x' = 1/x$ and $y' = 1/y$. This results in the development of an asymptotic model: $y = x/(a + bx)$.
- **Exponential Asymptotic fit** — Method of the nonlinear regression type in which a linear relationship $(y' = a \times x' + b)$ is fitted to a transformation of the original data, where $x' = x$ and $y' = \ln(y/K - y)$. This results in the development of an exponential asymptotic curve: $y = cK\exp(ax)/\{1 + c\exp(ax)\}$.
- **Single Exponential Smoothing** — Method of the exponential smoothing type in which the current estimate is taken as the geometrically weighted average of past values, and all future values are given this same value. This method is applicable to short term forecasts of non-seasonal data.

- **Double Exponential Smoothing** — Method of the exponential smoothing type in which the current estimate is taken as the geometrically weighted average of past values and then added to a trend term that is calculated in an identical fashion. Single exponential smoothing is therefore applied to both the series and the trend term.
- **Holt-Winters** — Method of the exponential smoothing type used on seasonal data because of its ability to handle changes in mean, trend, and seasonality components. It combines double exponential smoothing methods with multiplicative seasonal factors, which are in turn estimated through single exponential smoothing.

Advanced statistical parameters

When you select a forecasting method, you have the option to specify values for advanced statistical parameters. This enables you to manually fine-tune the forecast.

Setting advanced parameters is discretionary. If you are using the Automatic method, the forecasting engine sets parameters for the selected forecast method when it runs the forecast. If you are using a method other than Automatic, the forecasting engine uses the defaults for parameters that are relevant to the selected method.

The following section lists the advanced statistical parameters in alphabetic order and briefly describes each one. The actual parameters that you see depend on the forecast method that you chose.

Alpha

For the three methods of the exponential smoothing family (Single Exponential Smoothing, Double Exponential Smoothing, and Holt-Winters), specifies the relative weighting to give to recent changes in mean value.

- **Alpha Max** — The minimum value is 0.0; the maximum value is 1.0; the default is .3.
- **Alpha Min** (available for Double Exponential Smoothing and Holt-Winters) — The minimum value is 0.0; the maximum value is 1.0; the default is 1.0.
- **Alpha Step** (available for Holt-Winters) — The incremental value used to go from Alpha Min to Alpha Max. The minimum value is 0.05; the maximum value is 0.2; the default is 0.1. The value that you enter must evenly divide the difference between Alpha Max and Alpha Min.

Beta

For the double exponential smoothing and Holt-Winters forecasting methods, specifies the relative weighting to give to recent changes in trend.

- Beta Max — The minimum value is 0.0; the maximum value is 1.0; the default is .3.
- Beta Min — The minimum value is 0.0; the maximum value is 1.0; the default is 1.0.
- Beta Step — The incremental value used to go from Beta Min to Beta Max. The minimum value is 0.05; the maximum value is 0.2; the default is 0.1. The value that you enter must evenly divide the difference between Beta Max and Beta Min.

Cyclical Decay

For the Automatic, linear and non-linear regression forecast methods, indicates how trends that are calculated based on history will be considered as the forecast time horizon increases. This parameter is useful when the history is large and some cyclical component has been identified. The parameter value indicates how seriously deviations from baseline activity are considered: a higher value implies slower decay while a lower value implies faster decay for cyclical components. Note that for less history (for example, less than about 1.5 to 2 years) and in the absence of cyclical activity, this parameter might not have any effect on the calculated forecasts.

- Cyclical Decay Max — The minimum value is 0.2; the maximum value is 1.0; the default is 1.0.
- Cyclical Decay Min — The minimum value is 0.2 the maximum value is 1.0; the default is 0.2.

The difference between the maximum value and the minimum value must be evenly divisible by 4.

Data Filters

Turns a seasonal or aggregate data filter on or off. You can choose one of the following options:

- No seasonal filter (the default).
- Seasonal filter — Accounts for seasonal patterns in the data.
- Moving periodic total filter — An "aggregation" filter that handles sporadic or intermittent time series data.(Available for all methods except Holt-Winters.)

Gamma

For the Holt-Winters forecasting method, specifies the relative weighting to give to recent changes in seasonality.

- Gamma Max — The minimum value is 0.0; the maximum value is 1.0; the default is .3.
- Gamma Min — The minimum value is 0.0; the maximum value is 1.0; the default is 1.0.
- Gamma Step— The incremental value used to go from Gamma Min to Gamma Max. The minimum value is 0.05; the maximum value is 0.2; the default is 0.1. The value that you enter must evenly divide the difference between Gamma Max and Gamma Min.

Min/Max Bounds

For all forecasting methods, specifies upper and lower bounds on forecast numbers as a factor or multiple of the historical values.

- Minimum Forecast Factor — Sets lower bounds on forecast numbers. The default is 0.
- Maximum Forecast Factor — Sets upper bounds on forecast numbers. The default is 100.

Over adjustment of forecasts within periods

For all forecasting methods, specifies whether to prevent over-adjustment to the data by using average, rather than the individual, values of a period. For example, using this parameter for a forecast at the day level would allocate the forecast to all valid days in a weeks rather than forecasting individually at the day level.

Smoothing

For all forecasting methods, smoothes historical data by averaging data with the time series. You can set the following smoothing parameters:

- Median smoothing window — Specifies the length of the median smoothing period. Larger values result in smoother forecasts. Depending on the nature of the data, a window size that is too small might be unable to filter outliers while a window size that is too large might miss data patterns. The minimum value is 1; the maximum value is 27; the default is 3. The time period is based on the level/calendar and history start date.

- Do you want to fit the data on smoothed series? — Specifies whether you want to turn the median smoothing filter on or off. The default is off.
- Do you want to interpolate for missing values — Specifies whether you want smooth the data by interpolating for missing values. This is useful for handling occasional missing values in the time series. The default is no.

Trend decay

For the Automatic, Double Exponential Smoothing and Holt-Winters methods, specifies parameters that determine how large trends detected from recent data affect the forecast.

- Trend Min — The minimum value is 0.0; the maximum value is 1.0; the default is 0.4.
- Trend Max — The minimum value is 0.0; the maximum value is 0.8; the default is 0.8.
- Trend Step — The incremental value used to go from Trend Min to Trend Max. The minimum value is 0.05; the maximum value is 0.2; the default is 0.2. The value that you enter must evenly divide the difference between Min and Max.
- Trend Dampening for erratic data — (Active if you chose "Moving Periodic Total Filter" as the data option for Data Filters) Specifies whether to apply trend dampening to erratic data.

Verification Window Size

For all forecasting methods, provides a ratio that specifies the portion of the data used in the verification phase. This ratio is used to calculate forecast accuracy statistics (MAD, MAPE, and RMSE). For the Automatic method, this ratio is also used to verify the best-fit method. Increasing the size means that the forecasting engine will use a larger portion of the most recent data; decreasing the size means that it will use a smaller portion of the data. The minimum value is 1/26; the maximum value is 1/2; the default is 1/3.

Measure Property: Unit of Measure Association

When you enable the **Apply Unit of Measure (UOM) when aggregating data** property for a measure, Oracle Demand Planning uses the Unit of Measure (UOM) for leaf level product items when aggregating product values to higher levels. For example, suppose that the base Unit of Measure (UOM) for the plan is "Each." If product A has a UOM of DZ (dozen) and a value of 10, and product B has a UOM

of Each and a value of 20, then they would be aggregated to a higher level using the UOM conversion of 1 DZ = 12 Each, so $10 \times 12 + 20 \times 1 = 120 + 20 = 140$.

You would almost always want to associate UOM's with a new measure, because for volume amounts, it makes the most sense to have them aggregate up this way.

An example of when you might *not* want to aggregate would be for something like a "Population" stream, for which the UOM's would not make sense.

The Base UOM for the plan is defined in the Demand Planning Server; however, the UOM for specific products may be unavailable or the conversion rates between the leaf products' UOM and the Base UOM for the plan may be unavailable. In these cases, the conversion rates will default to 1, so it will act like a flat aggregate from the leaf level of Product to higher levels. (In the previous example, it would just mean $10 + 20 = 30$ if no conversion rates were available.)

Effect of Events on Measures

When you apply events to a stored measure, Oracle Demand Planning applies the factor specified in the Action phase of the event definition process.

For all event types, events are applied at the day level for Time, values are allocated to the leaf level of the hierarchies, and then aggregated up.

When viewing events and their effects, ensure you are looking at the day level for Time. If you have qualified your event, then ensure that you select the qualified dimension value at the level you selected. When viewing events from other levels you will see an aggregated or allocated value which may not match what you expect to see.

Effect of a promotion event on a measure

When you associate a promotion event with a measure, Oracle Demand Planning applies the lift value (for each intersection, $\text{New Value} = \text{Existing Value} + \text{Lift}$) or the lift percent (for each intersection, $\text{New Value} = \text{Existing Value} \times [1 + \{\text{Lift}/100\}]$) of the absolute lift (for each intersection, $\text{New Value} = \text{Lift}$).

Effect of a product introduction event on a measure

When you associate a product introduction event with a measure, Oracle Demand Planning calculates the effect of the event as follows:

- For a lifecycle event: $\text{Forecast for new product} = \text{Sum over all specified base products (specified weights applied to each base product} \times \text{History for base}$

product, with optional lag). Cannibalizations take away from the specified product a specified fraction of the forecast for the newly introduced product.

- For a supersession event: Forecast for new product = Sum over all specified base products (specified weights applied to each product * Forecast for that base product).

Effect of a product phase out event on a measure

When you associate a product phase out event with a measure, Oracle Demand Planning calculates the effect of the event as linear decay rate, with specified start and end dates and the factor of the start day's forecast remaining at the end day. The end day's value is the factor times the start day's value; values between start and end are linearly interpreted.

Effect of multiple events on a measure

When a measure is associated with multiple events, Oracle Demand Planning applies the events in the following order:

1. New product introductions
2. Product phase outs
3. Optional promotion events
4. Mandatory promotion events

Optional events are calculated before mandatory events for the following reason: Assume that you are a store retailer, who offers a storewide 10% discount on Saturdays. The discount is a mandatory event — it happens to all transactions on that day. A customer comes in with a \$50 voucher. The voucher is an optional event which may not happen for each transaction. The storewide discount is always taken before the voucher is used. In addition, it's unlikely that the vendor would allow a customer to use two optional events for one transaction. For example, you couldn't use a \$50 voucher and a voucher for 50% off anything at the same time.

How Demand Planning Uses Oracle Workflow

This section describes how Demand Planning makes use of Oracle Workflow.

The section includes the following topics:

- [Overview of Workflow](#)
- [Prerequisites for Using Workflow with Oracle Demand Planning](#)
- [Workflow Processes Within the Demand Planning Cycle](#)

Overview of Workflow

Oracle Demand Planning has extensive batch and background processing needs. It has a repetitive cycle of processing that is organized as a well defined business workflow. Demand Planning uses Oracle Workflow to govern these application process flows and notify the user community of processing status.

This requires the Demand Planning Server via Oracle Workflow to execute tasks and receive responses from Express Server. The Express PL/SQL SNAPI interface (hereinafter referred to as EPS) working as the conduit to the Express Structured N-dimensional API (hereinafter referred to as SNAPI) enables Workflow to call functions in the Oracle 8.1.6 (or higher) environment to connect to Express Server and run functions in the Express Server environment.

Through the use of concurrent programs, Workflow activities, and APIs, concurrent requests automatically start Workflow background engines that correspond to specific Demand Planning Workflow processes. Each request runs PL/SQL to monitor a specific process and runs an engine until that process has completed — at which point the request ends.

The flow is initiated from the Oracle Demand Planning, Demand Planning Administration user interface using the user interface to call the Express Structured Programming Language (hereinafter referred to as Express SPL), which in turn starts a predetermined Oracle Workflow process. This Workflow process takes control and, when needed, attaches to Express Server from PL/SQL through EPS and SNAPI by using Workflow function activities.

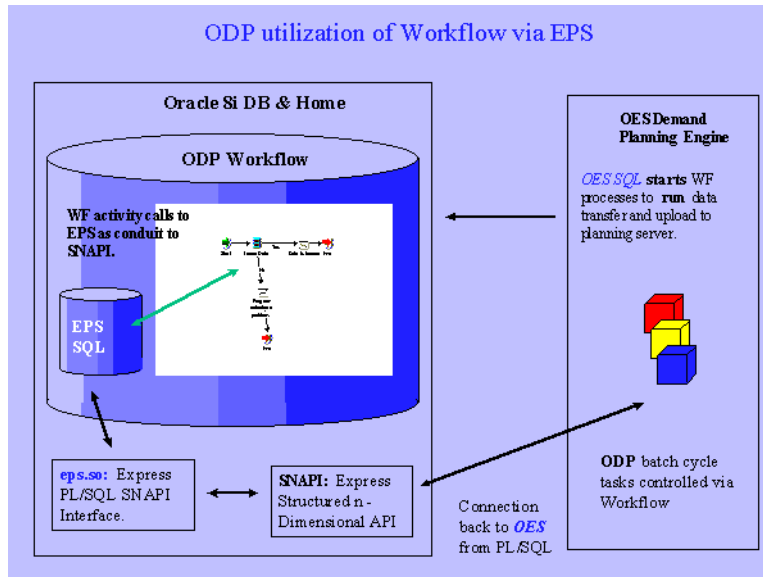
Workflow background engines

Some of the Workflow activities that are specific to Oracle Demand Planning are relatively long in duration. The intensive resource use takes place in Express Server, but the activity is managed in Workflow. These activities are deferred and run by Workflow background engines. When a background engine starts, it looks for a deferred activity to run, processes the activity if it finds one, and ends.

Oracle Demand Planning automatically launches the background engines for Workflow activities.

Example: Workflow utilization in Oracle Demand Planning

The following illustration shows how Oracle Demand Planning uses Oracle Workflow.



Prerequisites for Using Workflow with Oracle Demand Planning

In order to use Workflow in conjunction with Demand Planning, Oracle Workflow must be installed, configured, and tested.

If you want to generate e-mail alerts to users, e-mail must be configured for Workflow.

For information about testing and troubleshooting Workflow in conjunction with Oracle Demand Planning, see the *Oracle Demand Planning Installation and Configuration Guide*.

Workflow Processes Within the Demand Planning Cycle

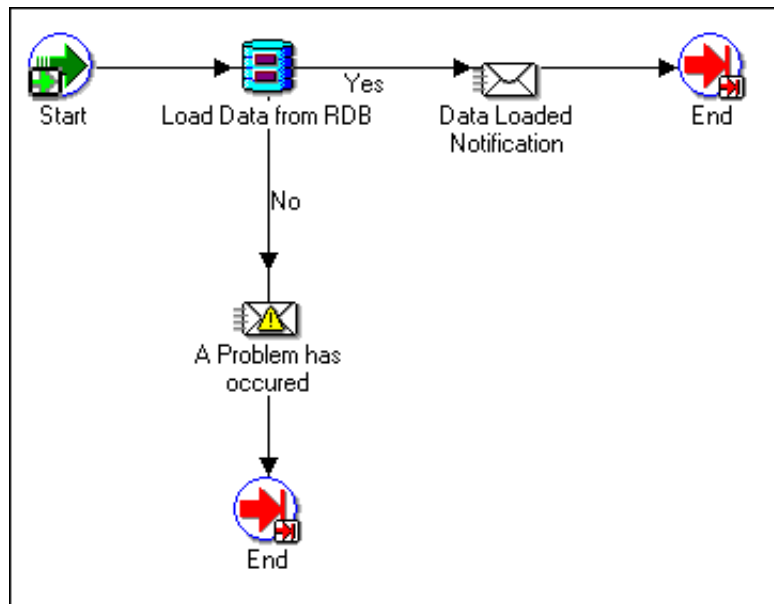
The demand planning cycle is made up of five stages, each of which initiates a specific Workflow process to govern the task that is performed during that stage. The five stages are as follows:

- Downloading data from the Demand Planning Server
- Populating measures (also runs forecasts)
- Distributing data and measures to demand planners
- Collecting and consolidating data from demand planners
- Uploading the consolidated data to the Demand Planning Server

Stage 1 Workflow process: Download data from Planning Server

This activity connects to the Express Server environment and begins to download data from the Demand Planning Server to Express. Upon successful completion of the download, Workflow sends a notification to the administrator. If an issue is detected by Express Server, then the "No" transition is taken by Workflow and a notification sent to the administrator.

The following illustration shows the Workflow process that runs to complete the Stage 1 task.

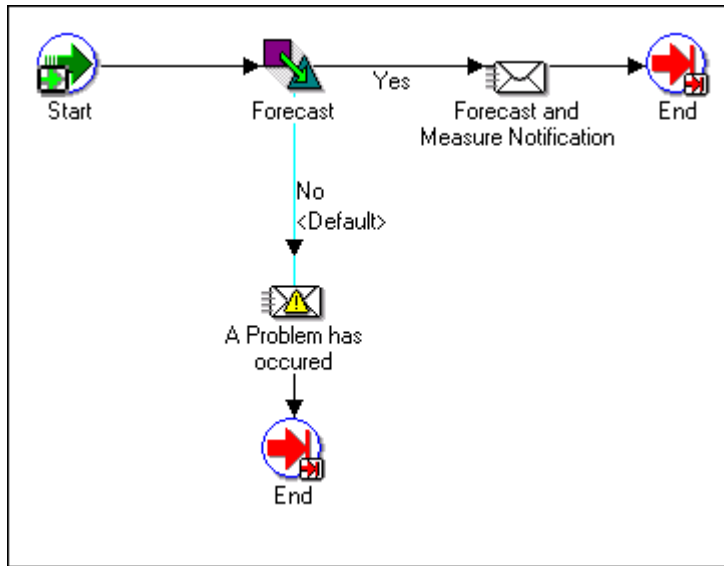


Stage 2 Workflow process: Populate Measures

During this stage Workflow interacts with Express Server to:

1. Run statistical forecasts.
2. Populate each measure that has been defined.
3. Notify the planning administrator of the outcome of the task.

The following illustration shows the Workflow process that runs to complete the Stage 2 task.

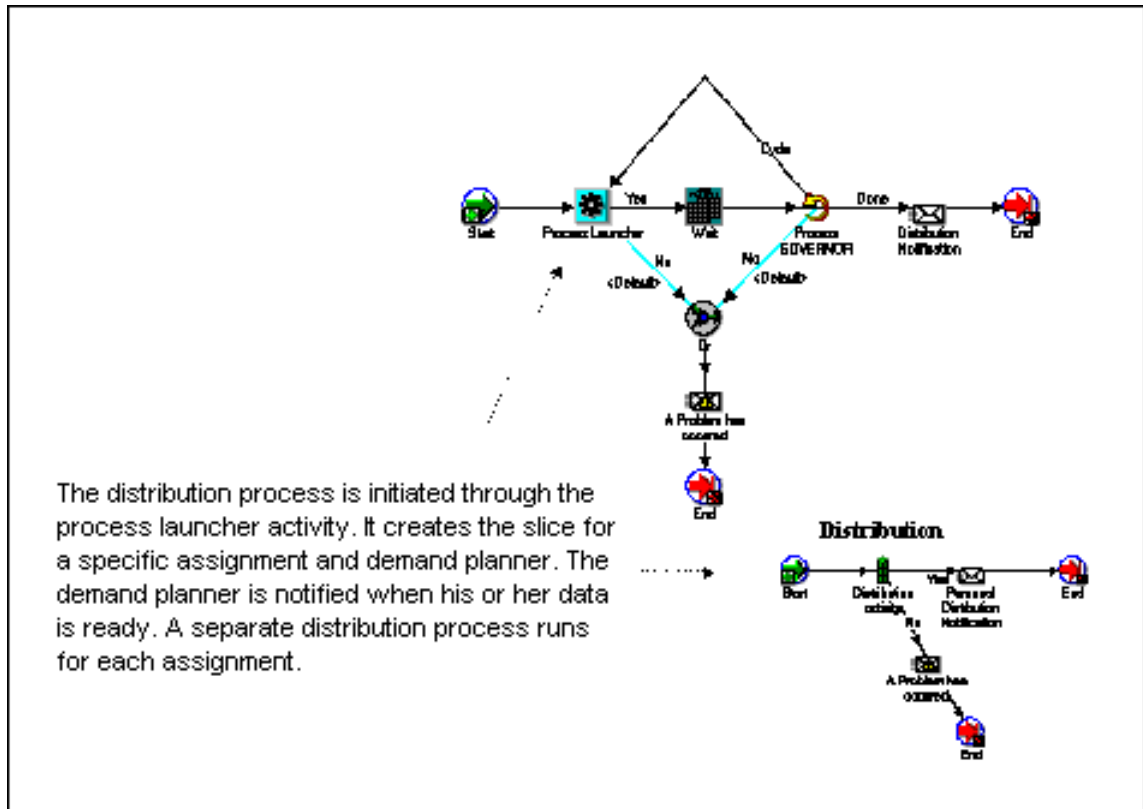


Stage 3 Workflow process: Distribute to planners

During this stage Workflow interacts with Express Server to:

1. Find all assignments defined for planners.
2. Build and distribute a personal slice of data for each user having a demand planner assignment.
3. Start a separate Workflow process to build each assignment and notify that user when their personal database is ready.
4. Notify the planning administrator of the outcome of the task when all assignments are built.

The following illustration shows the Workflow process that runs to complete the Stage 3 task.



Stage 4 Workflow process: Collect data from planners

There are two ways to collect data from planners. You can run the "standard" collection process (the default when you click Apply), or you can check the box "Collect Available Submissions Now" which runs the Collect Submission Now process.

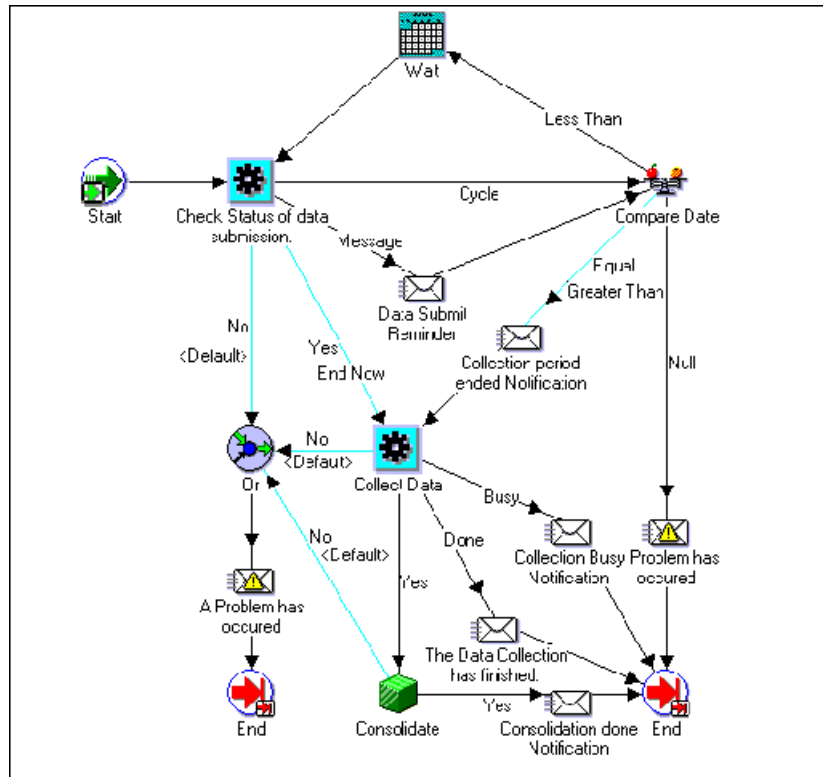
Note: If you use a concurrent program to automate processing, the system always runs the standard collection process. **For information about automating processing, see Automating the Planning Cycle on page 8-16.**

Standard collection process

When you run the standard collection, the following tasks are accomplished:

1. When all data has submitted by planners, it is collected, consolidated, and the process ends.
2. If the "Date to End Collection Period" is reached, all available submissions are collected and consolidated.
3. If reminder messages were requested, they will be sent when enabled.

The following illustration shows the Workflow process that runs the standard collection process for the Stage 4 task.



Collect Available Submissions Now

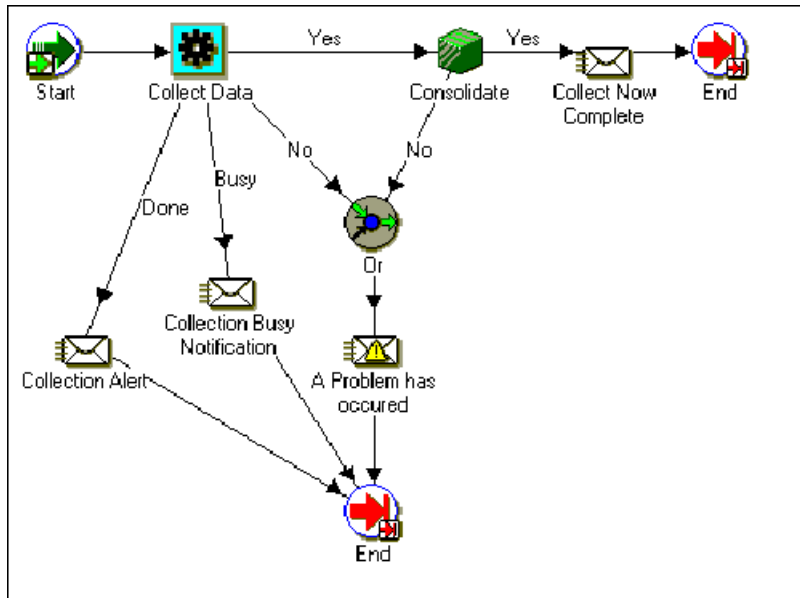
Collect Available Submissions Now is used to do an early collection of available submissions during the standard cycle. It is independent of the standard collection (the competitive nature of the two processes is managed by the system).

If you apply the Collect Available Submissions option, the following tasks are accomplished:

1. The Workflow process Collect Submission Now runs. This will not cycle. It will just look for any submitted assignments for that plan, collect and consolidate them, and then end. It will notify the administrator of the outcome.

2. The status for collected assignments will be set to *collected* and this process will then end.

The following illustration shows the Workflow process that runs when you choose **Collect Available Submissions Now**.

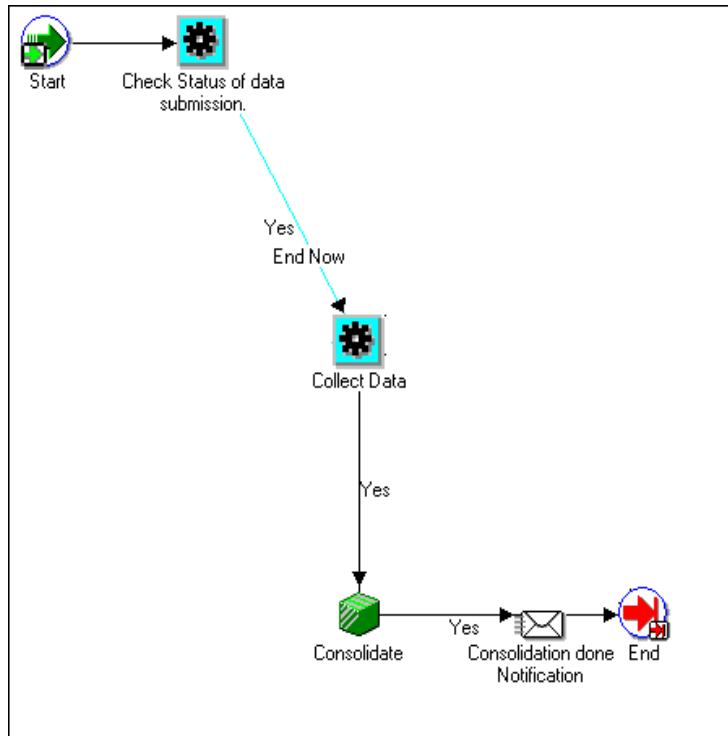


Scenarios for the standard collection process

The standard data collection process can follow several different paths. The three most common scenarios are described and illustrated following.

In the first scenario all data is *submitted* before the collection process is initiated. The Workflow status activity detects this and transitions to data collection and consolidation. No wait is involved. Immediately after the consolidation, a notification is sent indicating success.

The following illustration details the flow of activities when data is submitted before the collection process is initiated.

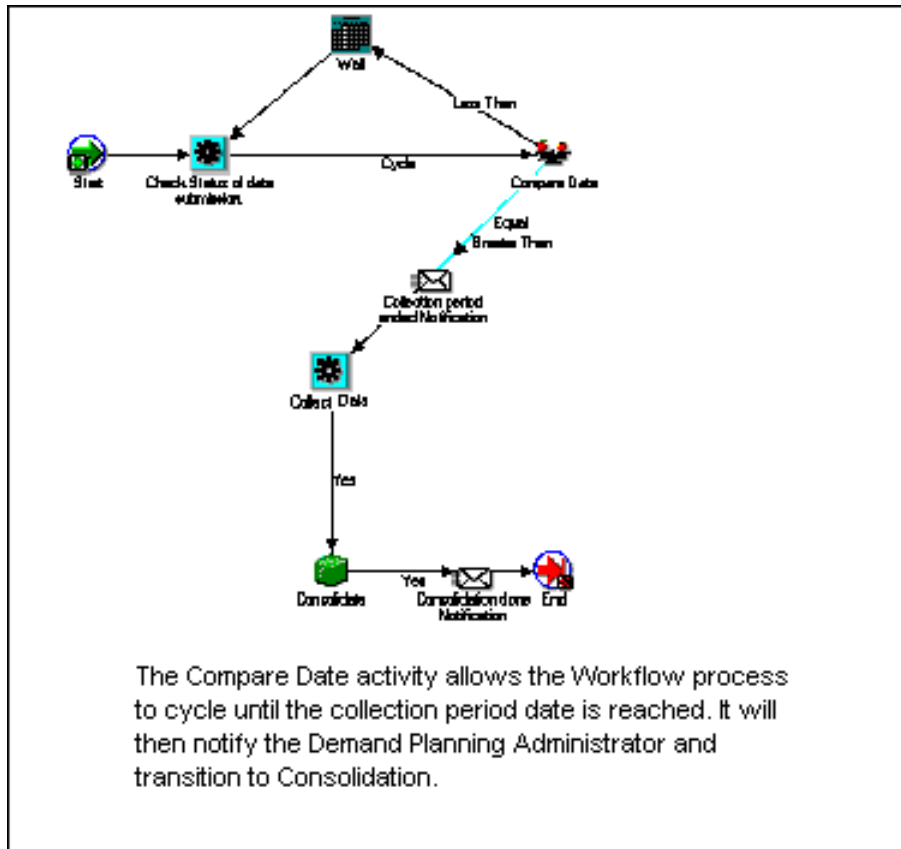


In the second scenario, not all data has been submitted when the Collect Data process is initiated. In this case, the Workflow process transitions through its activities to the Compare Date activity. If the end date for the collection period has not been reached, Workflow moves on to the Wait activity, where it pauses for the duration of the waiting period. It then moves on to the next activity, which checks the status of submitted data to verify whether all demand planners have submitted their data. If they have all submitted, then the first scenario above will be followed. Otherwise the flow will cycle.

Workflow will cycle through this set of activities until all demand planners have submitted their data, or until the data collection period end date is reached. When the data collection period end date is reached (whether all data has been submitted or not), Workflow sends a special notification to the Demand Planning System

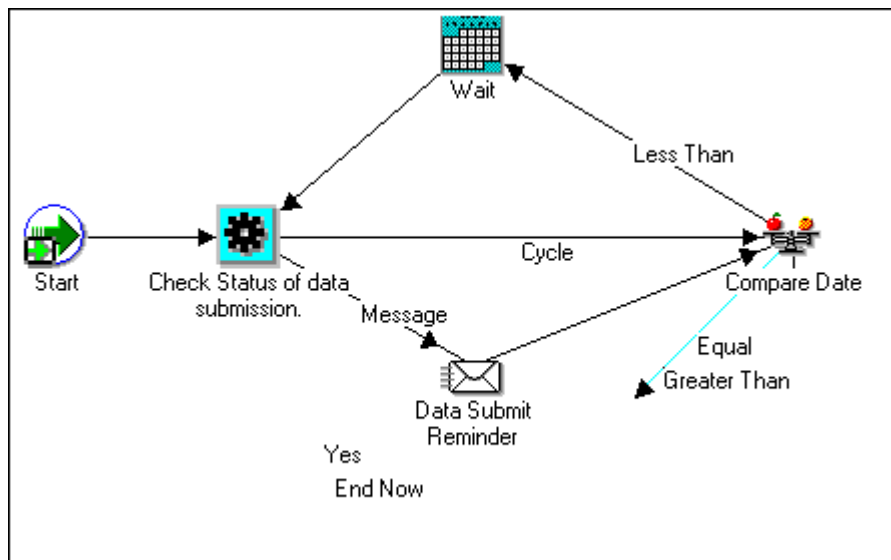
Administrator, and Workflow control is passed to the collection and consolidation activities.

The following illustration details the flow of activities when not all data has been submitted before the collection process is initiated.



The third scenario functions similarly to the second but includes an additional Workflow activity which sends a reminder to demand planners who have not submitted their data for collection. The Demand Plan Administration page enables you to specify the number of days prior to the data collection end date when Workflow will begin to send reminder messages, once per day, to demand planners who have not yet submitted their data.

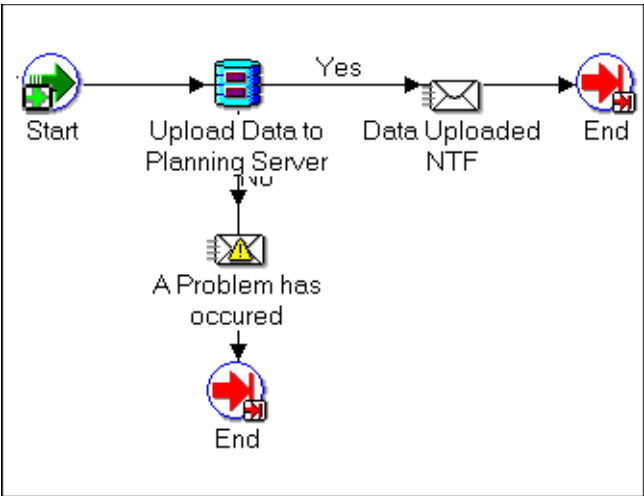
The following illustration details the flow of activities when not all data is submitted before the collection process is initiated and reminder messages are sent to planners.



Stage 5 Workflow process: Uploading measures to the Planning Server

In this final stage, the final forecast is published back to the Demand Planning Server. When this process is complete, Workflow notifies the Demand Planning System Administrator that the demand planning cycle has been completed.

The following illustration shows the flow of Workflow activities.



Profile Options

This section describes the profile options for Demand Planning.

The section includes the following topics:

- [Demand Planning Profile Options](#)
- [Main Planning Profile Options](#)

Demand Planning Profile Options

MSD: Calculate Planning Percentage This profile option controls the behavior of the planning percentage calculations. For example, it controls whether the planning percentages can be calculated from the sales history of options. This profile can prevent expensive calculations when the user does not want to calculate planning percentages and just wants to use the existing planning percentages specified in the enterprise resource planning source to explode the forecast.

MSD: Category Set Name This profile option is used to select one category set during the data collection process. If the user value is left blank, then all categories will be selected for data collection. Valid values are limited to valid category set names.

MSD: Client Debugging This profile allows you to enable debugging tools and is primarily for technical use.

MSD: Conversion Type This profile option determines what conversion rates are collected from the General Ledger rates table. Valid values are limited to valid conversion rates.

MSD: Currency Code This profile option designates the base currency used in Oracle Demand Planning. All revenues are calculated and displayed in this base currency. Valid values are limited to the currency list of values.

MSD: Customer Attribute This is a source profile option used to selectively bring the customer names into Oracle Demand Planning to improve system performance. This profile holds the descriptive flexfield column name that is used to indicate if a customer in the Customers table will be used by Oracle Demand Planning. Only those customers in the Geography dimension that have this flexfield populated will be collected. This profile option value is one of the attribute columns of the RA_CUSTOMERS entity, which indicates whether or not the customer will be used for demand planning purposes. In the customers table, you need to reflect this in a descriptive field. All of the source views for the geography dimension that use the RA_CUSTOMERS entity filter using this attribute column. If the profile option is not provided, then no filtering will occur. If the profile option is provided, then only the entities in the geography dimension that have the attribute in the RA_CUSTOMERS entity specified as Yes will be collected. To set up Key Customers, go to the Customer setup screen in Oracle Applications. Select the relevant customer and set an available flexfield column to Yes. For example, if you use attribute10, then you need to use this information in MSD profile option setup, too. Also in the

source instance set up the following information for profile option value MSD_CUSTOMER_ATTRIBUTE: list of values from ATTRIBUTE1 to ATTRIBUTE15.

MSD: Master Organization This profile option is used to select a master organization, if there are multiple master organizations. The item attributes pertaining to the selected master organization are used by Oracle Demand Planning. Note that the demand is exploded based on the item attributes in the respective inventory organizations, and is not exploded based on those in the master organization.

MSD: OLAP Directory Alias This profile allows you to specify database directory alias where the log files created during demand plan build process should be stored. The specified database directory alias is read during login and file-based operations. This profile option can only be set at the site level and is primarily for technical use.

MSD: One Step Collection This profile option controls the number of steps in the data collection process. Valid values are:

- Yes: indicating that the collection programs should take the data directly into the Fact Tables in a single step.
- No: allows for the default two step collection process. In the first step, the collection programs take the data in to the Staging Tables where the data can be consolidated and cleansed by the user, if required. In the second step, the pull concurrent programs carry the data over to the Fact Tables from the Staging Tables. Both set of tables exist on the Demand Planning Server. The default value is No.

MSD: Two-Level Planning This profile allows you to forecast demand at product family level on the basis of sales histories of member items. You can collect all the product family members and their sales histories regardless of the forecast control as long as the product family forecast control is 'Consume' or 'Consume & Derive' and the planning method for product family and members is not set to 'Not Planned'.

This is achieved by setting the profile value to: Collect all family members and their sales histories. The default profile value, Exclude family members with forecast control 'None' enforces the existing behavior that is, only 'Consume' or 'Consume & Derive' product family members are collected.

Main Planning Profile Options

For a complete list of all of the planning profile options, please refer to the Profile Options appendix in the *Oracle Advanced Planning and Scheduling Implementation and User's Guide*.

Glossary

A

ABC classification

A method of classifying items in decreasing order of importance, such as annual dollar volume or your company's transaction history.

absolute error

Magnitude of forecast errors, actual less forecast values, without regard to sign.

accuracy measure

In Oracle Demand Planning, a statistical data element that estimates the accuracy of a comparison between two measures. Accuracy measures include MAD, MAPE, and RMSE.

See also *Mean Absolute Deviation (MAD)*, *Mean Absolute Percent Error (MAPE)*, and *Root Mean Square Error (RMSE)*.

across

The column position in a Demand Planning report or worksheet. Columns go across the page.

See also *column*.

activity log

Demand Planning feature that enables planners to view a record of system activities.

ad hoc analysis

In Oracle Demand Planning, the process of analyzing data using a report or graph for which you specify the dimensions, dimension values, and layout. While viewing an ad hoc analysis, you can drill up or down on aggregate values.

See also *graph*, *report*.

adjustment

In Oracle Demand Planning, refers to the manual modification of forecast values to account for outliers or incorrect measurements. You can adjust a single value or a range of values. You can enter comments regarding the adjustments.

aggregate

In Oracle Demand Planning, a predefined grouping of values along a hierarchy, or a user-defined grouping of values. For example, a predefined aggregate for Geography might total territories by city, state, region, and country. A user-defined aggregate for Geography might combine values for three cities that are of interest to the user.

See also *custom aggregate*.

aggregate forecast

For a forecast variable such as demand, adding the contributions of child levels to obtain a single forecast value for the parent level.

aggregation

In Oracle Demand Planning, the consolidation of data for lower level dimension values into parent values. Data is often collected at the lowest available level of detail and is aggregated into higher level totals for analysis. For example, units sold in various cities might be aggregated into total units sold for all cities in a region. The aggregation rule might be “add,” in which case the values are added, or there might be an alternate aggregation rule such as “average.”

aggregation level

In Oracle Demand Planning, the position in a dimension hierarchy at which data can be viewed or manipulated. For example, aggregation levels for a Geography dimension might include City, County, State, Region, and so forth.

alert

In Oracle Demand Planning, a set of exception conditions that generates a notification to specified individuals when the conditions are met.

ahead

Quantities were delivered in advance of the customer's anticipated delivery date, or an over shipment in quantities occurred. The supplier must control this situation in such a way that he will not manufacture or deliver these quantities again. See: Behind.

AIAG

Automotive Industry Action Group, an organization which publishes combined EDI implementation requirements for the major automotive industry manufacturers and suppliers.

ALL_TAB_COLUMNS

A standard Oracle Database Table, maintained by the database, that contains the definition of every Column in every Table and View.

ALL_VIEWS

A standard Oracle Database Table, maintained by the database, that contains the definition of every View. Item Type is a high level grouping of Processes. Item Types are identified by name (e.g. ORDER) and are used to group other entities (like activities and messages) according to the type of business transaction or document they work with. Access to Item Types may be constrained by setting the R/W/X role privileges.

allocation

In Oracle Demand Planning, the process of changing child nodes values based on the change in the parent node, according to an algorithm. The algorithm might assign fixed, often equal, weights to each child, with the weights summing to unity.

ahead

Quantities were delivered in advance of the customer's anticipated delivery date, or an over shipment in quantities occurred. The supplier must control this situation in such a way that he will not manufacture or deliver these quantities again. See: Behind.

AIAG

Automotive Industry Action Group, an organization which publishes combined EDI implementation requirements for the major automotive industry manufacturers and suppliers.

ALL_TAB_COLUMNS

A standard Oracle Database Table, maintained by the database, that contains the definition of every Column in every Table and View.

ALL_VIEWS

A standard Oracle Database Table, maintained by the database, that contains the definition of every View. Item Type is a high level grouping of Processes. Item Types are identified by name (e.g. ORDER) and are used to group other entities (like activities and messages) according to the type of business transaction or document they work with. Access to Item Types may be constrained by setting the R/W/X role privileges.

allocation floor

See *lowest allocation level*.

alpha

In Oracle Demand Planning, a parameter used by the three forecasting methods of the exponential smoothing family: single, double, and Holt-Winters. This is the “level,” or baseline, parameter.

alpha smoothing factor

A value between 0 and 1 used in statistical forecasting calculations for smoothing demand fluctuations. Inventory uses the factor to determine how much weight to give to current demand when calculating a forecast.

anomalies

Outliers and other non-standard patterns in historical data.

APS

Acronym for Advanced Planning and Scheduling, a suite of Oracle products that includes Advanced Supply Chain Planning (ASCP), Global ATP (Available to Promise Server), Demand Planning, and Manufacturing Scheduling.

assembly

An item that has a bill of material. You can purchase or manufacture an assembly item.

See also *Bill of Material*.

assignment

In Oracle Demand Planning, the slice of data (measures and other dimension values) that a demand planner is responsible for forecasting and submitting to the shared database. Can also include data that the planner can view but not submit.

See also *assignment scope*, *view scope*.

assignment scope

In Oracle Demand Planning, the portion of the data (measures and other dimension values) that a demand planner is responsible for submitting to the shared database.

automatic method

See *best fit forecast*.

B**base model**

The model item from which a configuration item was created.

best fit forecast

The best performing method of the statistical forecasting models, based on historical data.

beta

Parameter used by two forecasting methods of the exponential smoothing type: double and Holt-Winters. It is referred to as the “trend” parameter because it controls the estimate of the trend.

Bill of Material (BOM)

A list of component items associated with a parent item and information about how each item relates to the parent item. Oracle Manufacturing supports standard, model, option class, and planning bills. The item information on a bill depends on the item type and bill type. The most common type of bill is a standard bill of material. A standard bill of material lists the components associated with a product or subassembly. It specifies the required quantity for each component plus other information to control work in process, material planning, and other Oracle Manufacturing functions. Also known as product structures.

bias

An error in the mean value of a forecast when compared to the actual data. Bias could apply to the entire data or to a segment of the data.

BOM item type

An item classification that determines the items you can use as components in a bill of material. BOM Item types include standard, model, option class, and planning items.

C**calendar**

A system to handle consistency for time-varying data. Oracle Demand Planning usually uses a Manufacturing calendar, where production is divided into four week periods.

calibration

The process of estimating model parameters from historical data in statistical forecasting models. Alternatively known as *training*.

cannibalization

The phenomena, often observed during the introduction of new products, in which one product takes the market share of another related product.

causal analysis

The process of forecast generation that uses known or calculated relations between a dependent variable, such as demand, and one or more factors that affect the dependent variable, such as weather, product promotion, and discounts.

cell protection

In Oracle Demand Planning, locking a cell so that its data cannot be modified until the protection is removed.

child

In Oracle Demand Planning, a dimension value at the level immediately below a particular value in a hierarchy. Values of children are included in the calculation that produces the aggregated total for a parent. A dimension value might be a child for more than one parent if the dimension has more than one hierarchy. See also *hierarchy*.

collaborative forecasting

In Oracle Demand Planning, forecast generated by consultation among, or consolidation of, individual forecasts issued by organizations that are linked to each other in the supply chain such as suppliers, manufacturers, customers, retailers and manufacturers.

column

An Oracle Demand Planning report or worksheet has three components for displaying multi-dimensional data: column, row, and page. The column component separates data for the dimension values that run across the report. See also *across*.

competitive event

Event that could potentially compete with other events in terms of its effect on product demand. In Oracle Demand Planning, only the competitive event with the highest priority is applied in any particular area.

component demand

Demand passed down from a parent assembly to a component.

component item

An item associated with a parent item on a bill of material.

composite

In the Express database used by Oracle Demand Planning, a dimension-like object that is derived from one or more base dimensions. Each member of the composite is a combination of members from each base dimension. Composite values are created automatically when data is assigned to a variable that uses the composite, thus reducing the number of NA values that would be stored on disk

confidence bounds or limits

The maximum and minimum level of variation expected for demand. These bounds are usually dictated by the uncertainty associated with the forecasts and represent the degree of confidence in the forecast values. For statistical forecasts, these correspond to the range with which a forecast value is expected to lie with some probability.

configuration

A product a customer orders by choosing a base model and a list of options. It can be shipped as individual pieces as a set (kit) or as an assembly (configuration item).

configuration bill of material

The bill of material for a configuration item.

configuration item

The item that corresponds to a base model and a specific list of options. Bills of Material creates a configuration item for assemble-to-order models.

configure-to-order

An environment where you enter customer orders by choosing a base model and then selecting options from a list of choices.

consensus forecast

Forecast generation by consultation among or consolidation of individual forecasts issued by different groups within an organization.

consolidation

The process of merging multiple forecasts for related, but not identical quantities. The forecasts can originate from multiple sources such as sales forecasts for different items, management forecasts for individual products, two managers forecasting sales for two different regions, or statistical forecasts for different commodities. Forecasts might also originate from a single source such as sales forecasts of different products from one salesperson.

constrained forecast

Unconstrained forecasts are generated from historical data or by individuals without regard to limitations. For example, a retailer with no knowledge of manufacturing capability or a manufacturer without knowledge might generate an unconstrained forecast. When an unconstrained forecast is appropriately modified based on knowledge of constraints, it is known as a constrained forecast. See also *unconstrained forecast*.

correlation

The relation between two or more variables, expressed as a number between -1 (perfect negative relation) and +1 (perfect positive correlation). The number 0 implies no relation.

correlation of events

See *event correlation*.

cross-correlation

The relation between a variable and the lagged values of another variable, expressed as a number between -1 (perfect negative relation) and +1 (perfect positive correlation). The number 0 implies no relation.

currency

The units of demand for that are used during data visualization, manipulation, and forecasting. In Oracle Demand Planning, currency is referred to as measures. See also *measure*.

custom aggregate

In Oracle Demand Planning, a single value that planners and the Demand Plan Manager can create to combine multiple values from one dimension into a single value. For example, a planner might create a custom aggregate that consists of three geographies rolled up into a single geography value. Custom aggregates appear on the user's selection list of dimension values.

cyclical decay

A parameter for linear and nonlinear regression that is useful if the length of the history is large and some cyclical component has been identified. The parameter value indicates how seriously deviations from baseline activity are considered: a higher value implies slower decay while a lower value implies faster decay for cyclical components. The allowable range is from 0.2 to 1.0. Since the algorithm searches for the best value of the parameter within the specified range, the recommendation is to leave the default values. Note that for less history (for example, less than about 1.5 to 2 years) and in the absence of cyclical activity, this parameter might not have any effect on the calculated forecasts.

D**data element**

A variable or set of variables that store data values. Alternatively, a place holder for data storage or viewing such as a cell or set of highlighted cells.

decimal precision

Number of digits after the decimal point that will be displayed (with rounding).

demand plan

In Oracle Demand Planning, an overall forecast of demand and possibly plans for integration with a supply chain. This consists of all available information from the

Planning Server including measures, baseline forecasts, conversion tables, scenarios, and event information.

dependent demand

Products for which forecasts are generated as a percentage or fractional rate of a related product. The rates might be obtained from history, from user input, or from the Planning Bill of Materials (BOM). For example, the blade of a turbine or the moon roof of a car illustrate dependent demand.

See also *independent demand*, *planning percent*.

dependent variable

In regression or modeling, a variable that is expressed as a function of another variable, or explained in terms of another variable.

differencing

The process of obtaining difference values at any give time. Difference values are the current value less the value at a given lag.

dimension

In Oracle Demand Planning, a list of categories for data. A dimension acts as an index for identifying the values of a variable. Examples of dimensions are Product, Geography, and Time.

dimension value

In Oracle Demand Planning, an element in the list that makes up a dimension. For example, dimension values in the Geography dimension might include Boston, Chicago, and New York.

disaggregate

The inverse of aggregation; spreading down or allocating data values at higher nodes to the lower nodes.

distribution

In Oracle Demand Planning a term used to refer to the process by which specific slices data are allocated to planners, based on their assignments.

document

In Oracle Demand Planning a collective term used to refer to a report, graph, or worksheet.

See also *report*, *graph*, *worksheet*.

down

The row position in a report or worksheet. Rows go down the page.
See also *row*.

drill

In Demand Planning, to navigate up and down through the levels of aggregation in a dimension that has a hierarchy. When selecting dimension values or viewing data, you can expand or collapse a hierarchy by drilling down or up in it. Drilling down expands the view to include child values that are associated with parent values in the dimension hierarchy. Drilling up collapses the list of descendant values associated with a parent value in the dimension hierarchy.

E**error bars**

Error range that forecast values are expected to exhibit with some degree of confidence.

estimation

Defining or determining a model or the parameters thereof.

event

In Oracle Demand Planning, any occurrence that is expected to impact the sales or demand forecast. For example, promotions, price reductions, product phase outs, and product introductions might be events.

event model

A technique that attempts to numerically capture the effect of an event on product demand at any aggregation level.

event correlation

The relation among events, such as a product introduction event and the corresponding cannibalization of a related product.

exception report

In Oracle Demand Planning, an ad hoc report that displays data associated with dimension values that are exceptions to planner-defined cutoff values. The criteria is applied to each page of data. For example, an exception report might identify customers whose orders have dropped by more a certain amount compared to the same period last year.

exponential smoothing

A class of statistic forecasting techniques in which the forecasts are obtained as simple linear weights of the actual value and the forecast value at previous time steps, or through some variation of this rule. The linear weights are the model parameters which are determined through calibration from historical data. Demand Planning offers three exponential smoothing methods: single, double, and triple (referred to as "Holt-Winter's").

Express

The database technology underlying the Demand Planning Engine. Demand Planning distributes data from the Demand Planning Server to a multi-dimensional Express database.

F**filtering**

In statistics, smoothing the data values by removing high frequency components. Filtering aids in the identification of underlying longer term trends and seasonality in the data that have some forecast-ability.

final assembly order

A discrete job created from a configuration or an assemble to order item and linked to a sales order. Also known as final assembly schedule.

forecast error

Each forecast that Demand Planning generates includes an estimate of the forecast error. The types of errors computed are Mean Absolute Percent Error (MAPE), Mean Square Error (MSE), and Mean Absolute Deviation (MAD).
See also *Mean Absolute Percent Error (MAPE)*, *Mean Square Error (MSE)*, *Mean Absolute Deviation (MAD)*

forecast reconciliation

See *reconciliation*.

forecasting methods

Refers to the statistical methods that you can use to generate forecasts in Oracle Demand Planning. These are Linear Regression, Polynomial Regression, Exponential Fit, Logarithmic Fit, Asymptotic fit, Exponential Asymptotic Fit, Single Exponential Smoothing, Double Exponential Smoothing, and Holt-Winters. As an alternative to selecting a specific method, you can allow the system to automatically determine the best-fit method.

formula measure

In Oracle Demand Planning, a formula that uses existing values in the database to calculate data on the fly. For example, you might create a formula measure that applies a weight to a forecast measure. A formula measure is not stored in the database, has no unit of measure association, and its values are never editable. See also *measure*.

frequency

The inverse of the time period at which the historical or forecast data are expected to repeat their past behavior. Seasonal or periodic data exhibit a low frequency component corresponding to their period. Purely random data that contain no substantial information usually exhibit high frequency.

frequency domain analysis

Analyzing time series data by first transforming it to the frequency domain, or by determining the time series components as a function of frequency. Estimates of the frequency components of a time series is often achieved through smoothed periodograms, using Fourier analysis. Frequency domain analysis often provides a better estimate for seasonal or periodic cyclicity in the data than time domain analysis. Demand Planning uses frequency domain analysis to calculate signal to noise ratios for outlier detection; however, this analysis is not visible to the planner and results are not reported directly.

G**gamma**

A parameter used by Holt-Winters, a forecasting method in the exponential smoothing family. This is the seasonal parameter.

Geneva

Refers to Roadmap Geneva Forecasting™ from Roadmap Technologies. Geneva is the forecasting engine that is used in Oracle Demand Planning for statistical forecast generation.

geography dimension

In Oracle Demand Planning, a category of data that denotes geographical area. For example, the Geography dimension might include values such as “Eastern US,” “Massachusetts,” and “Boston.”

See also *dimension*.

graph

An Oracle Demand Planning document that enables you to visualize and manipulate multi-dimensional data in graphical format. Types of graphs include area, bar, line, bar-line, pie, 3D, and scatter graphs.

H**hierarchy**

In Oracle Demand Planning, a means of organizing and structuring data within a dimension. A hierarchy exists when values within a dimension are arranged in levels, with each level representing the aggregated total of the data from the below. For example, a Geography dimension might have a hierarchy that includes levels for Account, City, State, and Region.

See also *aggregation, level*.

I**independence**

See *independent variable*.

independent demand

Products for which demand forecasts are generated from their own data, which could be in the form of historical demand, causal factors, third party information, and so forth. For example, forecasts for finished goods such as cars and computers illustrate independent demand.

See also *independent demand*.

independent variable

If a variable does not depend on another variable or set of variables in any way, then the first variable is said to be independent of the second. In regression, independent variable are those that cannot be expressed in terms of another variable. Note that independence implies no correlation between variables; however, the converse is not necessarily true.

input errors

Errors in measurement or data entry of variables that are used as inputs in the forecasting or planning process. Input error can be due to human or instrument error.

intermittent demand

Refers to sporadic demand patterns observed for certain products over certain time horizons. These types of demand are characterized by sudden surges followed by periods of zero or very low demand. Special modeling efforts might be required to handle these situations if the products constitute a significant proportion of the total sales.

introduction

See *product introduction event*.

item

Anything you make, purchase, or sell, including components, subassemblies, finished products, or supplies. Oracle Manufacturing also uses items to represent planning items that you can forecast, standard lines that you can include on invoices, and option classes you can use to group options in model and option class bills.

L**level**

In Oracle Demand Planning, a position in a dimension hierarchy. Each level above the base level represents the aggregated total of the data from the level below. For example a Geography dimension might have ascending levels such as Customer, City, State, and Region. Within a dimension hierarchy, a dimension value at one level has a family relationship with the dimension values at the levels above and below that level.

See also *aggregation, hierarchy*.

life cycle

The period over which a product stays in the market or is operationally produced by the manufacturer. A product's lifecycle events include the following:

- Born — A new product
- Young — A recently introduced product
- Old — A mature product
- Dead — A product whose functionality is no longer required as a result of new technology

likelihood

The probability of occurrence. The likelihood of a given model is the probability of the assumed model and the estimated parameters approximating reality.

linear models

A class of linear formulations that approximate the future behavior of a variable in terms of its own current and past values, or the current and past values of independent variables. The term implies that the model expresses the forecasts or the dependent variable as a linear function of the independent variables.

linear regression

A forecasting method in which a linear relationship ($y = a \times x + b$) is fitted to the data, where a and b are parameters estimated from history.

lowest allocation level

In Oracle Demand Planning, a setting in the Demand Planning Server that determines the lowest level of each dimension to which data will be allocated for a measure.

M**MAD**

See *Mean Absolute Deviation (MAD)*.

mandatory event

An event whose effects will be felt independently of other events that might occur. In Oracle Demand Planning, a priority is associated with such an event to determine the precedence of occurrence. This priority is necessary as the demand modification adds a specific number or uses an uplift factor, and operator precedence becomes important.

MAPE

See *Mean Absolute Percent Error (MAPE)*.

make-to-order

An environment where customers order unique configurations that must be manufactured using multiple discrete jobs and/or final assembly orders where the product from one discrete job is required as a component on another discrete job. Oracle Manufacturing does not provide special support for this environment beyond the support it provides for assemble-to-order manufacturing.

mandatory component

A component in a bill that is not optional. Bills of Material distinguishes required components from options in model and option class bills of material. Mandatory components in pick-to-order model bills are often referred to as included items, especially if they are shippable.

Mean Absolute Deviation (MAD)

A performance metric for evaluating forecast accuracy. $MAD = \{\Sigma(|Z_1 - Y_1|)\} / N$, where N is the total number of observations, the summation is for all N observations, Y represents the observed data at any time, and Z is the corresponding forecast data.

Mean Absolute Percent Error (MAPE)

A performance metric for evaluating forecast accuracy.

$MAPE = \{\Sigma|100 \times (Z_1 - Y_1) / (Y_i)|\} / N$, where N is the total number of observations, the summation is for all N observations, Y represents the observed data at any time, and Z is the corresponding forecast data.

Mean Squared Error (MSE)

A performance metric for evaluating forecast accuracy. $MSE = \{\Sigma(Z_1 - Y_1)^2\} / N$, where N is the total number of observations, the summation is for all N observations, Y represents the observed data at any time, and Z is the corresponding forecast data.

measure

In Oracle Demand Planning, a data variable that is a placeholder for storing or calculating data values for all levels of all dimensions.

See also *stored measure* and *formula measure*.

measurement errors

The expected errors or standard deviation errors that are associated with the measured or input values. For example, errors during a transaction are measurement errors.

metric

See *performance metric*.

middle-out

A method of allocating forecasts generated at a middle level of a hierarchy to the higher levels through aggregation and to lower levels through allocation.

model

An abstract, often statistical or mathematical, representation of reality. Used to approximate the complex process of demand generation, forecast generation, and answer what-if queries.

model bill of material

A bill of material for a model item. A model bill lists option classes and options available when you place an order for the model item.

model item

An item whose bill of material lists options and option classes available when you place an order for the model item.

moving average

A smoothing or forecasting technique where the smoothed or forecast value at a point is determined by the average, or weighted average for weighted moving average, of adjacent values in time. The window size used for computing the average is often a parameter that must be specified. For smoothing, both lagged and lead values can be used; for forecast, only past values can be used.

moving median

A smoothing or forecast technique where the smoothed or forecast value at a point is determined by the median of adjacent values in time. The window size used for computing the median is often a parameter that must be specified. It is used in Demand Planning to detect and filter outliers from historical data during statistical forecast generation. However, this analysis is hidden from the planner and results are not directly reported.

MSE

See *Mean Squared Error*.

MRP

See *material requirements planning*.

multidimensional

In Oracle Demand Planning, refers to accessing data through multiple dimensions that can be arranged and organized according to a planner's requirements.

N**new product introduction**

See *product introduction event*.

noise

In statistics, random variations in data caused by small changes in unaccountable factors, such as measurement error and lack of perfect repeatability during data generation. Loosely used to denote unexplained variances that are associated with demand that could be caused by individual human factors and are not expected to reoccur.

nonlinear regression

A class of statistical forecasting methods in which a linear relationship is fitted to a transformation of the original data. Demand Planning offers five non-linear regression methods: asymptotic fit, exponential fit, exponential asymptotic fit, logarithmic fit, and polynomial regression.

O

ODP

Abbreviation for Oracle Demand Planning.

OLAP

Abbreviation for Online Analytical Processing.

option

An optional item component in an option class or model bill of material.

option class

A group of related option items. An option class is orderable only within a model. An option class can also contain included items.

option class bill of material

A bill of material for an option class item that contains a list of related options.

option class item

An item whose bill of material contains a list of related options.

Oracle Workflow

The Oracle Workflow engine sequences the processes of demand planning. It is also used to schedule jobs and notify planners of certain events or exceptions.

outlier

A data value that is unusually large or small, usually caused by events that are not expected to reoccur and must be removed from the historical data when generating statistical forecasts.

outlier detection and filtering

The process of detecting and removing outliers from historical data for purposes of statistical forecast generation. The statistical forecasting techniques in Demand Planning automatically filter outliers through one of two methods: moving median in the “time domain” and signal to noise ratio in the “frequency domain.” During the forecast generation process, the best method is automatically selected.

P

page

In an Oracle Demand Planning document, the page component separates data for the dimension values that appear as pages.

parameter

Adjustable variable in a forecasting model, the values of which must be adjusted from historical data through a process called calibration or training.

parameter estimation

See *calibration*.

parent

In a hierarchical relationship in Oracle Demand Planning, the immediately superior level or node. For example in a Geography dimension, Eastern U.S. might be the parent of Massachusetts.

pareto analysis

A method for forecast model selection based on the type of item in stock. Items are divided into the following categories:

- A — Comprising 1 to 20% of all items but representing 80% of the total value, forecast in a controlled environment with non-adaptive forecasting models and significant monitoring.
- B — Comprising 20 to 30% of all items worth 15 to 20% of sales, forecast using short term adaptive models.
- C — Comprising 50 to 70% of all items and 5 to 10% of the value for which forecasts cannot provide significant ROI.

percolation

The process of modifying the values of parent nodes and successive nodes at the top of a hierarchy to reflect changes in the values of child nodes.

performance metric

A quantity that measures the performance of forecast values by comparing with actual data, for example, root mean square error.

period type

The temporal granularity, such as weeks or months, at which the effects of an event are likely to be felt.

periodicity

See *seasonality*.

personal database

In Oracle Demand Planning, the database to which a demand planner has modification rights. A demand planner works in his or her personal database and submits final forecasts to the shared database.

phase out

See *product phase out event*.

planning bill of material

A bill of material for a planning item that contains a list of items and planning percentages. You can use a planning bill to facilitate master scheduling and/or material planning. The total output of a planning bill of material is not limited to 100% (it can exceed this number by any amount).

planning percent

A component usage percentage that facilitates planning for optional components on model and option class bills, and all components on planning bills.

point value

The value of a variable defined at any one point, such as at a given level of aggregation, for specified hierarchies of each dimension.

predefined reports

In Oracle Demand Planning, a set of preformatted reports that target specific issues. There are predefined reports for forecast accuracy, trend analysis, comparison, distribution, growth, quota, and ranking.

price list

A list containing the base selling price per unit for a group of items, item categories or service offered. All prices in a price list are for the same currency.

product dimension

In Oracle Demand Planning, a category of data that denotes a product or group of products. For example, you might have product dimension values such as “sporting goods” and “rackets.”

See also *dimension*.

product introduction event

An event in which a new product is introduced. Oracle Demand Planning calculates the forecast based on the history or forecast, depending on the model type, of one or a linear combination of many model products using the spread model of a spread model product, which might be the same as the model product.

product phase out event

An event in which an existing product is allowed to die. In Oracle Demand Planning, a product phase out event is modeled as linear decay in demand.

promotion event

An event that represents the introduction of special schemes, incentives, or advertising to promote the demand and sale of a particular product. In Oracle Demand Planning, a promotion is defined as a standard event.

R**recalculate**

In Oracle Demand Planning, refers to calculating forecast values at selected points based on modified or new planner inputs, while keeping other forecast parameters the same as before.

reconciliation

Forecasts issued at higher levels of aggregation must be propagated to the lower levels through a top down technique. However, this process must not interfere with the numbers at the lower level, which could be generated from another forecast or for which some actual data might be available. In Demand Planning, reconciliation refers to the process of propagating forecast information from higher to lower levels without loss of information at the lower levels.

reforecast

Generate new forecast values for a selected data range, using modified history, a new history date range, or a different forecast method. A reforecast might also take into account effects such as promotions and new product introductions that had not been accounted for in a previous forecast.

regression

In statistics, a technique for determining the mathematical relation and the associated uncertainties between dependent variables, such as demand; independent variables, such as past demand; and other factors, such as price, promotions and discounts, through linear or nonlinear models. The form of the model could be dictated beforehand, or it could be dictated by the data.

report

A tabular presentation of multidimensional data. Demand Planning supports ad hoc reporting and also includes a set of predefined reports.

residual

Remainder. The residual of a forecasting process refers to the forecast error or the remaining variability that cannot be explained by the forecasting process.

responsibility

Determines the data, windows, menus, reports, and concurrent programs you can access in Oracle Applications. It is linked directly to a data group. Several users can share the same responsibility, and a single user can have multiple responsibilities.

RMSE

See *Root Mean Squared Error*

ROI on forecast

Return of Investment on forecast. Compares the revenue saved by issuing accurate forecast for n units of an item with the cost of gathering the data and issuing the forecast.

role

See *responsibility*.

Root Mean Squared Error (RMSE)

A number that summarizes the overall error and reflects the variability in the data. The individual errors are squared, added together, dividing by the number of individual errors, and then square rooted. A large RMSE indicates high fluctuations in differences between actual sales or shipments to corresponding forecast data.

row

An Oracle Demand Planning report has three components for displaying multidimensional data: column, row, and page. The row component separates data for the dimension values that run down the report. See also *down*.

S**safety stock**

Amount of inventory set aside to cover shortages. Depends on the forecast uncertainties and past performance.

scenario

In Oracle Demand Planning, forecasts can be generated from multiple sources such as sales, management, marketing, budget, constrained, and unconstrained. Forecasts from each source can also differ in scope, certainty, expectation (for example, optimist versus pessimistic), aggregation level, time horizon, attributes, and so forth. Each unique situation or function represents a scenario. Scenarios are set up and associated with a demand plan in the Demand Planning Server. Planners submit a forecast for each scenario in the demand plan.

seasonality

Repetitive pattern from year to year with demand for some periods considerably higher than others.

shared database

In Oracle Demand Planning, the database that stores consolidated data for a demand plan. Planners submit forecasts from their personal databases to the shared database; the Demand Plan Manager reviews data in the shared database before uploading the data to the Demand Planning Server.

signal to noise ratio

In time series, the ratio of the strength of the underlying signal, which is thought to generate the data, and the noise, which is thought to corrupt the data. This is a frequency domain tool used in Demand Planning for outlier detection.

See also *noise*.

sporadic demand

See *intermittent demand*.

spread model

The method for allocating data using top-down, bottom-up, or middle-out strategies. This could be done using specified weights, or weights that are calculated from history or forecasts.

standard event

In Oracle Demand Planning, any event other than product introduction or product phase out. These are characterized by event category, event type, priority, modification type, and uplift factor. The modifications are either additions or subtractions of numbers, or a factor of the demand of the product under consideration.

statistical forecast

Historical data are used to generate statistical forecasts in Oracle Demand Planning. The resultant forecasts include an estimate of the forecast error.

submit

In Oracle Demand Planning, refers to the action that a planner takes when he or she selects a forecast to commit to the shared database. Planners work on forecasts in their personal databases. Once a forecast is selected for submission, the data are moved from the personal database to a consolidated measure in the shared database.

supply chain planning

The development and maintenance of multi-organizational distribution and manufacturing plans across a global supply chain.

T

time dimension

In Oracle Demand Planning, a dimension whose values represent time periods. For example, values in the time dimension could include the following:

- » Years such as “2003” and “2004”
- » Quarters such as “Quarter 1 - 2003” and “Quarter 2 - 2003”
- » Months such as “February 2003” and “March 2003”

time domain analysis

Analysis of time dependent quantities using the actual values in time as independent variables. Temporal qualifiers such as time elapsed from some start date, might also be used as independent variables.

time series

A set of time-stamped data, such as demand data by the day.

time series analysis

Statistical analysis of time series data to determine statistical and other properties, and to often generate forecasts.

top-down

A method of allocating forecasts generated at the highest level of a hierarchy to the lower levels through allocation by a specified spreading rule.

tracking

The process of monitoring demand, historical data, accuracy of historical data, previous forecasts, and the past performance of forecasts.

trend

A characteristic that measures the inclination of time varying, demand, or other data values, to move up or down in an approximate straight line. While trend usually implies linear trend, it is loosely used to indicate other characteristics of data such as variation from mean, periodicity, or nonlinearity.

trend analysis

The process of analyzing data to yield trend estimates.

U

uncertainty

The degree of belief associated with a forecast. Uncertainty is useful to understand the expected skill of each forecast, and is an essential input for issuing composite forecasts. Uncertainty is measured and reported in terms of one of the following:

- » the expected standard deviation of the forecast errors
- » the expected upper and lower bounds on the forecasts
- » the probability of the forecast being accurate

unconstrained forecast

Forecast that is generated from historical data or by individuals without regard to limitations. For example, a retailer with no knowledge of manufacturing capability or a manufacturer without knowledge of customer demand might generate an unconstrained forecast.

See also *constrained forecast*.

uplift factor

For a standard event, the factor by which the existing demand must be increased or decreased.

upload

In Oracle Demand Planning, refers to the action that a Demand Plan Manager takes when he or she commits a final forecast to the Demand Planning Server.

V

variable

In Oracle Demand, a quantity that acts as a placeholder for a single datum or group of data. Demand for a particular product in a specific region is an example of a variable.

See also *measure*.

variance

In statistics, the square of the standard deviation. In Demand Planning, variance is loosely used to denote the forecast errors.

variant

In Oracle Demand Planning, a forecast version and related what-if analyses that planners can create.

view

See *multidimensional*.

view scope

In Oracle Demand Planning, refers to the portion of the data that a demand planner can view.

verification

The process of determining forecast performance using data that was not used during the forecast process.

W**what-if analysis**

A mechanism that enables planners to formulate ad hoc queries that represent hypothetical but realistic situations.

workflow

See *Oracle Workflow*.

worksheet

An Oracle Demand Planning document that enables planners to view and modify data.

A

- accessibility, 9-30
- accuracy measures
 - creating, 17-7, 17-33
 - submitting, 24-4
 - uploading, 24-8
- Activity log, 10-14
- ad hoc graphs
 - adding footnote, 15-11
 - adding subtitle, 15-11
 - adding title, 15-11
 - adding to folders, 21-3
 - applying custom aggregates to, 15-8, 19-5
 - applying saved selections to, 15-8
 - changing document type, 15-10
 - changing layout, 15-9
 - closing, 15-20
 - creating, 15-6
 - deleting, 15-21
 - description, 15-2
 - drilling in, 15-11
 - example, 15-3
 - exporting data from, 15-17
 - formatting, 15-11
 - formatting legend, 15-13
 - formatting tick labels, 15-12
 - opening, 15-7
 - printing, 15-14
 - renaming, 15-20
 - saving, 15-16
 - selecting data for, 15-7
 - toolbar, 15-4
 - types, 15-5
 - viewing properties, 15-21
- ad hoc reports
 - adding footnote, 14-29
 - adding subtitle, 14-29
 - adding title, 14-29
 - adding to folders, 21-3
 - applying custom aggregates to, 14-7, 19-5
 - applying saved selections to, 14-7, 20-7
 - changing to graph, 14-10
 - closing, 14-48
 - color coding, 14-34
 - copying data from, 14-44
 - creating, 14-4
 - deleting, 14-49
 - description, 14-2
 - drilling in, 14-10
 - example, 14-2
 - exporting data from, 14-46
 - format options, 14-24
 - formatting based on data conditions, 14-34
 - formatting fonts and colors, 14-26
 - formatting general elements, 14-25
 - formatting numbers, 14-31
 - formatting selected rows and columns, 11-33, 11-34, 14-30, 14-33
 - opening, 14-5
 - printing, 14-40
 - renaming, 14-48
 - saving, 14-43, 15-16
 - selecting data for, 14-6
 - setting row and column size, 14-27
 - stoplight formatting, 14-34
 - toolbar, 14-3
 - viewing events, 14-23

- viewing properties, 14-49
- adjusting data. *See* modifying data
- Aged Accuracy document, 16-6
- Aggregation and Allocation Functions, 3-13
- aggregation methods, stored measures, 17-11, 17-19, 17-28
- alerts
 - defining, 25-3
 - deleting, 25-15
 - description, 25-2
 - disabling, 25-12
 - enabling, 25-12, 25-13
 - example, 25-7
 - modifying, 25-11
 - properties, 25-15
 - renaming, 25-14
 - running manually, 25-14
- aligning
 - text for title, subtitle, and footnote, 11-31, 14-29, 15-11
 - text in ad hoc reports, 14-26, 14-30
 - text in worksheets, 11-27
- allocate demand, 7-13
- allocation floor. *See* allocation level, lowest
- allocation level, lowest, 9-8, 17-8, 17-42, 17-43, 23-5
- allocation methods, stored measures, 17-27
- assignment scope, 9-14, 9-17
- Assignment Set, 2-4
- assignments for planners
 - assignment scope, 9-17, 23-2
 - creating, 9-17
 - deleting, 9-23
 - editing, 9-20
 - finding overlapping values, 9-22
 - view scope, 9-17, 23-2
- Audit Fact, 5-3
- Audit Fact Data Report, 5-4
- Audit Fact report, 5-4
- audit statements, 5-12
- automatic forecasting method, A-2
- automating batch processes, 8-16
- autosizing, 11-28, 14-27

B

- Base Products, 6-23
- batch log, 8-21
- batch processes
 - automating, 8-16
- Bill of Material, 26-14
- borders, applying to ad hoc reports, 11-33, 11-34, 14-30, 14-33
- buttons
 - on ad hoc graph toolbar, 15-4
 - on ad hoc report toolbar, 14-3
 - on navigation toolbar, 10-5
 - on Planning Percentages worksheet toolbar, 12-4
 - on predefined report toolbar, 16-3
 - on worksheet toolbar, 11-3

C

- Cannibalized Products, 6-25
- chaotic data, 3-9
- child values, in Planning Percentages worksheet, 12-7
- closing documents, 11-41, 14-48, 15-20, 16-22
- Code, 2-9
- collaboration
 - setting up planners' assignments for, 9-14
 - See also* sharing data, sending data, receiving data
- collaboration history
 - viewing as Demand Planner or Demand Plan Manager, 9-42, 23-8
 - viewing in Demand Plan Administration, 9-42
- collect data from planners, 8-13, B-8
- Collect Filter Condition, 3-6, 3-26
- Collection Method, 2-7
- color coding
 - defining rules, 14-35
 - deleting rules, 14-40
 - description, 14-34
 - modifying rules, 14-39
 - options, 14-34
- colors and fonts
 - in ad hoc reports, 11-33, 11-34, 14-26, 14-30, 14-33

- in worksheets, 11-13, 11-27, 12-10
- Column mappings, 3-2
- column sizing
 - in ad hoc reports, 14-27
 - in predefined reports, 16-16
 - in worksheets, 11-28
- comment reason codes, defining, 9-26
- comments
 - display format in worksheet, 11-31
 - entering in Planning Percentages worksheet, 12-13
 - entering in worksheet, 11-23
 - persistence, 9-26
- comparative analysis, 7-13
- Comparison Accuracy document, 16-3
- Comparison document, 16-10
- Complete Refresh, 3-16
- complete refresh for download, 8-7
- conditional formatting. *See* color coding
- Conflict Resolution, 6-4
- Contract Purchases, 3-18
- control file, 3-22
- copying
 - data to clipboard, 11-19, 12-11, 14-44, 16-19
 - data to measure, 11-21
 - data to product, 11-21
 - documents to folders, 21-6
- Create Data Files, 4-32
- creating
 - ad hoc graphs, 15-6
 - ad hoc reports, 14-4
 - alerts, 25-3
 - custom aggregates, 19-2
 - folders, 21-3
 - measures, 17-4, 17-16, 17-24, 17-33, 17-37
 - saved selections, 20-2, 22-32
 - worksheets, 11-4
- CSV export, 11-39, 12-20, 14-46, 15-17, 16-20
- Currency, 2-4
- Currency Conversion, 4-8
- custom aggregates
 - applying to open documents, 19-5
 - defining, 19-2
 - deleting, 19-10
 - description, 19-2

- example, 19-5
 - modifying, 19-8
 - prior period, 19-3
 - properties, 19-9
 - renaming, 19-8
 - year ago, 19-3
- Custom Data collection program, 3-18
- Custom Data Stream definition identifier, 3-15
- custom data streams, 3-15
 - validating, 5-3
- custom data streams. *See* stored measures
- customer forecast, 3-12
- customizing Welcome text, 9-30

D

- data
 - collecting from planners, 8-13
 - copying to clipboard, 11-19, 12-11, 14-44, 16-19
 - copying to measure, 11-21
 - copying to product, 11-21
 - decreasing, 11-14
 - distributing, 8-11
 - editing in Planning Percentages worksheet, 12-9
 - editing in worksheets, 11-12
 - exporting from documents, 11-39, 12-19, 14-46, 15-17, 16-20
 - filling, 11-14
 - forecasting in worksheets, 11-17
 - formatting, 11-26, 14-24, 14-34
 - importing from flat files, 17-45
 - increasing, 11-14
 - recalculating, 11-22, 11-24, 11-37, 12-17
 - receiving, 23-7
 - resetting, 11-25
 - saving, 11-12, 11-37, 12-10, 12-17
 - sending, 23-4
 - sharing, 23-2
 - submitting, 24-2
 - uploading, 24-5
- data change flags, 11-13, 11-31, 12-10
- data driven formatting. *See* color coding
- Data Model, 26-43
- Data Pull, 3-19
- data streams, 3-4, 3-15, 3-17, 3-19, 5-4, 26-44

- decimal places, specifying for stored measures, 17-15, 17-23, 17-32, 17-36
- decreasing data, 11-14
- default measures, associating with scenarios, 9-25
- Define Column Dimension Attributes, 3-13
- Define Data Usage, 3-10, 3-17, 3-20
- Define-Advanced, 3-4, 3-6, 3-11, 3-13
- Define-Basic, 3-4, 3-7
- defining
 - demand plan hierarchies, 7-10
 - demand plan parameters, 7-12
 - demand plan scenarios, 7-23
 - demand plans, 7-2
- defining demand plan scenarios, 7-23
- defining demand planning hierarchy levels, 2-16
- defining demand planning levels, 2-15
- deleting
 - ad hoc graphs, 15-21
 - ad hoc reports, 14-49
 - alerts, 25-15
 - assignments for planners, 9-23
 - color coding rules, 14-40
 - custom aggregates, 19-10
 - documents from folders, 21-9
 - events, 18-18
 - folders, 21-10
 - measures as Demand Planner or Demand Plan Manager, 17-44
 - multiple documents, 11-43, 14-50, 15-22
 - saved selections, 20-12
 - worksheets, 11-42
- Demand Class, 8-26
- Demand Plan Administration
 - batch log, 9-41
 - selecting predefined reports, 9-31
 - setting comment reason codes, 9-26
 - setting default measures for scenarios, 9-25
 - specifying custom Welcome text, 9-30
 - specifying installation type, 9-30
 - viewing database information, 9-37
 - working with events, 9-10
 - working with measures, 9-3
- demand plan hierarchies
 - customizing in Planning Server, 26-2
 - defining in Planning Server, 7-10
- Demand Plan Manager, 1-6, 1-7, 11-12, 12-10, 18-2, 24-2
- demand plan parameters
 - defining, 7-12
- demand plan scenarios, defining, 7-23
- Demand Planner, 1-6, 1-7, 11-12, 12-10, 18-2, 24-2
- Demand Planning
 - data model and architecture, 3-4
 - description, 1-2
 - key features, 1-2
- Demand Planning Administration page, 8-4
- demand planning dimensions, defining, 2-8
- demand planning hierarchy levels
 - defining, 2-16
- demand planning levels
 - defining, 2-15
- Demand Planning page (for Demand Planner or Demand Plan Manager), 10-2
- Demand Planning Server. *See* Planning Server
- Demand Planning System Administrator, 1-6
- demand plans, defining, 7-2
- demand revenue, 26-27
- dependent demand, 9-15, 11-13, 12-2, 12-6, 26-11
- Dimension, 3-10
- dimension data, 26-45
- Dimension Level, 3-7
- Dimension Level Primary Key, 3-10
- dimension values
 - description, 11-6, 14-6, 15-8
 - selecting, 22-2
- Dimension viewer, 2-13
- dimensions
 - defining in Planning Server, 2-8
 - setting up in Planning Server, 2-8
- dimensions, description, 11-6, 14-6, 15-7
- disabling alerts, 25-12
- display formats in worksheets, 11-13, 12-10
- Display Labels, 3-17
- distribute to planners, 8-11, 25-6, B-6
- document folders. *See* folders
- document type, changing, 14-10, 15-10
- document workspace, 10-10
- documents
 - applying custom aggregates to, 19-5
 - applying saved selections to, 20-7

- default, 14-43, 15-16
- deleting multiple, 11-43, 14-50, 15-22
- saving, 14-43, 15-16
- See also* ad hoc reports, ad hoc graphs, worksheets, predefined reports
- download data from Planning Server, 8-6, B-4
- drag and drop
 - adjusting columns and rows, 16-16
 - changing ad hoc report layout, 14-9
 - changing worksheet layout, 11-9
 - sorting dimension values, 22-31
- drilling
 - enabling or disabling, 11-27, 14-26
 - in ad hoc graphs, 15-11
 - in ad hoc reports, 14-10
 - in Planning Percentages worksheet, 12-7
 - in predefined report, 16-15
 - in worksheets, 11-10

E

- editable cells, display format, 11-31
- editable property, for measures, 17-12, 17-20, 17-30
- editing
 - alert definitions, 25-11
 - assignments for planners, 9-20
 - custom aggregate definitions, 19-8
 - data in worksheets, 11-12
 - events as Demand Planner or Demand Plan Manager, 18-16
 - events in Demand Plan Administration, 9-12
 - measures in Demand Plan Administration, 9-5
 - Planning Percentages worksheet, 12-11
 - saved selection definitions, 20-10
 - See also* modifying
- effectivity dates, 12-10
- enabling alerts, 25-12
- EPS, B-2
- error, 3-25
- error detail, 3-25
- events
 - applying to measures, 9-13, 17-22, 17-31, 18-18
 - deleting as Demand Planner or Demand Plan Manager, 18-18
 - description, 6-2, 9-10, 18-2
 - effect on measures, A-7
 - grouping, 18-4, 18-9, 18-14
 - modifying as Demand Planner or Demand Plan Manager, 18-16
 - modifying in Demand Plan Administration, 9-12
 - new product introductions with cannibalization, 6-18
 - product phase outs, 6-3
 - promotions, 6-17
 - viewing for a measure, 11-11, 14-23, 18-22
 - viewing properties as Demand Planner or Demand Plan Manager, 18-17
 - See also* promotions, product introductions, product phaseouts
- events calendar
 - filtering by measure, 18-22
 - viewing from ad hoc reports, 14-23
 - viewing from worksheet, 11-11
- Examine Field and Variable Values, 26-45
- exception reports, 14-11
- exception then ranking reports, 14-11
- exporting data from documents, 11-39, 12-19, 14-46, 15-17, 16-20
- Express database, 1-3
- Express database information, 9-37

F

- fact table, 3-19, 4-32, 26-44
- Fact Validation, 5-4
- files, importing data from, 17-45
- filling data, 11-14
- filtering events by measure, 11-11, 14-23
- Fixed Levels, 3-9
- Flat File Loader Program, 4-36
- flat files
 - integrating legacy data, 4-31
- flat files, importing data from, 17-45
- flexible data streams, 3-2, 3-10, 3-18, 3-19, 3-22
- folders
 - copying documents to, 21-6
 - creating, 21-3
 - deleting, 21-10
 - deleting documents from, 21-9

- description, 21-2
- properties, 21-10
- renaming, 21-10
- fonts
 - setting for ad hoc reports, 11-33, 11-34, 14-26, 14-30, 14-33
 - setting for worksheets, 11-28
- footnotes
 - for ad hoc graphs, 15-11
 - for ad hoc reports, 14-29
 - for worksheets, 11-31
- forecast control, 26-13
- Forecast documents, 16-3
- forecast explosion, 26-11
- forecast measures
 - creating, 17-4
 - forecast allocation method, 17-8
 - forecast methods, A-2
 - See also* stored measures
- forecast methods, A-2
- Forecast Set, 8-26
- forecast versions, 24-6
- forecasting data in worksheet cells, 11-17
- forecasts. *See* forecast measures
- forecasts, submitting. *See* submitting measures
- forecasts, uploading. *See* uploading measures
- formatting
 - ad hoc graphs, 15-11
 - ad hoc reports, 14-24
 - formula measures, 17-39
 - stored measures, 17-15, 17-23, 17-32
 - worksheets, 11-26, 14-24
- formula measures
 - description, 17-3
 - formatting, 17-39
- From APS to Source, 2-3
- From Source to APS, 2-3
- full distribution, 8-11, 9-3, 9-10
- full download, 8-6

G

- GMT Difference, 2-3
- graphs. *See* ad hoc graphs
- gridlines, displaying, 11-27, 14-26

- grouping events, 18-4, 18-9, 18-14

H

- help. *See* online help
- hierarchies. *See* demand plan hierarchies
- Hierarchy Level Values Viewer, 4-29
- Hierarchy Name, 2-17
- history, collaborative
 - viewing as planner or planning manager, 23-8
 - viewing in Demand Plan Administration, 9-42
- history-based statistical forecasts, 26-36
- horizon time range, 17-6
- HTM export, 11-39, 12-19, 14-46, 15-17, 16-20

I

- importing
 - sales information, 26-36
- importing data from flat files, 17-45
- increasing data, 11-14
- Increasing/Decreasing Demand document, 16-10
- incremental refresh, 8-7
- indent by level, 11-27, 14-25
- Input Parameters, 26-41, 26-49
- input parameters, 9-3
- installation type, 9-30
- Instance, 2-6, 8-25
- Instance Code, 2-3
- Instance Type, 2-3
- Inventory Optimization (IO), 17-33, 24-2

J

- JAWS screen reader, 9-30
- Jinitiator, 9-30

L

- lag measure, formula, 17-37
- layout
 - ad hoc graphs, 15-9
 - worksheets, 11-8
- lead measure, formula, 17-38
- legacy integration, 4-32

- legacy integration control file formats, 4-37
- legend, formatting in ad hoc graph, 15-13
- Level ID, 3-11
- Level Name, 2-18
- level value associations, 26-9
- Level Value Audit, 5-3, 5-8
- Level Value Column, 2-18
- level value data collection, 5-8
- level values, 4-29, 26-9
- Level Values collection, 4-12
- Life cycle, 6-18
- lifecycle product introduction, 18-7
- Limitations, 8-29
- Linear and Nonlinear Phase Outs, 6-26
- Load Data Files using Self-Service User Interface, 4-36
- locked cells
 - display format in worksheet, 11-31
 - in Planning Percentages worksheet, 12-12
 - in worksheets, 11-21
- logging in
 - as Demand Planner or Demand Plan Manager, 10-2
 - as Demand Planning System Administrator, 8-4
- lowest allocation level *See* allocation level, lowest

M

- Mandatory promotion, 6-17
- mandatory promotion, 18-2
- Manufacturing Forecasts, 4-9
- Master Demand Schedule, 8-24
- measures
 - associating with scenarios, 9-23
 - copying data to, 11-21
 - creating in Demand Plan Administration, 9-3
 - deleting as Demand Planner or Demand Plan Manager, 17-44
 - description, 11-6, 14-6, 15-7, 17-2
 - editing as Demand Planner or Demand Plan Manager, 17-40
 - editing in Demand Plan Administration, 9-5
 - effect of events, A-7
 - filtering events by, 11-11, 14-23
 - importing data into, 17-45

- modifying in Demand Plan Administration, 9-5
- populating, 8-9
- properties, 17-42
- rebuilding in Demand Plan Administration, 9-6
- receiving, 23-7
- renaming, 17-41
- selecting for submission, 24-2
- selecting for upload, 24-5
- sending, 23-4
- See also* stored measures, formula measures
- modifying
 - alerts, 25-11
 - custom aggregates, 19-8
 - data in worksheets, 11-12, 12-9
 - saved selections, 20-10
 - See also* editing
- moving documents between folders, 21-4
- MSD_DIMENSIONS Lookups window, 2-9
- MSD_SR_SHIPTO_COUNT_V, 26-5
- MSD-Category Set Name
 - profile options, C-2
- MSD-Conversion Type
 - profile options, C-2
- MSD-Currency Code
 - profile options, C-2
- MSD-Customer Attribute
 - profile options, C-2
- MSD-Master Organization
 - profile options, C-3
- MSD-One Step Collection
 - profile options, C-3

N

- NA values, 11-8, 11-14, 11-27, 14-7, 14-25
- navigation list (for Demand Planner and Demand Plan Manager)
 - description, 10-4
 - tools, 10-5
- net change, 8-7
- New
 - alert, 25-4
 - custom aggregate, 19-2
 - event, 18-2
 - graph, 15-6

- measure, 17-4, 17-16, 17-24, 17-34, 17-37
- report, 14-4
- saved selection, 20-2
- worksheet, 11-4
- new product introductions, 6-19
- new product introductions and cannibalization, 6-18
- New product introductions with cannibalization, 6-3
- notifications
 - deleting, 25-17
 - generated by sending measures, 23-4
 - opening, 25-17
 - properties, 25-18
- number formats
 - applying to rows and columns, 11-32, 14-31
 - for measures, 17-15, 17-23, 17-32, 17-36
- Number of Workers, 2-6

O

- Online Analytical Processing (OLAP), 1-3
- online help, 8-5, 9-3, 10-16
- opening documents, 11-5, 14-5, 15-7, 16-12
- optional promotion, 18-2
- Options tab, 7-31
- Oracle Advanced Supply Chain Planning, 8-16, 8-24
- Oracle Demand Planning. *See* Demand Planning
- Oracle Express, 8-33
- Oracle Workflow. *See* Workflow

P

- pages, changing, 11-10, 14-11, 15-11, 16-16
- Parent Level Name, 2-18
- Parent Value Column, 2-18
- parent values, adding to Planning Percentages worksheet, 12-8
- pasting data into worksheets, 11-18, 12-11, 12-12
- Percentage Share document, 16-10
- persistent forecast scenarios, 8-29
- planned production, 7-14
- planner assignments. *See* assignments for planners
- planning percentages

- calculation, 12-8
- submitting, 24-3
- uploading, 24-6
- Planning Percentages worksheet
 - adding parents, 12-8
 - closing, 12-21
 - copying data from, 12-11
 - description, 12-2
 - display formats, 12-10
 - editing cells, 12-11
 - entering comments, 12-13
 - exporting data from, 12-19
 - locked cells, 12-12
 - modifying data in, 12-9
 - opening, 11-13, 12-3
 - printing, 12-17
 - saving data, 12-17
 - selecting data for, 12-6
 - viewing children, 12-7
- Planning Server, 3-10
 - downloading data from, 8-6
 - uploading scenarios to, 8-15
- Planning Server view, 3-6, 3-20
- Planning View Column, 3-10
- populate measures, 8-9, B-5
- predefined reports
 - Aged Accuracy document, 16-6
 - changing pages, 16-16
 - closing, 16-22
 - Comparison Accuracy document, 16-3
 - Comparison document, 16-10
 - copying data from, 16-19
 - default settings, 9-33
 - description, 16-2
 - drilling in, 16-15
 - exporting data from, 16-20
 - Increasing/Decreasing Demand document, 16-10
 - opening, 16-12
 - overview, 9-31
 - Percentage Share document, 16-10
 - printing, 16-16, 16-17, 16-18
 - Ranking document, 16-11
 - selecting, 9-34
 - sizing columns and rows, 16-16

- toolbar, 16-3
- Top/Bottom Ranking document, 16-11
- Trend document, 9-36, 16-11
- viewing as graphs, 16-15
- Pre-Processor for Oracle Demand Planning, 4-36
- preseeded streams, 3-4, 26-45
- price lists, 17-14, 17-22
- Price Modification Type, 6-7
- Price Modification Value, 6-7
- Pricing data collection, 4-15
- primary key value, 26-45
- primary keys, 5-7
- printing
 - ad hoc graphs, 15-14
 - ad hoc reports, 14-40
 - multiple documents, 11-36, 14-42, 15-15, 16-18
 - Planning Percentages worksheet, 12-17
 - predefined reports, 16-16
 - worksheets, 11-34
- prior period, 19-3
- product category, 3-12
- Product Dimension, 3-7
- product introductions, creating, 18-7
- product phase outs, 6-3, 6-26
- products, copying data to, 11-21
- profile options
 - MSD-Category Set Name, C-2
 - MSD-Conversion Type, C-2
 - MSD-Currency Code, C-2
 - MSD-Customer Attribute, C-2
 - MSD-Master Organization, C-3
 - MSD-One Step Collection, C-3
- promotions, 6-17
- Promotions and other events, 6-2
- promotions, creating, 18-2
- properties
 - viewing for ad hoc graphs, 15-21
 - viewing for ad hoc reports, 14-49
 - viewing for alerts, 25-15
 - viewing for custom aggregates, 19-9
 - viewing for events as a Demand Planner or Demand Plan Manager, 18-17
 - viewing for folders, 21-10
 - viewing for measures as Demand Planner or Demand Plan Manager, 17-42

- viewing for measures in Demand Plan Administration, 9-7
- viewing for notifications, 25-18
- viewing for saved selections, 20-11
- viewing for worksheets, 11-42
- protecting cells. *See* locked cells
- Publish Forecast, 8-24, 8-26
- Publishable, 7-34
- pull program, 3-15, 3-25
- Purge All Previously Collected Data, 2-6

Q

- quick distribution, 8-11, 9-3, 9-10
- quick download, 8-6

R

- Ranking documents, 16-11
- ranking reports, 14-11
- read-only cells, display format in worksheet, 11-31
- rebuilding measures, 9-6
- recalculating data, 11-22, 11-24, 11-37, 12-14, 12-17
- receiving measures, 23-7
- red flag, 9-23
- Relationship View, 2-18
- Relationship Views, 26-8
- renaming
 - custom aggregates, 19-8
 - documents, 11-41, 14-48, 15-20
 - folders, 21-10
 - measures, 17-41
 - saved selections, 20-10
- reports. *See* ad hoc reports, predefined reports
- resetting data, 11-25, 12-14
- Retaining old level values, 8-29
- rounding control, 7-32
- row sizing
 - in ad hoc reports, 14-27
 - in predefined reports, 16-16
 - in worksheets, 11-28
- running alerts, 25-10, 25-14

S

- sales forecasts, 26-36
- sales information, importing, 26-36
- sales opportunity, 26-44
- saved selections
 - applying to open documents, 11-7, 16-13, 20-7
 - defining, 20-2, 22-32
 - deleting, 20-12
 - description, 20-2
 - modifying, 20-10
 - properties, 20-11
 - renaming, 20-10
 - selecting values for, 22-32
- saving
 - ad hoc graphs, 15-16
 - ad hoc reports, 14-43, 15-16
 - data, 11-12, 11-37, 12-10, 12-17
 - worksheets, 11-37
 - See also* saved selections
- scaling to print, 11-36, 12-18, 14-42, 16-18
- scenarios
 - associating with a default measure, 9-25
 - description, 9-23
 - selecting measures to submit for, 24-2
 - selecting measures to upload for, 24-5
 - uploading to Planning Server, 8-15
 - viewing properties as Demand Planner or Demand Plan Manager, 24-11
 - viewing properties in Demand Plan Administration, 9-25
- screen reader for visually impaired, 9-30
- selecting data, 22-2
- sending data, 23-4
- setting up a demand plan
 - defining demand planning hierarchy levels, 2-16
 - defining demand planning levels, 2-15
- settings for predefined reports, 16-12
- sharing data, 23-2, 25-3
- Single Step Collection, 3-16
- sizing columns and rows, 11-28, 14-27, 16-16
- SNAPI, B-2
- sorting values, 22-31, 22-32
- Source of Data, 3-6, 3-14

- Source View, 3-6
- SQL*Loader, 3-19, 3-22, 3-24
- stages in planning cycle
 - collect data from planners, 8-13
 - distribute to planners, 8-11
 - download data from Planning Server, 8-6
 - populate measures, 8-9
 - upload scenarios to Planning Server, 8-15
- stages, running for demand plan, 8-3
- Staging Tables, 2-21
- staging tables, 3-14, 3-15, 3-16, 3-18, 3-19, 4-7, 4-11, 4-24, 4-28, 4-32
- statistical forecast, running for worksheet cells, 11-17
- stcsdata.ctl control file, 3-22
- stoplight formatting, 14-34
- stored measures
 - aggregation options, 17-11, 17-19, 17-28
 - allocation methods, 17-27
 - allocation options for new data, 17-9, 17-17
 - applying events to, A-7
 - copy options, 17-17
 - description, 9-5, 17-2
 - editable property, 17-12
 - forecast allocation methods, 17-8
 - formatting, 17-15, 17-23, 17-32
 - impact on system performance, 17-4
- Stream Identifier, 3-11
- submitting measures, 24-2
- subtitles
 - for ad hoc graphs, 15-11
 - for ad hoc reports, 14-29
 - for worksheets, 11-31
- supersession product introduction, 18-7
- supersession, 6-18
- system information, 8-6, 9-3, 10-16

T

- tick labels, formatting in ad hoc graphs, 15-12
- Time data collection, 4-13
- Time Dimension, 3-11
- Timeout (Minutes), 2-6
- titles
 - for ad hoc graphs, 15-11

- for ad hoc reports, 14-29
- for worksheets, 11-31
- toolbars
 - ad hoc graphs, 15-4
 - ad hoc reports, 14-3
 - data selection, 22-2
 - navigation list, 10-5
 - Planning Percentages worksheet, 12-4
 - predefined reports, 16-3
 - worksheets, 11-3
- top dimension level, 26-45
- Top/Bottom Ranking document, 16-11
- transformation, 9-7, 9-8, 17-42
- Trend document, 9-36, 16-11
- TXT export, 11-39, 14-46, 15-17, 16-20

U

- unavailable data. *See* NA values, zero values
- unconstrained forecasts, 7-13
- unit of measure, 17-12, 17-20, 17-30, A-6
- Unit of Measure conversion, 4-8, 26-33
- unlocking cells
 - in Planning Percentages worksheets, 12-12
 - in worksheets, 11-21
- update, refresh mode for download, 8-7
- upload scenarios to Planning Server, 8-15, 24-2, B-13
- uploading measures, 24-5
- User Dimensions, 7-2
- user page setup, 9-29

V

- Validate Data, 3-17
- version information, 8-6, 9-3, 10-16
- versions. *See* forecast versions
- view scope, 9-14, 9-17

W

- Welcome text, customizing, 9-30
- Workflow
 - automating batch processes, 8-16
 - description, B-2

- maintaining settings, 9-39
- processes, B-4
- scheduling background engines, B-2
- worksheets
 - adding footnote, 11-31
 - adding subtitle, 11-31
 - adding title, 11-31
 - adding to folders, 21-3
 - applying custom aggregates to, 19-5
 - closing, 11-41
 - copying data from, 11-18, 12-11
 - creating, 11-4
 - deleting, 11-42
 - display formats, 11-13, 12-10
 - drilling in, 11-10
 - entering comments, 11-23, 12-13
 - example, 11-2
 - exporting data from, 11-39
 - formatting, 11-26
 - formatting numbers, 11-32
 - layout, 11-8
 - locked cells, 11-21
 - modifying data in, 11-12, 11-14
 - opening, 11-5
 - pasting data into, 11-18, 12-11
 - printing, 11-34
 - recalculating data, 11-24
 - renaming, 11-41
 - resetting data, 11-25
 - saving, 11-37
 - saving data, 11-37
 - selecting data for, 11-6
 - sizing columns and rows, 11-28
 - toolbar, 11-3
 - viewing properties, 11-42
 - See also* Planning Percentages worksheet
- workspace, customizing, 10-12

Y

- year ago, 19-3

Z

- zero values, 11-8, 11-14, 11-27, 14-7, 14-25

